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Implementing GoChart: Transition to the new system

Whether moving from a different database solution, a collection of text documents and spreadsheets or a paper based system, the steps would be the same.

Step 1 is to identify the transition date, the date when you stop relying on the legacy system for day to day operations and dispatching.

Step 2 is to install the RBS GoChart system with a sample data base for initial staff training.

Step 3 is to replace the sample database with a blank database and build the lookup tables so data can be entered correctly. If the customer list is in a data file or spreadsheet, or can be exported from the legacy application, we can usually import that data. The same goes for vehicles, drivers and locations. It is important that you create the Bus Type list. This will categorize your vehicle list and be the basis for the fare structure.

Transition Date: The method that seems to work best is to pick a date at least 2 or 3 months in the future. New bookings that will depart after the transition date are input directly into GoChart. Previous bookings in the legacy system set to depart after the transition date are also entered at this time, including any deposits received toward them. New monies received for any charters departing after this date are also posted into the RBS system. The advantage of this phased in approach is that it provides an off-line training period for sales people to learn to use the system without the added pressure of taking online bookings over the phone using a new system. It gives you time to identify operational changes that you may need to deploy in the organization and it gives us time to implement custom programming changes that you identify.

When the transition date arrives, the system is ready to become the primary application for dispatch. The legacy system is maintained for historical data and past receivables. We usually suggest leaving receivables in the old system for a month or two after which they can be re-booked in GoChart, with the original depart date, so that all receivables can be tracked in one place.

Historical sales data: Some customers want to preserve “macro-view” of historical revenue data in order to take advantage of the month-over-month revenue comparison reporting and analysis that RBS provides. One way to do this is to create a charter for each month of the historical year (or years) and make the “cost” of the charter be the gross revenue for that month, then “pay it off” and then close it. We will assist you with that process when the time comes.