

RM

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Overview

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

Configuring Customer Types

The Customer Types module is located under the RAILTRAC Advance menu in the Reference Manager application.

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

SYSTEM CUSTOMER TYPES					GET DATA	+	Normal		
Customer Type	Customer Type Description	L/E	Begin Status	Ship Type					
(ALL)	Q	(ALL)	(ALL)	(ALL)					
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	3 (TO ORIGIN)	15 (PLANT TO PLANT)					
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)					
									Total Count: 19

Figure 1. The System Customer Types list in Reference Manager shows the default customer types with their Load or Empty condition, Begin Status, and Ship Type.

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 and reporting purposes only.

In the example below, a Consignee is assigned an “A” Customer Type:

- Loaded cars initiate in Car Status 1 as Shipment Type 19 (Origin to Vendor).
- Empty cars 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					
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)	

Figure 2. Customer Type setup for the example Customer Type, showing the Load and Empty Begin Status and Shipment Type.

032 CUST196

Customer Details* Destination Criteria Preferred Route Detention Profile Customer Recipient Customer Alias Customer Bill To

Consignee Facts

Consignee Number* 032

Consignee Type* A - AGENT

Required Consignee Name* CUST196

Required Consignee Name 2

Required Consignee Phone

Required Consignee Ext

Required Consignee Fax

Required Consignee Email

Destination Criteria

Consignee No. 032

Sight Co. Z

Road BNSF

Location City WYNNEWOOD

State OK

Total Count: 5,698

Figure 3. Consignee 032 assigned the A (Agent) Customer Type, shown in the Consignee Facts section.

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 the Customer Type in the Consignee setup:

Consignees - Reference

2019081 CUST2073 HOUSTON FUEL OIL TERMINAL HOUSTON TX Y C

2019102 CUST565 WILMINGTON CA Y C

2019115 CUST474 HERMOSILLO SO 2819736700 Y R

2019165 CUST1226 PORT OF PALM BEACH RIVIERA BEACH FL Y R

2019176 CUST710 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

Consignee Number* 2019081

Consignee Type* C - CUSTOMER

Required Consignee Name* CUST2073

Required Consignee Name 2

Required Consignee Phone

Required Consignee Ext

Required Consignee Fax

Required Consignee Email

Destination Criteria

Consignee No. 2019081

Sight Co. D

Road BNSF

Location City HOUSTON

State TX

Delivery ... 0

2019081 Y BNSF HOUSTON TX 0

2019081 Z BNSF HOUSTON TX 0

Total Count: 3

Figure 4. Selecting a Consignee's Customer Type in the Consignees - Reference screen, shown with the consignee list and the selected record detail view.

How Customer Type Impacts Trip Cycling

When trips are imported into RAILTRAC®, the system checks the Consignee's Customer Type on the trip to determine the Begin Status (initiating Car Status) for that trip.

Please refer to the Trip Cycling documentation for further details.

How Customer Type Impacts Diversions

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

For Consignees configured to initiate in Status 3, the Return Location populates based on the customer location. This field is read-only.

Please refer to the Managing Diversions documentation for further details.

Related Documents

For additional details and related configuration, see the following Documents on RAILChannel®:

- RAILTRAC® Advance™: **Trip Cycling**
- RAILTRAC® Advance™: **Managing Diversions**
- Reference Manager: **Configuring Loaded Switch Move Handling**