Dispatching A Delivery

The day has arrived to load up the vehicle and send it with your Driver to deliver or pickup goods. In this course, we show you how to open the delivery properties to make additions or changes prior to dispatching. Then we'll demonstrate how to print the delivery documents and mark them In-progress and Complete.

As documents are put onto a Dispatch Delivery, BisTrack stores the information within Delivery Properties. To view the properties, highlight a delivery and double-click on it or open the right-click menu and select Open Delivery. BisTrack opens Delivery Properties with menu and toolbar options at the top of the window. The options to Mark Orders as Picked and Delivered are conveniently located here without having to return to the Order Monitor function.

Below the toolbar is the delivery's header section details. This is where you can enter a Reference which is displayed on the Dispatch Delivery window after the manifest number. The Weight and Volume information is shown for both the vehicle capacity and current load.

There are a number of tabs available for viewing and working with the delivery properties. The General tab displays the status of the delivery and its associated color. Below is the vehicle information, chosen when the vehicle was added to the Dispatch Delivery. Planned and Actual dates are also available. You can make changes here if needed.

The document details are shown on the Pickups/Drops tab. You can see the number of drops, pickups, and stops. Multiple drops to the same location count as 1 stop. The document Number, Weight, Volume, and destination or pickup location are available for viewing. A right-click menu of options is accessible that offer the same actions as the buttons shown at the bottom of the window. From this tab, you can Add or Remove documents on this delivery.

You can also enter a document number in the Quick entry dialog box and add it to the delivery. BisTrack adds the new document to the bottom of the list. The

sequence of pickups and drops are listed in the order they were entered. Use the up and down arrow buttons to change the order as needed.

The Pickups/Drops by Product tab lists the goods that are on each document. You can sort the list by any column or drag a column header to the Group By area to reorganize the data in a different way. Last, use the Notes tab to add additional information to the Delivery properties. The Notes will print on the Delivery Manifest for the Driver to see. To exit the window and save your changes, click the Save and Close button.

The Manifest is a detailed report used by delivery personnel as they transport products on a Dispatch Delivery. You'll need to print it for the driver. There's a toolbar button on the Delivery Properties window that gives you quick access to print the Manifest or Delivery Set. The button displays the last option used. Select Print Manifest. Adjust the Print Document settings as needed.

There are a number of options for producing the document including Print, Fax or Email. We'll preview the document. The manifest prints the header information at the top of each page. Below that are the documents in order of delivery or pickup with details of the products and quantities.

To print the Delivery Note Set for all orders being delivered on the manifest, select Print Delivery Set. The system prints separate Delivery Notes by sales order. To print notes for specific orders or transfers, open the Pickups/Drops tab. Select the document and then use the Print button to choose the type of note to print.

The Dispatch Delivery window gives you the ability to manage delivery progress by marking them In Progress and Complete. For this example, the Dispatch Delivery window is open with a number of deliveries scheduled. All are at a Saved status as noted by their green color.

To change the status, select a Delivery and open the right-click menu. Choose the Mark In Progress option. The system opens the Order Delivery Date window. Update the fields appropriate for this delivery.

If the documents are already printed, disable the check box for Print delivery note document set. Click OK to continue. The Dispatch Delivery changes to the In Progress color. If you mark a delivery in progress prematurely, select it again. Open the right-click menu, then choose the Undo Mark In Progress. You can also change the status from within Delivery Properties.

Select the Delivery and then double-click. On the General tab, click the In Progress button to change the status. Saved is now a button which behaves just like the Undo Mark In Progress option. The current status In Progress is displayed in the background color. The Complete button is now available which can be selected when the delivery is finished.

To track the Actual dates and times in comparison to Planned, enable the Started at check box. Then enter the date and time the delivery began. The Start Now button behaves the same way as clicking the In Progress button. Choose Save and Close. You can print the associated documentation or choose No. The Dispatch Delivery is shown using the In Progress color.

Once the driver has returned and all pickups and deliveries on the manifest are finished, change its status to Complete. You can use the Complete button to immediately mark it finished. Or you can click the Finished at checkbox, and then enter the date and time it was completed.

Once you complete the entries, select the Finish Now button. The Status changes to Complete. Save and Close the window. The system shows the Dispatch Delivery is shown with a red Completed status color.

When you dispatch a delivery in BisTrack, you're initiating product transport and pickup. You should now recognize the information contained within Delivery Properties, be able to print delivery documents, and know how to mark a delivery In Progress and then Complete.

About Epicor

Epicor Software Corporation drives business growth. We provide flexible, industry-specific software that is designed around the needs of our manufacturing, distribution, retail, and service industry customers. More than 40 years of experience with our customers' unique business processes and operational requirements is built into every solution—in the cloud, hosted, or on premises. With a deep understanding of your industry, Epicor solutions spur growth while managing complexity. The result is powerful solutions that free your resources so you can grow your business. For more information, connect with Epicor or visit www.epicor.com.

EPICOR.

Corporate Office	**Latin America and Caribbean**	**Europe, Middle East and Africa**	**Asia**	**Australia and New Zealand**
804 Las Cimas Parkway	Blvd. Antonio L. Rodriguez #1882 Int. 104	No. 1 The Arena	238A Thomson Road #23-06	Suite 2 Level 8,
Austin, TX 78746	Plaza Central, Col. Santa Maria	Downshire Way	Novena Square Tower A	100 Pacific Highway
USA	Monterrey, Nuevo Leon, CP 64650	Bracknell, Berkshire RG12 1PU	Singapore 307684	North Sydney, NSW 2060
Toll Free: +1.888.448.2636	Mexico	United Kingdom	Singapore	Australia
Direct: +1.512.328.2300	Phone: +52.81.1551.7100	Phone: +44.1344.468468	Phone: +65.6333.8121	Phone: +61.2.9927.6200
Fax: +1.512.278.5590	Fax: +52.81.1551.7117	Fax: +44.1344.468010	Fax: +65.6333.8131	Fax: +61.2.9927.6298