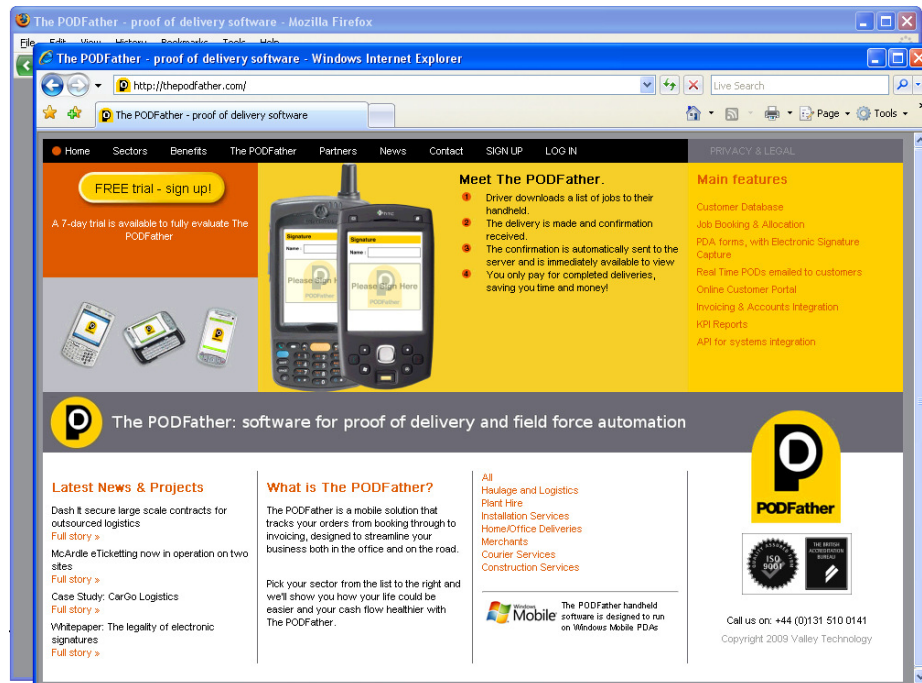


Overview of The PODFather

The PODFather is a workforce automation tool consisting of three parts:

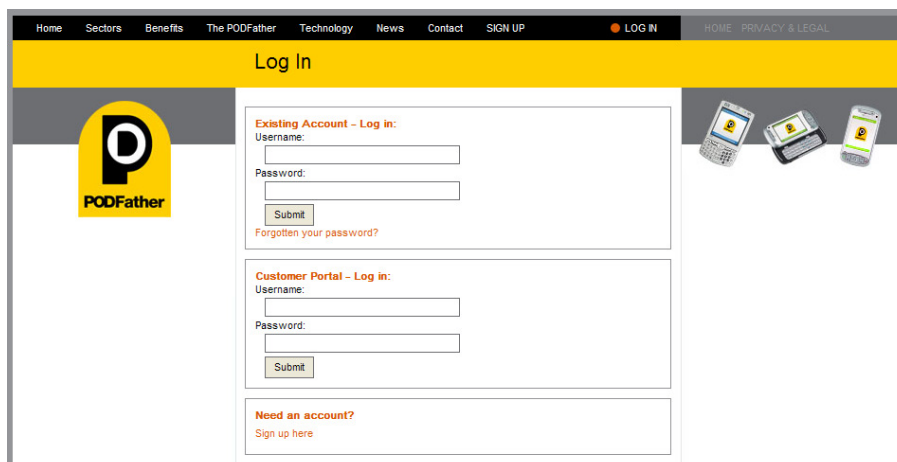
- A brochure website
- A web-based application which can be accessed globally through any web browser.
- A Windows Mobile application for mobile phones, personal data assistants (PDAs) and ruggedised handheld computers



Example Case

A Courier Company with ten drivers is given an account on the web application.

The administrative staff from the company would access the PODFather Web Portal through the website at www.thepodfather.com and log into The PODFather via a "Login" link



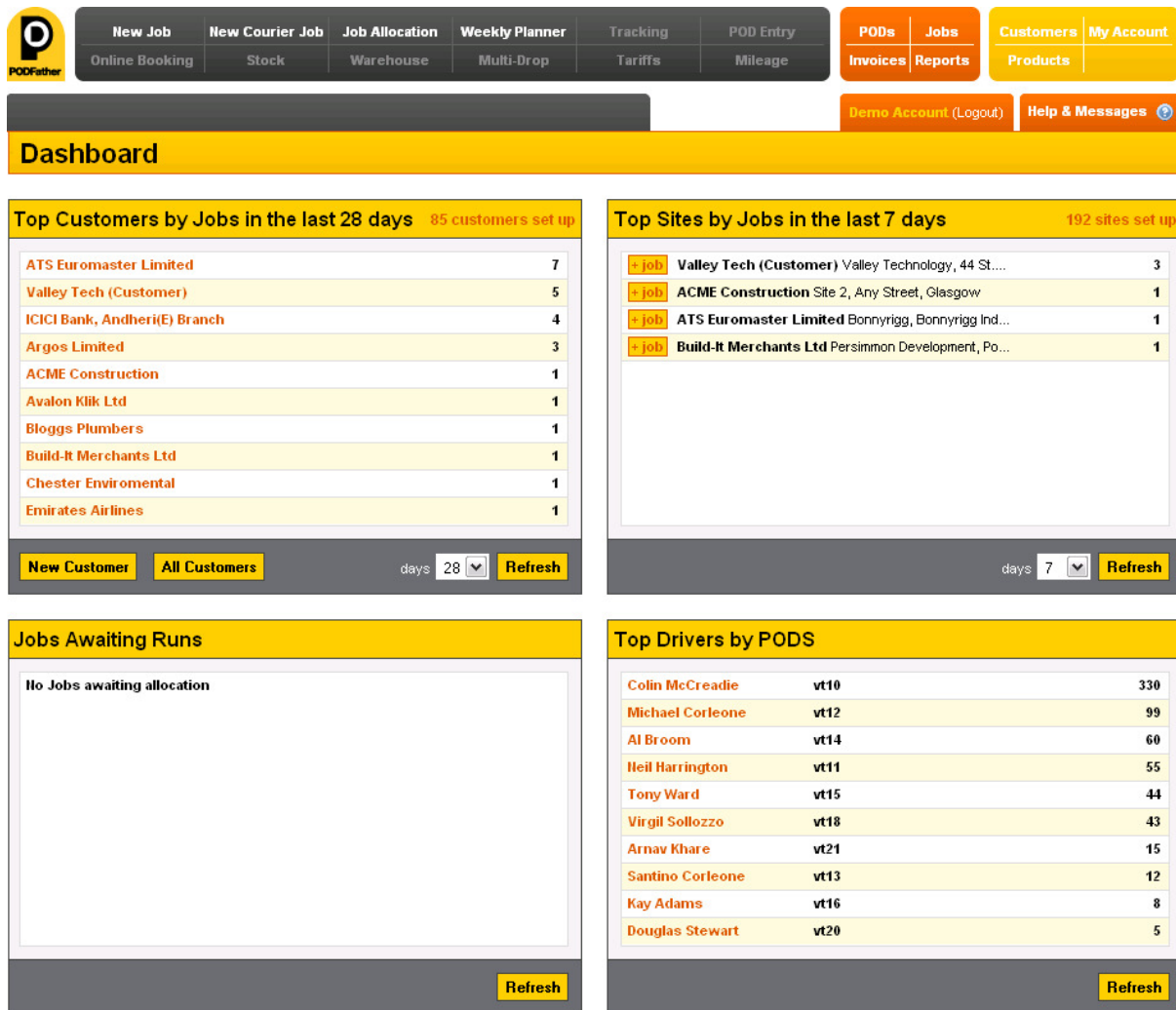
The PODFather Dashboard

The first screen the staff user will see after logging in is the PODFather Dashboard.

At one glance, the staff user is able to see the customers they have the most recent business with, their busiest sites, their busiest drivers, and any jobs that need to be assigned to drivers.

For each of these sections, there are several quick links to allow the user to do common tasks such as creating a New Customer, creating a New Job, or editing Customer information.

Along the top of the window are the different sections of the web application to allow the user to change screens and perform the work at hand.



The screenshot shows the PODFather Dashboard interface. At the top is a navigation bar with a logo and several menu items: New Job, New Courier Job, Job Allocation, Weekly Planner, Tracking, POD Entry, PODs, Jobs, Customers, and My Account. Below this is a secondary bar with Online Booking, Stock, Warehouse, Multi-Drop, Tariffs, Mileage, Invoices, Reports, Products, and Demo Account (Logout). The main content area is titled 'Dashboard' and contains four sections: 'Top Customers by Jobs in the last 28 days' (85 customers set up), 'Top Sites by Jobs in the last 7 days' (192 sites set up), 'Jobs Awaiting Runs', and 'Top Drivers by PODS'. Each section has a table of data and a 'Refresh' button at the bottom.

Top Customers by Jobs in the last 28 days 85 customers set up

ATS Euromaster Limited	7
Valley Tech (Customer)	5
ICICI Bank, Andheri(E) Branch	4
Argos Limited	3
ACME Construction	1
Avalon Klik Ltd	1
Bloggs Plumbers	1
Build-It Merchants Ltd	1
Chester Enviromental	1
Emirates Airlines	1

New Customer All Customers days 28 Refresh

Top Sites by Jobs in the last 7 days 192 sites set up

+ job	Valley Tech (Customer) Valley Technology, 44 St....	3
+ job	ACME Construction Site 2, Any Street, Glasgow	1
+ job	ATS Euromaster Limited Bonnyrigg, Bonnyrigg Ind...	1
+ job	Build-It Merchants Ltd Persimmon Development, Po...	1

days 7 Refresh

Jobs Awaiting Runs

No Jobs awaiting allocation

Refresh

Top Drivers by PODS

Colin McCreadie	vt10	330
Michael Corleone	vt12	99
Al Broom	vt14	60
Neil Harrington	vt11	55
Tony Ward	vt15	44
Virgil Sollozzo	vt18	43
Arnav Khare	vt21	15
Santino Corleone	vt13	12
Kay Adams	vt16	8
Douglas Stewart	vt20	5

Refresh

Creating a New Courier Job

The courier company receives a job for the following afternoon.

Delivery jobs are entered into the web application either:

- Keying into the "New Courier Job" screen in the the web browser
- Uploading from another computer system via The PODFather Xtensible Markup Language Application Programming Interface (XML API)

Using the web browser, an existing customer can be found in the database by using one of two different lookup tools:

- The Lookup box allows for the name to be typed in. If a name matches any of the characters entered, it will appear below the box, to be clicked and selected.
- A Select from List option will show a list of all the customers in the database.

Collection and Delivery addresses are entered using the lookup tool or by entering new addresses and futher details such as Due By time, contact detaiks, and the items to be delivered are included for the Courier Job.

The user enters the job into the PODFather system.

The screenshot shows the 'New Courier Job' interface of the PODFather system. At the top is a navigation bar with a logo and several menu items: 'New Job', 'New Courier Job' (highlighted), 'Job Allocation', 'Weekly Planner', 'Tracking', 'POD Entry', 'PODs', 'Jobs', 'Customers', and 'My Account'. Below this are sub-menu items like 'Online Booking', 'Stock', 'Warehouse', 'Multi-Drop', 'Tariffs', 'Mileage', 'Invoices', 'Reports', and 'Products'. A 'Demo Account (Logout)' and 'Help & Messages' link are also present. The main heading is 'New Courier Job'. Below it, there's a 'Job Template' section with a dropdown set to 'Default Template' and a 'Select' button. The first step is '1. Select Customer', featuring a 'Lookup' field with a magnifying glass icon, a 'Select from a list' button, and an 'Add new' button. A list of search results is shown below, including 'ACME Construction' at '1 Any Street', 'Townsville', and 'AB12 3CD'. The second step is '2. Select Addresses', divided into 'Collection Address' and 'Delivery Address'. The 'Collection Address' section has a similar 'Lookup' field and shows results for 'ACME Scotland' at '23 High Street, Floor 2' with postcode 'GL1 N2N'. The 'Delivery Address' section has a 'Lookup' field containing the word 'custom', a 'Select from a list' button, and an 'Add new' button. A dropdown menu is open below the 'custom' entry, showing 'Customer address, 1 High Street, London'. At the bottom of the form is a yellow button labeled 'Get mileage (by road)'.

Menu Item	Sub-Menu Item
New Job	Online Booking
New Courier Job	Stock
Job Allocation	Warehouse
Weekly Planner	Multi-Drop
Tracking	Tariffs
POD Entry	Mileage
PODs	Invoices
Jobs	Reports
Customers	Products
My Account	

New Courier Job

Job Template: Default Template [Select]

1. Select Customer

Lookup: [Search] | Select from a list | Add new

ACME Construction
1 Any Street

Townsville
AB12 3CD

2. Select Addresses

Collection Address

Lookup: [Search] | Select from a list | Add new

ACME Scotland
23 High Street
Floor 2
GL1 N2N

Delivery Address

Lookup: custom | Select from a list | Add new

Customer address, 1 High Street, London

Get mileage (by road)

Allocating Drivers to the Courier Jobs

The user creates a run, assigns it to a driver, and adds the newly-created job to the run.

The created job then enters into the queue of “Unallocate Jobs” until it is assigned to a series of jobs called Run and a Driver who will take that run.

Assigning the jobs is made simple with a drag-and-drop interface.

The job is dragged onto an existing run for a driver or a new run can be created and the job then be dragged onto the new run.

The screenshot shows the 'Allocate Jobs' interface. At the top is a navigation bar with links: New Job, New Courier Job, Job Allocation (active), Weekly Planner, Tracking, POD Entry, PODs, Jobs, Customers, My Account, Invoices, Reports, Products. Below the navigation bar is a header bar with 'Demo Account (Logout)' and 'Help & Messages'. The main content area is titled 'Allocate Jobs' and is divided into three panels. The left panel, 'Unallocated Jobs', contains a 'Filter' button and a job card: 'Delivery from Glasgow', '121389 for 30/12/2009 17:00', 'ACME Construction', 'Customer address', and '1 result'. The middle panel, 'Runs', has a dropdown menu set to 'Glasgow' and a 'Create Run' button. It also has a 'Filter' button and a job card: '04/06/09 from Glasgow', '30/12 Glasgow Run 1', 'Driver: Unallocated', and '0 jobs'. A '1 result' label is at the bottom. The right panel, 'Run Details', shows '30/12 Glasgow Run 1' and a red message: 'This Run has no Driver allocated to it. Allocate Driver?'. A yellow job card is being dragged from the 'Unallocated Jobs' panel to the 'Runs' panel.

The run is then assigned to a driver using a drop down list of available drivers.

Once the driver has been assigned to the run, the driver will be able to upload all jobs associated with that run.

The screenshot shows the 'Allocate Jobs' interface after a driver has been assigned. The 'Unallocated Jobs' panel now shows 'no results'. The 'Runs' panel shows the same job card as before, but the 'Driver' is now 'Broom, AI' and the 'jobs' count is '0/1 job'. The 'Run Details' panel shows the driver 'Broom, AI' in a dropdown menu and an 'Allocate' button. The job card in the 'Run Details' panel now shows a green checkmark next to the delivery information.

The Handheld Interface

The driver receives the run onto the mobile device, completes the job, and sends the signature and any details back to the PODFather.

When the driver first logs in, any new jobs that have been allocated to the driver will be picked up by the mobile device. The job details are downloaded and the details are held in a local database for the driver to edit.

Whenever a job is completed, the driver can choose to send the job and receive any new jobs that have been allocated.

After logging in, the driver selects a job from the list of allocated jobs, fills out the delivery details, takes photographs (if required) and captures the customer signature.

The signature and job details are then automatically uploaded back to the web application for the head office to view, print, fax or email.

The handheld interface consists of five main screens:

- Login:** Features the PODFather logo, fields for Username, Password, and Vehicle, and a Submit button.
- List jobs:** Displays a list of jobs for the driver. Example Run:

Site Name	Date	Time	Items
delivery	16/04	17:00	1
- View job 678:** Shows job details for a new customer.

From	To
Collection	delivery
Collection address 1	delivery address 1
Collection city	delivery city 1

FAO: Martin Adams
Department: Catering
Job Type: Delivery
Due by: 16/04/09 17:00:00

Job description	Qty
4011, Banana	50
- Examining item:** Shows a photo of a banana and a 'Take Photo' button.
- Delivery:** Shows the signature of John Smith and a 'Complete' button.

View POD and Invoicing

The courier company's client would like notification that the delivery was signed for.

From the "View PODs" screen, the staff user is able to create PDFs of the PODs and fax/email them to others. The delivery POD can be viewed and emailed directly to the courier's client.



New JobNew Courier JobJob AllocationWeekly PlannerTrackingPOD Entry

Online BookingStockWarehouseMulti-DropTariffsMileage

PODsJobsInvoicesReports

CustomersMy AccountProducts

Demo Account (Logout)

Help & Messages

POD

POD collected by Test Driver at 16/04/2009 10:14

Signed for by John Smith

Type email address here

Type fax number here

Create PDF

Email PDF

Fax PDF



Delivery Notice

Valley Technology Development
44 St. Mary's Street
Edinburgh
Lothian
EH1 1SX

Tel: +44 (0)131 553 0400
Fax: 0870 164 1058
E-Mail: podteam@valleyt.co.uk
Company Reg No: SC205666

Depot:
Depot 1

<u>Invoice Address:</u> New Customer Customer address 1 Customer city customer region customer postcode	<u>Collection Address:</u> Collection Collection address 1 collection city	<u>Delivery Address:</u> delivery delivery address 1 delivery city 1
--	---	---


Job No: 678 / 604	Delivery contact:
Order No:	Contact Tel No:
Order Date: 16/04/2009 09:59	Department:
Run Name Example Run	

ProductCode	Description	Order Qty	Del. Qty
4011	Banana	50.00	50.00
 16/04/09 10:04:58			
Total Qty Delivered			50.00

Delivered by: Test Driver	Travel time:
Delivery scheduled for: 16/04/2009 17:00	Waiting Time:
Delivery completed on: 16/04/2009 10:14	Break Time:
Payment: N/A - Invoice	Start Time:
Comment: Job OK	Finish Time:
Details:	Chargeable time: 00:00

Received by: John Smith

Customer Signature:

[New Job](#)
[New Courier Job](#)
[Job Allocation](#)
[Weekly Planner](#)
[Tracking](#)
[POD Entry](#)

[PODs](#)
[Jobs](#)

[Customers](#)
[My Account](#)

[Online Booking](#)
[Stock](#)
[Warehouse](#)
[Multi-Drop](#)
[Tariffs](#)
[Mileage](#)

[Invoices](#)
[Reports](#)

[Products](#)

[Demo Account \(Logout\)](#)
[Help & Messages](#)

Filter

Create PDF


<input type="checkbox"/>	Job #	POD #	Date Signed	Customer	Site	Run Name	Job Type	PO	Your Ref	Driver
<input type="checkbox"/>	121390	1 POD 18337	04/06/2009 10:23:59	Chester Enviromental	Chester Landfill	04/06 Eurozone Run 1	Collection			Virgil Sollozzo
<input type="checkbox"/>	121369	1 POD 18336	03/06/2009 13:51:09	ATS Euromaster Limited	Hargreaves	David Barclay 03/06/2009	Delivery			David Barclay
<input type="checkbox"/>	121340	1 POD 18332	03/06/2009 10:52:59	Valley Tech (Customer)	Valley Technology	03/06 Eurozone Run 1	Delivery			Michael Corleone
<input type="checkbox"/>	121384	1 POD 18335	03/06/2009 9:50:20	Angelique Floral Designers	Angelique Floral Designers	03/06 Leith Run 1	Delivery			test user
<input type="checkbox"/>	121385	1 POD 18334	03/06/2009 9:49:32	Angelique Floral Designers	1 vldia Price	03/06 Leith Run 1	Delivery			test user

Sending Invoices

The courier company needs to send out invoices to the customers who pay by invoice.

The “Invoicing” section of the PODFather integrates with the SAGE accounting package. PODs can be turned into draft invoices and uploaded in batches to SAGE.

Once invoices have been uploaded to SAGE, they are no longer drafts and can no longer be edited. They can then be printed in batches or individually and mailed.



[New Job](#)
[New Courier Job](#)
[Job Allocation](#)
[Weekly Planner](#)
[Tracking](#)
[POD Entry](#)

[PODs](#)
[Jobs](#)

[Customers](#)
[My Account](#)

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[Mileage](#)

[Invoices](#)
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[Products](#)

[Demo Account \(Logout\)](#)
[Help & Messages](#)

Uninvoiced PODsInvoicesBatches

Invoices

Filter

<input type="checkbox"/>	Invoice #	Customer	Date	Invoice Amount	In Batch	Actions
<input type="checkbox"/>	VT94	ATS Euromaster Limited	01/06/2009 13:54	75.00	✓	
<input type="checkbox"/>	VTXXX	ATS Euromaster Limited	01/06/2009 13:54	120.00		
<input type="checkbox"/>	VT93	ATS Euromaster Limited	01/06/2009 13:43	20.00	✓	
<input type="checkbox"/>	VT92	Build-It Merchants Ltd	19/05/2009 09:22	20.00	✓	

Displaying 4 results
You currently have 0 PODs selected

[Create Batch](#)
[Deselect all Invoices](#)

Valley Technology Development
44 St. Mary's Street
Edinburgh, Lothian, EH1 1SX
T: +44 (0)131 553 0400 F: 0870 164 1058
podteam@valleyt.co.uk
Company No: SC205666



New Customer
Customer address 1
Customer city
customer region
customer postcode

Invoice No.	POD56
Date	16/04/2009
A/C Ref	

Invoice

Job#/POD#	Type	Signed At	Signed By	Net.	V.A.T
16/04/2009					
Collection: Collection, Collection address 1, collection city - Delivery: delivery, delivery address 1					
678/604		16/04/2009 10:14:40	John Smith	15.00	2.25

I have updated this line1
I have updated this line2
I have updated this line3
I have updated this line4

Sub Total	15.00
VAT 15%	2.25
Gross	17.25