

Dispatch Delivery Overview Transcript

BisTrack's Dispatch Delivery system allows you to schedule and track product shipments for either delivery or pick up.

In this course, we introduce you to the Dispatch Delivery Planner window.

We also show you how to find documents for delivery and pick up and how to view orders on a Dispatch Delivery from within Order Monitor.

Dispatch Delivery Planner

The Dispatch Delivery Planner window has three main components.

Vehicles to be used.

Dates and Times for deliveries and pick ups.

And documents containing the details of where to go and what to pick up or deliver.

Access the planner using the Dispatch Delivery option from the ribbon area of the Home tab.

The Dispatch Delivery window opens in Calendar view.

The Vehicles being used are shown as column headings across the window with the Time intervals down the rows.

The information displayed for each vehicle includes the Name, Type, Capacity, Driver name, and Phone number.

The Times listed use the settings for start and end of day and the minutes between delivery intervals.

These are system defined but can also be customized by the user.

Hours within the defined work day are shown with a white background while the off hours are in blue.

The boxes in green, yellow and red indicate Dispatch Deliveries that have been added to the planner.

Those shown in green are at a Saved status, yellow are In-Progress and red are Complete.

Each delivery is assigned a Journey Manifest or JM number which is automatically generated by the system.

The manifest can be given a user-defined Reference that provides more description about the trip.

The information in brackets indicates the number of drops, pick ups and stops that have been included in a delivery.

A pick up or collection is noted by the letter “c” after the number.

Multiple drops or pick ups can be done at the same stop.

When applicable, the total weight and volume of the delivery is shown.

This information is compared against the vehicle to ensure the load size does not exceed the capacity available.

The documents on the manifest are listed below in the order they were added.

The number of documents shown depends on the length of time allotted for a delivery.

Reducing the allotted time for this delivery shrinks the display space.

Only the view is changed and the documents are still attached to the delivery.

The toolbar provides six other options for changing the view of the Dispatch Delivery Planner.

A Best Practice is to display it in Calendar view.

Below the toolbar are the View settings.

You can choose All Branches, Select Branches, or one Branch.

The display can also be limited to show deliveries for a selected Vehicle Type or all Types.

The Date to view can be entered or selected from the Date Picker. You can go forwards or backwards from the date shown using the arrow buttons.

Locating Documents for Delivery or Pick Up

The Dispatch Delivery window is a split design with the bottom portion used to select the documents to schedule onto a delivery.

First select the types of documents to Look for.

You can select All Documents, a specific type or pick multiple types using the Select Document Types option.

Enable the check boxes of the Types you want to search for.

Click OK when finished.

The Look for displays an abbreviation for the Documents selected.

You can also search for specific document numbers by entering those in the dialog box. When entering multiple numbers separate each with a comma.

Click Go or press Enter to perform the search.

The list contains documents that have not been previously added to the Dispatch Delivery planner.

Use the Filters option to further refine the current list of documents.

The first Filter is dependent on the Document Types selected. It allows you to choose a specific Customer, Supplier or Transfer Location.

The Date drop-down shows the Requested Dates from documents listed starting with the oldest. Select All or a specific Date.

The next two Filters allow you narrow the list by Delivery Area and Delivery City. Making a selection from any Filter automatically adjusts the list.

You can group the documents from the available headings.

For example, Group by Delivery/Pick Up City and then schedule those documents onto one Dispatch Delivery as time and capacity allow.

When you expand a list to show the documents, a Total Weight and Volume is shown for the group.

This is helpful information for matching a vehicle's capacity to the weight and volume requirements of the documents for delivery or pick up.

Documents that have been added to a Dispatch Delivery are visually noted by a Truck icon.

From the Home the tab, select Order Monitor from the Dispatch group.

Set the Filter to Orders For Delivery.

If not already selected, enable the check box beside Only orders at this status.

The Truck icon appears next to the order numbers on a Dispatch Delivery.

The background colors indicate the status. Green is a Saved Dispatch Delivery, Yellow is In Progress and Red is completed.

To see the Dispatch Delivery details for an order, highlight it and then right-click. Select Related Documents from the menu.

The Delivery Manifest is a Related Document to the order.

Clicking the plus sign beside the Manifest, displays all other documents that are on the same Dispatch Delivery as the order selected.

The Dispatch Delivery Planner is extremely flexible when setting display options and finding documents.

You should now recognize the areas of the Planner window, be able to locate documents for delivery or pick up and view orders on a Dispatch Delivery from within Order Monitor.

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