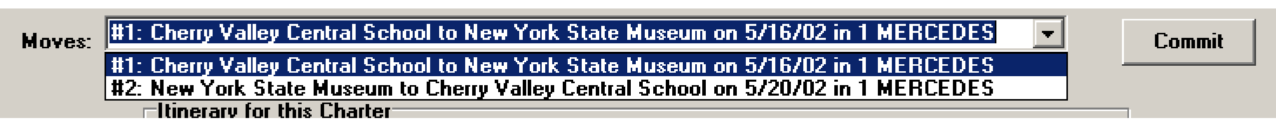
# GoChart 2000 Update Information

TECHNICAL NOTE: We are noticing that our customer's client workstations with 64MB of RAM may experience system slowdowns. This is especially true if users tend to have multiple applications open simultaneously.

The minimum recommended amount of system memory is:
128MB for Windows 95, 98, Millennium.
256MB for Windows2000, XP, 2003.

Please contact RBS if there is any question concerning these requirements.

On the Itinerary screen there is now a "Commit" button. You would click this button, so that when working on an extended itinerary the work can be saved at your convenience. This prevents changes made from being lost due to others working with the charter. If you are working with an itinerary and get an "update failed" message, you can always copy the changed information to the clipboard. After restarting your client you can then paste the information back into the itinerary.




HINT: It is possible to type text into the itinerary that has restricted views on various reports by typing a special control character at the beginning of each line of text that you want to restrict as follows:

**|** (Pipes Character) This is a shifted backslash / character –the one under the backspace key - Makes these lines of text not appear on any output ( Customer or Driver ) Screen Only. This can be used for accounts receivable information or anything else you want to say about the charter that you do not want anybody other internal personnel to see.

^ (Carat Character) This is a shifted Number 6 - This makes these lines of text appear only on customer confirmation and invoice, not on driver paperwork.

~ (Tilde Character) This is a shifted ` character. This is the key to the left of the number 1; this makes these lines of text appear only on Drivers Paperwork, not on customer confirmation and invoice.

## VERSION 12 UPDATE Released 10/1/2003

Besides some changes to client & server messaging to make the system more stable, the primary functional upgrade in this version is the addition of “Parent-Child” relationship for customers and billing.

On the Customer Master form which is accessed from the Utilities-Lookup Tables Customers Menu choice. You will notice that there is a parent customer look-up dialog box in the bottom right hand quadrant of this customer form. You can double-click on this box to select a parent for this customer. You should also then check the box “Parent Pays”. This now associates work for this child customer with this parent for the purpose of billing.

For example:
Ohio University Payable department the Paying Parent for

- Ohio University Drama Club
- Ohio University Men’s Football
- Ohio University Women’s Basketball

When you run a statement, you are given these options:

**Parent Only** This is basically a summary of all the unpaid work one line for each department.

**Parent w/Child Detail** This is the next level of detail with one line for each charter and a department summary.

**Parent w/Child Detail & Cost Components** This is the highest level of detail with a line for each charter and all the cost components for that charters listed.

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**Security**: We have added the capability to set a 2nd level of password protection. Administrative. This allows you to have certain reports and function that only a senior person can access. An example of this might be the ability to print the customer list might be restricted to admin level password only. This password is set by RBS directly into the database if you want to turn this feature on you need to contact us.

**Credit Card Date**: The preferred method of selecting a date anywhere in the RBS system is to double click on the date slot and select the date from the calendar presented. Double click on the credit card date field and select the last day of the expiration month and year. Optionally you can type in mm/yy or mm/dd/yy in this field. If you do happen to get a “Range Check Error” or “Credit Card Expiration Date Invalid”, you MUST use the calendar select method.

**SECURITY**: There is now a 2nd level of security with a user password and an Administrative password. The administrative password has to be set in the database by RBS at time of upgrade.

**STRETCHY SCHEDULING SCREEN:**

You will notice on the Schedule & Dispatch screen that there are 3 new columns that are not expanded. From left to right they are:

Pa – Party Name

Add - Pickup Address

Add – Destination address.

You can expand these columns to see more information by left clicking on the column edge and dragging it "open" just the way you would expand a spreadsheet in Excel or a column in Explorer. All the cells in this screen can be expanded to see more information.

If you have a higher resolution screen you can grab the right and left edges of the screen and stretch the screen bigger to have more information for expanded columns.

If you grab the bottom edge of the screen it stretches downward so that you can see more charters.

The column and screen width settings that you select will be saved as the defaults for your workstation.

If you get the view of this dispatch screen really messed up and want to start over again, you can click anywhere in the charter list at the bottom and press the control and the d keys simultaneously (**Control-D**) to return the screen to its default values.

One other note about entry into the Diary & Scheduling Screen: When select this option in the past you were presented with the date selection box, we realized that was redundant and now take you directly into the dispatch screen for today and that if you want another day you can navigate to another date by selecting the date selection filed in the upper right hand corner of the screen.

**SPOT & DEPART TIME:**

When creating a new charter, you now have the option of filling in the departure time and having it back fill the Spot time based on the number of wait minutes in the Company Setup.

When changing times in the Main Move screen on an existing charter if you Change the spot time it will fill in the modified depart time based on the wait minutes in Company Setup. If you change the depart time for an existing charter it will NOT back fill the spot time.

**IMPROVED CUSTOMER LABEL QUERIES**

Under Management Reports – Customer Labels there are a number of new features.

You now have the ability to narrow your selection by choosing:

A Customer Type
A Referral Source
A Customer Type

You can choose more than one type by selecting the 1st one and then hold the control key and select a 2nd type within the same type. This gives you an inclusive AND Query For example if you selected Customer Type Corporate and Customer Type School you will get all customers with the type Corporate and School. This will probably be more than just one or the other of these types.

You can choose across Types and will get a restrictive AND query. That is to say that if you choose Charter Type “Tour” and Customer Type “Corporate” you will get only Customer Type Corporate who have taken a Charter Type “Tour”.

The date field is a traveled since modifier. That is to say if you choose the current date you will get a list of customers who are traveling today and into the future who meet the criteria you have set as described above. If you choose to back this date up a year, you will get all customers who have traveled in the last year and into the future that meet the criteria.

If you want all the customers who have traveled since a particular date you need to highlight all the types in a category except ALL. Charter type is the recommended one to use for this purpose. Highlight the 1st Charter Type and left click. Then hold the ctrl key to select each of the other charter type in the list. Select print and it will select all customers who have traveled since.

If you have ALL types selected across the board you will get all customers regardless of the traveled since date.

The filter bad data check box filters out customers who do not have a city or state or zip or if both street addresses are blank.

All queries exclude inactive customers.

Finally the print to file option prints the customer data in a single line format that will look all jumbled up on the screen. It is intended for our customers who have our email and file export utility to import into a spreadsheet format to modify or send to other programs such as a mail house or CASS certification program.

**GOCHART2000 RELEASE 7 THROUGH 11 (Released July 1, 2003)**

**The main changes for these updates are:**

- Database structure changes that allow the integration of our Driver Time Management module – DDT3000. This add-on module is an upgrade to our popular DOS based "payroll module" Driver Duty Time. This module uses the driver's on-duty and off-duty times from scheduling as the source driver pay. Pay can be based on hours, miles, or percentage of trip cost, or a combination. Call for more information.

- User definable permissions in Security Set up allow you to turn on or off which reports and functions are password protected. You must ask us to "turn-on" security for you. There is no charge for this.

**Utilities - Security Set up:**

- Number of days before password is required. We will use for this example a setting of 4. That means a password is required to make a change that will affect the price of a charter, 4 days after the departure or return of the <u>last move</u> of a charter.

- Count from depart date when checked the password requirement starts from depart date, when not (the default), it starts from return.

- Password not required to cancel future charters. The default is for this to be unchecked, i.e. a password is required.

- Password required to make a change to a charter that has been invoiced regardless of the date. The default is unchecked, i.e. a password is required.

- Single login required. When this is checked you will only be asked once for the password and if successfully entered, you will not be asked again until you log off RBS and login again. The default is to have this unchecked so that you can see where things are protected or not, because it will ask you every time!

- No receipts prior to date: for customers with the RBS Advanced Accounting module, this date is used in conjunction with the Post Period procedure. Posting a period locks it down completely so that **<u>NO</u>** changes can be made to a charter in a posted period regardless of whether you know the password or not. From an accounting point of view this insures that sales and revenue figures for reported periods do not change. Call for more information about this Advanced Accounting module.

- Change password. The system is still a single password system. (We are working on creating multi-levels of password protection.) If you want to disable security, you select change password and click on OK with it blank.

- Change Permissions: this is where you select what reports and functions you want password protected.  The default set up is that nothing is password protected.  You turn on passwords for a function by clicking in the box to put in a  mark.  This uses a tab interface to organize groups.

- FUNCTION / TAB

| FUNCTION | TAB |
|---|---|
| Print Refunds report | Accounting Rpts |
| Print Cash On Cancelled report | Accounting Rpts |
| Print Receivables (aged) report | Accounting Rpts |
| Print Deferred Cash report | Accounting Rpts |
| Print Liabilities and Credits reports | Accounting Rpts |
| Print Per Capita Billing Report | Accounting Rpts |
| Print Customer Statement Reports | Accounting Rpts |
| Print Chart of Accounts reports | Accounting Rpts |
| Print Tips report | Accounting Rpts |
| Print Non-charter Revenue report | Accounting Rpts |
| Print Receipts Reconciliation report | Accounting Rpts |
| Print Aged Monthly Receipts report | Accounting Rpts |
| Print Month End report | Accounting Rpts |
| Print Daily Accounting report | Accounting Rpts |
| Run Batch Pay | Batch |
| Print batch receipts | Batch |
| Batch Close charters | Batch |
| Batch Post charters | Batch |
| Un-cancel a charter | Charters |
| Cancel a Charter | Charters |
| Receive a payment | Charters |
| Change Sales Person on a charter | Charters |
| Remove Invoice (IN) Flag | Charters |
| Print Customer List | Lookup Tables |
| Print Customer Labels | Management Rpts |
| Print Anticipated Revenue report | Management Rpts |
| Print Utilization Summary report | Management Rpts |
| Print IMG Utilization report | Management Rpts |
| Print Coach Requirements Calendar report | Management Rpts |
| Print Revenue Per Bus report | Management Rpts |
| Print Revenue Per Bus Detail Report | Management Rpts |
| Print Super Summary report | Management Rpts |
| Print Sub-contract Vehicle report | Management Rpts |
| Print Customer Labels | Management Rpts |
| Print Today's Details report | Receipts Rpts |

| | |
|---|---|
| Print Daily Receipts report | Receipts Rpts |
| Print Daily Creditcard report | Receipts Rpts |
| Print Details By Date reports | Receipts Rpts |
| Print estimated contribution report | Reconciliation |
| Print Receipt | Reports |
| Print Confirm | Reports |
| Print Driver Details report | Schedule Rpts |
| Change Password | Utilities |
| Print Driver info | Utilities |
| Change or Insert a sales person | Utilities |
| Change or insert fare type | Utilities |
| Change or insert bus type | Utilities |
| Change or insert a cost | Utilities |
| Change or insert std cost component | Utilities |
| Access Security Screen | Utilities |
| View Summary | Views |
| View Charter Main | Views |
| View Cost Calculator | Views |
| View Points | Views |

**Other System Changes:**

**Schedule memo**. There is a memo button on the scheduling screen that brings up a text box that lets you type an unlimited amount of information about that day. Some companies use this to note drivers and buses that are not available, special hospitality set up accident reports, etc. If there is any text on a given day the button turns blue.

**Other Database Changes:**

- Customer phone extensions lengthened to 6 characters
- Date customer created stamp
- Driver birth date, last physical, next physical, last drug test, credit/fuel card type and number; permit number and expirations.

## Version 6 New Features (Distributed as of 2/1/2003)

- The main change for this release was the fact that you can now have different start and release times for different buses on a multi-bus move.

- You can change the time on the scheduling screen by double clicking and using the time dialog box. If there is more than one vehicle on the move you will be asked if you want to use this time for all vehicles on the move. If you say no it changes the time only for that vehicle.

- When you right click on a charter in the dispatch screen and select view edit notes this screen has been expanded with the addition on a bus note that is associated with that specific vehicle in a multi bus move. If there is a bus note the off duty time for that line on the dispatch screen turns color. If there is a note that applies to all the vehicles in the move it can be put in the off duty note and when there is an off-duty note the return date and time for all vehicles in the move turn color. The purpose of these colors and notes is to make the charters that did not go exactly as planned to stand out for post departure reconciliation. There is an exception report an exception report under sales reports that documents charters with these notes on them. For post departure review and reconciliation.

- Right Click on a charter in scheduling and dispatch and selecting view points takes you to the points screen for the specific move that you came from on a multi move charter. Also the top of the points screen is now active to put in notes and changes times although most people prefer to do this from the schedule & dispatch screen.

- Changing a charter that already has a bus and driver assigned to it. We have made it so that the only place this can be done is in the points screen and not on the main screen, which in previous versions could lead to the assigned vehicle and driver being inadvertently un-assigned. When a change is made the bus type cell on the schedule & dispatch screen turns color to alert the dispatcher that a change has been made that may affect already distributed driver's paper work. In larger organizations where the people making changes and the people responsible for dispatch are not the same or may not even be in the same location. IT IS IMPORTANT TO NOTE OF WHAT THE CHANGE IS BE CLEARLY MADE IN THE POINTS NOTE SECTION OF THE LEG (PICKUP OR DROP-OFF) BEING AFFECTED.

- We have added a commit button to the itinerary and points screen. This button does a snapshot save of work put in these screens and is meant to be used if you are putting in a very long itinerary or making complex changes to points in multi-moves charters. By hitting these commit buttons frequently while doing your work, you reduce the likelihood of getting the dreaded update failed re-do your changes. (One tip if you do get locked out in the itinerary with an update failed you can still copy the itinerary to the clip board, cancel all the changes you made, go back into the charter and past the itinerary back in. There is not the same capability with points so that I recommend that you make changes to points 1st hit the commit button in points and them move onto make changes in the itinerary or other objects.

- When canceling a charter, your are now presented with a 40 character edit box that brings in the name of the sales person who originally booked the charter you can add to this name or change it to the name of the person in your organization who is canceling the charter. You then have some additional space to type in the name of the person on the customer side who is canceling the charter. This is then stamped into the first line of the itinerary for that charter.

- Marking a charter on the current charter list. We have expanded this beyond the one dimensional X to X plus 1 2 3 4 or 5. This way you can create a system where a 1 for example means that you have received a deposit from the customer, a 2 means you have received a signed contract, a 3 that you have called and confirmed the itinerary with the customer etc.

## Version 5 New Features (Distributed as of 12/15/2002)

Addition of user definable "How did you here about us" or referral source to the customer file. Allows you to track your advertising and promotional efforts. User definable Referral Source list under utilities and lookup tables can be used in the customer record to tag customer.

Multiple rates or fare types for each bus type. This feature allows you to have different rates per hour, mile, or minimum and maximum days for each bus type for use in the cost calculator. There is no limit to number of different fares that you can have, and they are completely user definable. Some customers set up different types for weekend, weekday, high season, or low season. Other customers base the different fares on type of business or customer. The user definable list is accessed under utilities, lookup tables, and fare types. These are then assigned values in the bus type lookup table by left clicking on them.

Expanded field length for party name, contact 1st name and last name, group name, P.O.#, and bus ID#.

## Version 4 New Features (Released 9/15/2002)

- Expanded driver contact, license and demographic information. Access from Utilities, lookup tables, drivers, detail button
- Sort lists and columns on the fly by clicking on column headings. The highlighted column becomes the column of focus for searching
- Expanded Diary, Scheduling and Coach requirements reporting. Access under schedule & dispatch reports menu, coach requirements, hourly availability and requirements.
- Quicker access to Driver and Charter information from the scheduling screen. Double-click on the driver from the dispatch board.
- New color coded alert flags on the dispatch board. Access by right click on move in dispatch board and select mark charter.
- New flags on the Dispatch screen when changes are made to charters that have driver or vehicles assigned the bus type turns red. Dispatcher can clear the change warning by right clicking on the move and selecting confirm schedule.
- "Single Click Right Click" from the main list of open charters to show all work for a customer; open/closed and cancelled moves. All work can also be found for customers without open work by using the pull down in the upper right hand corner of the open charter list.
- Detail and Summary options when printing receipts and confirmations.
- Expanded Batch Processes include Batch Payments, Drivers Orders, Confirmations, Invoices and Close Charters. Access from the main reports menu to batch processes.
- Addition of E-Mail and customer billing reference fields.
- Improved report generation interface and date dialog box. After you run a report the parameters for re-running the report stay on the screen.