Scheduled Deliveries

Introduction

Scheduled Deliveries can be used when drivers make delivery stops on a regular basis to certain customers. For example, this module can be used if a driver is scheduled to always stop at a customer site on Monday and Wednesday, to pick up and/or drop off cylinders. There are multiple methods of scheduling such as Daily, Days of the Week, Days of the Month, and Days between Visits. All of these options allow the operator greater flexibility when scheduling.

To begin using Scheduled Deliveries, a quote will need to be created that will be used to schedule tickets on a repetitive basis. This should include any hard good items and/or cylinders that will be delivered to the customer.

The operator will need to setup the customer in the Schedule Delivery file with the appropriate dates to be scheduled.

Note: this is located on the **Billing menu** > **Scheduled Deliveries**.

Use the **Schedule New Delivery** icon to start the process.

The Customer Number and the Quote Number to be used will need to be entered at this point.

The method of scheduling will also need to be selected.

The schedule options are:

- Daily
- Days of the Week
- Days of the Month
- Days between Visits
- One time

A **Start** and **Stop Date** can be entered if needed. If this is set, deliveries will only be scheduled during this specified time frame.
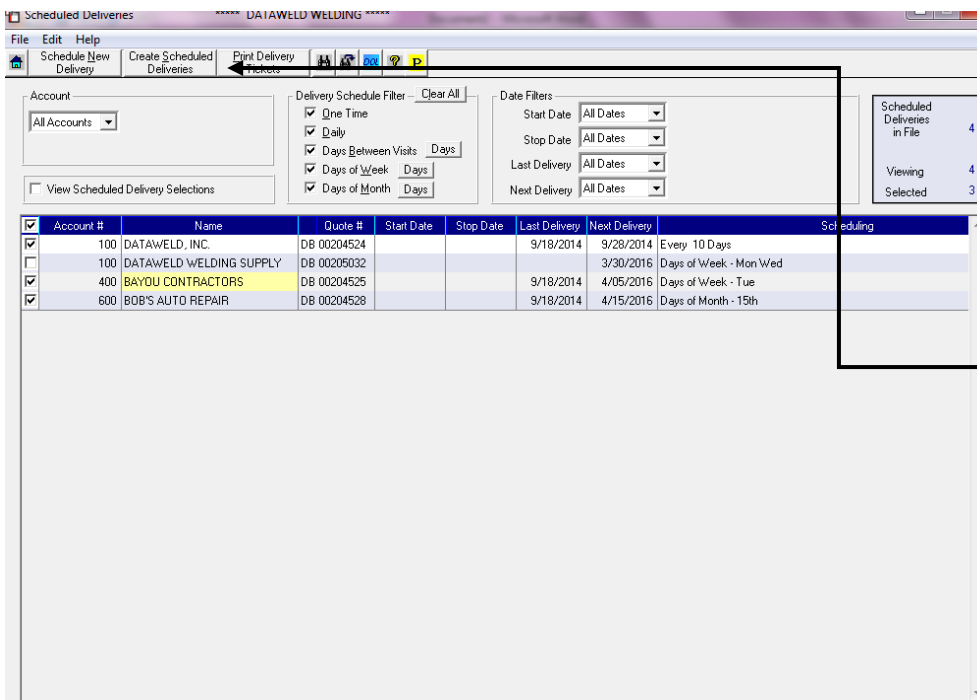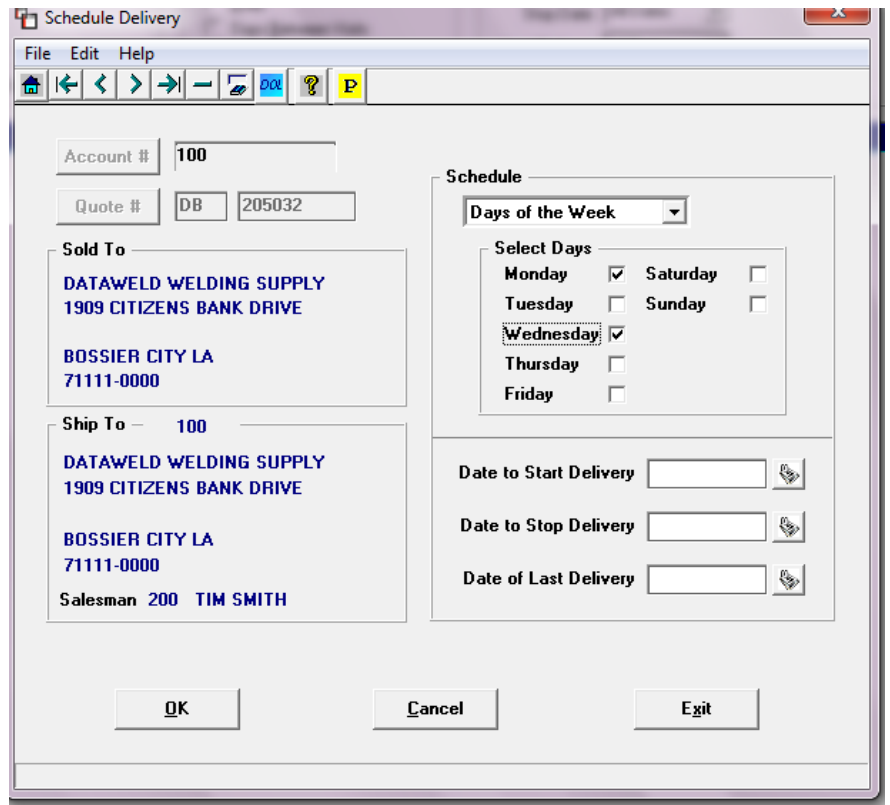
If the **Days of the Week** option is chosen, one or multiple days can be selected. For example, a customer could have a scheduled delivery on Monday, Wednesday and Friday.

The **Days of the Month** option allows the delivery to be scheduled for one or multiple dates during the month such as the 1st and the 15th.

The **Days between Visits** option allows the deliveries to be schedule bi-weekly (14 days), every 10 days, etc.

Each week as deliveries are to be scheduled, the operator will use the **Delivery Schedule Filter** to select the dates to be scheduled. For example, the day of the week, such as Monday, would be selected and only those deliveries would be visible on the screen.
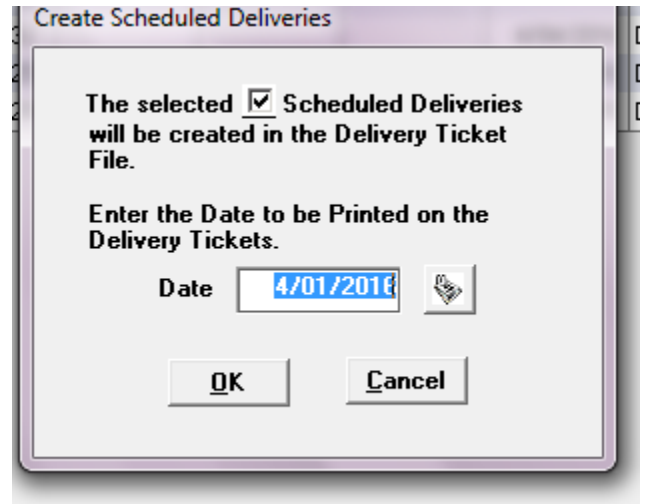
Once the deliveries are selected, click the **Create Scheduled Deliveries** button.

Note: the date that is entered at this point will be the date used to create the tickets in the Delivery Ticket file.

At this point, the schedule delivery tickets can be printed by using the Print Scheduled Delivery button.

The tickets will now be in the regular Order Entry file and can be modified in the Change Mode as needed. From this point, the tickets will be processed with the normal billing.

Have questions? Feel free to send us an email, we welcome the questions!