

## Preparing a Dispatch Delivery

There are three steps to preparing a Dispatch Delivery. These include selecting a date, adding vehicles, and placing documents onto a Dispatch Delivery. We'll review the process and introduce you to the View Delivery Info option. Let's begin.

To begin, open the Dispatch Delivery option from the Home tab. Alternatively, you may access it from within Order Monitor. The Dispatch Delivery window opens with the current date selected. Ensure that Calendar view is selected. You alter the date one day at a time using the left and right arrow buttons. As the date changes, any previously scheduled Dispatch Delivery's are shown. You can also set the date by entering it or selecting it from the Date Picker.

The next step is to add vehicles to the Dispatch Delivery. With your mouse pointing anywhere in the Calendar view area, right-click and then select Add Vehicle. From the window displayed, begin by choosing a Vehicle. For Vehicles that can have a separate Trailer, you can pick the Trailer to use. Then optionally select the Driver.

Vehicles, Trailers and Drivers are previously set in System Manager. Click OK to close the window. The Vehicle and Driver information is added to the Dispatch Delivery. Continue adding Vehicles as needed.

BisTrack also gives you an option to Add All Unused Vehicles from the right-click menu. This adds all vehicles to the grid at one time. All Vehicles are displayed in a separate column across the window. You can also remove, change, or copy vehicles and drivers for the date shown using the options from the right-click menu.

The third step involves finding a document and then adding it to a vehicle and time slot. From the Documents for Delivery or Pick Up area, set the Look for and Filter settings to list the documents you want to schedule onto the Dispatch Delivery. Typically you would select Sales Orders, Transfers, Credit Notes, and Purchase Orders.

A Best Practice is to set a Group By Date Required as orders are often prepared for delivery before they are at a Delivery Status. For the purpose of this demonstration, we set the Group By to Status. Select a document and then drag and drop it in to a Vehicle and time slot. The system automatically generates a new Delivery Manifest number, and shows the weight and volume details. You will want to monitor this as you add documents to the same delivery. We will place a few more documents into the same manifest.

As you add each new document, the system updates the number of drops, stops, weight, and volume. When you feel that you need to adjust the time for delivery you can increase or decrease it according to the intervals shown. Now we add a purchase order for pick up onto a vehicle and time slot. Then we increase the time slot to four hours. You can add multiple documents to a delivery at the same time using the shift or control and click keyboard and mouse functions.

Remember to adjust the time accordingly when adding items for delivery.

When you add a sales transaction to a Delivery and the delivery address is the same as another on a different Delivery Manifest for the same day, the system displays a warning. To add the transaction to the existing Delivery, select Yes. You can continue to add documents to the Dispatch Delivery window for the date shown. To schedule deliveries for dates and times for a different day, begin the three-step process again. Set a calendar date, add vehicles, and then find documents to drag and drop into a vehicle and time slot.

With a Delivery Manifest selected, open the right-click menu and then click the View Delivery Info option. BisTrack displays a summary of the documents on the manifest in a pop-up window. The Summary shows the Type for each document, and indicates whether the delivery is for drop or pick up by a (d) or (c) in brackets. You can resize the window as desired or use the scroll bar to view the columns not visible.

A right-click menu of options is available to Open the document, review Related Documents, or Remove a Drop or Pick Up from the manifest. Choosing the remove option takes the document off the manifest only. It is still in the system

and can be put onto another Dispatch Delivery. From the View Delivery Info window, you can move a document onto an existing manifest for the current date or create a new one. In our example, the order highlighted is going to the same city as another delivery. We'll drag and drop the highlighted item to a different manifest. The Delivery Info window remains active as you click on a different manifest and the information displayed changes to reflect the current delivery.

The system updates the Delivery Manifest drop, stop, weight, and volume settings for the document moved. The Delivery Info window no longer contains the document we moved. Click the X icon to close the window.

Moving products to and from customers, suppliers, or other branches can take complex coordination. You should now be able to prepare a Dispatch Delivery to assist with this process. In this course, we reviewed procedures for Setting the date, adding vehicles, and placing documents onto the delivery. Spend some time with the View Delivery Info window and use the many options available to streamline product flow.

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