

Transfer Events in GoChart 2000

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1. Basic Transfer Example

Transfer events make it possible to transfer buses from one garage to another. This way you can easily schedule a bus for work at another garage.

The first step to transferring is to make sure everything is set up correctly. You must have the fare type, salesperson, customer, rate adjustment and charter type set. The fare type must be set to Transfer. The same is true for the salesperson, rate adjustment and the charter type. The customer must be set to the origin garage. In order to set these, go to the Utilities menu and then go to the LookUp Tables. There you can pick the one you need to set.

In order to begin to schedule a transfer first go to the Diary/Scheduling menu, then click the Scheduling option. Now you will be able to view the schedules of different buses and drivers.

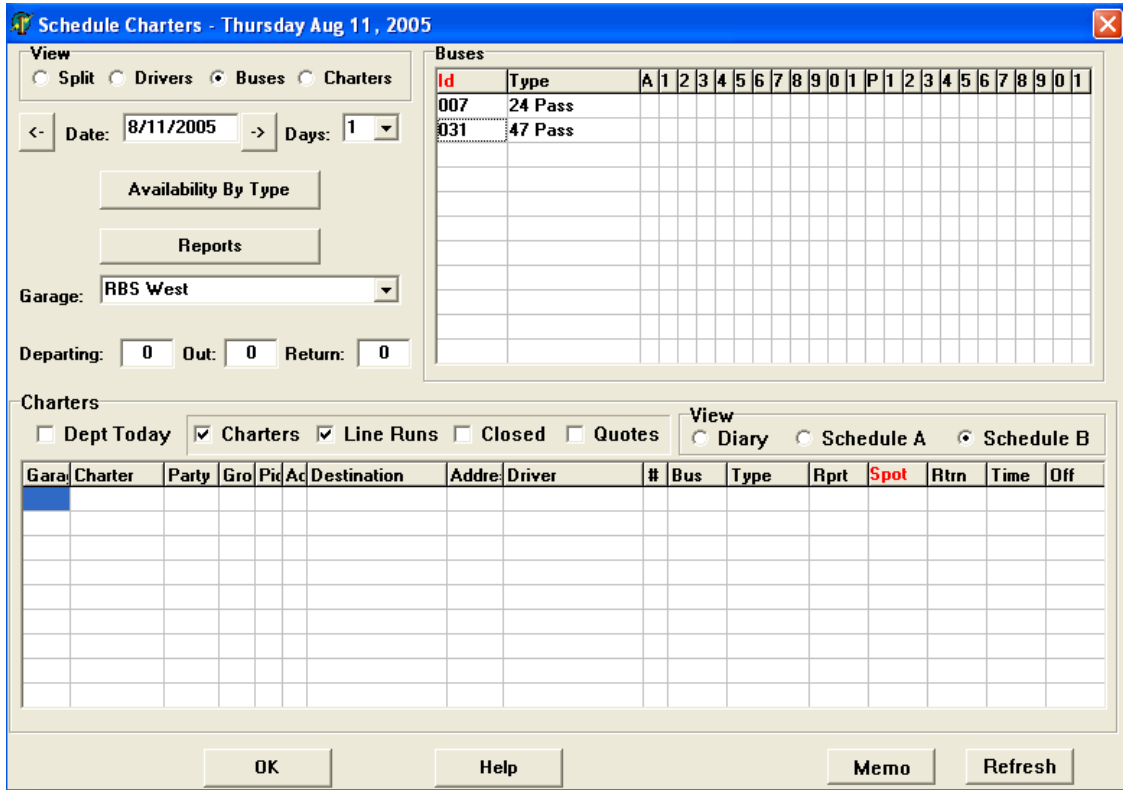


Figure 1. Charters Screen

In order to view only buses, click the buses option under View in the top left corner. You'll notice now a listing of buses in the top right corner. Find the one you want to work with and double click it. Now you will be at the bus information screen. If you click the Edit Bus Calendar button you will be able to configure your bus transfer.

The 'Bus Information' dialog box is titled 'Bus Information' and has a close button in the top right corner. It contains the following fields and controls:

- Bus Number: 031
- Type: 47 Pass (dropdown)
- Year: 1996
- Make/Model: Champion
- Description: 24 pass Mini Coach
- Sub-Contracted
- Registration #: []
- Date Purchased: []
- Inspection: Date Inspected: [], Expiration: []
- Leased: Date Leased: [], Expiration: []
- Cost Per Mile: Maintenance: 00.00, Fuel: 00.00, Date Last RTA Update: []
- EZ Pass: []
- Garage: RBS West (dropdown)
- Inactive
- Buttons: Edit Bus Calendar, View Calendar Screen
- Buttons: OK, Cancel, Help

Figure 2. Bus Information

Once you decide to edit the calendar you will see a listing of events that already might have been scheduled. To add a new one, click the Insert button.

The 'Bus Calendar Entry' dialog box is titled 'Bus Calendar Entry' and has a close button in the top right corner. It contains the following fields and controls:

- Bus ID: 031
- StartDate: 11/17/2005, 12:01 am
- EndDate: 11/25/2005, 11:59 pm
- Note: []
- Transfer:
- Origin: [] (dropdown)
- Destination: [] (dropdown)
- Days: M T W T F S S
- Available: [] [] [] [] [] [] []
- Unavailable: [] [] [] [] [] [] []
- Buttons: OK, Cancel, Help

Figure 3. Insert Screen

The fields you need to use to transfer successfully are:

- Bus ID - The identifier for the bus. This cannot be changed.
- StartDate - Date the event begins.
- StartTime - Time the event begins.
- EndDate - Date the event ends.
- EndTime - Time the event ends.
- Note - A note describing what the event is for.
- Transfer - This box shows if the bus is going to be transferred or not.
- Origin - The garage where the bus is being transferred from. This cannot be changed in this screen.
- Destination - The garage where the bus is being transferred to. The available options are listed in the pull down menu.
- Available/Unavailable days - This lets you select the specific days the bus is available. This is useful if you are transferring the bus over a period of more than one day.

If you want to use the available days you must check them before you check the transfer option. Once you have filled out all the needed information you can click the OK button. Now the bus has been transferred from one garage to the other. This will create a charter for that bus for the transfer time period. In order to account for any travel time necessary when transferring the bus, the charter is set for a four hour period before and after the start and end dates. This transfer time can be set by you in the Company Setup. This example has been set to four hours. Below is an example of the transfer filled in.

The screenshot shows a 'Bus Calendar Entry' dialog box with the following details:

- Bus ID: 031
- StartDate: 11/17/2005
- StartTime: 8:00am
- EndDate: 11/25/2005
- EndTime: 6:00pm
- Note: Transfer Example
- Transfer:
- Origin: RBS West
- Destination: RBS South
- Available days: M, T, W, T, F, S, S (all selected)
- Unavailable days: (none selected)
- Buttons: OK, Cancel, Help

Figure 4. Transfer Example

As you can see this transfer is on November 11 and runs from 8a.m. to 6p.m. on November 25 and is transferred from the RBS West garage to the RBS South garage. If you click the OK button to confirm the transfer you will go back to the transfer listing screen. Only now your new transfer will be shown.

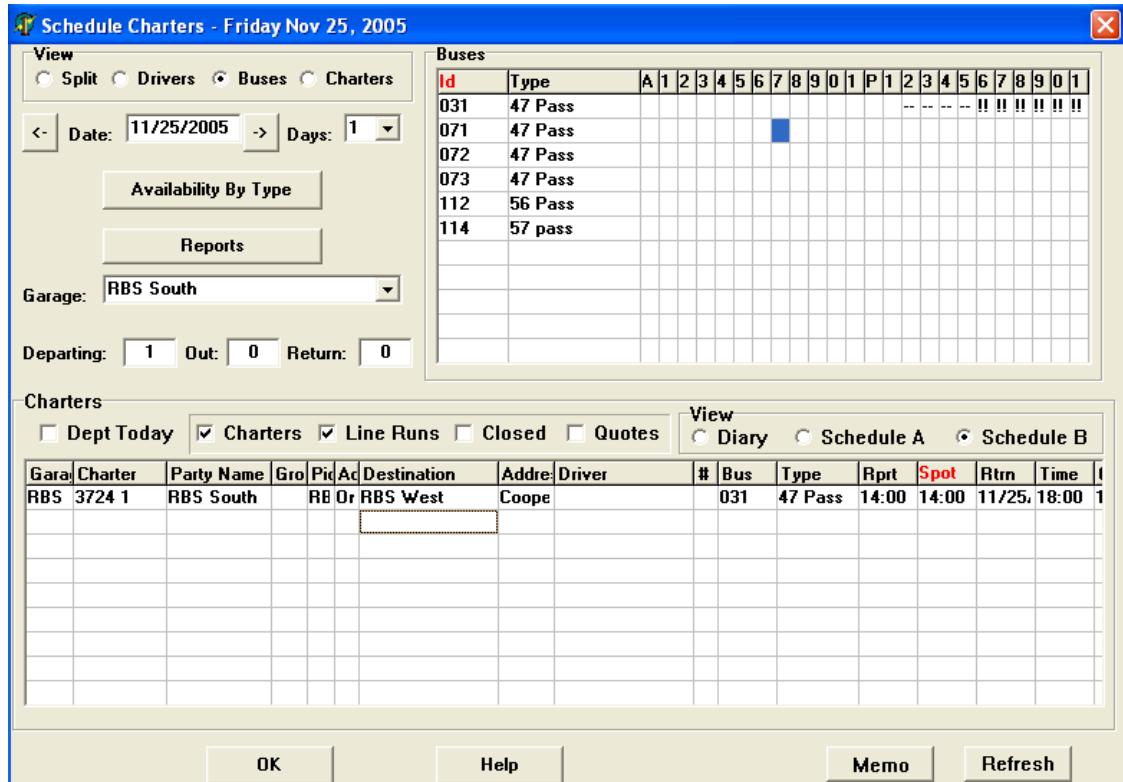


Figure 8. Return Charter

As you can see this is the scheduling screen for the garage RBS South. GoTour has automatically created the charter that is listed on it. This is to schedule the return of the transferred bus to the garage RBS West.

2. Assigning Customers to Transfers

GoChart gives you the ability to assign a customer to a transfer. This way if a transfer works out in a way that you can also create a charter with it you can easily do that and charge for it. For example, using our previous transfer example, let's say that a customer wants a charter from near the RBS West garage to near the RBS south garage on November 17th. With GoChart you will be able to assign this to the transfer very easily.

So, using the transfer from the previous example if you double click on the charter that was created automatically. Below is the screen of the garage with the outgoing transfer charter.

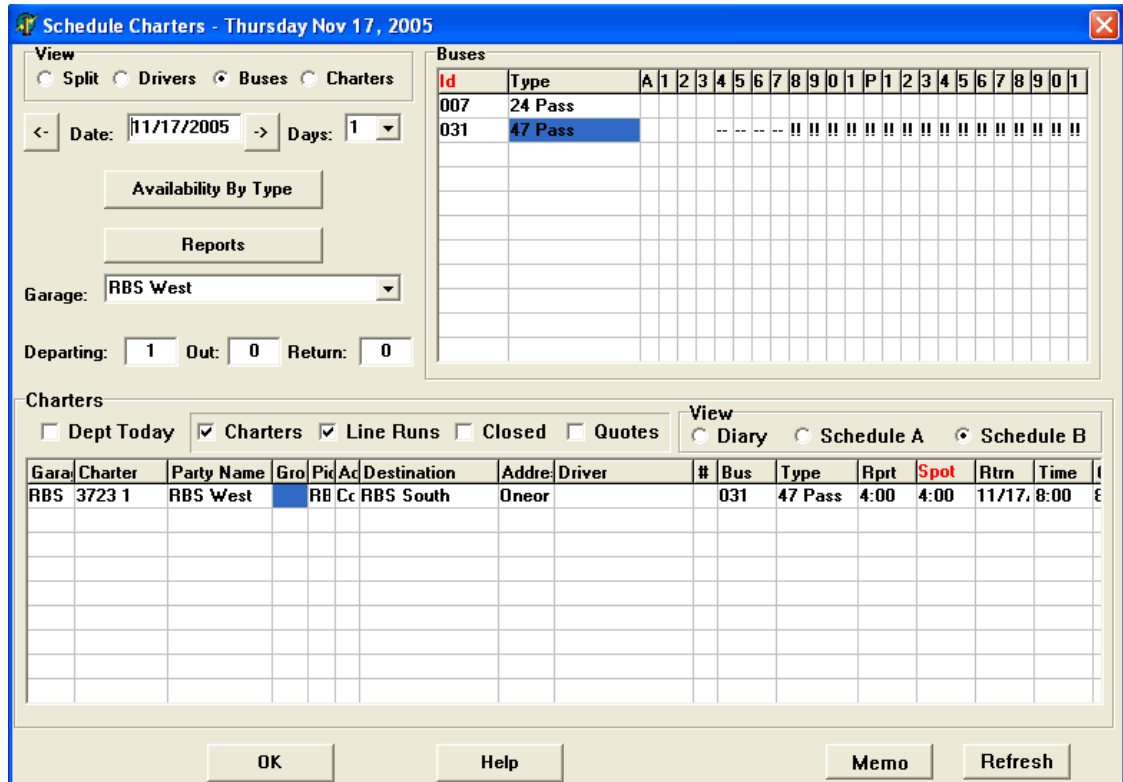


Figure 9. Outgoing Transfer Charter

As stated earlier, double click on the charter. This will bring you to the charter screen where you can configure this transfer for a customer.

Summary

Main
 Charter #: 3723 Group: Booked: 11/17/2005 Status: OPEN
 Moves: #1: RBS West to RBS South on 11/17/2005 in 1 47 Pass

RBS West Name: Salesperson: Transfer
 Phone: Ext: Billed P.O. Number:

Receipts
 Price Quoted: 0.00
 Deposit: 0.00 due:
 Balance: 0.00 due:
 Balance Due: \$ 0.00

Cost/Miles

Total Cost			0.00

Itinerary

Points

M	Action	Location	Date	Time	Miles
1	OnDuty	RBS West	11/17/2005	4:00	.0
1	Pickup	RBS West	11/17/2005	4:00	.0
1	Dropoff	RBS South	11/17/2005	8:00	.0
1	OffDuty	RBS South	11/17/2005	8:00	.0

 Schedule On OK
 \Main\Cost Calculator\Cost/Miles\Receipts\Itinerary\Points\Summary/

Figure 10. Charter Screen

As you can see, all the points are set to the garages at the moment. There is also no costing associated with this charter as of yet. So, in order to start set this charter for your needs, click the Main tab at the bottom of the charter screen

Main

Order # Booked: Charter Type:

Chartering Party: Salesperson:

Person in Charge: Purchase Order:

Group Name:

Move Information

M#	#V	Bus Type	Pick Up	Destination	Live	Dead	Depart Dt	Spot	Return Dt	Time
1	1	47 Pass	RBS West	RBS South	.0	.0	11/17/200	4:00	11/17/200	8:00

Main / Cost Calculator / Cost/Miles / Receipts / Itinerary / Points / Summary /

OK Cancel Help

Figure 11. Setting a Customer

You can select a customer from the drop down box as shown. Once you have selected your customer, you can set the points for the pick up and drop off. In order to do this you will need to click on the Points tab at the bottom of the charter screen.

Again there is a drop down box where you can choose a pickup location. In this example the pickup is set to Reading Junior High. Once you have set your pickup click the OK button to set the changes. You can set the drop off in the same manner. Now you may want to set a cost to this charter. In order to do that click the Cost/Miles tab at the bottom of the charter screen.

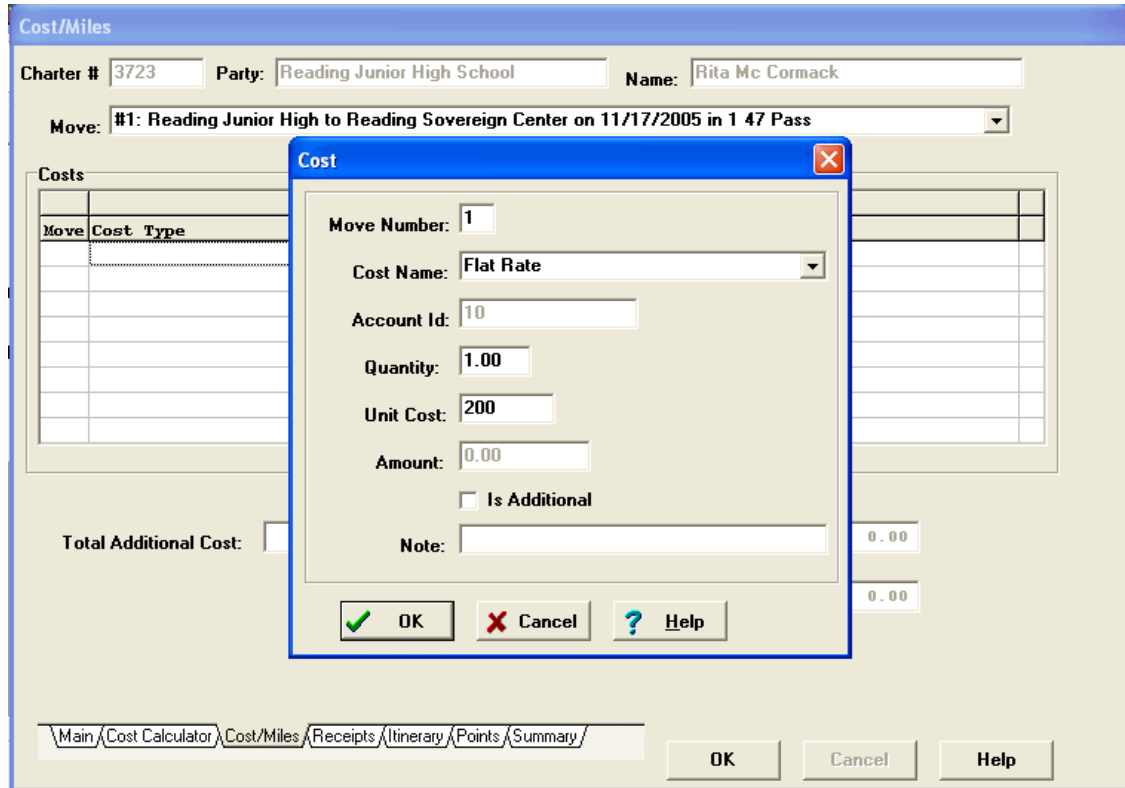


Figure 14. Setting a Cost

If you double click on one of the lines under Cost Type another box will pop up that allows you to set a cost to this charter. As you can see the Cost Name that has been selected is a flat rate. This means that the charter will cost a certain amount regardless of any miles that are accrued. Also the amount has been filled in. Once you have set the cost that you want, click the OK button. Now if you go back to the Main charter screen you will see that the information has been changed.

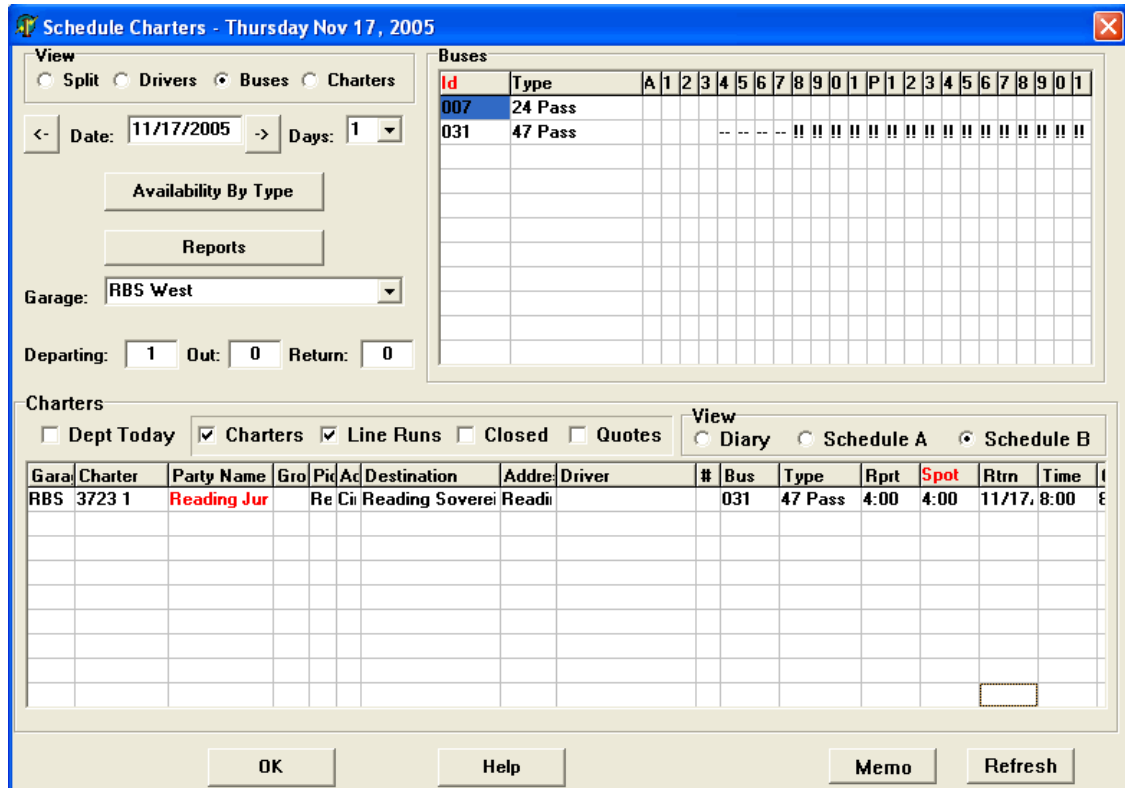


Figure 15. Main Charter Screen

Now you have connected a bus transfer to a customer and can charge for it.