



Fort Barnes
103c Rookery Lane
Lincoln
LN6 7PW
Tel: 01522 526964 & 07803 758658
Fax: 01522 546812
E-mail: sales@zipzap.co.uk

ParcelTrak

Training Guide

This training guide is divided into several chapters which relate to the successful operation and setting up of ParcelTrak.

You should already have the ParcelTrak system installed on your computer along with a Gazetteer.

Or the setting up of the system follow chapters 1-3, as the chapters after are for the main day to day important procedures. If in any doubt please read the relevant chapters in the main manual or consult with ZipZap.

TABLE OF CONTENTS

Chapter 1 - Setting Up	Page 5
Chapter 2 - Customers	Page 13
Chapter 3 - Pricing	Page 17
Chapter 4 - Manifesting	Page 29
Chapter 5 - PODS	Page 33
Important Information	Page 35

CHAPTER 1 - SETTING UP

Part 1 - Parameters

From the main menu move to the option called **Utilities** and press **Enter**, this will open up another menu on the screen, move to the option called **Parameters** and then press **Enter**.

The screen will look as below. You must fill in the relevant details which I will explain.

PARCELTRAK 02.07 ZIPZAP - 01522 526964/0374 675625 10 Jul 96

Zipzap Computer Consultants Set Up Home Depot Parameters

Vat Rate (%) : 17.50	Surcharges -	AM Surcharge AM
This Depot Code : 5LN		10AM Surcharge 10
FOC Acct : FOC001		SATAM Surcharge SAM
Cash Acct : CAS999		SAT10 Surcharge S10
Ins Value per Th: 3.00		
Hub Security : 0.00		
Vehicle Option : No		Sales Reps Option : No
	Input Full Address Details during Manifesting :	Yes
Remote File Dir :		
Manifest Data : Yes	Out : a:cons	
	In :	
Pod Data : No	Out :	
	In :	
Base Town : LINCOLN		Manifest to Other Networks : Yes
Use Sage Accounts: No	Sage Drive/Path/File :	
Default Nominal:		

This Most Commonly Used VAT Rate

Although this screen may be daunting it is very easy to understand, you will be prompted to enter information into every part of the screen. You will now be taken through every field and explained and what information is required.

- Vat Rate** - This field holds the current default Vat rate in percentage terms, so for the current VAT at the moment you should enter 17.5.
- This Depot Code** - This is your depot code, so if you are depot 5LN in the Network you should enter 5LN.
- FOC Account** - This is an account which should exist in your customer file where no consignment has a charge. In consignment entry any consignment entered through the FOC (free of charge) account will price as zero.
- Cash Account** - This account is primarily used for cash transactions, ie., where a customer will pay for the consignment straight away and will wish to receive an invoice there and then.

CHAPTER 1- SETTING UP

5. **Insurance (Value per Thousand)** - In this field please input how much you charge for additional insurance to cover a thousand pounds worth of goods.
6. **Hub Security** - If the Hub charges an additional rate for consignments manifested as security freight then please input this amount.
7. **Vehicle Costing Option** - For ease of use please enter **N** at this field, or refer to the main manual for a full explanation of how vehicle costing works.
8. **Sales Option** - For ease of use please enter **N** at this field, or refer to the main manual for a full explanation of how the sales rep option will work for you.
9. **Input Full Address Details during Manifesting** - Please set this option to **Y**, it allows you to input the full delivery address during consignment entry, which will print out on printed consignment notes and labels.
10. **Remote Files Dir** - This option asks where you wish to store the outgoing files to the hub and where to read the incoming files from the hub, for example **C:**, this is MS terminology. If you are unfamiliar with DOS then please contact ZipZap. Simply leave this field blank.
11. **Manifest Data** - Set this option to **N**.
12. **POD Data** - Set this option to **N**.
13. **Base Town** - Enter the town that your depot is situated in, eg., **LINCOLN**. This field is used for the quoting programs, in that the from destination will default to this field as 99% of quotations will be normal collections.
14. **Manifest To Other Networks** - Set this option to **N**.
15. **Use Sage Accounts** - If you are not going to use the ParcelTrak Sales Ledger key in **Y** into the first field, **4000** into the next and **C:\TRANS.CSV** into the next. This will prohibit postings being made to the ParcelTrak Sales Ledger.

Next the system will ask you for the surcharge codes that you wish to use for the four main timed deliveries that you offer, ie., **AM, TEN AM, SAT AM** and **SAT TEN**.

Another screen will appear for you to fill in details, please press **Enter** through the details as these will have already been set up for you.

If you are going to use Sage

You will now be prompted for the start invoice number, key in the first invoice number that you wish ParcelTrak to use when you do your first invoice run from within ParcelTrak.

CHAPTER 1- SETTING UP

If you are going to use the ParcelTrak Sales Ledger

You will be prompted for the start invoice number, credit note number and the month information for the Sales and Purchase Ledgers.

Once this information has been entered select **Save** from the menu at the bottom of the screen and you will return to the sub menu from the **Utilities** option on the main menu. Simply select **X-Exit** to return to the main menu.

CHAPTER 1- SETTING UP

Part 2 - Depots

Select the **Depots Menu** option from the main menu and press enter, a sub menu will open. Chose the top option which is called **Create/Amend Depots** and press enter.

This program is designed to maintain the depots that you send consignments to.

A. The system is currently asking for a depot code to be inputted, please key in the first depot number that you wish to create and press **ENTER**. This screen will now look as below, which will need information entering.

The information fields that need pointing out are explained below:

```
PARCELTRAK V2.07          ZIPZAP - 01522 526964/0374 675625          26 Jul 96
-----
Zipzap Computer Consultants  Create/Amend Depots
-----
Depot Code : PSLN
-----
Depot Name : Zipzap Computer Consultants          Region : 01
Address : Unit 14                                Network : 02
         : Fort Barnes                            S/L Acc : PDON01
         : Rookery Lane                          Del Surcharge: 0.00
         : Lincoln                               Security : No
Post Code : LN6 7PW                             Home :
Telephone : 01522 526964                        Alias :
Fasimile  : 01522 546812                       Scottish : No
Cont Name 1:                                     Areas Covered Ln Dn Pe20-25
Cont Name 2:
-----
X-Exit Amend Delete Copy
```

1. **Depot Name** - The name of the depot.
2. **Region** - This is the pricing region that the depot belongs to. Please note that if the region, has not full tariff records that references it as a delivery region, you will be launched into setting the full tariff rates.
3. **Network** - This is for specifying which parcel network this depot belongs to. You may only enter the network number or search for it if you have specified that you wish to use multiple networks in the parameters section.
4. **A/C** - The Customer Account Number of this depot, because Depots will also be customers of yours.

CHAPTER 1- SETTING UP

5. **Delivery Surcharge** - Does the Depot charge an additional amount for delivery, over the normal rates.
6. **Security** - By entering a Y any items manifested to this depot will default to the security status of Yes.
7. **Home** - This is the bay code to which the depot belongs.
8. **Alias** - This is a facility that allows you to give the depot an alternative code to be printed on the manifests.
9. **Scottish** - This is where you enter Yes if it is a Scottish depot and No if it is not. This is so you may print a separate Scottish manifest if required.

The other fields relate to address details and phone numbers etc.

Recommended Collection/Delivery Pricing Regions

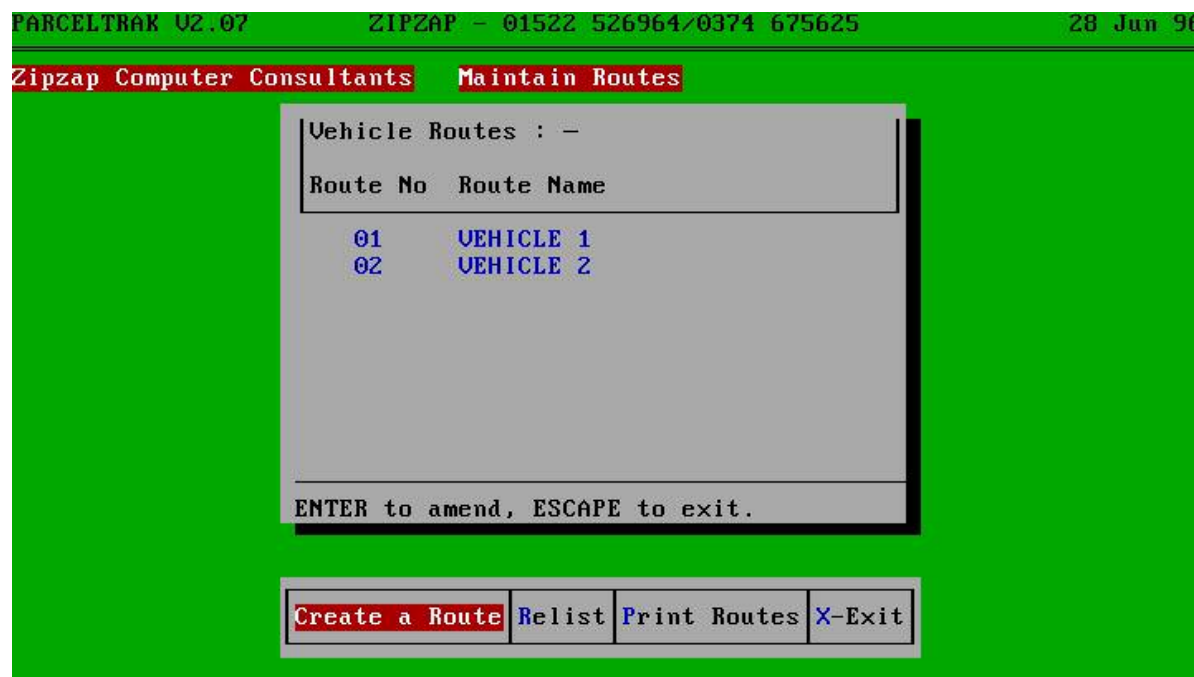
- | | |
|----|----------------------|
| 01 | - Internal |
| 02 | - England |
| 03 | - Scottish Lowlands |
| 04 | - Scottish Highlands |
| 05 | - Northern Ireland |
| 06 | - Southern Ireland |

Once the fields have been entered you will be given the opportunity to save the details etc.

CHAPTER 1- SETTING UP

Part 3 - Gazetteer

Select the **Gazetteer Menu** from the main menu and press **ENTER**. A sub menu will open up, chose **Delivery Routes** followed by **ENTER**. The screen will look as below:



You will have to set up delivery routes for the incoming consignment to be routed.

Imagine that you have four delivery vehicles, normally each delivery vehicle delivers to their own specific part of the delivery area, this would need setting up in order to allocate the delivery route number against each of your own delivery postcodes.

Select **Create a Route** from the menu, you will then see a data entry box where you have to key in a route number from 01 to 99 and a route name. Once the first one has been keyed in you will be positioned against the list of routes and by pressing **Esc** you may create another route, Exit the program etc.

When you finally Exit the program please select **Bulk Gazetteer Change (Split)** from the menu.

When you enter this program please make sure that you have a copy of all the postcodes and which depots cover them. The initial screen is shown over the page:

CHAPTER 1- SETTING UP

```
PARCELTRAK V2.07          ZIPZAP - 01522 526964/0374 675625          28 Jun 96
-----
Zipzap Computer Consultants  Split Postcode Change
-----
                          Split Postcode Change Utility
Change from Postcode  to  to the Depot Code  Region  S  0.00
                    ↑

```

What you now need to do, as we have only supplied the Postcodes and Town names, is to tell the system which depots cover which postcodes, for example:

1. The complete postcode of **AB** is covered by depot **1** and is in pricing region **2**.

Enter **AB0** in the first field, **AB99** in the second, **1** in the third and **02** in the fourth field.

2. The postcodes **LN1** to **LN5** are covered by depot **2** and are in the pricing region **03**.

Enter **LN1** in the first field, **LN5** in the second, **2** in the third and **03** in the fourth field.

CHAPTER 2 - CUSTOMERS

Creating Customers

Please select the option **CUSTOMER MENU**, press **ENTER** and a sub menu will be displayed. Select **Create/Amend Customers** from this menu and press **ENTER**, You will be asked for an account reference. Once you have entered one you will be presented with a screen similar to the one below:

```
PARCELTRAK V2.07          ZIPZAP - 01522 526964/0374 675625          24 Jul 96
Zipzap Computer Consultants  Customer Maintenance
Account Reference : ZIP001
Account Name: Zipzap Computer Consultants      Last Used: 230796
Address:                                         Type : Customer
:                                               Notes : Yes
:                                               Labels : Yes
:                                               Inv Pd : M B: No
Post Code:                                     Factoring No :      Inc :
Telephone:                                     Facsimile :         Inv : No
Contact:                                       Watch Consignment Numbers : No
Cust Ver Used : No  Vet :                     Invoice Type : Detailed
Maintain Pre-printed Note Levels : No  Left : 0  Warning : 0
Terms : 0 from Date of In Statmt : Yes  Default Contract :
Cr Limit : 0.00  Security : N  Sec Charge : 0.00 In : 3.00
Balance : 0.00  Commission : N  Sales Rep : % 0.00
Turnover : 0.00  Min In : 0.00  Own PaperWork : No  LA : No
Amend Delete Month Figures Set Budgets Remove Budgets X-Exit
```

I will explain the fields one at a time

1. **Account Name** - the trading name of the customer
2. **Type** - either **C** for Customer or **D** for Depot
3. **Notes** - Either **Yes** or **No** to whether this customer will have any consignment notes printed during a complete consignment note print run for a day.
4. **Labels** - Either **Yes** or **No** to whether this customer will have any labels printed during a complete consignment note print run for a day.
5. **Invoice Pd** - **D** for Daily , **W** for Weekly, **T** for Two Weekly and **M** for Monthly invoicing.
6. **B**- Either **Yes** or **No** to whether the customers address should be blanked out on any pre-printed Consignment Notes or Labels.

CHAPTER 2 - CUSTOMERS

7. **Address** - The address where any invoices raised for this customer need sending to.
8. **Postcode** - The postcode of the customers address.
9. **Factoring number** - If you are factoring you will have to key in a factoring number for the factoring house, this number will appear on any invoices that are raised for the customer.
10. **Inc** - If you are using factoring, then do you wish to include this customer in the factoring policy.
11. **Inv** - Do you wish to raise invoices to this customer.
12. **Telephone** - The telephone number of the customer.
13. **Facsimile** - The fax number of the customer.
14. **Contact** - The contact at the customers, usually the person you need to chase for payments.
15. **Cust Ver Used**- Has this customer got a copy of the Customer version of ParcelTrak enter either **Yes** or **No**.
16. **Vet** - Do you wish to have the ability to change any of the consignments during transfer before they are made into consignments **Yes** or **No**.
17. **Invoice Type** - You may set this to produce a Detailed or Summarised invoice.
18. **Maintain Pre-printed Note levels** - You can pre-print blank consignment notes, with a customers name and address for them. It is often useful to know how many pre-printed notes that a customer has left, you may set this option to **Y** if you wish to know this.
19. **Warning** - If you have set Maintain Pre-printed Notes Levels to **Y** you will need to key in a warning level, then during consignment entry you will be told when the level has fallen below this figure.
20. **Terms** - If you are using the ParcelTrak Sales Ledger you will need to enter the number of days credit the customer has followed by :
21. **From** - Either **D** for **Date of invoice** or **E** for **End of month**.
22. **Statement** - If you are using the ParcelTrak Sales Ledger and produce statements from it setting this to either **Yes** or **No** will dictate whether or not a statement is produced for this particular customer.

CHAPTER 2 - CUSTOMERS

23. Default Contract - To call up the pricing for a customer during consignment entry you generally need to key in a contract code. Here you may enter the most commonly used one so it comes in automatically.

24. Security - If a specified customer mainly sends out security consignments then you can set this to Yes to allow the system to default to Security during consignment entry for this customer.

25. Sec Charge - Do you wish to add a charge for any consignments sent through as security for this customer if so enter the amount to charge.

26. Commission, Sales Rep and % - These fields relate to the Sales Reps Option being set to Y, see the main manual for more details regarding this program.

27. Min Invoice - You may set a minimum invoice value for specific customers and when an invoice is raised it will be rounded up to the minimum amount if it doesn't meet it already.

28. Own Paperwork - If a customer uses their own paperwork, setting this field to Yes will ensure that during manifesting the system will automatically print out a consignment note with all the details filled in.

29. LA - Set this option to Yes if you wish to learn delivery address for this customer.

This is currently the information that needs to be keyed in for each customer.

To amend an existing customer key in an existing account number or key in the search key followed by some text to search for, eg. /A will list all accounts with an account reference beginning with A.

Once you have entered all your customers press ESC where the system expects you to enter an account number for creation or amendment.

Then select Exit from the sub menu to return to the main menu.

CHAPTER 3 - PRICING

Concepts of pricing within ParcelTrak

ParcelTrak prices consignments by a number of different means but is based around:-

1. Where the parcel started from
2. Where the parcel is going to
3. Its weight or other multiplier used for pricing

There are a set of default rates called STANDARD TARIFFS. These are prices that ParcelTrak uses if it cannot find anything else to use. All areas being used MUST have a valid full tariff rate table.

There are a set of rates called CONTRACTS. These are prices that have been quoted to the individual customer. Since you normally quote these on paper to your customer then these are true contracts between you and the customer. Note that you may only have quoted to the customer a set of prices that go to one particular area, in this case he will have a contract price to that area but standard prices to the others.

There are another set of rates called GLOBAL CONTRACTS. These are similar in structure to normal contracts but they can be used for any customer. A good example of a global contract would be a letter pack.

Pricing consists of a set of tables of prices. These are the prices from a particular area to another area. Areas (or PRICING REGIONS) are just given numeric codes. We normally give the local area around the depot running ParcelTrak a designation of being in pricing region >01'. There are 20 pricing regions available.

Pricing regions relate to areas on a map. The difference between one area or another is usually due to:-

1. Having different hub rates to the area
2. Having different delivery rates to the area

As a general guide the pricing areas concerned are:-

- 01 Local area
- 02 England and Wales
- 03 Southern Scotland
- 04 Northern Scotland
- 05 Northern Ireland
- 06 Southern Ireland

This is only intended to be a rough guide and they can be set up in any form whatsoever. These are simply physical areas on a map.

So a parcel going from the local depot to Northern Ireland would use the pricing table for >01' to >05'. It would first look to see if the customer had a valid contract to that region and if it did it would use it. If it did not then it would fall back onto the standard tariff rates. A

collection requested from a depot in Northern Ireland would be priced on the basis of the >05' to >01' table.

It is vital that you have a default standard tariff rate for all combinations of >FROM= and >TO= that you use. It also holds details of whether the pricing areas concerned are Vatable.

The >FROM= and >TO= areas are obtained from the source and destination postcodes by looking them up in the gazetteer. They are initially set by using the bulk change options on the gazetteer menu.

Do not try to overcomplicate the regions being used. There is a facility within the gazetteer to add delivery surcharges on individual postcode areas where these apply.

Do not create unnecessary contracts. The rule of thumb is that if you have quoted a price then you create a rate for it and if you haven't - then you don't. The standard tariff rates will catch it anyway.

Surcharges for additional services are added via the pricing menu. Again, these are general prices. If someone has a different price to the standard one you can create a special rate using DISCOUNTED TIMED SURCHARGES.

Always think of the operator when creating contracts. These are given a name like 24K or 48K. It is better if the name appears meaningful to the operator and they can associate the contract with the job. You can have a rate called 24K for a customer from one area to another and the same name for different areas at totally different prices. These are quite valid.

You can use the same contract name again and again with different customers. Again this is quite valid. We suggest that you always use the same names for the same type of freight - it makes the operators life easier.

The possible permutations of pricing are almost limitless.

Depots should be entered into the system as depots AND customers. Their customer account code should fall into standard accounts format and you should NOT use their depot code in case the depot changes.

The standard format for account codes is as follows:-

1. First three letters
2. Sequential number from 001 to 999

So the XYZ Trading Company would be XYZ001 while the XYZ Sweet Company would be XYZ002.

ParcelTrak uses a special system for searching using the >/= wildcard symbol, so if you asked for >/XYZ= it would offer you a choice of the two.

CHAPTER 3 - PRICING

Full Tariff

Please select the **PRICING MENU** from the main menu and press **ENTER**.

Now select **Full Tariff Prices** rates from the pricing menu.

Some of the region combinations will already be set up for you.

Region combinations have to be set up but the pricing applies to any of the customers who do not have specialist pricing. For example it would be doubtful that your customer had a specialist price for the combination **01/06 Your Region/Southern Ireland**, so these prices would be used. You may however set up specialist pricing for this combination if you wish.

The screen will look something like as below:

As you can see the list on the left hand side of the page shows that the region combinations

PARCELTRAK V2.07 ZIPZAP - 01522 526964/0374 675625 27 Jun 96

Zipzap Computer Consultants Full Tariff Prices

St Reg	End Reg
01	01
01	02
01	03
01	04
01	05
01	06

'A' Service Prices
from Region 01 to Region 01. Days to Deliver : 1

CUSTOMER			
Free:	25.0000	Base:	5.0000
Free:	9999.0000	Base:	0.0000
		Kilo:	0.2500
		Kilo:	0.0000

TRUNK			
Free:	0.0000	Base:	0.0000
Free:	9999.0000	Base:	0.0000
		Kilo:	0.0000
		Kilo:	0.0000

DELIVERER			
Free:	0.0000	Base:	0.0000
Free:	9999.0000	Base:	0.0000
		Kilo:	0.0000
		Kilo:	0.0000

have been set up as follows:

Your region/Your region	- 01/01
Your region/England	- 01/02
Your region/Scotland	- 01/03
Your region/Highlands	- 01/04
Your region/N Ireland	- 01/05
Your region/S Ireland	- 01/06

CHAPTER 3 - PRICING

You can set up any kind of combination to also handle reverse collections, third party collections.

England/Your region - 02/01 - Reverse Collection
England/Scotland - 02/03 - Third Party Collection

When you press **ENTER** next to a region combination on the left hand side of the screen, you will have to input whether that region is vatable **Y** or **N**.

Now the first page of rates relates to the quickest service, the A service, which is generally regarded as Next Day. You will see a field which asks for the number of days to deliver on this service, this would normally be one but for example **01/04 - Your Region/Highlands** may take a minimum of three days so these are configurable. It is important that the days to deliver details are filled in correctly for the **Late Delivery Reports** to be accurate.

Now all you have to do is key in the rates for the customer, trunk and delivery portions for the next day service. You have two breakpoints for each portion. After these have been keyed in the system will ask for the rates for the next service level and so on.

CHAPTER 3 - PRICING

Contracts

Select **Contracts** from the **Pricing Menu** and press **ENTER**.

The screen will look as below:



Contracts are for specific rates for customers relating to different types of charging for different pricing regions and different service levels. Do not use contracts for any depot within your parcel network.

You will need to key in the account number that the pricing relates to then a Contract Number, which is really a code, that is easy to remember for the type of pricing and service level, a good example would be **24KILO** for a next day kilo rate.

You then need to specify which region the pricing is coming from, mostly this region will be **01**, which means that it is coming from you although the system will accept anything from **01**

to **15** to enable it to handle reverse collections and third party collections. A **>To=** pricing region also needs to be keyed in.

You must now specify what service the price is for, **A = NextDay, B = TwoDay, C = ThreeDay.**

You will now be moved into an entry box which is probably a little confusing at this time but with some explanation it is very easy.

The three sections are explained individually below:

CHAPTER 3 - PRICING

Customer

Type - The type of pricing that you are going to charge the customer.

Kilo = K
Parcel = P
Pallet = L
Half Pallet = H
Mileage = M
Cubing = C

Here are some examples of how each type of price works:

	Bands	Base	
Kilo	20	7.50	.25

You are giving your customer a rate of ,7.50 for anything up to and including 20 Kilos, any kilo after the initial 20 will be charged at 25 pence each.

	Bands	Base	
Parcel	1	5.50	4.50 .25

For the first parcel you are charging a rate of ,5.50 and any subsequent parcel you are charging ,4.50, and if the weight of each parcel goes over the weight limit then any extra kilos are charged at 25 pence.

	Bands	Base	
Pallet	1	50.00	40.00 .25
	10	410.00	30.00 .25

Two out of the eight pricing bands are illustrated here to demonstrate some powerful pricing for a pallet charge. The first Pallet is charged at ,50.00 and any thereafter at ,40.00, but after 10 Pallets the subsequent Pallet rate is reduced to ,30.00 per Pallet. Also if the weight of each pallet goes over the weight limit then any extra kilos are charged at 25 pence.

	Bands	Base	
Half Pallet	1	25.00	20 .25
	10	2.05	15 .25

This works exactly the same as full pallets above. It is generally assumed that the weight limit on a Full Pallet is 1000kg and a Half Pallet is 500kg.

	Bands	Base	
Mileage	20	20.00	.36

The first 20 miles are charged at ,20.00 but every mile after is charged at 36 pence.

	Bands	Base	
Cubing	1	38.00	

CHAPTER 3 - PRICING

For each cubic metre you are charging your customer ,38.00 although if the consignment is not a complete cubic metre then the customer is charged a percentage.

Limit - For parcel or pallet charges on the customer portion you may state that each Parcel or Pallet can not weigh more than so many kilos, for example you specify that each parcel can not weigh more than 10 kilos, during manifest entry you use this pricing, if the item is over the limit then the extra kilos will not be added at an additional rate.

Min Charge - You may specify a minimum charge on each portion, an example of this is as follows you give your customer a parcel contract as below:-

The First Parcel is charged at ,4.00 and every parcel after at ,2.50, but the minimum charge for any consignment is ,5.00.

Use Intelligence - This field will only allow input if the customer portion is to be charged using Kilo Pricing. The facility exists for the automatic uprating of Kilo and Pallet charging.

If you set **Use Intelligence** to **Yes** then you must specify a weight that when surpassed the system uses an alternative contract.

Trunk and Deliverer Portions

If you wish to analyse the profit margins that you are making on each consignment, customer, etc., then it is wise to key in how much trunk and delivering depot are charging you. Again you may specify which type of pricing you are using.

For example you may be charging your customer a rate per Parcel but the trunk and deliverer may be charging you a Kilo Rate, the system was designed with flexibility in mind. You can also put minimum charges on these portions.

When you have entered this box, another box will be displayed for actually inputting the rates, please notice that the trunk and delivery portions will be automatically filled in from the full tariff rates, which will need setting up.

CHAPTER 3 - PRICING

PARCELTRAK V2.07				ZIPZAP - 01522 526964/0374 675625				27 Jun 96			
Zipzap Computer Consultants				Normal Contracts							
Customer : ZIP001 Zipzap											
Contract : 01 From Region : 01 To Region : 02 Service : A											
CUSTOMER				TRUNK				DELIVERER			
Bands	Base	Kilo	Over	Bands	Base	Kilo	Over	Bands	Base	Kilo	Over
20	7.500	0.250	0.000	25	0.800	0.000	0.000	25	2.070	0.080	0.000
9999	0.000	0.000	0.000	200	2.500	0.000	0.000	9999	0.000	0.000	0.000
0	0.000	0.000	0.000	9999	0.000	0.000	0.000	0	0.000	0.000	0.000
0	0.000	0.000	0.000	0	0.000	0.000	0.000	0	0.000	0.000	0.000
0	0.000	0.000	0.000	0	0.000	0.000	0.000	0	0.000	0.000	0.000
0	0.000	0.000	0.000	0	0.000	0.000	0.000	0	0.000	0.000	0.000
0	0.000	0.000	0.000	0	0.000	0.000	0.000	0	0.000	0.000	0.000
0	0.000	0.000	0.000	0	0.000	0.000	0.000	0	0.000	0.000	0.000
0	0.000	0.000	0.000	0	0.000	0.000	0.000	0	0.000	0.000	0.000
				Enter Contract Type				Save Re-enter Discard			

As you can see some rates have already been entered into the customer portion of the pricing.

After you have input the whole entry box you will be allowed to save the information. After saving you may copy the same rate to another pricing region, by selecting **Copy** from the menu, this will ask for a start region and an end region.

We have set this contract up from region **01** to region **02**, inputting the start region as **03** and the end region to **05** in the copy box will create the price for the start/to region combinations as well as **01/02**.

01/03
01/04
01/05

By either exiting the program or pressing **ENTER** at the location where the system asks for an account number, you will be returned to the main menu.

CHAPTER 3 - PRICING

Special Contracts

This type of pricing is identical to contract pricing, but a special contract can be used by any customer and is not linked to any customer account. This type is recommended for deliveries/collections done on behalf of other depots within your network.

So the Start Region will be either **02, 03, 04, 05, or 06** and the end region will be **01** for deliveries for other depots. For collections on behalf of other depots that start region will be **01** and the end region will be either **02, 03, 04, 05 or 06**.

You will have to set up rates for the combinations illustrated below:

<u>Start Region</u>	<u>End Region</u>	<u>Service</u>	<u>Type</u>
02	01	AKilo	
03	01	AKilo	
04	01	AKilo	
05	01	AKilo	
06	01	AKilo	
02	01	BKilo	
03	01	BKilo	
04	01	BKilo	
05	01	BKilo	
06	01	BKilo	
02	01	CKilo	
03	01	CKilo	
04	01	CKilo	
05	01	CKilo	
06	01	CKilo	
02	01	APallet	
03	01	APallet	
04	01	APallet	
05	01	APallet	
06	01	APallet	
02	01	BPallet	
03	01	BPallet	
04	01	BPallet	
05	01	BPallet	
06	01	BPallet	
02	01	CPallet	
03	01	CPallet	
04	01	CPallet	
05	01	CPallet	
06	01	CPallet	
01	02	AKilo	

CHAPTER 3 - PRICING

01	03	AKilo
01	04	AKilo
01	05	AKilo
01	06	AKilo
01	02	BKilo
01	03	BKilo
01	04	BKilo
01	05	BKilo
01	06	BKilo
01	02	CKilo
01	03	CKilo
01	04	CKilo
01	05	CKilo
01	06	CKilo

Please note that you only need to enter the amount you get paid for delivery/collection in the customer portion, simply leave the trunk and delivery portions zero as this does not apply to the deliveries you do.

CHAPTER 3 - PRICING

Surcharges

This is where you set up your timed and untimed surcharges.

The initial screen will look as below:-

S U R C H A R G E S										
Code	Description/Valid	Customer	Hub	Delivery	Nvd	Tim	Day	Time	Sec	
9AM	Pre 9.00am Delivery	15.00	0.00	8.00	BC	Y	0	09:00	No	
AM	AM DELIVERY	6.00	0.00	3.00	BC	Y	0	12:30	No	
SAM	SAT AM DELIVERY	30.00	0.00	23.00	BC	Y	6	12:00	No	
STAM	Saturday Pre 10.30	35.00	0.00	25.50	BC	Y	6	10:30	No	
TAM	Pre 10.30am Delivery	10.00	0.00	5.50	BC	Y	0	10:30	No	

Press Enter to Amend, Escape to Exit. YYYNNNNNNNNNNNNN

If you wish to create a surcharge, then simply select **Create a Surcharge** from the menu displayed at the bottom of the screen and a data entry box will appear for you to fill in the details below:

Code:	Description:	Valid :				
Customer :	0.00	Hub:	0.00	Del:	0.00	
S/N/U:	Timed :	Day :	0	Time :	00:00	Security :

The fields are explained as follows:

Code - A four digit alphanumeric code for identifying the surcharges as mentioned below, there are several that you should set up, ie., AM, TEN, SAT AM, SAT TEN.

Description - A description of the surcharge.

Customer - The amount that you generally charge for this type of surcharge to the customer.

Hub - The amount that the hub charges you for this surcharge.

Deliverer - The amount that you are charged by the delivering depot.

CHAPTER 3 - PRICING

S/N/V -You may specify up to two service levels that the surcharge cannot be used with, eg., **BC** means that the surcharge cannot be used with **Two Day** and **Three Day** services.

Timed - Is the surcharge timed, either **Y** or **N**.

Day - If the surcharge is timed, on what day has it got to be delivered **0 = Any Day, 1 = Monday etc.**

Time - Again if the surcharge is timed, then by what time does it have to be delivered. Eg., **12:00** for an AM delivery.

Sec - Do you wish this surcharge to force security status.

Once these details have been keyed in you should enter which pricing zones/regions the surcharge is allowed for, you will have to enter **Y or N** for the 15 pricing regions/zones that are allowed.

Please note that generally you will have to create more than one surcharge for AM, TEN AM, SAT AM and SAT TEN as you will create duplicates with a different code for deliveries that are sent to you by other depots with just an amount in for the customer charge.

Once you have created a surcharge you will be positioned against a list of surcharges that you have created, by simply pressing the **Esc** key you may create another entry or Exit the program.

Once you have exited the program select the **Discounted Timed Surcharges** option and press **ENTER** to run the program.

CHAPTER 3 - PRICING

Discounted Timed Surcharges

If you have a customer that you generally charge less or more than the prices you have entered already for surcharges, then this is the program that you run.

You will first be asked for the account reference of the customer. Simply key this in and the screen will ask you for a valid timed surcharge code, key this in and the screen will look as below:

```
PARCELTRAK 02.07      ZIPZAP - 01522 526964/0374 675625      27 Jun 96
Zipzap Computer Consultants  Contract Surcharges
Account Number : ZIP001  Zipzap
Surcharge Code : 9AM
Contract Surcharge
Code : 9AM
Desc : Pre 9.00am Delivery
Customer Charge : 15.00
                ↑
Trunk Charge : 0.00
Delivery Charge : 8.00
Not Valid : BC
Amount to Charge this Customer
```

Here you will be allowed to change the customer charge to whatever you want to. After this has been completed you may save the changes and either enter another customer reference or leave the program by pressing the **ESC** key.

CHAPTER 4 - MANIFESTING

Automatic Entry

Please select the **MANIFEST MENU** from the main menu followed by **CONSIGNMENT ENTRY**. The Consignment Entry screen will look as follows:

PARCELTRAK V2.07		ZIPZAP - 01522 526964/0374 675625		02 Jul 96	
Zipzap Computer Consultants			Automatic Consignment Entry		
Acc No : ZIP001 Vehicle Number : 123456 Date 02 Jul 96 Order : Org : 5LN From Depot 5LN P/C : DE1 Town : DERBY 5DE To : MR JACKSON Cont : 24 Normal Kilo Service: A Security :No Items : 1 Weight/Miles: 10	ZIP001 Zipzap Unit 14 Forte Barnes Rookery Lane Lincoln	Price : 47.00 VAT : 7.17 Hub : 6.50 Delv : 27.25 Sp Ins : 6.00 Manf : Y N.B. This is not Uatable !!!			
Insurance :Y Amt : 1500.00 COD :Y Amt : 75.00	Timed Surcharge : STAM Other Surcharge : Remarks: Saturday Pre 10.30				
Save Discard Re-enter Change Prices Notes Alternative Sender					

The fields are explained below:

Acc No - This is where you enter the account number that the consignment is from.

Number - A consignment number is required here entering 1 will result in 000001 being shown in the box.

Order - A customer order number can be keyed into this field.

Date - The date of despatch for the consignment, this will default to the system date but you can alter it.

Org - The depot who is responsible for the consignment, it will normally be you so it defaults to your depot but can be changed.

From - The depot the consignment was despatched from, again normally your depot.

P/C - The postcode where the consignment is going to, normally the first 3 to 4 characters of the postcode, once located in the gazetteer the system will fill in the town as well as the depot to.

CHAPTER 4 - MANIFESTING

Town - If you wish to search by town you may, and once located the postcode field will be filled in as well as the depot to.

To - The consignees name - After this has been inputted you will be allowed to enter the rest of the address lines.

Cont - A valid contract number for that customer or leave blank to use full tariff pricing.

Service - Either **A** for **Next Day**, **B** for **Two Day**, **C** for **Three Day**.

Security - A simple **Y** or **N** if the consignment is to be sent via security.

Items - The number of items that make up the consignment.

Weight - The weight in kilos of the consignment.

Insurance - A simple **Y** or **N** if the consignment requires additional insurance

Amt - If the consignment requires additional insurance, then how much for?

COD - A simple **Y** or **N** if the consignment requires cash on delivery.

Amt - How much is the COD for?

Timed Surcharge - Please enter a valid timed surcharge code if the consignment requires a timed surcharge or leave blank for none.

Other Surcharge - Please enter a normal surcharge code if one is required.

Remarks - You are allowed to enter two lines of 20 characters containing some descriptive comments on the consignment.

Once these details have been entered then you will be presented with a menu shown below:

|Save|Discard|Re-Enter|Change Prices|Labels|Notes|

The menu options obviously speak for themselves, **Labels** will produce labels for the current consignment, **Notes** will produce a consignment note for the current consignment.

After you have saved the current consignment another menu will appear at the bottom of the screen asking if you wish to select the same account move on to another or Exit, this allows you to shortcut if you wish to stay with the same account.

CHAPTER 4 - MANIFESTING

Amend Consignments

This option on the manifest menu allows you to delete or amend a consignment that already exists on the system. Simply locate the consignment by entering the consignment number or by entering the customers order number.

Depot Manifest

This program will produce the required depot manifests on a nightly basis, key in the date of the day you wish to produce manifests for and the system will print first the normal manifests and then any security manifests for each delivering depot.

Single Depot Manifest

This program will allow you to re-print a single manifest for a delivering depot, be it normal or security for a given date.

Internal Manifest

This manifest is for your eyes only as all consignments will be listed on it for a given date showing full pricing information, it is suggested this is run off the morning after to double check the customers prices are correct.

Combined Security

The combined security manifest is a manifest that needs to be sent to the hub each night illustrating Security freight all on one sheet.

CHAPTER 5 - PODS

Basic PODS

ParcelTrak has some of the most advanced POD systems built into it so it is advised that you read the manual for more information.

By selecting the **POD MENU** from the main menu and pressing **ENTER** you will be presented with a sub menu, please select the first option which is called **TRANSFER PODS** and press **ENTER**.

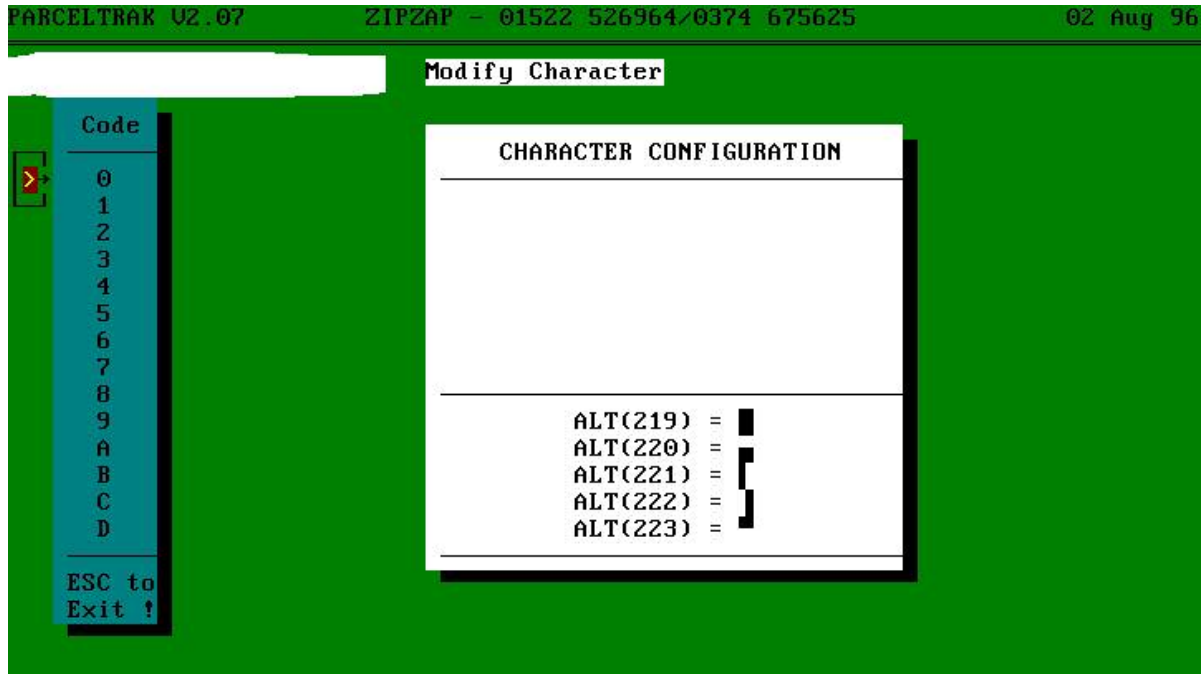
Transfer PODS

Any consignments that you have keyed in are not in the POD file until you transfer them. The system will default the transfer date to the day before as this is generally the procedure used through the parcel industry, (you may override the date if required). Once you accept the date all PODs up to that date will be transferred.

CHAPTER 5 - PODS

POD Entry

Select **POD Entry** from the sub menu and press **ENTER**, the screen will look as below:



Key in a consignment number and you will be presented with the above screen.

By selecting Enter Information you can then enter the details of the POD.

Save	Enter Discrep Code	Clear Discrep Code	Re-enter	Discard	Remarks
------	--------------------	--------------------	----------	---------	---------

If you have to enter a discrepancy code then choose **Enter Discrep Code**, from the menu, and a list of the discrepancy codes that you will need to setup will be listed for you to choose one.

If you have any additional delivery remarks to add to the POD then choose **remarks** where you will be allowed 40 characters of textual information.

Selecting **Save** will save the POD information that you have entered.

IMPORTANT INFORMATION

It is suggested that you read the chapters relating to pricing and manifesting in the manual as an aid to this training guide.

If for any reason that you attempt to log into the system with your log in name and the system informs you that the user is still logged on, then you must log in as the **MANAGER** and select **NAME TABLE** from the menu.

You will be presented with a list of all the user names that can log onto the system. Select **CLEAR ACTIVE USERS** from the menu at the bottom of the screen.

You will now be positioned against the list of user names, move down to the user name that is yours by using the cursor keys then press the **ENTER** key, the system will ask you if the user is to be logged off, press **Y** for Yes.

Now press the **ESCAPE** key three times and you may then log on to the system with your own name.