

RTMS –System Features

Background

Sicab Computer Services was established in 1982 and has worked continuously within the transport industry.

We are committed to providing software that fits the requirements of our clients. To this end all our standard software can be customised to meet the unique specifications that may be required by clients.

RTMS Key System Features

Some of the key features of the RTMS system are:

- The information necessary to efficiently manage your transport business from booking jobs, managing runs, POD capture through to client invoicing and receivables management if desired.
- An Easy Pay License that incorporates monthly or quarterly payments and includes **unlimited support and maintenance**.
- Guaranteed currency – System Upgrades are included in the license fee. Regular upgrades ensure your system is never 'out of date.'

Operations:

- Auditing of all changes performed on a job once it is booked.
- Add any number of notations to job and the ability to email these to the client.
- The ability to create a Quote and when required turn the quote into a job with the press of a button.
- The ability to record all client complaints and all the steps taken to resolve it.
- Jobs that are done on a regular basis can be automatically generated from a master template this eliminates data entry of the same information every time the job falls due.
- An e-mail detailing job activity can be scheduled to be sent on a daily basis.
- KPI reports can be automatically generated as Excel native file and can be automatically e-mailed to selected clients.

Accounts / Pricing

- Ability to e-mail invoices directly to the client or print on A4 paper.
- An individual client can have invoices generated Daily, Weekly, Fortnightly or Monthly.
- All invoices are archived as PDF files.
- Allocation of Payments Received, Credit Notes and Credit Journals directly against invoices issued.
- All contact notes with the client can be recorded with a date and time stamp and reviewed at any time.
- The ability to export data in a format suitable for importing in an external accounting system.
- Every day an e-mail report can be automatically generated and sent to management of clients that are not meeting trading expectations.
- The company creates its own unique service codes and pricing rates. Special pricing rates can be created for specific clients.

1.4 Screen Shots

Screen shots highlighting Key features of the system are as follows:

1.4.1 Client Records

The RTMS system has many features that are typically incorporated into a contact management system –the following tab shows the depth of information that can be held about each client - below is the main client screen with the core client information.

Changing a Client Record

General | Accounting Information | General Notes | Financials Summary | Email Addresses | Other Information

Client Code: ACME001 Active Branch: SYD State: Sales Rep.: ABN:

Client Name: ACME LOGISTICS PTY LTD Created: / / By:

Postal Address:
PO BOX 845
MASCOT 1460
Copy Postal Address to Site Address

Site Address:
30 JONES ST
BOTANY 2019
City/Town:

Contact Information:
Phone: 9666 2322
Fax: 9666 8798
Contact(s): ADMIN

Client Groups/Classification (free format):
1. 2. e.g. LAW, TRAVEL, MFG etc.

Operational details:
Default Service Code: Send jobs for this client to channel number: 0
Display when creating a job:
Frequency of bookings - at least one job every days

Client Contacts
Client Notes/Calls
Client Complaints
Service Discounts
Leg Specific Rates
Cubic Conversion Exceptions
Permanent Jobs
Jobs Enquiry
Payments and Credits
View Audit
 OK
 Cancel

A multitude of pricing options are possible

The following screen highlights the flexibility of the billing parameters that can be customised for your business. The system automatically includes the facility to print a client specific notice on each invoice.

The screenshot shows the 'Changing a Client Record' window with the 'General' tab selected. The window is divided into several sections:

- Client Rate Codes:** A table with columns 'Rate Codes' and 'Discount'. Row 1 has 'STD' in the Rate Codes column.
- Billing Period:** Radio buttons for Daily, Weekly (selected), Fortnightly, and Monthly.
- Statement Options:** Checkboxes for 'Charge Account Fee on Statement', 'Print Reference Summary on Statement', and 'Deduct Settlement Discount on Invoice?'. A text box for '# of significant characters in reference' is set to '1'. Other fields include 'Settlement Discount', 'Trading Terms (days)', 'Credit Limit' (999,999), and a checked checkbox for 'Export to other accounting system (e.g. MYOB)'.
- Rate Increase change dates:** Text boxes for 'Rates Dated' (1/01/2000), 'are applicable up to (but not including)' (1/01/2000), and 'then from the above date use Rates Dated' (1/01/2000).
- Cheques Received Details:** Text boxes for 'Name on Cheque', 'Bank Name', and 'Bank Branch'.
- Fuel Surcharge:** Radio buttons for Rate 1, Rate 2 (selected), No Surcharge, and Custom.
- Custom Fuel Rates:** Text boxes for 'Percent 1', 'up to date', and 'then this'.
- Message to print on Invoice:** A text box with a red warning label: 'Message to print on Invoice (if not blank this text will print on all invoices)'.

On the right side, there is a vertical menu with buttons for 'Client Contacts', 'Client Notes/Calls', 'Client Complaints', 'Service Discounts', 'Leg Specific Rates', 'Cubic Conversion Exceptions', 'Permanent Jobs', 'Jobs Enquiry', and 'Payments and Credits'. At the bottom right are 'OK' and 'Cancel' buttons.

Email invoices and other documents to your clients directly to your clients see below..

The screenshot shows the 'Changing a Client Record' window with the 'Email Addresses' tab selected. The window is divided into several sections:

- Email Invoice/Statement to:** Text boxes for 'Name' (AQ) and 'Address' (ninoq@idx.com.au). Radio buttons for 'Email Invoice option': Automatically, Prompt (selected), and Skip Emailing.
- Email Activity Report to:** Text boxes for 'Name' (AQ) and 'Address' (ninoq@idx.com.au). Radio buttons for 'Email Activity option': Automatically, Prompt (selected), and Skip Emailing.
- Email KPI Report to:** Text boxes for 'Name' and 'Address'. Radio buttons for 'Email KPI option': Automatically, Prompt, and Skip Emailing (selected).

On the right side, there is a vertical menu with buttons for 'Client Contacts', 'Client Notes/Calls', 'Client Complaints', 'Service Discounts', 'Leg Specific Rates', 'Cubic Conversion Exceptions', 'Permanent Jobs', 'Jobs Enquiry', and 'Payments and Credits'. At the bottom right are 'OK' and 'Cancel' buttons.

Print invoices and statements automatically to PDF format and apply a generic message...

Print Client Invoice/Statement

Please note that irrespective of the options selected a PDF Invoice/Statement is always created

Print for ...

Daily

Weekly

Fortnightly

Monthly

Client Code range

From

To

blank selects ALL clients

Page Format

Portrait Lines per page adjust number of detail lines that print

Landscape Lines per page per page to compensate for printer differences

Print Separate Fuel Column (only valid for Landscape format)

For Invoices that are Printed

For Invoices that are e-mailed

Settlement Discount Date

Print only for Clients that have traded

Preview Invoice/Statements as they are generated

Message to print on statements

PDF Folder:

Redirect Emails To

Booking new jobs is easy, capture all the information you need...

Adding a Job Record

Client Code: ACME001 ACME LOGISTICS PTY LTD Operations Job Number: 230974

Phone: 9666 2322 Booked by: admin

Job Date: 14/05/2010

Cons. Note No: 230974

Reference:

Cust/Purch Order:

Contact:

Service Parameters

Service Code: HH

Items/Parcels: 4

Weight (Kgs): 56.0

Airfreight Weight:

Cubic Metres:

Pickup Details

ACME LOGISTICS PTY LTD

30 JONES ST

BOTANY

Here At: on

Waiting Time:

O/S Destination:

Delivery Details (or Pickup)

56 GEORGE ST

SEE JOHN SMITH

REAR ENTRANCE

Here At: on

Waiting Time: POD Name:

Condition of Goods:

Follow On Job Details (follow from the Delivery details above)

Pos	A	Items	Weight	Cubic	Town/Suburb	Details

Channel Number: 0 Total Kms: 10 Job Cost:

Cash Job

Job Times

Time Ready: 15:20

Despatched:

E.T.D.:

Hire Time: (First Leg)

Waiting Time: (Total Job)

Final Delivery:

Time:

Drivers and Driver Instructions

Driver	Pay	Revenue	% Re

Job Comment (prints on Invoice/Statement)

COD Amt:

Quoted Charge:

Job Charge:

Fuel Surcharge:

Add. Charges:

GST charged:

Client Charge: \$0.00

Fuel Surcharge %:

Allocating jobs is easy with job status colour coded...

Unallocated Jobs

Channel 1
 Channel 2
 Channel 3
 Channel 4
 Display if ready next hours
 Display Future 14/05/2010
 SYD

Ch	B	D	Date	<<Ready>>	Serv.	Items	Weight	Cubic	From	To ...	Client Code	PreA	Classification	Reference	Li
1			14-05-10	5:00	HH	1	1.0		ALEXANDRIA	[D] REDFERN	ABC002			CAR 33	
1			14-05-10	5:30	HH	55	311.0		ALEXANDRIA	[D] BALMORAL	ABC002	2		CAR 28	
1			14-05-10	5:30	HH	4	55.0		ALEXANDRIA	[D] HABERFIELD	ABC002			CAR 28	
1			14-05-10	5:30	HH	5	33.0		ALEXANDRIA	[D] MASCOT	ABC002	1		CAR 39	
1			14-05-10	5:30	HH	1	1.0		ALEXANDRIA	[D] CABRAMATTA	ABC002			CAR 28	
1			14-05-10	5:30	HH	2	44.0		ALEXANDRIA	[D] NORTH CASINO (NSW)	ABC002			CAR 39	
1			14-05-10	5:30	HH	2	554.0		ALEXANDRIA	[D] REDFERN	ABC002			CAR 39	2
1			14-05-10	6:00	HH	1	1.0		ALEXANDRIA	[P] KATOOMBA	ABC002			CAR 38	
1			14-05-10	7:00	S	5	32.0		INGLEBURN	[D] ALEXANDRIA	DXP009			DOCS	
1			14-05-10	7:00	S	5	32.0		INGLEBURN	[D] ALEXANDRIA	DXP009			DOCS	
1			14-05-10	7:00	S	1	1.0		INGLEBURN	[D] ALEXANDRIA	DXP009			DOCS	
2			14-05-10	11:00	FLT	3	222.0		MOUNT KURI	[D] BANKSMEADOW	C765432			CAROL EXP	
1			14-05-10	12:00	S	1	2.0		SEVENHILLS	[D] BOTANY	X123456			EDWARD	
1			14-05-10	15:20	HH	4	56.0		BOTANY	[D] SYDNEY	ACME001				23
1			14-05-10	16:08	S	2	2.0		ALBION PARK	[D] SEFTON	8765432			SAAS	

Warn Me When List Changes

Easily look at the detail of each driver's current job status..

Driver Jobs

Channel 1
 Channel 2
 Channel 3
 Channel 4

Branch/Company SYD Display Only Undelivered Jobs

Driver	Veh	Ch	Name	<<Job No.>>	S	I	D	Date	Rdy	Desp	Acpt	P/Up	Del	Serv	From	To ...
1	PAN	0	HOUSE DRIVER	230686				14/05/10	16:08	15:47				S	ALBION PARK	[D] SEFTON
4	VAN	0	TOM JONES	230725				14/05/10	6:00	15:40				HH	ALEXANDRIA	[P] KATOOMBA
16	1T	0	TROY SPRINGER	230750				14/05/10	5:30	15:40				HH	ALEXANDRIA	[D] MASCOT
54	VAN	0	DOMINIC PAPAND													
76	BT	0	PETER CHARLES													

Working Date 14/05/2010


Capture POD's and store or send real time!

Changing a Job Record

Client Code: ABC002
 Phone: 9699.0052
 Job Date: 14/05/2010
 Cons. Note No.:
 Reference: CAR 39
 Cust/Purch Order:
 Contact:

Service Parameters
 Service Code: HH
 Items/Parcels: 2
 Weight (Kgs): 44.0
 Airfreight Weight:
 Cubic Metres:

Job Times
 Time Ready: 05:30
 Despatched: 08:10
 E.T.D.:
 Hire Time: (First Leg)
 Waiting Time: (Total Job)
 Final Delivery: 11/04/2005
 Time: 14:00

POD Signatures
 Selected: c:\Apps\Clarion6\vcis\signatures\0\230\230836*.gif
 Signature File Names:
 230836_002.gif
 Signature:


Operations Job Number: 230836
 Booked by: PJOB
 Pickup: NORTH CASINO (NSW)
 Action:
 Delivery
 Pickup
 Both
 action to perform at this location
 4:00 on 11/04/2005
 POD Name:

Charges
 COD Amt:
 Quoted Charge:
 Job Charge: 28.00
 Fuel Surcharge: 3.36
 Add. Charges:
 GST charged: 3.14
 Client Charge: \$34.50
 Fuel Surcharge %:
 Additional Charges
 Calculate Charge
 Email/Record Job Notes

Buttons: Make into a Quote, View Audit, Email Address, External Documents, Dimensions, Containers, OK, Cancel

Send job specific messages to customers....

Job Notes - Record to disk and Email

To record this "message" without sending it to anyone simply leave the "To" entry blank.

From: admin@sicab.com.au
 To: fred.smith@acmelogistics.com
 CC:
 BCC:

Subject: Job Number: 230836

Attach: C:\Temp\20081103_Fleet_advice_2008.doc

Message Body: This job requires documentation as attached.

Buttons: Select "To" Address, Select "CC" Address, Select "BCC" Address, Attach Any File, Attach Signatures, Attach Job Images, Display previously sent messages, Record this note and optionally Email Message, Exit this window without recording notes

Purchase the web-interface module and your customers can easily book their jobs over the internet directly into your system...

Antonino Quartararo from Sicab Computer Services : Account ACME001

Home | Select Account | Job Booking | Job Enquiry | Common Addresses | Logout

Job Booking

General Job Details

Job No. Job Date dd/mm/yyyy Job Class Job Type: Must be one of LCL, FCL, LTL, PTL, LD, OTH

Time Ready Reference Service Type:

XRef Job No.: Customs Formalities:

Pickup Details and Delivery Details

From Company To Company From Address To Address

City/Town City/Town

Shipment Lines

Total Quantities

Total Items Total Weight (in Kgs) Total Cubic Metres

Other Details

Driver Instructions

POD Details

Date Delivered dd/mm/yyyy Date Customs cleared dd/mm/yyyy

Time Delivered: Time Customs cleared

POD Name

Development Strategies

We develop systems using methodologies that have the following goals.

User benefits:

- Ease of use without extensive training.
- Easily customisable to meet client specific demands.
- Do not require specialised staff to implement
- Eliminate duplication of data entry.
- Flexible client rating.
- Track and Trace.
- Web Access.
- Operations and Management Reporting.

On going benefits

- Ability to easily develop specific interfaces for import of jobs and export billing and reporting data to other systems.
- Ability to integrate with other specialised systems, e.g. GPS mapping, GPRS communication with driver PDA devices.
- Ability to generate reporting capabilities specific to individual client requirements.
- Ability to easily modify processes to conform with the client's operational requirements.

Disclaimer: All screen shots are current at the time of publication but actual screens will vary as updates are developed.