

EQUIPMENT  
Tracking

*You stack it. We track it*

Equipment Tracking Limited

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# SEEC PALLET CONTROL SYSTEM



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## Preface

SEEC is a modern Client / Server application designed to provide comprehensive control of every aspect of your equipment pool. It operates across a network to provide real-time equipment management information at all sites. The system not only provides details on equipment balances at each site but can also be used to manage individual client accounts and haulier balances. The system can also control, monitor, and re-invoice both customers and suppliers who are involved with the management of Chep, LPR, IPP or other hired or purchased equipment.

The use of the SEEC system will cut down the amount of time required to manage your equipment pool of pallets and other equipment, whilst giving you superior reporting and control.

The system will interface with existing enterprise systems that already capture stock / equipment movements. The data normally available as a minimum is a unique order (or despatch) number, delivery date, sending and receiving locations. Other data that may be available is equipment type and quantity and haulier responsible for the delivery. However, the system can be configured to accept all available data to reduce the amount of manual keying - keeping errors to a minimum whilst providing extensive information for managing the equipment pool.

The system resides on a central server so that information on the system is live giving sites accurate balances and information on despatches and receipts. The system is based on an optimised client / server model with the Server running on Microsoft SQL Server and the client currently available as a native Windows application. All loose equipment (roll cages, crates, different pallet types) can be controlled on this system, and it is immaterial whether these are hired or purchased products.

The system has been under constant development over the last 9 years, its core server functionality expanding to provide extra features and reports. Through our experience with the different types of equipment users, from manufacturing, through to Logistics providers, the system is capable of modelling and controlling almost every loose equipment scenario. The SEEC Client is the new 3<sup>rd</sup> generation windows client, optimised for minimal network bandwidth, and efficient management of the clerical work often associated with Equipment Management.

## System Objectives

Our experience in the industry has shown that companies, who are normally very good at controlling their normal stock, tend to overlook an important and vital part of the supply chain. Without equipment such as pallets and roll cages companies would be unable to move their products. Often seen as a necessary overhead, the control of pallets and other equipment (and the costs involved) have been overlooked. It is not normally until a large replacement request or lost equipment charge is received that companies become aware of their losses.

The system has been designed to assist companies, both large and small to control their equipment, keeping their inventories at a minimum, maximising the utilisation and enabling them to quickly identify where adequate controls are not in place. As loss areas are quickly identified, the risks are minimised and stocks protected.

The system can be used for single user account, multi user account, generic and unique products. An in-depth consultation with the client is undertaken before the installation of the software to make sure that the functionality provided fully meets their needs.

## System Model

In order to provide comprehensive tracking of equipment movements, SEEC closely models your physical Equipment Network. Locations, Clients, and Accounts are created in the system to match their real-world counterparts. A major part of SEEC's core functionality is its internal model of the complex CHEP Equipment pool, as well as the simpler one way trip models of the LPR and IPP pools. SEEC understands the interaction between the various CHEP designated locations such as Banks and Transfer Hire locations, and can automatically raise the expected 'follow on move' or

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invoiceable transaction. In addition to this the system deals with all of the operations offered by all equipment suppliers including the exchange, managed recovery and one way trip services. Once set up SEEC removes the

need to use multiple portals for equipment declaration and will automatically transmit files in the appropriate format to each of the pallet suppliers.

SEEC has also been expanded to accommodate the new Chep Global pricing architecture and assists users in identifying non-cooperative and low volume locations when raising Chep follow on paperwork (PCVs or DLNs) with improved reporting allowing users to identify the costs incurred when delivering to these locations.

With the provision of electronic invoices SEEC will also automatically reconcile and check transactions that have come on and off your account and will verify the costs charged.

## SYSTEM OVERVIEW



### Locations

Locations can have different “roles” for different types of Equipment. A “role” is the instruction to SEEC in how to deal with any despatch or receipt. The type of instruction given to the system will either mark the transaction as one that is an internal movement and will not affect the overall account balance when invoiced or one that requires action by the account handler and to expect a debit or credit on the invoice.

SEEC recognises eleven possible location roles

- Stock Location (Such as a Depot, warehouse or Factory)
- Supplier Loan (Supplier locations such as Co-Packers, re-workers, or customer locations where balances will be managed internally)
- Transfer Hire Locations
- Supplier Chargeable (Suppliers which Invoice such as CHEP, LPR or IPP)
- Bank (CHEP Authorised Bank Location that will issue a PCV)
- Customer
- Haulier
- Outstore
- Intermediate Warehouse (locations where stock is stored for onward delivery to a retailer)
- One-Way-Trip
- Managed Recovery

The user is expected to input not only location name and address details, but will decide on its role within the distribution network, and what stock limits are acceptable to the site.

A different role type can be given to the same location depending on the product being delivered into it. For instance you may want a large retailer to be marked as a *Bank* location when you deliver CHEP pallets into them, however, should you deliver any other equipment into them, such as white pallets, you can select a location type of customer or one way trip. The system will then automatically know which rules to apply to the delivery and generate the appropriate paperwork for you.

Each location can be assigned a CHEP global ID, to allow for automated Invoice reconciliation via the new CHEP Priced GTL file. As further integration into the CHEP model, each delivery location can be assigned its correct CHEP designation, such as NCD, or LVD status. This designation allows SEEC to automatically calculate the cost of de-hiring equipment left at the delivery point and will allow users to run reports to compare total delivery costs to a specific site.

To aid in the management of equipment balances, each location can be assigned a Target Balance KPI. When applied to a haulier or supplier location, this can provide a ready indication of the locations performance. SEEC will generate weekly reports that can be sent to locations that are not meeting their Balance KPI. SEEC also provides graphical reports of the locations balance against target over a period of time.

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## Accounts

The system supports multiple accounts, so if an operator holds more than one Chep invoice account, or manages accounts on behalf of clients – such as logistics or warehousing operatives, the charging and management information can be supplied by client. Each product account will have authorised clients linked to it to assist with the management of individual clients.



## Clients

SEEC supports multiple clients in the one system. All equipment moves are assigned an associated client so that Companies managing equipment on behalf of multiple clients can report on that clients moves. Balances at all locations are provided on a client-by-client basis. Users on the system can be configured to only 'see' or add data related to particular clients moves.



## Products

Any number of different products can be controlled with the SEEC System. New products can be added at anytime, and can then be assigned to the locations that will use them.



## Moves

Moves are at the core of the SEEC system, each equipment movement is usually assigned a unique 'Note Number' matching that on the accompanying physical document. Based on the "Roles" specified for each of the locations, the move will be assigned a 'Type', SEEC currently recognises ten individual move types:

- New Equipment Issue (e.g CHEP, LPR, IPP or equipment supplier Issue)
- Equipment Return (e.g.CHEP, LPR, IPP or equipment supplier Return)
- Internal Equipment Transfer
- Customer Delivery
- Bank Delivery (CHEP Authorised Bank Location)
- Equipment Transfer Hire In
- Equipment Transfer Hire Out
- Supplier Loan
- One Way Trip (e.g.CHEP or other pallet supplier One way Trip)
- Managed Recovery

If required SEEC can produce associated paperwork required for individual moves, an example of this would be the delivery notification paperwork (POD / PEN).

The Adding and Completion of movements can be adapted to suit individual companies, including the use of grouping movements together by Load to provide greater search and completion flexibility. SEEC's manual move entry screens have been optimised to make the entry process as quick and error free as possible. The new SEEC Client provides

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extensive support for creating and actioning moves from data contained in Excel files. This data can often be provided by Clients, Hauliers, suppliers etc, or can be queried out of systems on a daily basis.

Wherever possible much of the manual keying can be relieved through interfaces with existing Enterprise systems. As much relevant information as possible will be transferred into the SEEC system and despatches can either be left "on hold" until manually confirmed and despatched, or despatched automatically.

The SEEC Interface is usually custom built for each new install to insure the greatest flexibility in supportable types. SEEC Interfaces can range from simple Flat file CSV files, through structured files such as EDI, through to Socket based communication. We've previously interfaced with a wide range of systems, including CS3 Warehouse management systems, Customer Delivery information routed over EDI, and full SAP manufacturing systems.

The system is also designed to automatically declare movements to Chep, LPR and IPP such as transfers off the clients account using Chep's Chep Global Format (CGF) and the recognised formats for LPR and IPP. The system will automatically calculate the correct quantity for declaration should there be a return of equipment at time of delivery. Users can

select whether all movements (on and off) or just movements off the account should be declared. Where suppliers allow it all under returns of equipment can be declared to ensure that accounts are credited immediately and avoids any risk of penalties associated with late declaration.

## **EXEL COMPANION**

A common problem experienced by many companies is that they need to check another businesses records of pallet receipts and despatches against the SEEC records, or they use a different reference number which you wish to add onto your system as a cross reference to ensure that records mirror each other.

The exel companion is a flexible tool that takes another companies spreadsheet and allows user to compare data automatically against SEEC saving hours of manual cross checking. It also automatically updates selected fields and will bring back SEEC quantities or invoice dates when verifying information.

There are a large number of variables that it can check and update on or bring back records all holding a certain reference.

## **Follow On Documentation**

The CHEP pool makes use of several special documents to resolve movements that didn't result in a 1-4-1 exchange. If there is under-return during a customer delivery, SEEC will automatically raise a representation of the correct documentation, be it a PCV Note, a DLAN Note or a generic COLL note. Where equipment was moved to a location with its own CHEP account SEEC will automatically declare the transfer.

## **PCV Management**

The PCV Management module provides a systematic software supported approach to managing the PCV Redemption process. The PCVM Module provides support for organising the entire redemption process from liaising with the traffic office through to closing down successfully redeemed PCV's. The PCV Management module also includes a wide selection of special reports to allow you to analyse every stage of the PCV Process.

SEEC will assist users through the various stages of the PCV redemption, return and de-hire processes from the creating of control cards to pass to the Traffic Office or the automated process of producing summary sheets to send onto Chep to request a credit against your account.

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Aside from providing general reports for managing the PCV Control Cards, the PCV Management module also includes reports which enable you to monitor daily redemption performance and Bank Redemption performance on either a singular bank basis or across your banks as a whole.



## Physical Balances

Real-time, and historical balances are made available through the balances screen. The interactive balances screens allow you to view a locations physical balance at any point in time, or look at the net change to a locations balance between particular dates. Drilling down into the balance provides the list of moves that created the balance. Balances can be viewed for a single location, all locations, or a group of locations. The listed balances can be output to Excel for further calculation or for inclusion in management reports.

## Intransit Balances

The intransit balances, serve two purposes, firstly it can be used to help manage equipment availability at sites, with depots etc able to see if they have any equipment currently en-route to site. It also provides all the information necessary to manage the return of delivery debrief information from Hauliers. Intransit equipment can be viewed in three ways, by the dispatching site, such that all the customer deliveries from an NDC could be viewed. By receiving location, such that a depot may see any internal stock transfers that may affect its stock count. Finally the Intransit equipment may be viewed by the Haulier assigned to its delivery, such that a haulier may be chased for debrief information on the moves it was responsible for.



## Reports

Most of the standard reports supplied are based on our knowledge of managing equipment pools giving managers the most effective tools for looking after their stocks or re-negotiation with suppliers.

During the consultation period, we work with clients to ensure that their reporting requirements are met. Any special reporting requirements will be added as standard reports. SEEC operates an open database format, meaning that we are happy for the host companies IT Department to develop individual reports and interaction with the system, and will provide the required information about SEEC's Database Schema.

The Reports section on SEEC is split into six main sections:

- General Reports Engine III
- CEC Reports
- Haulier Reports
- KPI Reports
- Delivery Reports
- At Risk
- Excel Wizard

## General Reports Engine (GRE III)

The general reports engine or GRE is now in its third generation, it was designed to offer pallet managers complete and flexible access to every aspect of the equipment movements recorded on the system. Users are free to choose the fields of information they require in their report, and apply as many or as few filters as they require. Using the simple step-by-step interface the user can query out exactly the information they require. Once a report has been configured, it can be saved as a report file, so that it is quickly accessible at a later date, or so that it can be emailed to another SEEC user. The results of the report can then be displayed to a grid onscreen, output to Excel for further calculation, or output to a printable PDF report which can then be saved / printed / emailed. The system can also

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output the reports directly into a chart or graph. The GREIII also provides a special Expert Filter Mode, allowing capable users to write special filters, for one off or complicated reports.

## **CEC Reports**

The CEC Reports section provides a selection of automated reports for account administrators. These reports usually provide a high level view of their equipment pool, and include, cost and performance indicators. These reports include the Reconciliation Report, which provides a complete view of your equipment system balances against your paying account. The report provides a breakdown of your equipment balance, uninvoiced transactions, and weekly running costs. All the information on the Reconciliation report is then further broken down, on the detail pages, to allow investigation into the make up of summary figures in case further investigation is required.

## **Haulier Reports**

One of the most important aspects of maintaining efficient use of an equipment pool is in managing Haulier Balances, slow equipment turn around, and high yard balances, can significantly increase delivery trip-costs. To this end SEEC provides extensive Haulier balance and performance reports. The Haulier delivery statistics report provides a detailed breakdown of a hauliers' delivery over the entered date range, including Exchange performance etc. SEEC also helps to automate the process of managing Hauliers by generating a Haulier Statement Report which is automatically emailed or faxed to them without the need of further intervention by the user. The haulier statement report includes the Hauliers balance and Target Balance, and a declaration for them to sign and return that they agree with the Balance. The statement also contains a list of any deliveries the Haulier has not provided debrief information for.

For incomplete deliveries, the system generates an excel spreadsheet template for the hauliers to complete which when returned automatically updates the system. Other functionality includes a haulier portal for those operators who find it easier to use this process.

## **At Risk Reporting**

With many interactions in the equipment pool being time-critical, it is important that pallet controllers can easily identify any moves that require immediate attention. The At Risk reporting provides an interactive summary of moves that are "At risk". Without attention the company could be exposed to either excess hire charges, late declaration fees or at worst lost pallets. The effected moves may then be output as a report, or can be immediately actioned.

## **Invoicing**

Invoice reconciliation, is an important and time consuming aspect of loose equipment management. Every effort has been made to ensure that manual reconciliation in the system is as efficient as possible. In the case of CHEP invoices, the SEEC system can process CHEP electronic invoice files such as the new Priced GTL file. This allows the system to automatically reconcile moves on the system (checking dates, from and to locations and product types and quantities), and offer suggested match's for those moves that are not an exact match. Other supplier invoices such as those supplied in excel format from LPR and IPP are also automatically compared against system figures to ensure that all declared despatches have been credited on the right day and for the right quantity.

Under development to work alongside the Priced GTL is the automatic raising of invoice queries against invoices and automatic notification of overdue items.

## **KPI reporting**

Reporting to monitor the performance of locations, hauliers and overall performance levels are provided and can be grouped by region, sales rep, group etc., as required. Standard reports will give the client:-

Delivery Cost reporting that takes into account, length of time on hire, length of time pallets are on paper (PCVs or left at Customer Location) issue costs, additional costs such as Non Co-operating Location fees and Low Volume charges.

Base Pallet to actual despatch costs to cover cost of pick pallets (if base pallet information available)

Supplier and Haulier Performance against target levels

PCV redemption

## **EXCEL WIZARD**

The wizard functionality allows users to auto update SEEC records by using a pre-set template. This template is auto generated by clicking on the excel wizard and selecting which function you would like to use.

Using these templates users can automatically update location roles and rules. Set up multiple new locations or complete movements on the system that remain in-transit. You can also use the wizard to delete and invoice movements.



## **MAINTENANCE AND INTERFACES**

The maintenance and interface sections of the system allow users to change passwords, allocate user levels and visibility options and enter individual pricing for the accounts.

The interface section is developed in line with company requirements and will enable users to fix and interrogate rejected movements.