

SAGE ACCPAC



Sage Accpac Extended Enterprise Suite for the transportation industry

Sage Accpac Extended Enterprise for Transport: The Integrated Journey

When your world consists of rising fuel costs, expensive spare parts, and limited skilled labor, you want to invest in a rock-solid ERP solution that won't set you back. Sage Accpac Extended Enterprise Suite, including Sage Accpac ERP and SageCRM, and integrated with Service Manager by Technisoft, a Sage Software Endorsed Solution, offers transport companies a complete end-to-end business management tool. Your entire cycle—from sales and marketing through to quotations, route scheduling, and costing—as well as complete fleet management and maintenance can all be accurately tracked and reported in a simple business intelligence layer.

Sales and Marketing Simplified With Sage Accpac Extended Enterprise Suite

The beginning of every interaction should be managed by a robust CRM layer. 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 centralized SageCRM server. This robust CRM layer is totally integrated to all aspects of the business and flows information to the marketing team, who use this valuable data to manage their marketing campaigns, schedule functions, conferences, information sessions, and meetings with the appropriate clients. And since SageCRM integrates directly with Microsoft Outlook, important marketing events and meeting dates will be synchronized automatically with the Outlook Calendar and will notify the appropriate people of upcoming events by e-mail or whichever alert system you choose.

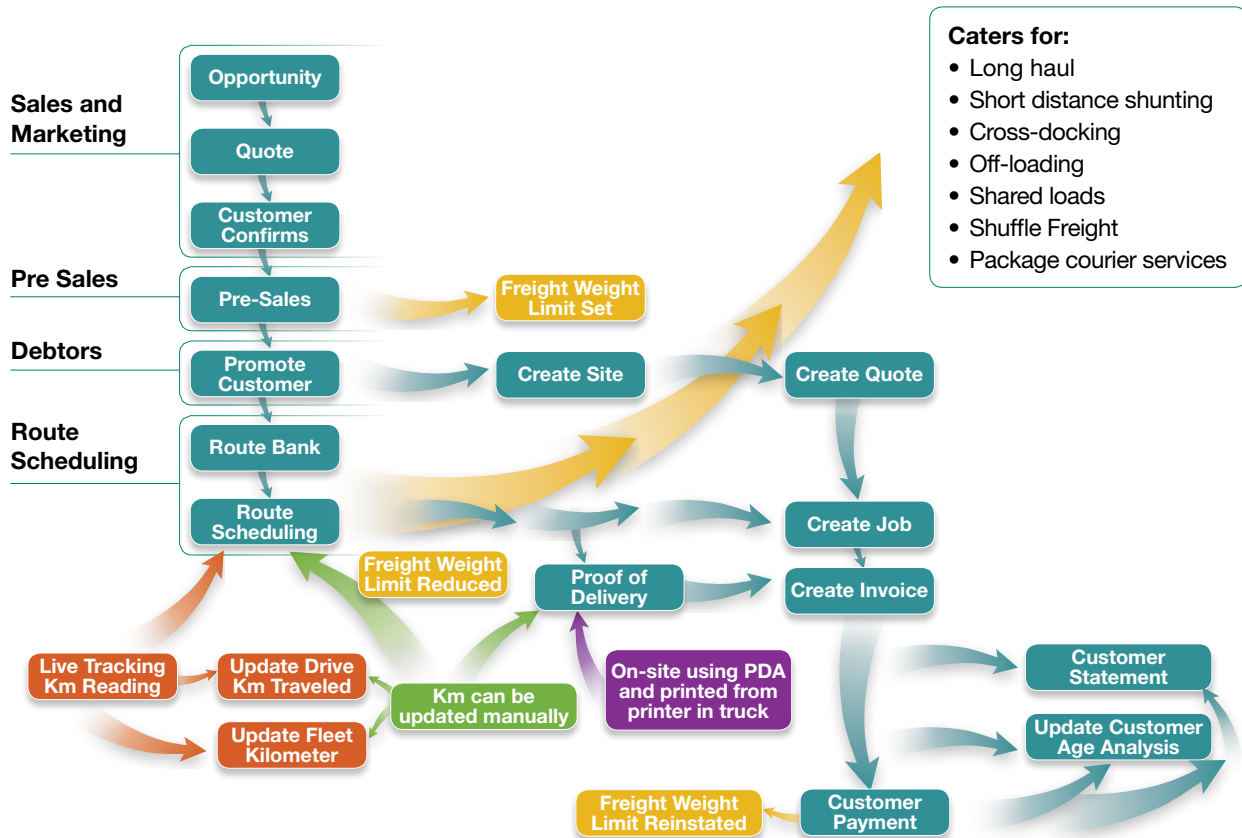
The sales team can manage their progress on forecasts using a graphical pipeline in SageCRM that shows the percentage of leads turning into opportunities and eventually sales. Sales staff can also manage expectations by adding estimated timelines and probability statistics of closing specific deals, giving them a true reflection of when opportunities will turn into bookings—a significant benefit when planning new capital purchases or managing maintenance schedules.

Order Entry and Fleet Assignments

Once a potential customer agrees to a quote, the pre-sales team will complete the appropriate credit checks, managed by workflows, before an order is created in SageCRM. The pre-sales team will also determine the freight limit that is allowed for the specific customer and the order will be sent to the customer using the pick-up and delivery addresses previously captured.

Since Sage Accpac Extended Enterprise Suite is a completely integrated solution, the customer data is automatically routed to the Sage Accpac ERP system in the back office where an Accounts Receivable (AR) customer profile with a unique ID will be created. 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.

Transport and Route Scheduling



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 and 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 are identified), the entry will be removed from the planning pool and added to the route schedule. This will prevent schedulers from double-booking transport entries in the planning pool.

As soon as an entry is added to the route schedule, a job card is created based on the finalized 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 odometer reading
- Driver
- Schedule of the driver's shifts
- Trailer with the latest odometer 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 mileage
- Proof of Delivery note
- Cross-docking details (from Fleet Number to Fleet Number)
- Loading time
- Off-loading time
- Time spent waiting for loading/off-loading
- Fleet item/truck odometer reading on off-load (from integrated tracking systems)
- Trailer mileage reading on off-load
- Total transport mileage
- Calculation of revenue for the specific freight
- Calculation of cost per kilometer/mile for the specific freight
- Refueling details and odometer readings
- Mechanical problems and breakdown details
- Number of miles/kilometers until next service of fleet item
- Number of miles/kilometers until next service of trailer
- Destination at various intervals
- Authorization code if driver is not going to sleep when required



Collating Actual Readings and Data—Live

The freight weight limit, initially determined 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 the transportation of goods that has not been confirmed and approved by the customer. The freight weight limit will be reinstated on receipt of payment from the customer after the Proof of Delivery (POD) has been signed and the customer has been invoiced.

The fleet item/truck mileage reading, together with the trailer mileage reading and/or the refueling readings will be used to update the meter reading in Sage Accpac ERP. The meter readings will be used to determine the next service interval for fleet items and trailers, while miles or kilometers traveled by a specific driver of a specific fleet item/truck will be used to update the payroll system in order to determine driver bonuses.

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 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 the head office using a cellular service network. This will update the job card status on the server and will complete, post, and invoice the job—in real time. The POD will then 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 then be sent by e-mail to the customer for payment.

Fleet Maintenance, Procurement

Sage Accpac ERP procurement workflows can be used to electronically approve 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:

- Spare parts
- Diesel
- Tires
- Batteries
- Covers for trailers
- Engine blocks, differentials, gearboxes, and other high-value equipment items

Reordering these items will be based on re-order levels per item per location as well as the delivery lead times of the vendors 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 a specific vendor.

Purchase costs can then be checked easily when requesting quotes from vendors for purchasing. Items will also be linked to price lists, which can be linked to customers in the event that specific items are sold externally rather than used internally for servicing 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 of the PO number for reference purposes. A Goods Received voucher is generated and linked to the PO once the purchased goods arrive on location.

The PO and PO receipt will be linked to the vendor's invoice once it is received from the vendor. These documents will complete the source document confirmation pack and will be used to pay the vendors after the electronic reconciliation of vendor accounts. PO receipts will update the item quantity on hand per location in real time. Items can now either be used to service or maintain fleet items or can 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 multiple counting teams for accuracy and control.

Internal Costing and Issues

Diesel dispensed will be captured electronically using an internal issues workflow. Create a fuel issue document with the fleet item's updated odometer reading, then post the fuel issue and automatically update the odometer reading on the job card and fleet vehicle.

Mileage is captured either by refueling the fleet items or updated through integrated fleet tracking—or manually by phoning drivers en-route. This information will be used to determine when fleet items and trailers are due for the next planned service. Fleet items/trucks will be equipped with serialized equipment items such as tires, engine blocks, gearboxes, and batteries. This will give management a true reflection of fleet maintenance costs.

Business Intelligence

All financial, fleet, and equipment maintenance reports will be created using the business intelligence feature to identify problem equipment and total expenditure of fleet items as well as the complete monthly management pack and exception reporting.

Planned Maintenance

Templates will be created for:

- Planned maintenance based on odometer readings of trucks and trailers
- Ad-hoc repetitive repairs of equipment items such as gearboxes
- 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 hours of work 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.

Labor hours will be used to update the employees' actual times for wages in the payroll system. Sage Accpac ERP will also track the warranties of equipment items installed on fleet vehicles. When job cards are created for the repair and maintenance of these items, the user will be notified whether or not a specific piece of equipment falls within the warranty period.

Equipment items can be repaired in-house at the workshop or can be returned to suppliers for repairs. The movement of items returned to the workshop or supplier will be tracked using the Return to Manufacturer Authorization (RMA) feature.



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