



Traffic in 7.3 Workshop March 2014

Presented by Tom Barnes

7.3 Traffic

This system arranges and tracks the movement of equipment from branch to customer, customer to branch, or branch to branch. It can be used to help schedule and ship items from place to place, or it can simply be used for confirmation of delivery via a signature on the printed document that it produces. It allows for many different transaction Types, user-definable Subtypes, In- or Outbound shipments, and Pickups or Deliveries.

The system contains a wide range of information, including customer and equipment details as well as specific shipping instructions. Various controls are used to maintain integrity including an in/out flag on the equipment record and error correction receipt creation if errors are discovered relating to the in/out status or the branch where the item should be located. The in/out flag on the equipment will either show as in, or the one letter code of the type of receipt it is currently out on and the subtype, if applicable.

In addition, there are also other updates that occur to the equipment including branch location changes and status changes. The system also creates traffic history for any equipment attachments once the delivery is completed. Machines may also be reserved for a user-defined period of time, by creating 'held' status receipts.

Traffic can be accessed via three menu paths:

Product Support→Equipment→Traffic

Product Support→Service→Traffic

Product Support→Rental→Traffic

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Configuration→Equipment→General→Traffic

Select Location: 01 - Guelph

Traffic

of Days to Hold a Held Receipt: 999

Blank Salesperson on Inbound: ☒

Update Salesperson on Outbound: ☐

Blank Customer on Inbound: ☐

Allow Nonassigned Location to Receive Location Traffic: ☒

Update Hour Meter Reading Date Always: ☒

Add Work Order on Receipt of Inbounds: ☐

Copy Inspection Steps to Memos: ☒

Allow 0 Traffic Hours if Equipment Has 0: ☒

Create Traffic in Work Orders: Both

Active for System: ☒

Printing

Default Printer ID: P1

Print Signature: ☒

Print Rental Comments: ☒

Print Inspection Steps: ☐

Print Signature Lines: ☒

Always Print Location Traffic on Receipt: ☒

Nonserialized Rental Traffic Controls

Summarize Like Items: ☒

Print Item Weight Total: ☐

Print Quantity Underline: ☐

Copy traffic setup to another location.

7.3 Traffic

System 804 – Traffic Security

Authorization List For Product Support - Traffic	
Function	
<input checked="" type="checkbox"/>	Access Traffic Via Equipment
<input checked="" type="checkbox"/>	Access Traffic Via Service
<input checked="" type="checkbox"/>	Access Traffic Via Rental
<input checked="" type="checkbox"/>	Modify Traffic
<input checked="" type="checkbox"/>	Access Part Add Ons
<input checked="" type="checkbox"/>	Update Attachments
<input checked="" type="checkbox"/>	Allow ? Stock Number
<input checked="" type="checkbox"/>	Access Stock Add Ons
<input type="checkbox"/>	Capture Electronic Signature
Either	Allow Quick Add
<input checked="" type="checkbox"/>	Access Multimedia
<input checked="" type="checkbox"/>	Add Multimedia
<input checked="" type="checkbox"/>	Modify Multimedia

Select All Deselect All Delete Save Close

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Monthly view

Monthly Weekly Listing >>

Include: ☒ All ☐ Outbound ☐ Inbound

Display: ☒ Time ☒ Unit Description ☒ Make/Model

Select Department:

Select County:

Type ☒ Customer Name ☒ Group

Select Location: 01

Select Trucker:

Salesperson ☒ Stock Number ☒ Job Site Description

Select Salesperson:

Include History: ☐ Go >>

Urgency ☒ Low ☐ Medium ☐ High

Confirmed Movements - March 2014

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
						1
2	3	4	5	6	7	8
	O-01-C Sale Telehandler VANBOXMEER CONSTRUCTION E43631 CT TH62 AG 000008				O-01-C Sale JCB 540-70 BIRNAM EXCAVATING E47647 JC 540 TC 000009	
9	10	11	12	13	14	15
		O-01-C Demo Trencher Tractor Lynn Ltd. 1223457 VM T455- 346 TU 000010				O-01-C Loaner Trencher Debbie Folkard 022500 VM RTX350 TR 000011
16	17	18	19	20	21	22
			O-01-C Demo Dump Truck Vance Oscar 87568 VV A25C DT 000013			
23	24	25	26	27	28	29
30	31	1	2	3	4	5

Add Memo

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Weekly view

Monthly Weekly Listing »

Include: ☒ All ☐ Outbound ☐ Inbound

Display: ☒ Time ☒ Unit Description ☒ Make/Model

Select Department:

Select County:

☒ Type ☒ Customer Name ☒ Group

Select Location: 01

Select Trucker:

☒ Salesperson ☒ Stock Number ☒ Job Site Description

Select Salesperson:

Include History: ☐ Go >>

Urgency ☒ Low ☐ Medium ☐ High

Confirmed Movements

Monday - March 03, 2014	Thursday - March 06, 2014
O-01-C Sale Telehandler VANBOXMEER CONSTRUCTION E43631 CT TH62 AG 000008	
Tuesday - March 04, 2014	Friday - March 07, 2014
	O-01-C Sale JCB 540-70 BIRNAM EXCAVATING E47647 JC 540 TC 000009
Wednesday - March 05, 2014	Saturday - March 08, 2014
	Sunday - March 09, 2014

Add Memo

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Listing view

Monthly

Weekly

Listing

>>

Sort by: ☒ Date ☐ Receipt Number ☐ Type

Include History: ☐

Select Receipt Number:

Select Inbound / Outbound:

Select Type:

Select Date Range: From: To:

Select Customer Number:

Select Stock Number:

Select Status:

Select Location:

Go >>

Traffic Management							Results to display: 10
Receipt Number	Type/Subtype	Status	Stock Number	Description/Make/Model	From	To	Vendor/Trucker
000016	In Service	Pending	990148	Dozer	John Neutel Construction	Guelph	
000017	In Service	Pending	0	CT D9			
000020	In Transfer	Pending	001332	RANSOMMES FRTMNT 4WD	City Of London	Guelph	
000023	Out Rental	Pending	0	RA 728D			
000005	In Service	Pending	T06827	JD 4120 MFWD TRACTOR	Brant	Guelph	
000014	In Rental	Pending	25	JD 4120			
000015	In Rental	Pending	DAHMER02	DAHMER FORKLIFT	Guelph	Birnam Excavating	Priority: 01
000006	Out Service	Pending	2802	WS 1200			
000021	Out Rental	Pending	001330	Kubota Frt Mnt 4WD	CITY OF LONDON	Guelph	Priority: 01
000007	In Service	Pending	1367	FD 3060			
			433221	JD 5420 TRACTOR	Don Agar	Guelph	Priority: 01
			90	JD 5420			
			433221	JD 5420 TRACTOR	Bolton Farms	Guelph	Priority: 01
			66	JD 5420			
			010076	Skid Steer Loader	Guelph	VANBOXMEER CONSTRUCTION	
			475	JD 250			
			E45831	CIH MXM190 Tractor	Guelph	Dawn Smith	Priority: 01
			1119	IH MXM190			
			010070	Compact Track Loader	BIRNAM EXCAVATING	Guelph	
			953	CA 450CT			

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Need to create a traffic ticket? Click here to add.

Perform a consolidated print

7.3 Traffic

Types of Traffic Tickets:

Select Type

Demo

Loaner

Rental

Transfer

Sale

Purchase

Service

Trade-in

Miscellaneous

Re-Rent

Close




7.3 Traffic

Receipt Details:

Receipt	Shipping Information	Stock Add Ons	Part Add Ons	Attachments	Comments	Multimedia
Receipt Details						
Receipt Number: 000023		Source: Rental Counter		Created By: Larry Trueman - Guelph		
Outbound						
From: Guelph		Status: Pending		Type: Rental		
To: Birnam Excavating		<input type="radio"/> Pickup <input checked="" type="radio"/> Delivery				
Mark's Cell # 555-8352		Shipping Date: 01/31/2014				
Contact: <input type="text"/>		Time: 10 : 41 AM		Trucker: <input type="text"/>		
Phone Number: 5199026687		Urgency: <input type="text"/>		Driver: <input type="text"/>		
Contract: 000065		Return Date: <input type="text"/>		Priority: 01		
Department: <input type="text"/>						
Salesperson: C01						
Printed: 0 times						
		Stock Number: DAHMER02				
		Description: DAHMER FORKLIFT				
		Serial Number: 5405913T125691			Hours: 2802	
		Model: 1200			Units: 0	
					Group: 1	
		Billing Comments: <input type="text"/>				
<div>Print Save Save / Exit Close</div>						

10

Shipping Information:

Receipt	Shipping Information	Stock Add Ons	Part Add Ons	Attachments	Comments	Multimedia
Shipping Information						
Receipt Number: 000023 Rental		Direction: Outbound		Created By: Larry Trueman - Guelph		
<div>  <div> Name: MASONVILLE MALL Job Site: MASONVILLE MALL  </div> <div> Address: 1600 RICHMOND ST NORTH Map Book: <input type="text"/> </div> <div> LONDON Page: <input type="text"/> </div> <div> ON Grid Number: <input type="text"/> </div> <div> Zip/Postal Code: N5N5N5 Estimated Shipping Charge: <input type="text" value="0.00"/> </div> <div> Country/Prov/State: <input type="text"/>  </div> <div> County: <input type="text"/> </div> </div>						
Instructions: <div> <div></div> <div></div> </div>						
<div> <div>Save</div> <div>Close</div> </div>						

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Stock Add Ons:

Receipt

Shipping Information

Stock Add Ons

Attachments

Comments

Multimedia

Stock Add Ons

Lines to Display: 10

Receipt Number: 000020 Transfer Direction: Inbound Created By: Larry Trueman - Guelph

Stock Number	Description	Hours	Units
A6732X		0	

(1 - 10 Of 10)

Add >>

Save Close

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Attachments:

Receipt

Shipping Information

Stock Add Ons

Attachments

Comments

Multimedia

Attachments - T06827

Lines to Display: 10

Receipt Number: 000020 Transfer

Direction: Inbound

Created By: Larry Trueman - Guelph

Stock Number	Description
B5336S	CRARY 82187 8500LB

(1 - 10 Of 10)

Add >

Save

Close

7.3 Traffic

Comments:

Receipt

Shipping Information

Stock Add Ons

Attachments

Comments

Multimedia

Comments

Receipt Number: 000020 Transfer Direction: Inbound Created By: Larry Trueman - Guelph


Chase Tractor would like to thank you for your business - it is always appreciated!! We strive to meet & exceed our customer's expectations and we look forward to seeing you in the near future at one of our 6 locations.

Save

Close

7.3 Traffic

Multimedia:

Receipt	Shipping Information	Stock Add Ons	Attachments	Comments	Multimedia
Multimedia					
Receipt Number: 000020 Transfer		Direction: Inbound		Created By: Larry Trueman - Guelph	
Current					
					
4120 Image					
Added: Tue Mar 4 2014					
By: DW					
Click here to add a link from the PFW server					
Add an external link					
<input type="button" value="Close"/>					

Thank you

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