

The logo features the letters 'RM' in a large, bold, cyan font at the top. Below this, the word 'REFERENCE' is written in a bold, white, sans-serif font, and the word 'MANAGER' is written in a bold, cyan, sans-serif font. The entire logo is set against a dark navy blue rectangular background.

RM REFERENCE MANAGER

Reference Manager: Managing Customer Types

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Summary

The behavior of trip cycles and diversions are determined by the Customer Type assigned to the Consignee on the trip. Customer Types are created and assigned to Consignees so that you can customize trips to meet your unique business needs. This configuration is managed in the Reference Manager Application.

Configuring Customer Types

The Customer Types module can be found under the RAILTRAC Advance menu in the Reference Manager application.

The application is set up with the below Customer Types. However, you may add new or configure these existing customer types to meet your business needs.

Customer Type	Customer Type Description	L/E	Begin Status	Ship Type
A (AGENT)	AGENT	EMPTY	1 (TO CONSIGNEE)	01 (PLANT TO CUSTOMER)
A (AGENT)	AGENT	LOAD	1 (TO CONSIGNEE)	01 (PLANT TO CUSTOMER)
B (BROKER)	BROKER	EMPTY	1 (TO CONSIGNEE)	01 (PLANT TO CUSTOMER)
B (BROKER)	BROKER	LOAD	1 (TO CONSIGNEE)	01 (PLANT TO CUSTOMER)
C (CUSTOMER)	CUSTOMER	EMPTY	1 (TO CONSIGNEE)	01 (PLANT TO CUSTOMER)
C (CUSTOMER)	CUSTOMER	LOAD	1 (TO CONSIGNEE)	01 (PLANT TO CUSTOMER)
G (LOADED STORAGE)	LOADED STORAGE	LOAD	1 (TO CONSIGNEE)	16 (ON HAND LOADED)
I (INTERNAL TRANSFER)	INTERNAL TRANSFER	EMPTY	1 (TO CONSIGNEE)	17 (ON HAND EMPTY)
I (INTERNAL TRANSFER)	INTERNAL TRANSFER	LOAD	1 (TO CONSIGNEE)	16 (ON HAND LOADED)
L (LEASE TRACK)	LEASE TRACK	EMPTY	1 (TO CONSIGNEE)	09 (LEASE DELIVERY)
N (CONSIGNMENT)	CONSIGNMENT	EMPTY	1 (TO CONSIGNEE)	01 (PLANT TO CUSTOMER)
N (CONSIGNMENT)	CONSIGNMENT	LOAD	1 (TO CONSIGNEE)	01 (PLANT TO CUSTOMER)
P (PLANT)	PLANT	EMPTY	1 (TO CONSIGNEE)	17 (ON HAND EMPTY)
P (PLANT)	PLANT	LOAD	1 (TO CONSIGNEE)	20 (VENDOR TO PLANT)
Q (STORAGE)	STORAGE	EMPTY	1 (TO CONSIGNEE)	24 (EMPTY TO STORAGE)
Q (STORAGE)	STORAGE	LOAD	1 (TO CONSIGNEE)	16 (ON HAND LOADED)
S (SHOP)	SHOP	EMPTY	1 (TO CONSIGNEE)	05 (MAINTENANCE/TESTING)
T (TERMINAL)	TERMINAL	EMPTY	1 (TO CONSIGNEE)	01 (PLANT TO CUSTOMER)
T (TERMINAL)	TERMINAL	LOAD	1 (TO CONSIGNEE)	01 (PLANT TO CUSTOMER)

This Customer Type Module gives you the ability to define the trip behavior of a Customer Type for Loaded and Empty trips

- Begin Status (initiating car status for trips) - *You may define one Loaded and one Empty Begin Status For each Customer Type*
- Shipment Type - *This does not impact trip cycling and is used for information/reporting purposes only.*

*In the below example Consignee 032 is assigned as a “A” Customer Type:

- Loaded cars will initiate in Car Status 1 as Shipment Type 19 (Origin to Vendor)
- Empty cars will initiate in Car Status 3 as Shipment Type 01 (Plant to Customer)

Set up of Customer Type

☰ Railtrac Advance - Customer Types - Reference

SYSTEM CUSTOMER TYPES

GET DATA

Customer Type ↑	Customer Type Description	L/E	Begin Status	Ship Type
(ALL)		(ALL)	(ALL)	(ALL)
A (AGENT)	AGENT	LOAD	1 (TO CONSIGNEE)	19 (ORIGIN TO VENDOR)
A (AGENT)	AGENT	EMPTY	3 (TO ORIGIN)	01 (PLANT TO CUSTOMER)
B (BROKER)	BROKER	LOAD	1 (TO CONSIGNEE)	01 (PLANT TO CUSTOMER)
B (BROKER)	BROKER	EMPTY	1 (TO CONSIGNEE)	01 (PLANT TO CUSTOMER)
C (CUSTOMER)	CUSTOMER	LOAD	1 (TO CONSIGNEE)	01 (PLANT TO CUSTOMER)
C (CUSTOMER)	CUSTOMER	EMPTY	1 (TO CONSIGNEE)	17 (ON HAND EMPTY)

032 CUST196

Save

Customer Details*

Destination Criteria

Preferred Route

Detention Profile

Customer Recipient

Customer Alias

Customer Bill To

Consignee Facts

Destination Criteria

Consignee Number*

032

Consignee Type*

A - AGENT

Custo...

RO...

Required

Consignee Name*

CUST196

Required

Consignee Phone

Required

Ext

Required

Consignee Name 2

Contact Type

Consignee Fax

Care of Party Name

Contact First Name

Consignee No.	Sight Co...	Road	Location City	State
032	Z	BNSF	WYNNEWOOD	OK

Total

Assigning Customer Type to a Consignee

Assignment of a Customer Type to a Consignee is managed in the Consignee module. This is a required field.

Selection of Customer Type in Consignee set up

Consignees - Reference

Home

Commodities

Consignees

Railroad Facts

Geography

Reference Objects

Equipment

RAILTRAC Advance

YardMaster Advance

2019081	CUST2073	HOUSTON FUEL OIL TERMINAL	HOUSTON	TX	Y	C
2019102	CUST565		WILMINGTON	CA	Y	C
2019115	CUST474		HERMOSILLO	SO	2819736700	Y
2019165	CUST1226	PORT OF PALM BEACH	RIVIERA BEACH	FL	Y	R
2019176	CUST716		PEORIA	IL	Y	R
Total Count: 5,698						

2019081 CUST2073

Customer Details*

Destination Criteria

Preferred Route

Detention Profile

Customer Recipient

Customer Alias

Customer Bill To

Consignee Facts

Customer Details*

Destination Criteria

Consignee Number*

2019081

Required

Consignee Name*

CUST2073

Required

Consignee Name 2

Care of Party Name

HOUSTON FUEL OIL TERMINAL

Care of Party Name 2

Freight Bill To Number

Ship To

Required

Consignee Phone

Contact Type

Contact First Name

Contact Last Name

Consignee Email

Sold To

Customer Type*

C - CUSTOMER

Customer To

RO...

Required

Est

Consignee Fax

Destination Criteria

Normal

Consignee No.

Sight Co.

Road

Location City

State

Delivery

2019081

D

BNSF

HOUSTON

TX

0

2019081

Y

BNSF

HOUSTON

TX

0

2019081

Z

BNSF

HOUSTON

TX

0

Total Count: 3

How Customer Type Impacts Trip Cycling

When trips are imported into RAILTRAC the system will check the Customer Type of the Consignee on the trip to determine the Begin Status (initiatng Car Status) of that trip.

Please refer to the Trip Cycling documentation for further details.

How Customer Type Impacts Diversions

For Consignees that are configured to initiate in Status 1, the Return Location will populate based on the Route Code entered in the Diversion form. This field can be changed.

For Consignees that are configured to initiate in Status 3, the Return Location will populate based on the customer location. This will be read only.

Please refer to the Managing Diversions documentation for further details.