

Door Delivery Process

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Door Delivery of Items from a Local Store

Scenario 1

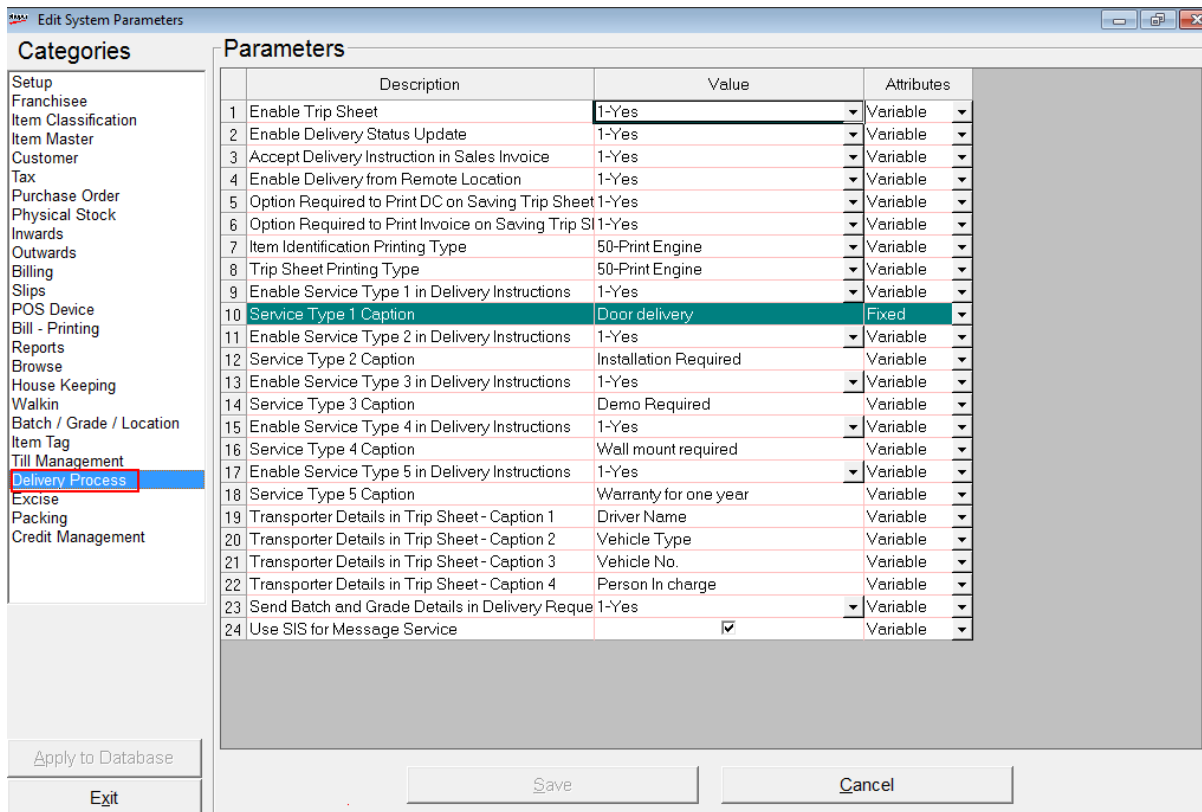
In this scenario, the local store enables the required system parameters, bills and identifies the items for delivery. This store does not prepare trip sheet nor update status of the delivery.

Enable Delivery Process

Enable the System Parameters to initiate the delivery process of white goods.

- Go to **Setup > General > System Parameters**
- Click **Delivery Process** under **Categories**

The **System Parameters** window for the selected category is displayed.



The parameter, **Service Type 1 Caption – Door Delivery**, is configured as **Fixed** and cannot be changed. The other parameters being variable can be changed as per the business requirements.

Enable Item Tag

Configure this parameter to enable **Item Tag & Additional Attributes**

- Go to **Setup > General > System Parameters**
- Click **Item Tag** under **Categories**
- Select **Enable Item Tag & Additional Attributes**

Service Types Captions

Similarly, enable and provide the captions for types, **Service Type 2 to Service Type 5**.

For example, if your store provides installation services, then you may enable **Service Type 2** and provide the caption as **Installation Required** and so on.

Door Delivery Instructions in Sales- Billing

The recording of details of door delivery happens during the billing process. The recording of delivery instructions can be made in the following ways:

- On completion of the Billing/Invoice and selecting **Payment on Delivery** as the payment mode in Billing, then the system prompts a message to enter the door delivery instructions.
- The second option is during the billing process click **Delivery Instructions** in the **Billing** window.

Note: On completion of the Billing/Invoice and selecting Remote location for any of the items in the bill, the system prompts a message to enter the door delivery instructions.

Door Delivery with Payment on Delivery Option

The **Billing** window is displayed with the item tag information.

The screenshot shows the Tally Billing window for 'Open for 20/05/2014 - ACME Bazaar'. The Bill Type is 'Product' with 'Cash' selected. The Customer is 'C01 Chandrashekar' and Sales Staff is 'E01: Eshwar'. An 'Item Tag Information' dialog box is open, showing details for Stock No. 000005, 'Electric Chimney SS 500CM', with a quantity of 1.00. The dialog includes a table for item details:

Serial No./IMEI No.	Battery No	Sim Type
1 EC1000	Motor No. EC1001	Hood No. EC1003

The main grid shows the following item:

S No.	Stock No	Item Description	Rate	Qty	Value	Disc Code	Disc Qty	Disc. %	Disc.Amt	Total	SalesStaff
1	000005										

Buttons at the bottom include 'Show Item Tags' and 'Delivery Instructions'.

- Accept the item tag information and the **SalesStaff** to display the details in the main grid
- Click **F8: Accept Payment** to settle the bill
- Select **Payment on Delivery** under **Mode of Payment**

The Payment Code and other details are displayed under **Payment Details**.

Mode of Payment		Payment Details				
Payment on Delivery		Pay Mode	PayCode	Units	Ex. Rate	Amount
		Payment on Delive	PAYONDEL	12595.00	1.00	12595.00
No. of Units						
Exchg. Rate						
Amount						
		Total Qty	Net Payable	Amount Receivable		
		1.00	12595.00	0.00		
						Ok Cancel

- Click **Ok**

A message, “**Delivery Instructions are not entered....Do you want to Continue the Billing?**”

- Click **No** to enter the delivery instructions
- Fill the delivery instruction details for stock items on door delivery

The **Delivery Instructions** window is displayed with the details of delivery instructions.

Delivery Instructions							
Customer Name & Address							
Select	<input checked="" type="checkbox"/> Same as Billing Address						Clear
	Billing Address			Shipping Address			
Customer	Chandrashekar			Chandrashekar			
Address	Malleshwaram			Malleshwaram			
Landmark	Nr. Hotel Maiya			Nr. Hotel Maiya			
Locality	11th Cross Malleshwaram			11th Cross Malleshwaram			
City	Bangalore			Bangalore			
State	Karnataka			Karnataka			
Pincode	560003			560003			
Mobile No.	9987456944			9987456944			
E-mail-Id	chan@xyz.com			chan@xyz.com			
Service Details							
	Stock No.	Item Description	Location	Serial No. / IMEI No.	Door delivery	Installation Required	Demo Require
1	000005	Electric Chimney SS Not Applica	EC1000		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Expected Delivery Date: 05/06/2014 Time: 19:00:00							
Delivery Remarks: Collect payment cheque from customer.							
Additional Instructions: Phone before delivery and provide Demo.							
						OK	Cancel

- Click **OK** to complete the billing transaction for printing

Item Identification

This menu is helpful in identifying the stock item that is set for door delivery. If the billing and delivery is done by the same store, then the identification of the item has to be done by the store during delivery process after the bill is made.

You can also select the serial no. of the item which you are going to deliver if serial number is enabled for those items.

Note:

If the billing is done by the store and the delivery is made by a service location, then the identification has to be done by the service location.

If the item identification is done by the same store, then already selected serial number (during billing) will pop up. If the item identification is done by service location, then the service location has to identify the serial numbers for serial number enabled product brand combinations.

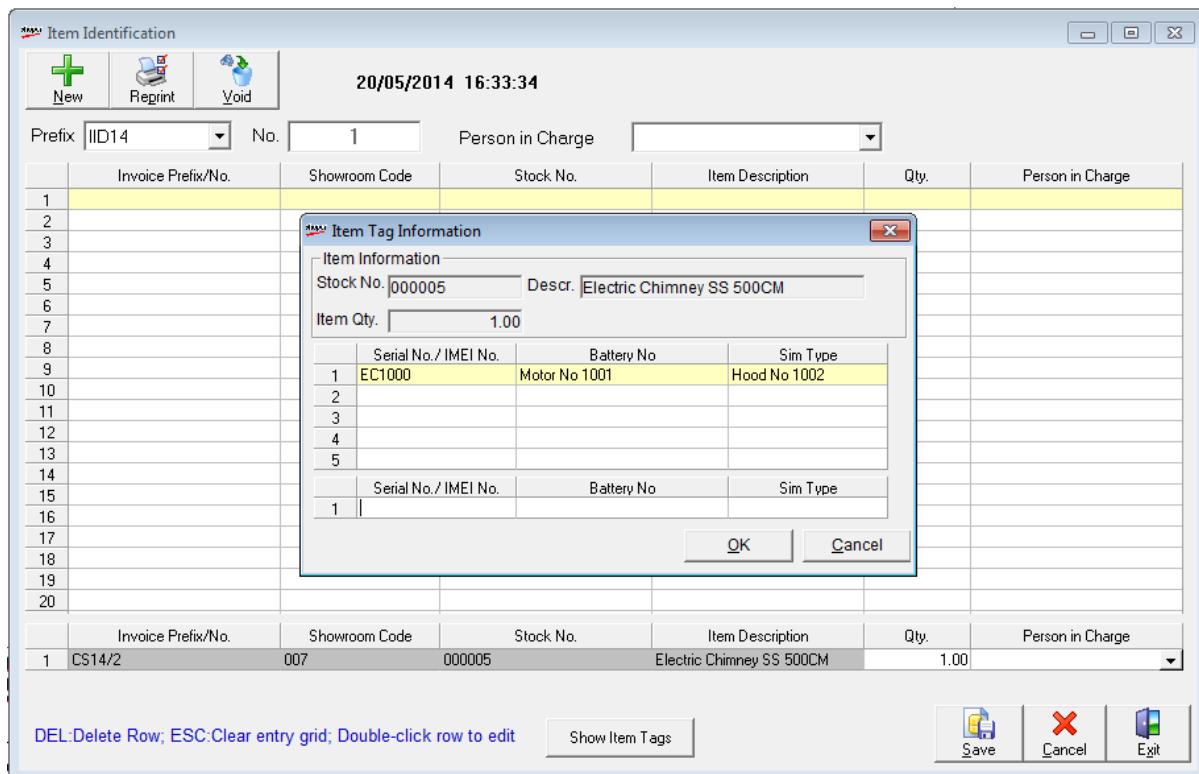
The Release 2.7 provides the facility to identify the items for delivery to the customer at the required address.

- Go to **Sales > Delivery Management > Item Identification for Delivery**
- Click **New**
- Select the required invoice from the **Search Result** in the **Browse** window

The invoice details are displayed in the stock item entry grid.

- Press **Enter** in the **Qty** field

The **Item Tag Information** window is displayed.



The item tag information of the stock item billed in the invoice is displayed.

- Click **OK** to accept the item tag information
- Select the value under **Person in Charge**
- Click **Save** the print the item identification details
- Click **Exit** to close the window

Scenario 2

The local store bills and identifies the items for delivery, prepares the trips sheet but does not generate the status update information.

- Follow the steps as outlined in the **Scenario 1**
- Prepare the trip sheet for delivery of the identified items

Trip Sheet Creation

This menu is used to create and print the trip sheet for door delivery of stock items to customers from the store or remote locations.

- Enable System Parameter, **Enable Trip Sheet** under **Delivery Process**
- Configure the captions for parameters, **Transporter Details in Trip Sheet- Caption 1 to Caption 4**
- Create and print trip sheet for delivery of items to customers at their door steps

The **Trip Sheet** window is displayed.

20/05/2014 16:42:21

Prefix TS14 No. 1

Transport Details

Driver Name Shiva Vehicle Type Temp Vehicle No. KA XXX L XXXX

Person In charge Ramprasad Remarks Delivery of item Electric Chimney to customer

	Customer Name	Contact No.	Invoice Prefix/No.	Ref. Doc. Prefix/No.	Billing Location Code	Print Invoice	Print DC
1	Chandrashekar	9987456944	CS14/2	IID14/1	N/A	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

List Matching Items

Reprint Save Exit

- Select **Expected Delivery Date**

- Select **Showroom** and the corresponding value under **Code**
- Select **Locality** and its corresponding value
- Click **List Matching Items**

The **Browse** window is displayed.

Note: *If filters are not set in **List Matching**, it will list all the pending bills for which the item identification is done and the delivery is pending. By default, these filters are not selected. You can select one or more filters at the same time.*

- Select the identification doc details, **Doc Prefix** and **Doc No** in the **Browse** window
- Click **OK** to accept the selections to return to the **Trip Sheet** window

The values of **Prefix** and **No.** are displayed with the date and time details. The details of the customer name, contact details and the invoice details, etc. are displayed.

Under **Transport Details:**

- Select driver's name against **Driver Name**
- Select vehicle type against **Vehicle Type**
- Select vehicle number against **Vehicle No.**
- Select person in charge against **Person in charge**
- Type/enter details against **Remarks**
- Click **Save** to save and print the trip sheet details
- Click **Exit** to close the window

Scenario 3

In this scenario, the store follows the entire delivery process from billing to delivery status update and generates a report on the status.

- Follow the steps as outlined in the scenarios 1 & 2
- Prepare the delivery status update information

Delivery Status Update

This menu provides information on the status of items that are to be delivered to the door of the customer. It provides information on pending, delivered, rescheduled and rejected deliveries.

- Enable System Parameter, **Enable Delivery Status Update** under **Delivery Process**.

Pending Status

- Go to **Sales > Delivery Management > Delivery Status Update**
- Select the dates in **From Date** and **To Date**
- Select **Pending** under **Delivery Status**
- Click **Show**

The **Delivery Status Update** window for pending delivery is displayed.

No.	Trip Sheet No.	Invoice No.	Invoice Date	Stock No.	Serial No./IMEI No.	Item Description	Shipped Qty.	Delivered	Delivered Qty.
1	TS14/1	CS14/2	20/05/2014	000005	EC1000	Electric Chimney SS 500CM	1.00	<input type="checkbox"/>	

- Select **Delivered** if the delivery is made
- Type/enter value under **Delivered Qty**
- Type/enter value under **Delivered Date**
- Click **OK** to update the details

Delivered Status

- Select/enter dates in **From Date** and **To Date**
- Select **Delivered** under **Delivery Status**
- Select the invoice of the delivered item
- Click **Show**

The **Delivery Status Update** for delivered items is displayed.

No.	Trip Sheet No.	Invoice No.	Invoice Date	Stock No.	Serial No./IMEI No.	Item Description	Delivered Qty.	Delivered Date
1	TS14/1	CS14/2	20/05/2014	000005	EC1000	Electric Chimney SS 500CM	1.00	20/05/2014

Rejected Status

To know about the status of rejected deliveries:

- Click Settings

The **Settings** window is displayed.

Column Selection	Select
Billing Location	<input type="checkbox"/>
DC No.	<input type="checkbox"/>
DC Date	<input type="checkbox"/>
Customer Name	<input type="checkbox"/>
Shipped Qty.	<input checked="" type="checkbox"/>
Delivered Qty.	<input checked="" type="checkbox"/>
Delivered Date	<input checked="" type="checkbox"/>
Rejected Qty.	<input checked="" type="checkbox"/>
Rescheduled Qty.	<input checked="" type="checkbox"/>
Rescheduled Date	<input checked="" type="checkbox"/>
Remarks	<input type="checkbox"/>
Exchange-Item Received	<input checked="" type="checkbox"/>

Apply Ignore

- Select **Rejected Qty**
- Click **Apply**

In the **Delivery Status Update** window of pending deliveries:

- Select/enter dates in **From Date** and **To Date**
- Select **Pending** under **Delivery Status**
- Click **Show**
- Enter the value under **Rejected Qty**
- Click **OK** to accept the change
- Select **Rejected** under **Delivery Status** to view the report

The Delivery Status Update for rejected deliveries is displayed.

Delivery Status Update

Trip Sheet Date range
From Date: 20/05/2014
To Date: 20/05/2014

Delivery Status: Rejected

No.	Trip Sheet No.	Invoice No.	Invoice Date	Stock No.	Serial No / IMEI No.	Item Description	Rejected Qty.
1	TS14/2	CS14/4	20/05/2014	000006	TV1000	Television Curvy Swivel	1.00

No. Trip Sheet No.
1 TS14/2

Show Clear Filters

Settings OK Cancel Exit

- Click **OK** to update the status
- Click **Exit** to close the window

Rescheduled Status

To know about the status of rescheduled deliveries:

- Click **Settings**

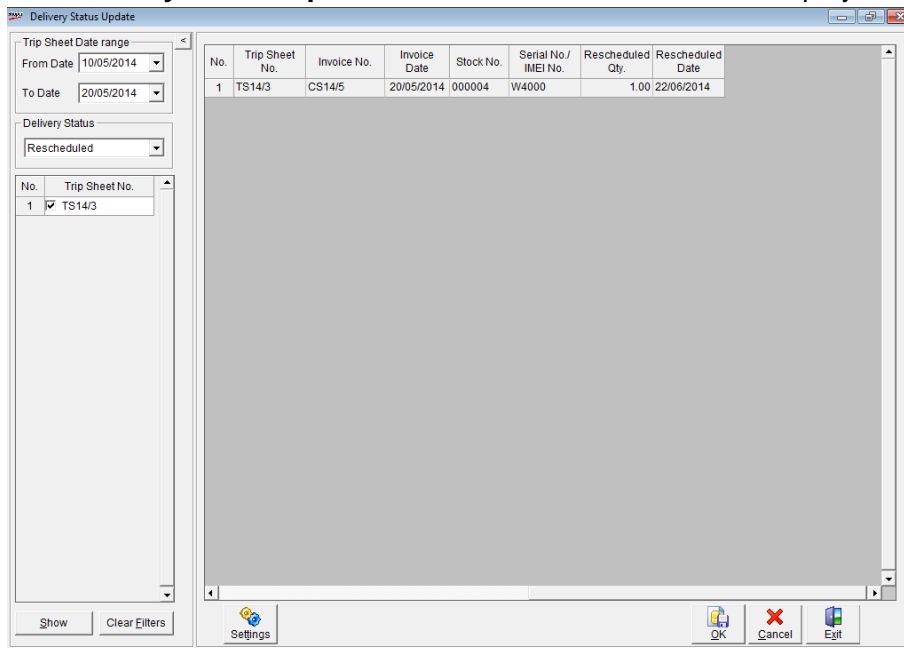
The **Settings** window is displayed.

- Select **Rescheduled Qty**
- Select **Rescheduled Date**
- Click **Apply**

In the **Delivery Status Update** window of pending deliveries:

- Select/enter dates in **From Date** and **To Date**
- Select **Pending** under **Delivery Status**
- Click **Show**
- Enter the value under **Rescheduled Qty**
- Enter the value under **Rescheduled Date**

The **Delivery Status Update** for rescheduled deliveries is displayed.



- Click **OK** to accept the change
- Select **Rescheduled** under **Delivery Status** to view the report

Delivery Status Report

This report provides information on the delivered and undelivered items from the local store and remote location.

- Go to **Sales > Delivery Status Update > Delivery Status Report**
- Press **F2** in **Document No** and select the required invoice or leave it blank
- Press **F2** in **Customer Code** and select the required customer
- Enter the code against **Showroom Code**

Under **Display**:

- Select **Delivered Items** if required
- Select/Unselect **Non Delivered Items**

Under **Sorting**:

- Select Invoice Number/ Customer Code

The **Delivery Status Report** window is displayed with the details.

The screenshot shows the 'Delivery Status Report' window with the following details:

- Selection Details**
 - Filters**
 - Date Range: From 20/05/2014 To 20/05/2014
 - Document No.: CS14/2
 - Customer Code: C01 (Chandrashekar)
 - Showroom Code: 007
 - Display**
 - Delivered Items
 - Non Delivered Items
 - Sorting**
 - Invoice Number
 - Customer Code
- Buttons**: View, Cancel

- Click **View** to display the report

Door Delivery of Items from Remote Locations

Scenario 4

In this scenario, while the local store bills the items, the identification of the items for delivery is done by the remote location/store. The remote location neither prepare trip sheet nor update status of the delivery.

Enable Delivery Process

Enable the System Parameters to initiate the delivery process of white goods.

- Go to **Setup > General > System Parameters**
- Click **Delivery Process** under **Categories**

The **System Parameters** window for the selected category is displayed.

In Local Store

- Enable **Delivery from Remote Location**
- Enable **Service Type 1** in Delivery Instructions, etc...

If your store wants to exchange information with your service location using the **Shoper Integration Service**, Enable the parameter, **Use SIS for Message Service** under **Delivery Process**

Cataloguing Remote Location

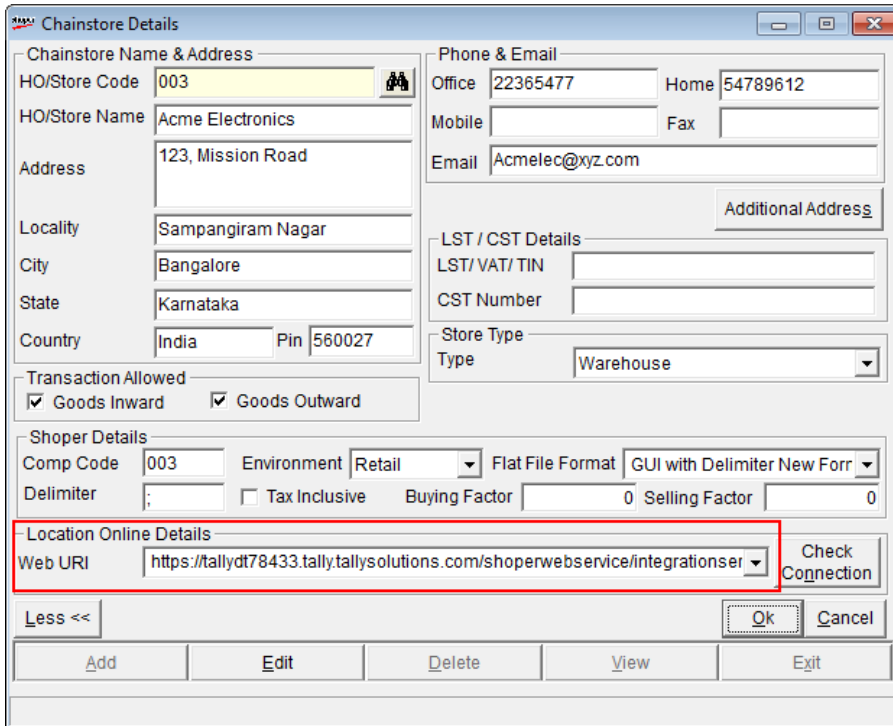
This option is used to record details regarding Head Office and chain stores. The option to allow or restrict Goods Inwards and Outwards from the location can be specified in this window.

Release 2.7 allows you to configure the Location Online Details – Web URL for HO as well as the service/remote locations/stores.

You can define the web URL in the HO chain stores menu. By doing so, you can communicate with HO as well as other remote locations/stores. You can ascertain stock details at your remote location and exchange information using the web service. The remote location will execute the delivery process.

- Go to **Catalogue > HO Chain Stores**

The **Chain store Details** window is displayed.



- Click **Add**
- Enter the required details
- Enter the Web URL
- Click **Check Connection** to test the connection with the store/location
- Click **OK** to save the details
- Click **Exit** to close the window

Note: To identify the items, refer **Item Identification in Scenario 1**

Scenario 5

The local store bills but the remote location identifies the items for delivery, prepares the trips sheet but does not prepare the status update information.

- Follow the steps as outlined in the scenario 4
- For the process relating to **Trip Sheet**, refer **Trip Sheet Creation** under **Scenario 2**

Scenario 6

In this scenario, the local store bills the items, but the entire delivery process from identification to delivery status update and generation of a status report is done by the remote location.

- Follow the steps as outlined in the scenarios 4 & 5
- For the process relating to **Delivery Status Update**, refer **Delivery Status Update** under **Scenario 3**