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Trucking Menu

The TRMeOST version of the Dump Truck System is best used by companies that invoice by the weight. A special field for Haul Backs is present. There is also a nice feature that bills a "Plant Fee" where applicable.

The [Quoting], [Preliminary Forms] and [Dispatch] are optional and will help organize your business but are not necessary for DTS operation.

The work process starts by ensuring that the customer has been entered. Following that, customer jobs should be set up with the rates and locations. When the tickets come into the office, they should be entered into the system. This means entering the ticket numbers and quantities can be checked in and stacked according to how they are to be invoiced. There is a feature in the Invoicing Screen to enter weight tickets is a very fast manner.



The [Attendance Tracking] option allows for scheduling time off in advance as well as tracking when an employee does not work, whether excused or not.

[Post Freight Bills] is the screen where the freight bills and tickets are entered and researched. The [Find] option on this screen allows you to enter a freight bill or weight ticket number and then it will be displayed on the screen. You can see if the entry was billed or paid.

Post Freight Bills

When this screen is entered, yesterday's date appears in the name stripe of the window. If any freight bills/tickets have been entered for this date, they will appear.

| Ft Bill | Pay Code | Truck | Payee | | Customer | | Load Site | | | |
|------------|----------|--------|-------------------|-------------|----------|--------------|-------------|------------|----------|----------|
| 10000011 | FLIF | 100 | FLINTSTON | E, FRED | BEDROC | K THREE | BEDROCK All | RPORT - DL | MP | |
| 1234567890 | 108 | T100 | IC 108 COMF | PANY | BEDROC | K ONE | BEDROCK SA | ND AND GF | AVEL-APP | 'IAN WAY |
| 3452345234 | PU1000 | | IMA PULLER | 1 | BEDROC | K ONE | BEDROCK SA | ND AND GF | AVEL-APP | 'IAN WAY |
| 9876541111 | 109 | | IC 109 COMF | PANY | BEDROC | K ONE | BEDROCK SA | ND AND GF | AVEL-APP | 'IAN WAY |
| 9876543210 | 109 | [| IC 109 COMP | PANY | BEDROC | K ONE | BEDROCK SA | ND AND GF | AVEL-APP | 'IAN WAY |
| FF1000 | FLIF | 100 | FLINTSTON | E, FRED | BEDROC | K ONE | BEDROCK SA | ND AND GF | AVEL-APP | 'IAN WAY |
| | | | | | | | | | | |
| | | | | | | | | | | |
| Back Save | Add | Edit H | lide Ft Bills F | Find A Ft B | Bill Go | Previous Day | Next Day | Reports | More | Batch: |

The [**Back**] button exits this screen. Clicking on [**Save**] commits any pending changes. [**Add**] is used to add new tickets to the system.

The **[Hide Ft Bills]** button is a toggle. This is useful when used in conjunction with dispatch. When dispatched, the entries actually come into this screen. Thus, reports are available to show what has been dispatched, but not yet received into your office. When the ticket does come in, navigate to the date and double click on the line to edit the billing and paying amounts. The other side of the button is [Show All Ft Bills]. If the freight bills that were already received are hidden, click this button to display all on the date. This feature is very helpful when matching dispatched entries with tickets received. Only empty slots will appear.

The **[Go]** button can be used to go directly to a date. **[Previous Day]** backups up one day and displays the tickets for that date. **[Next Day]** rolls forward one day.

The [Reports] button contains reports that pertain to information entered on this screen.

It would clutter the screen to have a button for every possible option. Seldom used options are listed under the **[More]**.

5

Adding Tickets

When the **[Add]** button is pressed, a list of customers appears as shown. To select a customer, either double click on the company name, arrow up or down to highlight and press the [OK] button.

| | | × |
|------------|----------------------|--------|
| | Find % | |
| COMPANY | CODE | |
| BED ONE | BEDROCK ONE | 1007 🔺 |
| BED THREE | BEDROCK THREE | 1003 |
| BED TWO | BEDROCK TWO | 1008 |
| SLATE | SLATE CONSTRUCITON | 1000 |
| TRINITY ES | FLINTSTONE BROKERAGE | 1005 |
| | | 1006 |
| | | - |
| • | | • |
| Find | OK | Cancel |
| | UK | Lancel |

| Customer Jobs | | | | | \times |
|------------------|--------------------|--------------|-----------|----------|----------|
| | Find BEDROCH | SAND AND GRA | VEL | | |
| Origin | Destination | Туре | Bill Rate | Pay Rate | Jobse |
| BEDROCK SAND AND | GF APPIAN WAY | T | 8.25 | 8 | <u></u> |
| BEDRUCK SAND AND | GF BEDROCK AIRPORT | Ť | 7.25 | 7.25 | v |
| • | | | | | Þ |
| Find | 0 | IK | | | Cancel |

The following screenshot shows a completed freight bill. The upper right hand corner of the screen displays the Customer Job that was selected. It is very handy to have customer jobs set up with rates in order to cut down on errors and rework. The top-left portion of the screen shows date, ticket, payee and job information. The up/down arrows to the right of the Date indicate that you can use the up and down arrows on the keyboard to change the date. Wherever an identified is displayed in red, then you may double click in the box to get a list of possible values. The billing information is contained in the upper square and the pay side is shown underneath.

| Customer: BED | g (TRLoOst) | | | - | | 0 |
|---------------------------|-----------------------|----------------|------------|--------|------------------|----------------------|
| Job Seq: 9 | | | | | Custo | omerJob SetUp |
| | 1 2015 | | | | Sequence: 9 | |
| Date: 11-0 Ticket: 345 | | | | | Cust Job: BED. | JOB-1 |
| D or I: I | 2343234 | | | | P. 0.: | |
| Driver/IC: PU1 | | PULLER | | | Job Type: T | |
| Truck: | | ULLIN | | 0.00 | 0.25 | |
| Trailer: 113 | <u> </u> | | | | | 8.25 |
| Location: BED | Manager Manager Party | AND GRAVE | L-APPIAN W | AY | | 8.00 |
| Material: SAM | | | | | Origin: BED | ROCK SAND AND GRAVEL |
| Type: T | | | | | | |
| | | 0 | Rate | Amount | | |
| | Billing: | Qty 25.00 | 8.25 | 206.25 | Destin: APP | IAN WAY |
| | Stand By: | 23.00 | 0.23 | .00 | | |
| H | laul Back: | | | .00 | | |
| | | 1 | Subtotal: | 206.25 | | |
| | В | roker Fee: | | .00 | Late: X | |
| | 1 | Admin Fee: | 10.00 | | Turned In: 12-00 | 6-2015 |
| | | | Invoice: | | Pay Now: | |
| | | Qty | Rate | Amount | | |
| | Paying: | 25.00 | 8.00 | 200.00 | | |
| | Stand By: | i - | | .00 | | |
| F | laul Back: 🗍 | j | | .00 | | |
| | | | Subtotal: | 200.00 | | |
| | | Broker Fee: | 8.00 | 16.00 | | |
| | T | railer Rental: | 15.00 | 30.00 | | |
| | Admin Fee: | | | | | |
| | | Driver Pct: | | | | |
| | | Sta | atement: | - | | |
| | | | | | | |
| Comment of the second | T. | | | | | |
| ck <u>Save</u> <u>A</u> n | other Dele | te | | | | |

If the freight bill was turned in late, then click in the Late: field. Today's date is supplied for you. Change it to reflect the date the late freight bill was actually turned in. You may not want to pay the Independent Contractor 30 days later, but want to make sure that you receive payment for the late billing. When the freight bill is ready to pay, click in the Pay Now field. There is a nice feature to quickly review Late Freight Bills in the Payables, I.C. Statements screen under the [More] button.

Finding A Freight Bill

This extremely helpful feature allows you to type in a freight bill or portion of one and have the matches appear. Then, double click on the freight bill you want to research and it appears on the screen. You can instantly see the invoice number if it was billed and the pay statement if paid.

| Date | Description BEDROCK SAND AND | Invoice | Customer BEDROCK ONE | Driver 109 |
|-------|---------------------------------------|---------|-------------------------|---------------|
| | BEDROCK SAND AND | | BEDROCK ONE | 109 |
| | | | | |
| | | | | |
| [| | | | |
| | i | | | |
| | | | | |
| | · · · · · · · · · · · · · · · · · · · | | | |

Batch Review

This screen also has a handy feature that assists in double checking what was just entered. When freight bills are entered, the user that entered the freight bill is added. Double click on the *Batch*: field to [Print Batch] or [Clear Batch].

| | | | | Dum | r p <mark>Truck Sys</mark> | tem | | 312- 112- | 1 | × — | | |
|--------------|------|-----|--------------|-----|-------------------------------|-----------------|-----------------------------|--------------|---|---------|--------------|--------|
| | | | | | | atch Counter Op | otions <u>C</u> lear Bat | ch | h | | | |
| <u>B</u> ack | Save | Add | <u>E</u> dit | | Ft Bills | Find A Ft Bil | I Go | Previous Day | | Reports | <u>M</u> ore | Batch: |

| | | | | BATCH RE | VIEW | | | | | | | | 06/2019 3:14 PN |
|-------------|-----------|---|----------------------------|----------|--------|--------|-------|--------|--------|------|--------|-------|--------------------|
| Date | Ft Bill | Payee | Description | Bill | Rate | Amount | Pay | Rate | Amount | Br% | Broker | Tr% | Trailer |
| 11/01/15 | 10000011 | FLINTSTONE, FRED | BEDROCK AIRPORT - DUMP | 1.00 | 250.00 | 250.00 | 1.00 | 250.00 | 250.00 | | | | |
| 11/01/15 | 123456789 | 0 IC 108 COMPANY | BEDROCK SAND AND GRAVEL-AP | 25.00 | 8.00 | 200.00 | 25.00 | 8.00 | 200.00 | 8.00 | 26.40 | | 0.00 |
| 10000000000 | | | Stand By | 1.00 | 80.00 | 80.00 | 1.00 | 80.00 | 80.00 | | | | 000000 |
| 1000 | | | Haul Back | 10.00 | 5.00 | 50.00 | 10.00 | 5.00 | 50.00 | | 1000 | | |
| 11/01/15 | 345234523 | 4 IMA PULLER | BEDROCK SAND AND GRAVEL-AP | 25.00 | 8.25 | 206.25 | 25.00 | 8.00 | 200.00 | 8.00 | 16.00 | 15.00 | 30.00 |
| 11/01/15 | 987654111 | 1 IC 109 COMPANY | BEDROCK SAND AND GRAVEL-AP | 24.00 | 8.00 | 192.00 | 24.00 | 8.00 | 192.00 | 8.00 | 25.36 | | 0.00 |
| | | a a los conservations and a service of the service | Haul Back | 25.00 | 5.00 | 125.00 | 25.00 | 5.00 | 125.00 | | | | |
| 11/01/15 | 987654321 | 0 IC 109 COMPANY | BEDROCK SAND AND GRAVEL-AP | 25.00 | 8.00 | 200.00 | 25.00 | 8.00 | 200.00 | 8.00 | 32.40 | 2 | 0.00 |
| | | | Stand By | 1.00 | 80.00 | 80.00 | 1.00 | 80.00 | 80.00 | | | | |
| | | | Haul Back | 25.00 | 5.00 | 125.00 | 25.00 | 5.00 | 125.00 | | | | |
| 11/01/15 | FF1000 | FLINTSTONE, FRED | BEDROCK SAND AND GRAVEL-AP | 25.00 | 8.25 | 206.25 | 25.00 | 8.25 | 206.25 | | | 3 | |
| 11/14/15 | 432404 | LEIJA, LARRY P | RIALTO-ORANGE | 89.14 | 7.25 | 646.27 | 89.14 | 7.25 | 646.27 | 6.50 | 42.01 | | |
| 11/15/15 | 1212121 | LEIJA, LARRY P | ASDFASDFASDF | 25.00 | 5.00 | 125.00 | 25.00 | 5.00 | 125.00 | | | | |
| 11/15/15 | 432404 | IC VSTEEG COMPAN | WASH OUT | 1.00 | 103.50 | 103.50 | 1.00 | 103.50 | 103.50 | 6.50 | 6.73 | 0.00 | 0.00 |

Quoting

The quoting function is flexible and adapts to the way you do quotes. When the screen is entered, the first customer is displayed. Use the [<], [>], or [Go] buttons to scroll or go directly to a customer. The first two tabs organize the quotes into Active quotes and Old Quotes. The Address tab contains the address and phone numbers for the customer. The Customize tab is explained in the next section. Using the DTS for your quotes has several advantages. The first is organization. If a customer calls to review or have you resend or modify a quote, you can pull it up by going to the company and then double clicking on the quote.

| Company: BEDI Owner: In Use: ⊽ | ROCK PAVING | <u>}</u> | | Co Sort a | | | | |
|--------------------------------------|-------------|----------|--------------|--|---|------------|------------|------------|
| Active Quotes | Old Quotes | Address | Customize | | | | | |
| lob Name | | | Customer Job | × | | Bid Date | Fax Date | Expires |
| PJ NAME | | | PJ NUMBER | | 1 | 07/13/2013 | 07/13/2013 | 08/30/2013 |
| PJ NAME | | | PJ NUMBER | | 3 | 07/13/2013 | 07/13/2013 | 09/11/2013 |
| SDFGSDFGSD | | | DSDFGSDFG | | | 09/19/2013 | 09/19/2013 | 10/31/2013 |
| | | | | | 6 | | | |
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Quoting Screen

Customize Tab

Quote Style: This field controls the format of the printed quote. The quotes can print with your logo at the top.

Fax Signer: This information is printed on the quote.

Description: The very large text is the default wording that is placed on all new quotes. This is where your generic text for each quote is set up. This text is copied into each new quote, but then you can change it so that it is specific to the quote. Changing the wording on the quote does not change this template text.

| Customer Job | History Address Customize | |
|--------------|---|--|
| Quote Style: | QUDTS | |
| Fax Signer: | F. FLINTSTONE, OFFICE MANAGER | |
| MIXED CASE | that it is specific to the quote that it was copied into. E IS PROVIDED FOR EMPHASIS. time is charged after the first 15 minutes. | |
| *** Customer | r takes posession of the material at the plant. | |

Adding New Quotes

The quotes are automatically numbered. Enter the Project Number and Project Name. The column titles are changeable per quote! Some companies might quote hourly truck rental as well as material sales. Simply highlight the text in the column title and change to your needs. Notice that the column titles can range more than one line.

Enter information in the quote detail lines. When the cursor enters the field, a unique list of previously entered data. This helps you rapidly complete your quotes. To enter text that has not previously been entered, simply cancel the pick list and type your information into the field. It will then become part of the list.

| Quoting (QuDTS) Company: BEDROCK BUI Attention: Email: BBC@BEDROC | | | Quote #: 1 Bid Date: 01/02/2012 | | |
|--|-------------------------------------|---------------------|---|--|--|
| Project Number: APPIAN WAY Project Name: 2012-100 | | | Fax Date: 01/02/2012 Expires: 03/31/2012 | | |
| <mark>Column 1</mark> Equipment Type | Column 2 Daily Rate | - Contraction | Column 3 Weekend Rate | | |
| Transfer Trailers | \$85.00 | \$87.0 | | | |
| Bottom Dumps | \$88.00 | \$90.0 | | | |
| | | | | | |
| | | | | | |
| Back Save Add Delete Edi | it Text New Quote For This Customer | View-Print Quote Co | py This Quote | | |

[Edit Text] New quotes are given the generic text you entered on the Customize tab. Select this button to review and modify the text so that it is specific to this quote.

[View-Print Quote] This button displays the quote. You may then print or create a PDF copy of the quote.

[Copy This Quote] If you want to send this quote to another customer, select this button and then the customer. A new quote for the customer will be created based off this quote. If you want to send this customer a variation of an existing quote, then select the same customer!

Preliminary Forms

This screen assists in producing and tracking construction liens. A lien is a claim made against a property by a contractor or other professional who has supplied labor or materials for work on that property. Construction liens are designed to protect professionals from the risk of not being paid for services rendered. Remedies vary from state to state, and can differ depending on whether the property in question is real property or personal property.

| Preliminary N | | |
|-------------------------|------------------------------|--|
| Prelim Number: | | Name and address of claimant giving notice: Start Date: 07/01/1 |
| | CAVE DWELLER TRUCKING | COMPANY NAME Deadline: |
| | BEDROCK CONSTRUCTION LENDERS | STREET Prelim Date: 07/01/1 |
| Envelope | 100 MAIN STREET | CITY, CA 92000-0000 Job Seq: 3 |
| | BEDROCK CA 92005 | has furnished or will furnish labor, service, equipment or material of the following description: |
| | 800 555-1212 | TRUCKING |
| Cert Mail: | 1111111111111 | |
| | 🖲 Public, 🔿 Private | Description of job site sufficient for identification: |
| Uwner/Agency: | SLATE CONSTRUCTION | |
| Envelope | 1313 MOCKINGBIRD LANE | |
| | MUNSTER, CA 91313 | |
| Phone: | 800 555-1212 | The name of person or firm who contracted for the |
| Cert Mail: | 11112122222 | purchase of such labor, sercices, equipment or material furnished is: |
| Direct Contract: | SLATE CONSTRUCTION | CAVE DWELLER TRUCKING |
| Copy Owner | 1313 MOCKINGBIRD LANE | |
| | MUNSTER, CA 91313 | An estimate of the total price of the labor, services, |
| | | equipment or material provided is: |
| | 800 555-1313 | 25,000.00 |
| Cert Mail: | 1111223333 | |
| | | Signer Name: FRED FLINTSTONE |
| Other: | CAVE DWELLER TRUCKING | Server Name: |
| | | Signed At City: BEDROCK, CA |
| | | Date Status Amount Description |
| | | 07/01/13 PN 25,000.00 PRINTED THE 20 DAY PRELIMINARY NOTICE |
| Phone: | | 07/13/13 CP 1,212.00 THROUGH 07/13/2013 |
| Cert Mail: | [| 07/13/13 UP THROUGH 07/13/2013 |
| | | 07/13/13 CF |
| | | |
| | | |
| Back Save | Go All New Prelim 20 Day CP | UP CF UF Stop Notice Reports More |
| DOCK 2446 | | or cr or stop notice neports Mole |

The bottom right corner of the screen displays a history of when the 20 day notice was sent as well as the other forms such as Conditional Progress, Unconditional Progress, Conditional Final, Unconditional Final and Stop Notice. Double clicking on a history line will bring it up in the viewer where it can be reprinted.