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 initate in Car Status 3 as Shipment Type 01 (Plant to Customer)

Set up of Customer Type

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

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.