



Truck Schedule

YouTube Training Video

Selecting equipment to load on different trucks
<http://www.youtube.com/watch?v=q4qoSxkBJiQ>

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Truck Schedule

How does it work?

The Truck Schedule is used to organize freight for a booking and organize your trucking fleet for a particular day. The schedule works by taking a look at the bookings that are coming in and going out of the warehouse on a day to day basis. By default previously assigned bookings will not show up AND the truck schedule date is set to tomorrow's date, as you will most likely be planning your schedule ahead of time.

When is it used?

It is used for bookings, transfers and cross rentals where the freight is marked as 'We Deliver' or 'We Pickup' and the booking is CONFIRMED. Bookings that have a 'Customer Pickup' or 'Customer Return' will not display.

Purchase Orders can be added to the schedule by enabling Operational Parameter #70 – Display PO Pickups in Schedule.

How do I use it?

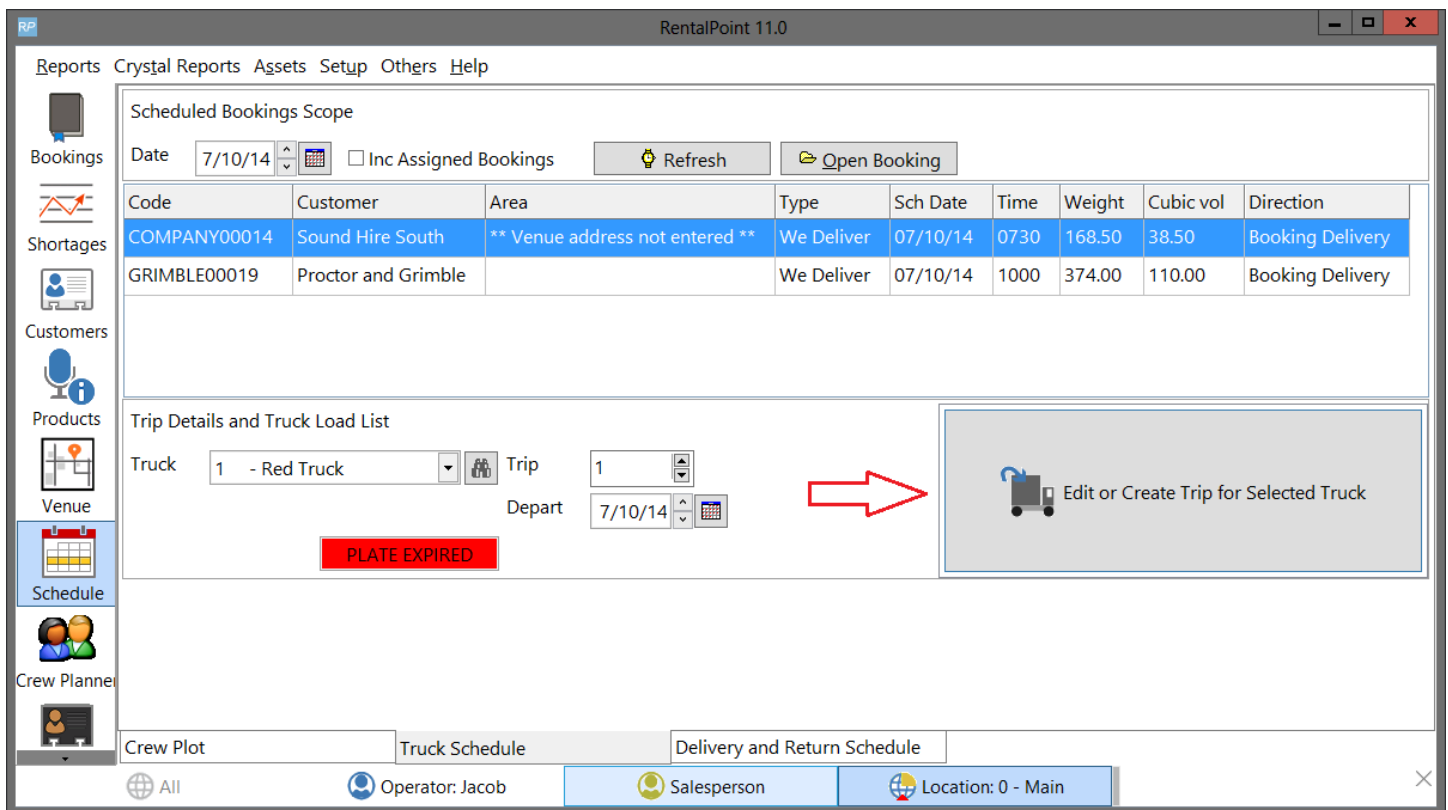
The screenshot shows the RentalPoint 11.0 software interface. The sidebar on the left contains icons for various functions: Bookings, Shortages, Customers, Products, Venue, Schedule, and Crew Planner. The 'Schedule' icon is highlighted with a red arrow labeled '1.'. The main window displays the 'Scheduled Bookings Scope' section, which includes a date filter set to 7/10/14 and a table with columns: Code, Customer, Area, Type, Sch Date, Time, Weight, Cubic vol, and Direction. A red arrow labeled '3.' points to the 'Customer' column. Below this is the 'Trip Details and Truck Load List' section, which includes fields for Truck (1 - Red Truck), Trip (1), and Depart (7/10/14). A red arrow labeled '2.' points to the 'Truck Schedule' tab at the bottom. A button labeled 'Edit or Create Trip for Selected Truck' is also visible.

Finding Bookings

- The truck schedule will only display one day at a time, again by default the date is set to tomorrows' date. The CONFIRMED bookings for that day will be loaded into the top grid along with their volume and weight. The volume and weight calculations come from the values that have been entered in the inventory setup for rental and sales items.
- Check the 'include assigned bookings' if you want to include bookings that already have a driver assigned in the grid

Selecting a Truck

- Next, select the truck that you'd like to load and click Edit or Create Trip for Selected Truck.



The screenshot shows the RentalPoint 11.0 software interface. The top menu bar includes Reports, Crystal Reports, Assets, Setup, Others, and Help. The left sidebar contains icons for Bookings, Shortages, Customers, Products, Venue, Schedule, and Crew Planner. The main window is divided into two sections: 'Scheduled Bookings Scope' and 'Trip Details and Truck Load List'.

Scheduled Bookings Scope: This section displays a table of bookings for the date 7/10/14. The table has columns for Code, Customer, Area, Type, Sch Date, Time, Weight, Cubic vol, and Direction. The data is as follows:

Code	Customer	Area	Type	Sch Date	Time	Weight	Cubic vol	Direction
COMPANY00014	Sound Hire South	** Venue address not entered **	We Deliver	07/10/14	0730	168.50	38.50	Booking Delivery
GRIMBLE00019	Proctor and Grimble		We Deliver	07/10/14	1000	374.00	110.00	Booking Delivery

Trip Details and Truck Load List: This section shows the details for a selected truck. The 'Truck' dropdown is set to '1 - Red Truck'. The 'Trip' dropdown is set to '1'. The 'Depart' date is 7/10/14. A red arrow points to a button labeled 'Edit or Create Trip for Selected Truck'.

At the bottom of the interface, there is a status bar with the following information: Crew Plot, Truck Schedule, Delivery and Return Schedule, All, Operator: Jacob, Salesperson, and Location: 0 - Main.



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Assigning a Booking

- Select a driver for the truck. You can mark a technician as a driver by checking the 'driver' box in Inventory Setup (F10, technician properties, contracting tab).
- To load a booking onto the truck highlight the booking in the top grid and click **Add to Truck**. The booking will be moved to the bottom grid. The system will alert you if the booking is too heavy or too large (volume) for the selected truck. Click **Save Trip** to save the truck schedule information.

Print Truck Schedule

- Once all the bookings for the day are organized onto their respective trucks you can print the trucking schedule and distribute it to your drivers. See screen below for location of **Save and Print** button.

The screenshot shows the RentalPoint 11.0 software interface. The top menu bar includes Reports, Crystal Reports, Assets, Setup, Others, and Help. The left sidebar contains icons for Bookings, Shortages, Customers, Products, Venue, Schedule, Crew Planner, and Crew Plot. The main window is titled 'Scheduled Bookings Scope' and contains a table with columns: Code, Customer, Area, Type, Sch Date, Time, Weight, Cubic vol, and Direction. The table lists a booking for GRIMBLE00019, Proctor and Grumble, with a weight of 374.00 and cubic volume of 110.00. Below this table is a section for 'Trip Details and Truck Load List' with fields for Truck (1 - Red Truck), Driver (TB - Thomas Briggs), Depart (7/10/14 0900), and Arrive (7/10/14 1200). To the right of these fields are buttons for Open Booking, Save Trip, Map Route, Save and Print, View Trip Conflicts, Cancel, Remove Booking, and Weight/Volume. At the bottom, there are tabs for Crew Plot, Truck Schedule, and Delivery and Return Schedule. The status bar at the very bottom shows 'All', 'Operator: Jacob', 'Salesperson', and 'Location: 0 - Main'.

Code	Customer	Area	Type	Sch Date	Time	Weight	Cubic vol	Direction
GRIMBLE00019	Proctor and Grumble		We Deliver	07/10/14	1000	374.00	110.00	Booking Delivery

Code	Customer	Area	Type	Sch Date	Time	Weight	Cubic vol	Direction
COMPANYC	Sound Hire Sout	** Venue ac	We Deliver	07/10/14	0730	168.50	38.50	Booking Deliver



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Trip Conflicts

- Upon saving the truck schedule, the system will compare the trip Depart and Arrive dates against other trips saved in the system. If there's an overlap, you will be notified; however you can still save and continue your trip.
- To resolve trip conflicts click **View Trip Conflicts**. To resolve trip conflicts you can drag and drop the trips to adjust their dates and times. Changes are saved automatically.

Resolve Trip Conflicts

Plot Start Date: 10/ 7/2014

Plot End Date: 10/ 7/2014

Time Breakdown:
☒ 30 mins ☐ 2 hours
☐ 1 hour ☐ 4 hours

Refresh

Tue 7

0:00 0:30 1:00 1:30 2:00 2:30 3:00 3:30 4:00 4:30 5:00 5:30 6:00 6:30 7:00 7:30 8:00 8:30 9:00 9:30 10:00 10:30 11:00 11:30 12:00 12:30 13:00 13:30 14:00 14:30 15:00 15:30 16:00 16:30 17:00 17:30 18:00

Shipping Equipment
Truck : Red Truck
Driver : Thomas Briggs
Trip : 2

Shipping Equipment
Truck : Red Truck
Driver : Thomas Briggs
Trip : 1



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Driver Trucking Schedule for a Given Day

The Trucking Schedule report shows the truck schedule for any given driver on any given day.

Access the report as follows:

RentalPoint 11.1.9.4

Reports Crystal Reports Assets Setup Others Help

Bookings Shortages Customers Products Venues **Schedule** Crew Planner Vendors POs Contacts To-Do

Scheduled Bookings Scope

Date: 24/11/16 ☐ Inc Assigned Bookings Refresh Open Booking Add to Truck

Code	Customer	Area	Type	Sch Date	Time	Weight	Cubic vol	Direction
------	----------	------	------	----------	------	--------	-----------	-----------

Trip Details and Truck Load List

Truck: 1 - Ford F150 Trip: 1 Driver report

Driver: Depart: 24/11/16 0900 Arrive: 24/11/16 1200

Open Booking Save Trip Map Route Save and Print View Trip Conflicts Cancel Remove Booking Weight/Volume

Code	Customer	Area	Type	Sch Date	Time	Weight	Cubic vol	Direction
------	----------	------	------	----------	------	--------	-----------	-----------

Crew Plot **Truck Schedule** Delivery and Return Schedule

Enter the Trip Date and the Driver Name

Driver Report

Date: 24/11/2016

Driver:

OK Cancel



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Click Preview to run the report

RP Fast Report Template List

Report name

☒ Truck Schedule - Default

Print

Preview

Report settings

Exit

The report uses the depart and arrive dates from the trip. Each side of the trip will display on it's own line on the report.

Scheduled Bookings Scope

Date: 2-11-16 ☐ Inc Assigned Bookings Refresh Open Booking Add to Truck

Code	Customer	Area	Type	Sch Date	Time	Weight	Cubic vol	Direction
ABC100026	abc compnay	938 Street	We Pickup	22-11-16	1200	0.00	0.00	Booking Return

Trip Details and Truck Load List

Truck: 1 - New Truck Trip: 1

Driver: Depart: 22-11-16 0900 Arrive: 22-11-16 1200

Open Booking Save Trip Map Route Save and Print View Trip Conflicts Cancel Remove Booking Weight/Volume

Code	Customer	Area	Type	Sch Date	Time	Weight	Cubic vol	Direction
------	----------	------	------	----------	------	--------	-----------	-----------

Driver notes will be pulled from the booking notes. Only notes between the lines marked 'driver notes' to the line marked 'driver notes end' will be displayed.

RP Inquiry

Out 21-11-16 1030 In 22-11-16 1200 ABC100026

Customer	Calendar	Equipment	Crew	Venue	Notes
<p>Notes</p> <p>here are some booking notes</p> <p>driver notes</p> <p>notes for the driver go here</p> <p>driver notes end</p> <p>more booking notes</p>					



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REPORTS ASSETS SETUP OTHERS HELP

RP Cross rental - ABCTEST00001 [PO # 4]

Details Dates Equipment Delivery Address Notes Attachments

Notes about the PO

driver notes

notes for the driver

driver notes end

more notes about the PO |

The contacts for each trip point are as follows

- Warehouse (regular booking) – none
- Delivery (regular booking)
- Pickup for return - Venue Contact on the venue tab in the booking

Venue Contact Allen Smith

Contact Phone 1 519 555-5555 44

- Collection of sub (from supplier)/Return of sub (to supplier) - Main contact of the customer/vendor supplying the PO

Edit Vendor

General Other Notes Attachments

Vendor Code ABCTEST ☐ Disabled

Organisation ABC Co

Contact Harry Green

Address

Add Line 2

Suburb State

Country Post Code

Account Number

Website Address

Email Address email

Phone 1 Country Code Area Code Number Extension

1 519 555-5555 64



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Customer Maintenance

Address Financials Credit Card Others Notes Fields Attachments

Customer Code: CUST [D] [E] [X] Hide/Disable

Record Type: ☒ Customer ☐ Prospect ☐ Competitor ☐ Other

Organization: customer

Street Address Postal Address

Street: [] Phone 1: Country Code 1 Area Code 519 Number 555-5555 Extension 55

Add Line 2: [] Phone 2: [] [] []

City: [] Fax: [] [] []

State: [] Fax Options: ☐ Dial Area Code Local []

Country: [] Cell: [] [] []

Zip Code: [] []

Website Address: [] []

Email Address: [] A/R Email Address: [] []

Last Name	Position	Phone 1	Phone 2	Address
Irene McLennan		1 519 555-5555 x55		

Main Contact: Irene McLennan [X] Add Existing [X] New [X] Open [X] Delete [X] Copy Phone [X]

- Delivery of sub/Collection of sub from warehouse - Contact / phone 1 from the Delivery Address in the sub hire

Cross rental - ABCTEST00001 [PO # 4]

Details Dates Equipment Delivery Address Notes Attachments

Drop Ship: ☒ Venue ☐ Contact [X] Drop Ship To...

Deliver To: []

Room: []

Street: []

Add Line 2: []

Suburb: [] State: []

Country: [] Post Code: [] []

[X] Reload From Location [X] Copy From Booking

Country Code Area Code Number Extension

Phone 1: 1 519 546-5555 34

Fax: [] [] [] []

Contact: Jean McLean

Addresses are entered as follows

- Load/Unload at Warehouse (regular booking) - no address
- Delivery/Pickup for return - Venue / delivery address in the booking
- Collection / return of sub - Street address of supplier (customer/vendor)
- Delivery of sub/Collection of sub for return - Delivery address in sub hire PO