

Accpac ERP for transport

- The Integrated Journey



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In the world of rising fuel costs, expensive spare parts and limited skilled labour, it is essential to invest in a rock solid ERP solution. Accpac ERP for Transport is a complete end to end business management tool taking you on a journey from sales and marketing through to quotations, route scheduling and costing as well as complete fleet management and maintenance all reported in a simple business intelligence layer.

Sales and Marketing Interactions

The beginning of every interaction should be managed by a robust CRM layer that is totally integrated to all aspects of the business. Typically sales are generated by the marketing team who will either receive calls from existing customers or by cold-calling new prospects.

All communications, contact and company details are captured on the centralised CRM system to be available for all that are required to access and respond to this data controlled with an inbuilt workflow management tool.

This solution flows to the marketing team who are able to manage their marketing campaigns by scheduling functions, conferences, information sessions and meetings using the information from CRM. As Accpac CRM integrates directly with MS Outlook, it means that important marketing events and meeting dates will be synchronised with the MS Outlook Calendar. Once scheduled, Accpac CRM will notify the appointed people of upcoming events via e-mail and/or SMS.

Sage Accpac CRM Company: Jacob's Boerdery

Record New Opportunity

For Company: Jacob's Boerdery Person: Jacob Van Der Merwe

Details

Description:

Source: Phone Type: --None-- Customer Ref:

Opened: 19/04/2008 10:40 Closed:

Territory: Default

Route From: --None-- Route To: --None--

Pick Up Date: Delivery Date:

Product: --None-- Quantity:

Load/Unload Details:

Additional Information:

- Border Clearance
- Hazardous Cargo
- Live Stock
- Special Instructions
- Expiration Problems
- Cover with Salt
- ACCUSURE

Wheat
Maize
Soya-beans
Sunflower
Barley
Fertilizer
Coal
Wood
Raisins
Animal feed
Steel
Cement
Zinc
Cables
Liquids
Equipment

Actions:

Current State: Lead

- Send to Finance
- Send Quote
- Quote Accepted

The Sales team will manage their progress on forecasts utilising a graphical pipeline in Accpac CRM that shows the percentage of leads turning into opportunities and opportunities being sold. Sales staff will manage expectations by adding estimated timelines and probability for closing specific deals and thus get a true reflection of when opportunities will turn into bookings – a huge benefit when planning new capital purchases or managing maintenance schedules.

Order Entry and Fleet Assignments

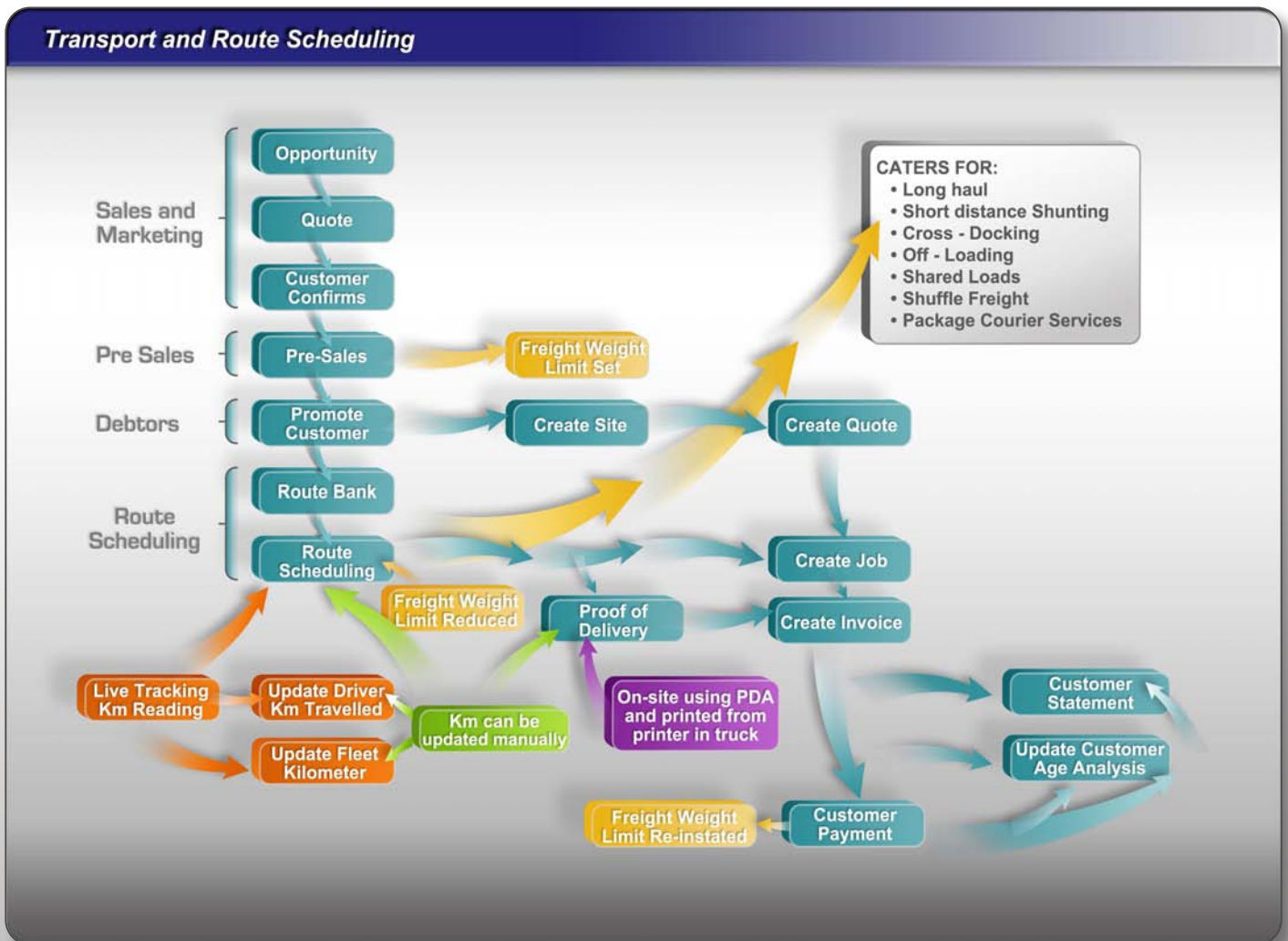
Once the quotation is accepted by the potential customer, the Pre-Sales team will complete the appropriate credit checks, managed by workflows, before an order is created in Accpac CRM using the pick-up and delivery addresses previously captured. The Pre-Sales Team will also determine the freight limit that is allowed for the specific customer and the order is then sent to the customer.

Being a completely integrated solution, the customer is now promoted to the backoffice ERP system where an

Accounts Receivable (AR) Customer is created with unique IDs. At the same time, a Quote is created and a default truck or fleet item is selected. This will enable Fleet Managers to track fleet costs and revenue and will allow users and management to see a real-time gross profit for every delivery.

Route Scheduling

The freight transport quote will now be placed in the Route Bank/planning pool for Route Scheduling. Route Schedulers will still be able to edit the customer as well as the fleet item details while the transport is within the Route Bank. Once the transport has been scheduled by the Scheduler (at which stage the customer details are fixed and the truck and trailer that will be used has been identified), the entry will be removed from the planning bank and added to the Route Schedule. This will stop Schedulers from double booking transport entries in the planning pool.



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As soon as an entry is added to the Route Schedule, a Job Card is created based on the finalised quote details. The Route Schedule will include the following information that will be updated by the Schedulers until the freight has been delivered:

- Fleet item/truck with the latest kilometre meter reading
- Driver
- Date of driver's off weekend
- Trailer with the latest kilometre meter reading
- Internal Order Number
- AR Customer
- Product
- Route
- Product weight (with provision for estimated weight, actual loading weight, actual off-loading weight, difference in loading and off-loading weight, reason for difference)
- Price per unit/Price per freight
- Empty freight kilometres

- Proof of Delivery Note
- Cross-docking details (from Fleet Number to Fleet Number)
- Loading time
- Off-loading time
- Time duration waiting for loading/off-loading
- Fleet Item/truck kilometre meter reading on off-load (from integrated tracking systems)
- Trailer kilometre meter reading on off-load
- Total transport kilometres
- Calculation of Revenue for the specific freight
- Calculation of cost per kilometre for the specific freight
- Refuelling details and kilometre readings
- Mechanical problems and breakdown details
- Kilometres left until next service of fleet item
- Kilometres left until next service of trailer
- Destination at various intervals
- Authorisation code if driver is not going to sleep when required

Collating Actual Readings and Data – Live

The freight weight limit, as indicated initially by the Pre-Sales team as being the maximum allowable limit for transport of a specific customer's freight, will be reduced by the actual freight loading weight as soon as an entry has been scheduled on the Route Schedule. This will eliminate transport of goods that has not been confirmed and has not been approved by customers. The freight weight limit will be reinstated on receipt of payment from the customer after the (POD) Proof of Delivery has been signed and the customer has been invoiced.

The Fleet item/truck kilometre meter reading together with the trailer kilometre meter reading and/or the refuelling kilometre meter readings will be used to update the meter reading in Accpac ERP. The meter readings will be used to determine the next service interval for fleet items and trailers. Kilometres travelled by a specific driver of a specific fleet item/truck will be used to update the Payroll system (Softline VIP preferred) in order to determine when the driver will receive any pre-determined bonus.

On final delivery of the customer's freight, the customer has to sign the POD. Each fleet item/truck may be equipped with a robust hand-held device and a printer that are housed in the truck cabin. The customer will sign the POD on the hand-held PC and the driver will upload the

POD to the central server at head-office using a GSM network when in range. This will update the Job Card status server-side and this will complete, post and invoice the Job - Live. The POD will be printed on the printer in the cabin of the truck and will be handed over to the customer. Once the invoice has been posted, the customer's age analysis will be updated, the entry will appear on the customer's statement and the invoice and statement can be e-mailed to the customer for payment.

Fleet Maintenance - Procurement

Accpac ERP procurement workflows will be used for electronic approval of all defined purchases. This enables users to create requisitions for the reordering of inventory items/stock as well as the purchasing of fixed assets and other sundry items.

Reordering of inventory items includes the following:

- Spares
- Diesel
- Tyres
- Batteries
- Covers for trailers
- Engine blocks, differentials, gearboxes and other high-value equipment items

Reordering of the above items will be based on re-order levels per item per location as well as the lead times per vendor for delivery of these items to ensure the minimum quantity holding in the warehouse/workshop/depot. Items will be linked to preferred Vendor/Supplier per item with the cost of the item when purchasing items from this specific Vendor.

Purchase costs can then easily be checked when requesting quotes from Vendors for purchasing. Items will also be linked to Price Lists and Price Lists can be linked to Customers in the event that specific items are sold externally rather than being used for services of fleet items.

On final approval of the electronic Purchase Requisition, an approved Purchase Order (PO) will be created and the originator (the person who requested the reordering of the item) will be notified by e-mail (and/or SMS) of the Purchase Order number for reference purposes. A Goods Received Voucher is generated and linked to the Purchase Order once the purchased goods arrive on location.

The PO and PO Receipt will be linked to the Vendor's Invoice once the Invoice is received from the Vendor. These documents will complete the source document confirmation pack and will be used for payment of the Vendors after the electronic reconciliation of Vendor accounts. PO Receipts will update the item quantity on hand per location, real time. Items can now either be picked for services/maintenance of fleet items or be transferred to remote depots using Inter-branch transfers for servicing at these depots. Periodic as well as ad-hoc stock counts can be done at multiple locations using more than one counting team for confirmation and correctness purposes.

Internal Costing and Issues

Diesel issues will be captured electronically using an Internal Issues workflow. Creation of a fuel issue document will involve the update of the fleet item's kilometre reading and posting the fuel issue will update the kilometre meter reading on the job card and fleet vehicle.

Kilometres captured either by refuelling the fleet items or updated via integrated fleet tracking (or manually by phoning drivers en-route) will be used to determine when fleet items and trailers are due for the next planned service. Fleet items/trucks will be equipped with serialised equipment items like tyres, engine blocks, gearboxes, batteries, etc. This will give management a true reflection of fleet maintenance costs.

Planned Maintenance

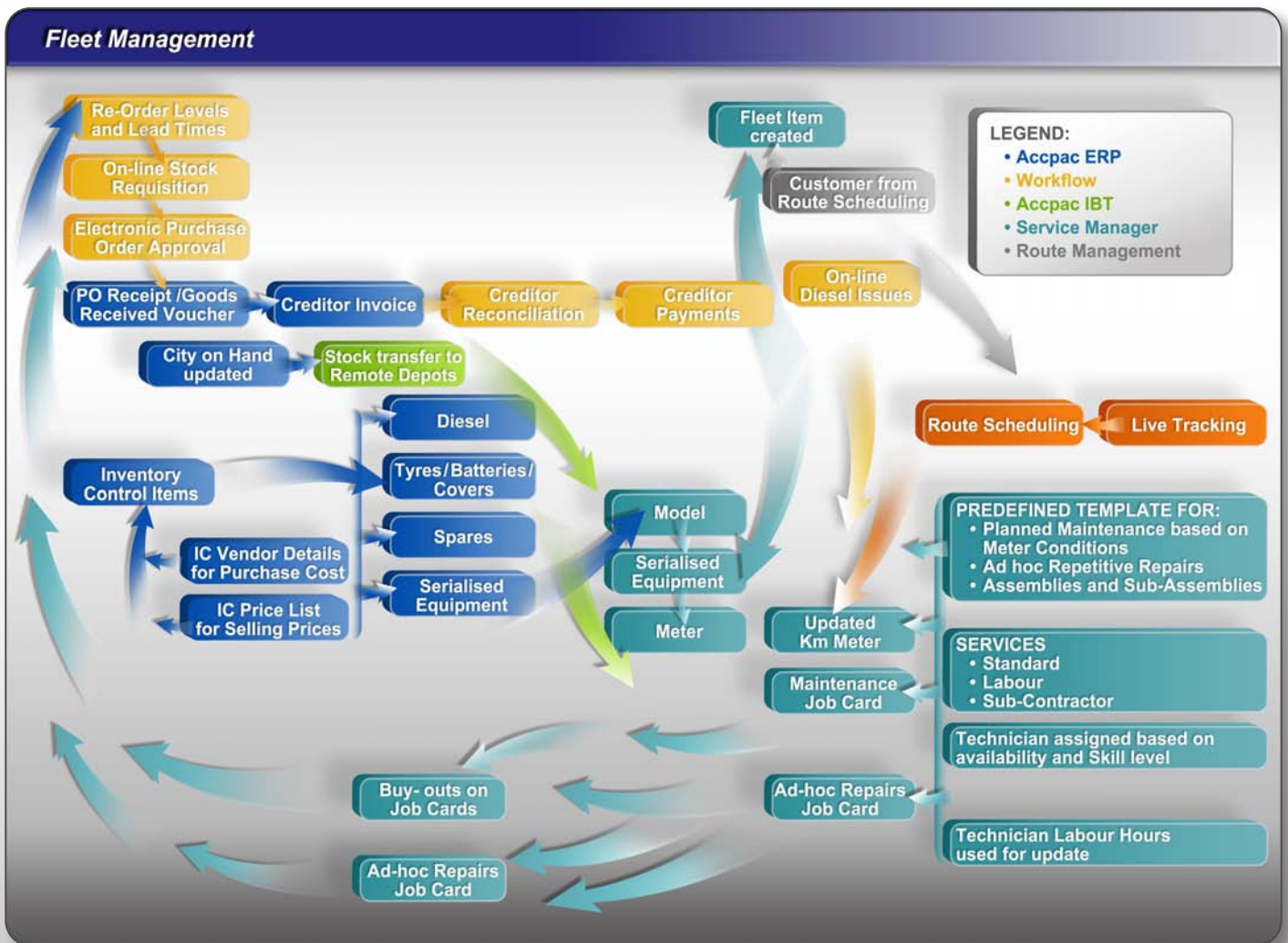
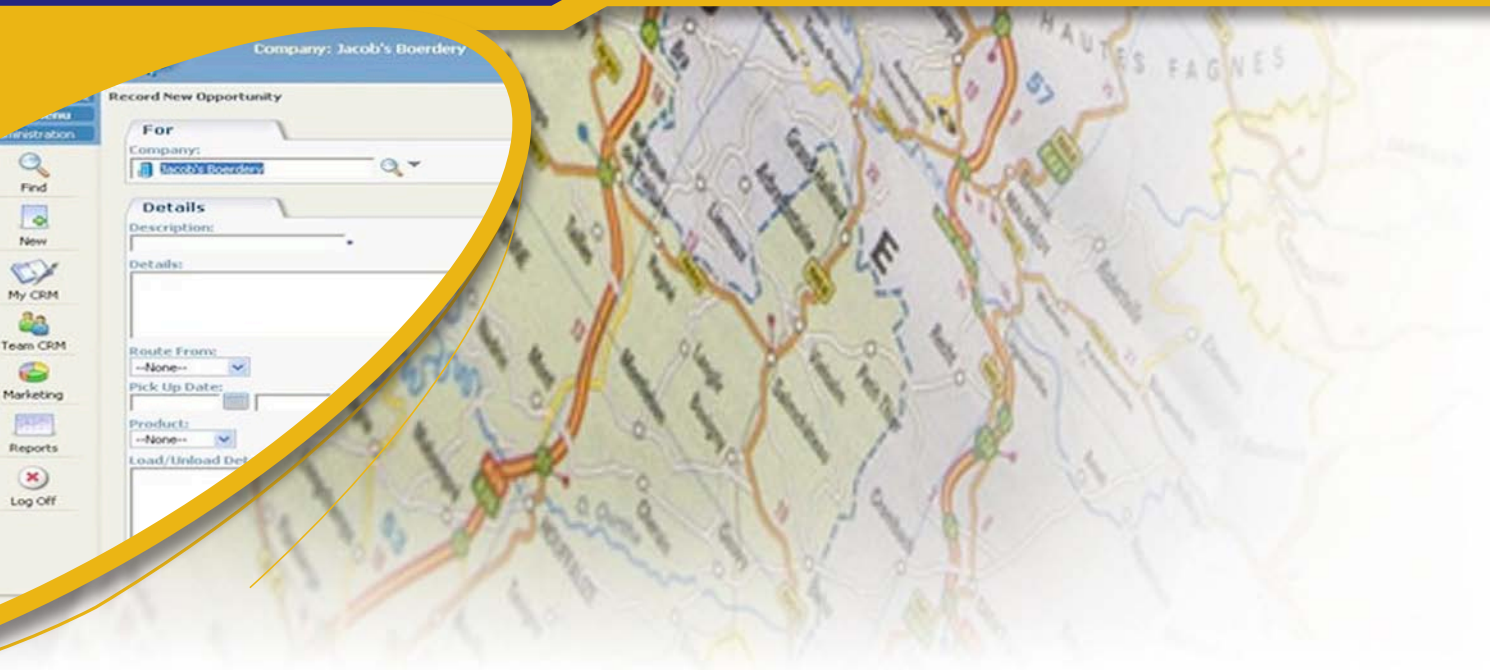
Templates will be created for:

- Planned maintenance based on kilometre meter readings of trucks and trailers
- Ad-hoc repetitive repairs of equipment items like gearboxes, etc.
- Assemblies and sub-assemblies for the manufacturing of trailers

When a truck or trailer is due for a service based on its current meter reading, a job card is automatically generated. The job card lists all the default spares and labour durations needed for a specific service as per the template used. Technicians can now be scheduled, based on their availability and skill levels, to complete the service of the truck and/or trailer.



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