

Main Menu

 Invoice Menu	 Customer Menu	 Customer Accounts	 Charge Rates	 Delivery Items	 Trucks	 Locations	 System Maintenance
---	--	--	---	---	---	--	---

WELCOME TO



TRANSPORT MANAGEMENT SYSTEM

Developed by: **Regional IT**
Leading Business Solutions

**** Please select an option from the toolbar above ****

 **Exit TransIT**

Introduction

TransIT is a consignment note and invoicing system developed by Regional IT. The system interfaces directly into MYOB Accounting suites or other accounting software or it can be a customised stand alone system. TransIT can handle a large number of transactions and it is flexible enough to cater for multiple depots.

History

TransIT has been servicing the transport industry since 2004. Since then the system has evolved to provide specific options to benefit the transport industry.

We have a number of satisfied clients. Here are two companies that are happy for you to contact them to discuss the system.

- Danzic Freight in Whyalla SA (Bob Broadway) phone 08 8645 5502
- Hentschke Transport in Loxton SA (Paul Muller) phone 08 8584 5255



1 Wilson Street
BERRI SA 5343
Ph 08 8582 5400
Email : enquiries@regionalit.com.au
Website: www.regionalit.com.au

Summary of TransIT Features

- Stores negotiated prices / rates by customer for generating of invoices
- Stores prices / rates by delivery item (parcel, carton, pallet etc)
- Location specific pricing
- Holds consignment notes in monthly “buckets”, making it easier to find, manage and track historical transactions
- Provides the ability to have parent customers and sub customers. Delivery specific pricing can apply to just the customer, the sub customer or both
- Transfer of invoices to MYOB via direct interface at your preferred detail level
- Has the ability to send daily summary invoices off site if required (company manager, owners home office, shareholders etc)
- Suits the smallest transport company to the large multi site company
- Requires minimal computer resources so additional hardware is not usually required
- Runs using the latest windows technology and the latest edition of Microsoft SQL for fast, flexible and reliable data access
- Is a multi user system allowing multiple users to access the system over a network
- Summary and detailed reports are available based on the data captured. These reports can be printed, emailed or exported to files like excel at anytime

The following pages show a brief overview of the TransIT system through each of the menus.





Consignment notes from the truck driver can be simply entered into TransIT by selecting the details of the customer, truck used and the destinations 'from' and 'to' by using drop down boxes to select.

The Invoicing Screen

Items delivered (generic, customer specific, location specific etc) are selected. The items selected have predetermined prices / rates which are then used to create a Tax Invoice for the customer as shown below.

The Invoice

TAX INVOICE

TEST CUSTOMER, TEST
1 TEST STREET
ADELAIDE
SA 5000

Invoice Number: 100
Invoice Date: 10/05/10
Customer Ref: 100
Page: 1

Sub Customer: SUB TEST, SUB TEST
Comments:

Quantity	Description	Rate	Total	GST	Total
1.00	PALLET	\$100.00	\$100.00	\$10.00	\$110.00
1.00	PALLET	\$100.00	\$100.00	\$10.00	\$110.00
GST Total					\$20.00
INVOICE TOTAL					\$220.00



Entering a Cash Receipt

The screenshot displays the 'Browse Customer Accounts' window. At the top, there is a 'Customer' dropdown menu and a checked 'Show Only Outstanding' option. Below this is a table with the following data:

Customer	Month	Transaction Date	Transaction Type	InvoiceNo	Amount
TEST CUSTOMER, TEST	9	30/09/10		103	\$176.00
TEST CUSTOMER, TEST	9	13/09/10		103	\$-50.00
BLOGGS, FRED	8	31/08/10		787878	\$5.50

An 'Update Customer Accounts' dialog box is open in the foreground, showing the following details:

- Transaction Type: [Dropdown]
- Installment: 2
- Transaction Date: 13/09/10
- Month: 9
- Customer: TEST CUSTOMER, TEST
- Invoice #: 103
- Outstanding: \$126.00
- Reference #: [Text Box]
- Amount: [Text Box]
- Comments: [Text Area]

At the bottom of the dialog box, there is a 'Complete?' checkbox and buttons for 'OK', 'Cancel', and 'Help'. The main window also features a 'Search Invoice' field with the value '0' and several action buttons: 'Add Transaction', 'Add Bulk Payment', 'Change', 'Delete', 'Close', and 'Help'.

Any payments will then reflect on future statements.





Customers and Sub Customers are easy to set up by adding their contact details and any specific pricing into the Customer menu. Specific pricing for the customer can be created by selecting a delivery item, then the locations for that item and then entering the special pricing. This pricing is only available for use when an invoice is created for that customer with those locations.

The Customer Details Screen with Specific Pricing Entry

The screenshot displays the 'Update Customer Details' window. The 'Details' tab is active, showing fields for ID (9), Customer Start Date (10/09/10), and a checkbox for 'Exclude this Customer from Price Increase?'. The customer name is 'TEST CUSTOMER TEST'. Address fields include '1 SMITH STREET' and 'ADELAIDE' in the suburb. A 'Delivery Items' list shows 'PALLET' selected. An 'Update Delivery Item Rates' dialog box is open, showing 'TEST CUSTOMER TEST' as the customer name. It has fields for 'Item', 'From', 'To', 'Base Rate', 'Start Date' (10/09/10), and 'Term' (Months). A table in the background shows a base rate of 105.00, a date of 3/09/10, and a term of 3.

Base Rate	Date	Term
105.00	3/09/10	3





The charge rates menu allows the user to set standard rates for items (for any locations). It also has the ability to set rates for specific items going between specific locations that can be used for any customer with those locations.

Also allows for the special pricing to be short term if required (ie a special price for a particular item for a month)

Location Rates Screen

Code	From Location	To Location	Rate
Item	From	To	Rate
BOX	ADELAIDE	BERRI	25.00
BOX	ADELAIDE	SYDNEY	150.00
PALLET	BERRI	SYDNEY	500.00
BAG	ADELAIDE	SYDNEY	25.00

Charge Rates Menu

Update Default Delivery Item ...

General

Item: > [Dropdown]

From: [Dropdown]

To: [Dropdown]

Base Rate: 0.000

Start Date: [Calendar]

Term: [Spinner] Months

Buttons: OK, Cancel, Help

Main Window Buttons: Delete, Help





Create delivery items (parcels, cartons, pallets etc) by entering a description of the item. The item is then able to be used with all rates. This menu can print a list of customers with specified delivery rates.

The Screen showing Priced Delivery Items for a Specific Customer

Report on customers with specific pricing.



CUSTOMER SPECIFIC PRICING DELIVERY ITEM REPORT

BLOGGS, FRED

Description	Location From	Location To	Rate
SCOOP	BERRI	BERRI	80.000

SMITH, JOE

BOX	ADELAIDE	ADELAIDE	5.000
-----	----------	----------	-------

TEST CUSTOMER TEST

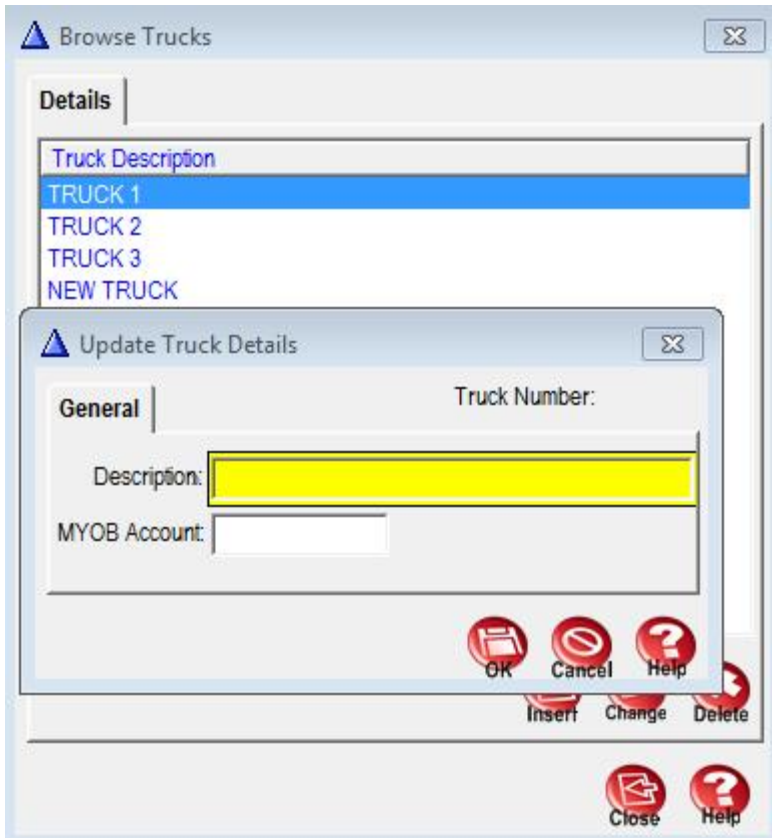
Description	Location From	Location To	Rate
PALLET	ADELAIDE	MELBOURNE	100.000





Trucks menu is used to add and edit trucks available to record the sales/invoices by truck. This can then be imported into myob sales to show income against each truck.

Set up Trucks Screen





Create locations by entering names of locations that trucks will be collecting from and delivering to. These will then be available when invoicing or setting specific pricing.

List of Transactions by Location



Location Transactions

From 1/01/10 To 13/09/10

Transactions From ADELAIDE

Invoice No.	Date	To	Customer
787878	24/08/10	ADELAIDE	BLOGGS, FRED
100	3/09/10	MELBOURNE	TEST CUSTOMER, TEST
101	3/09/10	MELBOURNE	TEST CUSTOMER, TEST
103	10/09/10	MELBOURNE	TEST CUSTOMER, TEST

Transactions To ADELAIDE

Invoice No.	Date	From	Customer
787878	24/08/10	ADELAIDE	BLOGGS, FRED

Transactions To MELBOURNE

Invoice No.	Date	From	Customer
100	3/09/10	ADELAIDE	TEST CUSTOMER, TEST
101	3/09/10	ADELAIDE	TEST CUSTOMER, TEST
103	10/09/10	ADELAIDE	TEST CUSTOMER, TEST

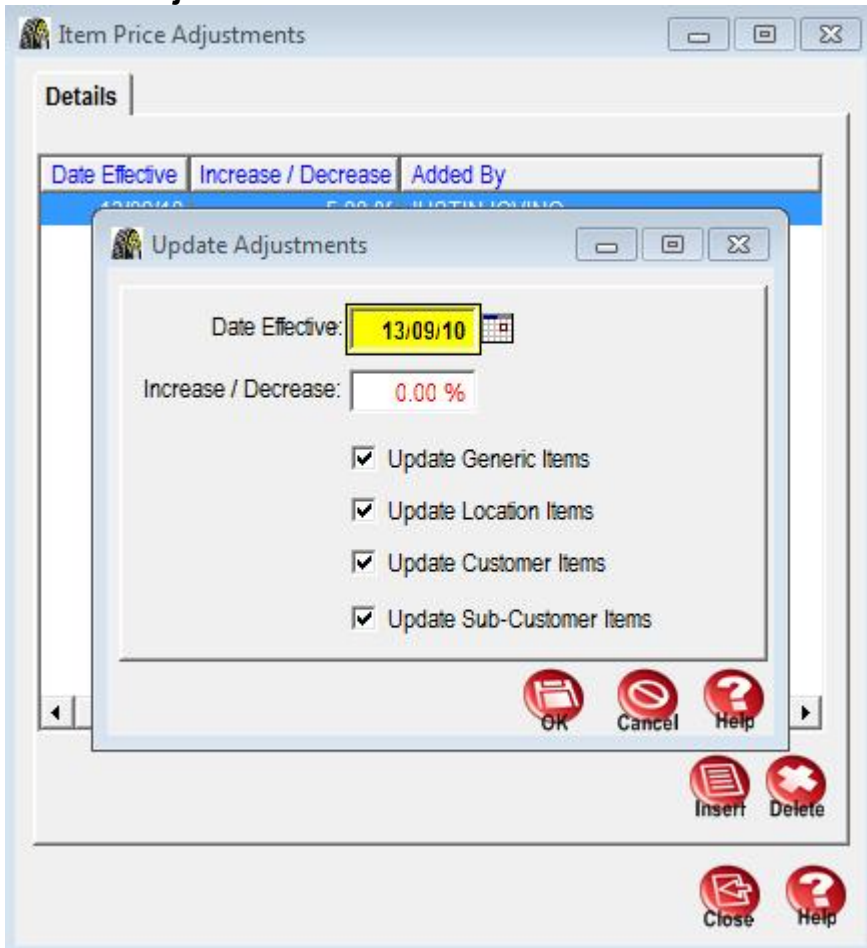
The report above listing transactions by location can be run for a specified date range and for selected locations (or all locations). This report could be useful for monitoring trends etc.





The System Maintenance menu is used to set up or edit company details and set up employee access (either full or restricted). This menu allows a % price increase across all customers (note customers can be excluded from a blanket % price increase)

% Price Adjustment Screen



Price increases can be run for specific items only, ie generic rates only, or customer rates only, etc.

