Web Application User Manual

PODFather

Version 1.24

Valley Technology Ltd.

What is The PODFather?

The PODFather is a mobile solution that tracks your orders from despatch to delivery, streamlining your business service both in the office and on the road. Simple to set up, easy to use and quick to update, The PODFather captures and exchanges information wherever you are.
And because you only pay for what you use, The PODFather adapts to the needs of your business, whatever its size.
Whether it's to log an electronic signature, scan a barcode or take a picture of a problem on site, The PODFather keeps you in the know.

What does The PODFather do?

- Customer database: keep track of all your customers details and site addresses
- Job booking: enter customer orders using a simple online form, or upload from an existing back-office system
- Driver allocation: drag-and-drop allocation makes it easy to plan for today or for the whole week
- Electronic signature capture: drivers confirm delivery with a customer name and signature. Pictures can also be taken as evidence
- Real-time PODs: PODs are received as soon as the delivery is made, with options to auto-email them to your customer
- Online customer portal: improve your customer service through this free portal for online POD retrieval
- Accounts integration: integrates fully with your existing back-office systems

What do you need to get started?

- PC with a web browser and internet connection for booking and allocating jobs
- A PDA running either Windows Mobile 5 or 6

What does it cost?

- Account set up is free
- Integration and customisation (if required) at a fixed daily rate
- Then just pay-as-you-go for each job signed in the system

No fixed contracts, no annual license fees, just pay-as-you-go.

Contents

Section 1

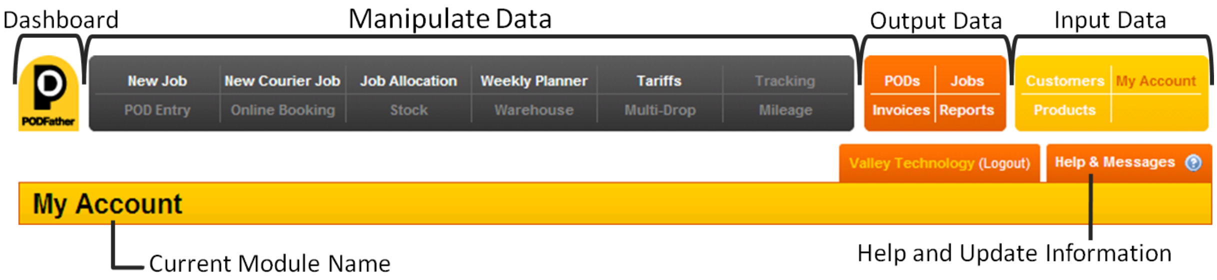
Introduction

The PODFather Web Portal is a means of providing information to interested parties across the World Wide Web. Users will be able to securely log in to the web portal from any location providing an internet connection and find information relevant to the user, such as PODs and reports. Users will also be able to create jobs and allocate drivers to those jobs.

1.1 Layout

The Navigation Bar

The main navigation of the PODFather



Buttons have been organised to keep similar tasks together in blocks of buttons.

PODFather Logo The PODFather Logo will bring you back to the dashboard

Black Creating jobs, job allocation, and other information manipulation can be found in the block of black buttons. The active button text is yellow

Orange The output data of the PODs, Reports, Invoices, and Completed Jobs are found together in the block of orange buttons. The active button text is yellow

Yellow Data entry such as Customers, Products, and Account information can all be found in the block of yellow buttons. The active button text is red

When you click on a button to change module, the text colour of the active module will be changed. The module that is currently active will also be the title of the Module Page.

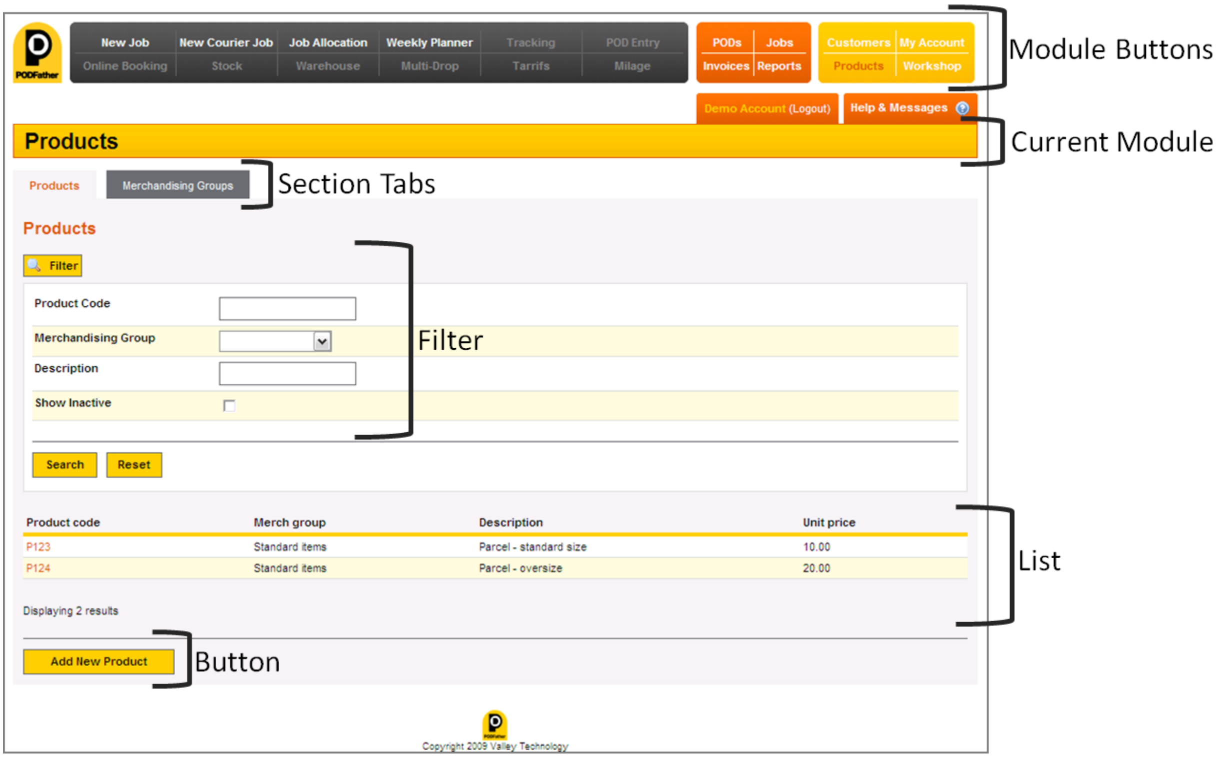
Optional Modules

Buttons that are greyed out are optional modules for your PODFather system which are not enabled.

When you click on a non-enabled module button, you will see a preview of the module and a description of the functionality of that module.

To enable a module, contact your Account Manager.

The Page Layout



Module buttons Click on the module button to move to a different module page

Section Tabs Click on the section tab to move to a different section within a module

Module Filter Use to filter lists (*See the following section on Filters*)

List Lists of information, can be filtered

Button Buttons are represented as Button for the purposes of this User Guide

1.2 Filters

Filters are used to shorten a list to only the relevant items. The filter shows the list containing only the items which match the information entered into the filter. If you wish to remove the filter on the list, click the Reset button

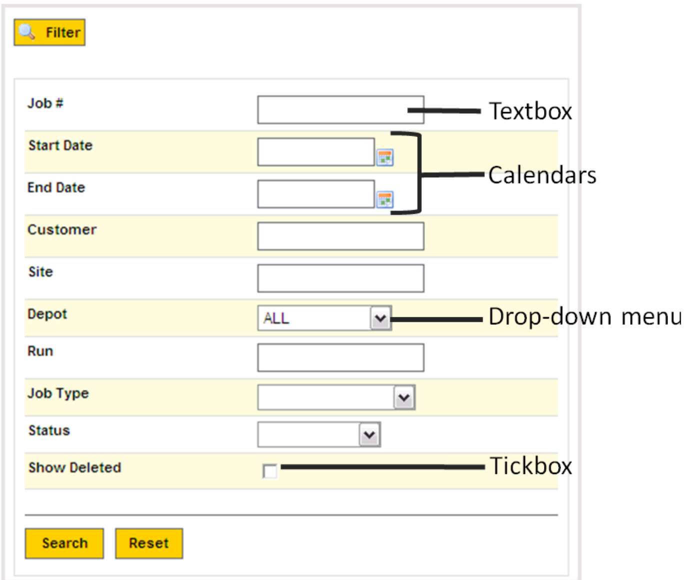
Filters may employ a combination of input methods:

Text Box Type text into the text box. The list will be filtered to only items that contain that text

Tick box Click once on this box to tick it. If the tick box is asking "`Inactive?`", then by ticking the tickbox you are choosing "Yes, include inactive items in the search."

Drop-Down Lists Text boxes that also have an arrow pointing downward are drop-down lists. Click once on the textbox and a list will appear below it. Click on an item in that drop-down list and your selection will be set.

Calendar Type dates into the box or use the calendar utility. For more information on the calendar utility, see section 1.3



Using a filter

1. Click the Filter button that can be found above each list
2. Fill in the information you wish to filter by. *A list will only be filtered by the given details. Not all text boxes need to be filled out.*
3. When you have entered all the information, click the Search button. The filtered list will appear below

1.3 Entering dates using the Calendar

Dates can be entered into the date text boxes in the format DD/MM/YYYY.

The Calendar utility allows you to select the date from a calendar.

To use the calendar, click the calendar button to the right of the date text box.

A calendar will pop-up, showing the current month.

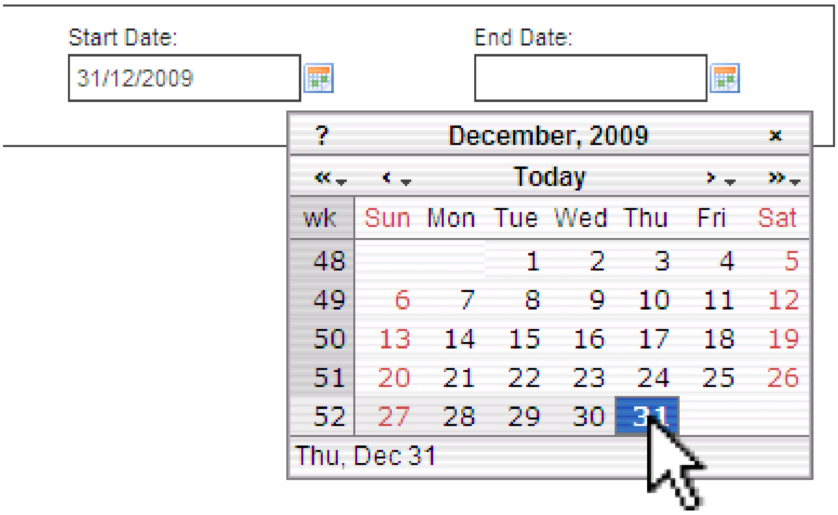


Figure 1.1: Using the Calendar tool to select the 31st December 2009

To navigate through years, use the $<<$ Double Arrows $>>$.

To navigate through months, use the $<$ Single Arrows $>$.

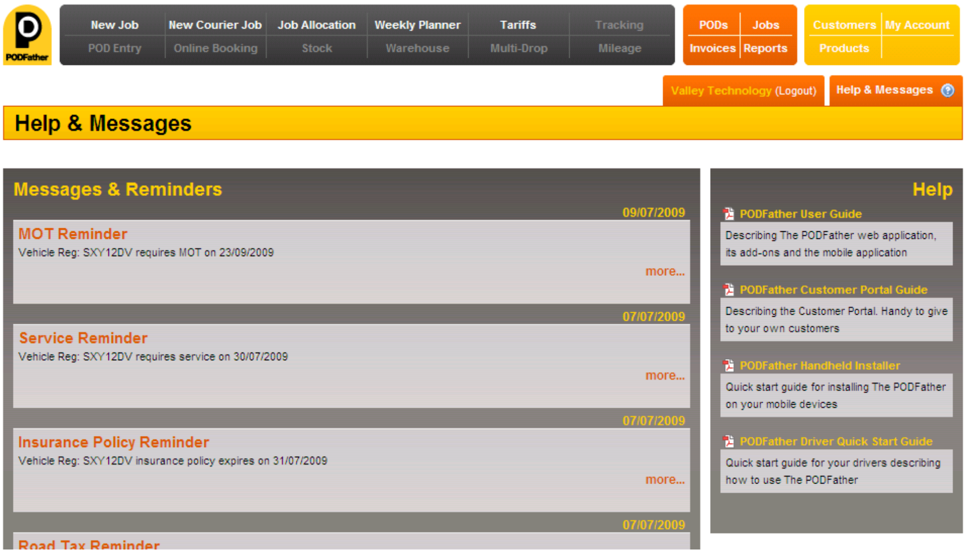
If you wish to return to the current month, click `Today`. If you click `Today` when you are viewing the current month, the current date will be entered into the date text box and the calendar will close.

When you are viewing the appropriate month, click the day you wish to be entered into the date text box. The date will be entered and the calendar will close.

1.4 Help & Messages

Clicking on the **Help & Messages** button in the Navigation Bar will bring you to a page with links to the various help documents for The PODFather, as well as any system update notifications, messages, and reminders.

If you have the Vehicles Module enabled, any reminders for upcoming expiration dates or inspections will be listed here, as well as on the dashboard after logging in.



Section 2

Dashboard

Your Dashboard is the first module you will see when you log in. You can access the dashboard from any page by clicking The PODFather logo at the top left of the page.

The Dashboard will list your top customers, top customer sites, top drivers by the number of PODs, and notifications.

The Dashboard is also complete with quick action links.

2.1 Top Customers by Jobs

- Click on a name to view/edit customer and site details
- All Customers Brings you to a list of all the customers

  Click on a customer to edit customer and site details
- New Customers Brings you to a New Customer form
- Change the time period using the drop-down to view the past day, week, fortnight, or month

2.2 Top Sites by Jobs

- View sites by recent activity - Past day, week, fortnight, or month
- Click on a name to view/edit site details
- Create new jobs for a site
- Change the time period using the drop-down to view the past day, week, fortnight, or month

2.3 Jobs Awaiting Runs

- This is a notification section with a quick link to the Allocate Job page

2.4 Top Drivers by PODs

- View the drivers who have submitted the most PODs
- Click on a driver to view/edit the driver details. Driver details can also be accessed in the My Account section

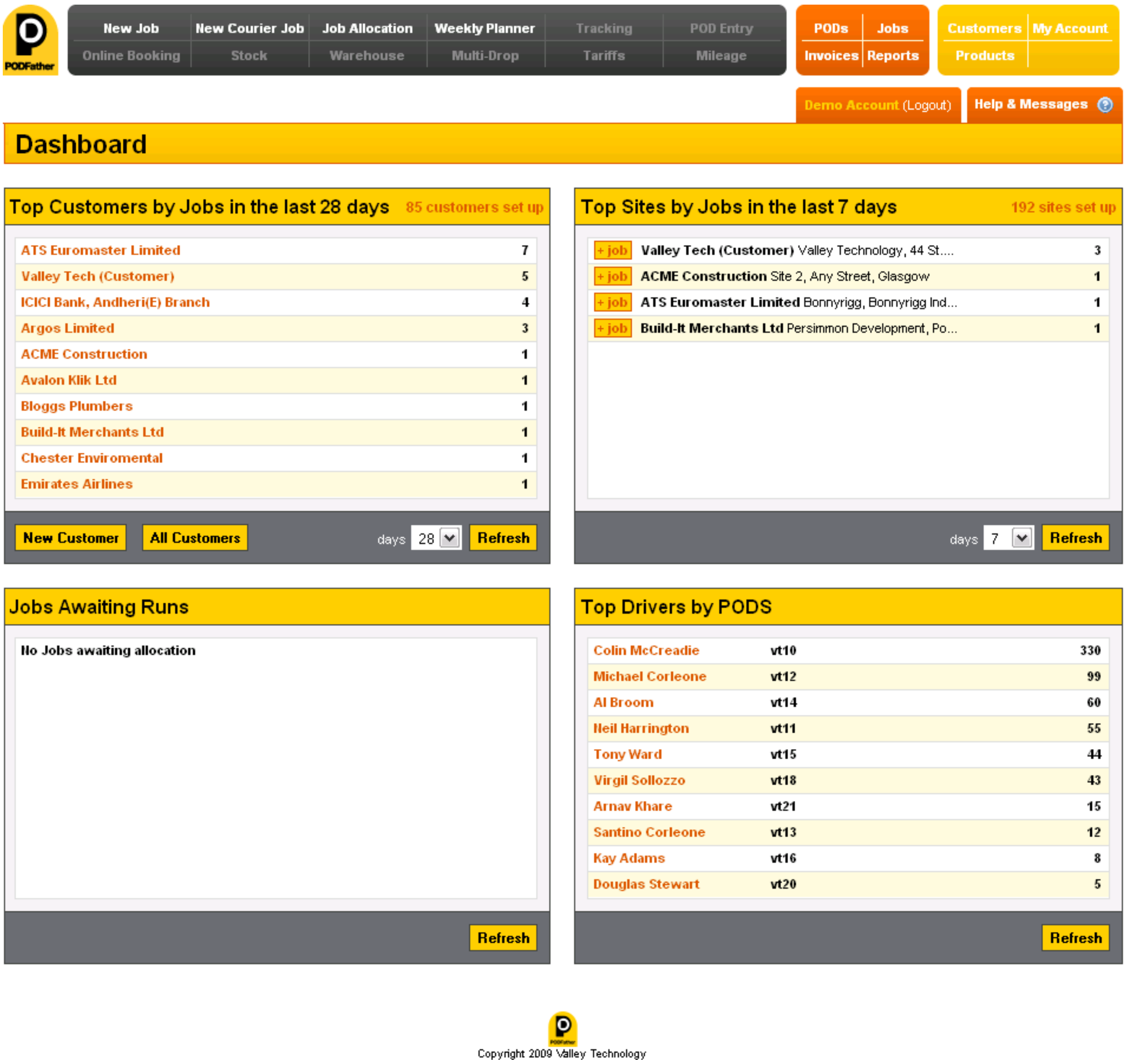


Figure 2.1: PODFather Dashboard

Section 3

My Account

Within your **My Account** module, you can change or view the settings and details for your Company, PODFather Users, tariffs and surcharges, and vehicles.

3.1 Company

3.1.1 Edit Company Details

1. Within **My Account**, click on the **Company** section tab
2. Click the Edit Company Details button
3. Fill in or edit the required details

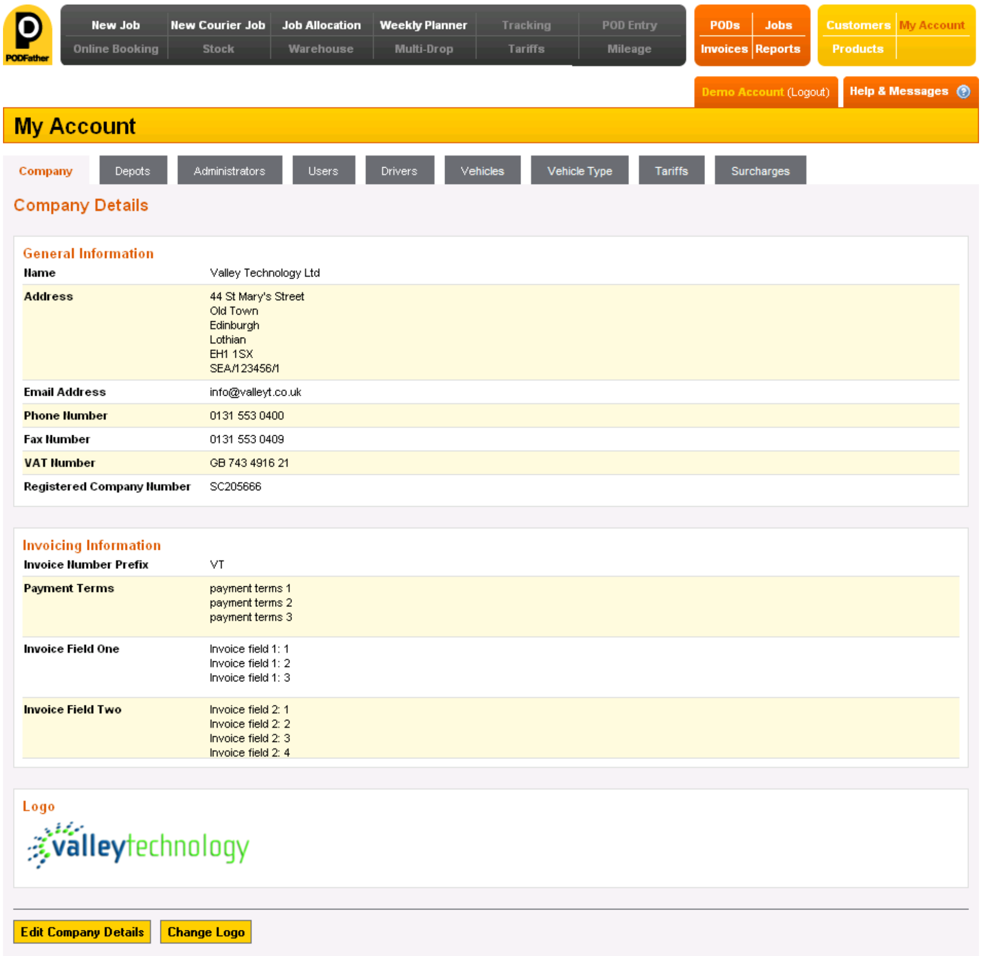
3.1.2 Invoicing Information

Invoicing information will be greyed out if you do not have the Invoicing Module enabled. To enable the Invoicing Module, contact your Account Manager. For information on the Invoicing Information section of the My Account tab, see section **14: Invoicing** section on page 62

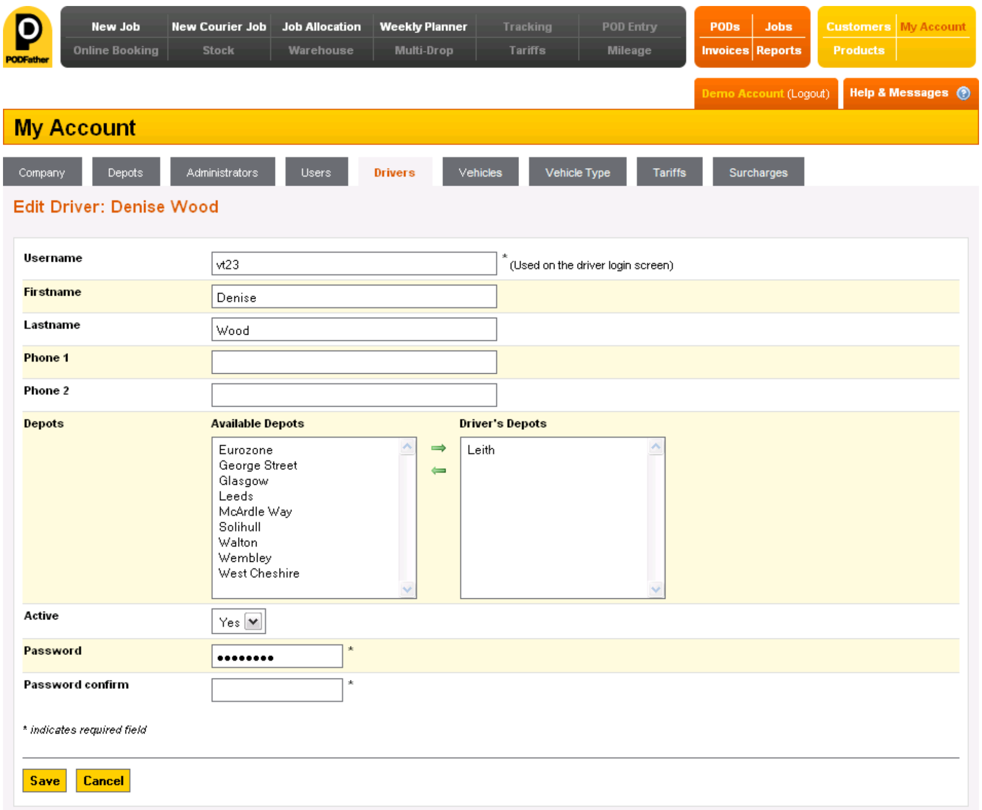
3.1.3 Change Company Logo

An image roughly the size 220 pixels wide by 50 pixels tall is ideal. The logo will be used in the headers of POD PDFs so the logo should not be much larger than this.

1. Within **My Account**, click on the **Company** section tab
2. Click the Change Logo button
3. Click the Browse... button
4. Select the image you wish to use
5. Click the Upload logo button



(a) Company Tab



(b) Editing a Test Driver

Figure 3.1: My Account

3.2 Depots

1. Within **My Account**, click on the **Depots** section tab
2. Click the Add Depot button to create a new depot
3. Click the Depot Name to edit an existing depot
4. Fill in or edit the details
5. Click the Save button

3.3 Administrative Users

Administrators can:

- View all depots, users, jobs, and time analysis reports
- Create new Administration Users, Normal Users, and Drivers
- Create new Depots and assign Ordinary Users and Drivers to the Depots
- Create customers and sites and assign the default depot to be used for each customer

1. Within **My Account**, click on the **Adminstrators** section tab
2. Click the New Administrative User button to create a new administrative user
3. Click the Administrator Name to edit an existing administrative user
4. Fill in or edit the details

   > The Depots section specifies which depots are viewable by the user. Click the depots within `Available Depots` and click the right arrow to move that depot into `User's Depots`.

5. Click the Save button

3.4 Normal Users

1. Within **My Account**, click on the **Users** section tab
2. Click the New User button to create a new user
3. Click the Name to edit an existing user
4. Fill in or edit the details

   > The Depots section specifies which depots are viewable by the user. Click the depots within `Available Depots` and click the right arrow to move that depot into `User's Depots`.

5. Click the Save button

3.4.1 Customer Portal Users

The Customer Portal allows a customer to view the PODs associated with that customer. If a unique Portal Username and Portal Password are created for the customer, that customer will be able to view only their PODs.
For further information on using the Customer Portal, see the separate “Customer Portal User Guide”.

3.5 Drivers

1. Within **My Account**, click on the **Drivers** subsection tab
2. Click the Add a new Driver button to create a new driver
3. Click the Name to edit an existing driver
4. Fill in or edit the details

   > The PODFather ID is the driver's Login name on the handheld.
   >
   > The Depots section specifies which depots the driver can do jobs for. Click the depots within `Available Depots` and click the right arrow to move that depot into `Driver's Depots`.

5. Click the Save button

3.6 (Optional) Vehicles

Information regarding upcoming expiration dates and service appointments will be given as notifications when the user logs in on the day of the notice. A reminder date can be set for expiration dates so registrations and policies can be updated before they expire.(*See section 1.4 on page 9 for more information on messages and reminders.*)

3.6.1 Create a new vehicle

From the **Vehicle** tab within the **My Account** module, click the Add New Vehicle button. You will be brought to a form for various vehicle dates and details.

Vehicle Registration (Required)Enter the vehicle registration number without any spaces

VIN (Optional) Enter an Vehicle Identification Number

Type (Required) Select the Vehicle Type from the drop-down list(see section 3.7 for creating and editing Vehicle Types)

MOT Date (Optional) The date for the next MOT test

MOT Reminder (Optional) A date to be reminded of the upcoming MOT test

Date of Last Service (Optional) The date of the last service

Date of Next Service (Optional) The scheduled date for the next vehicle service

Date of Next Service Reminder (Optional) A date to be reminded of the upcoming vehicle service

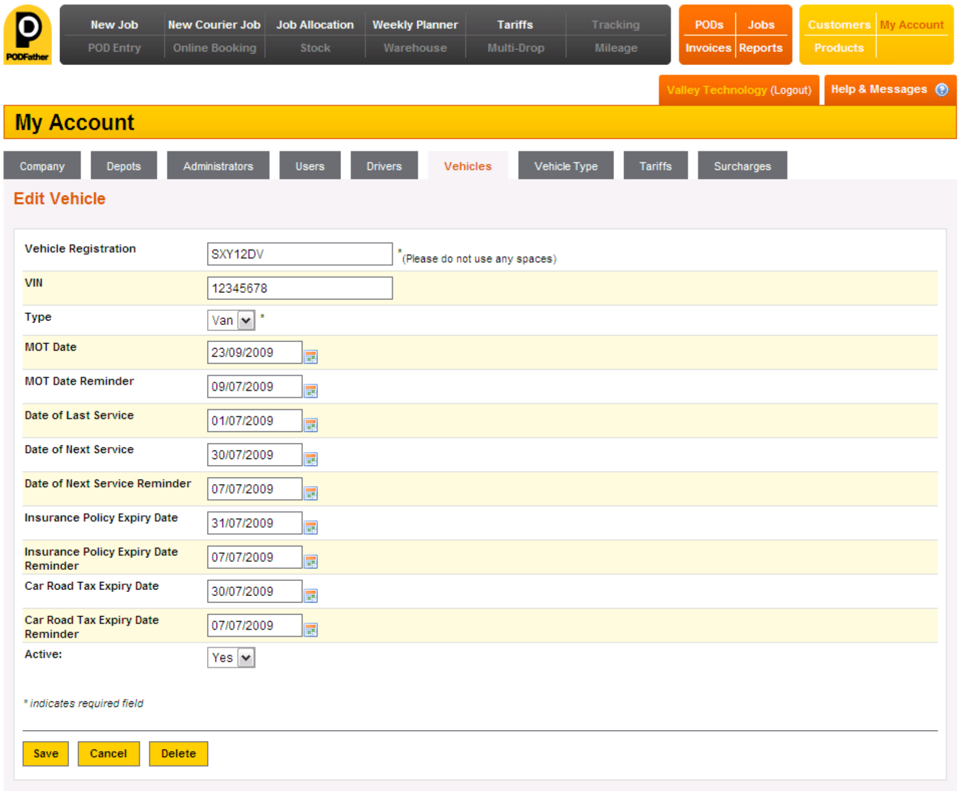
Insurance Policy Expiry Date (Optional) The date the Insurance Policy will expire

Insurance Policy Expiry Date Reminder (Optional) A date to be reminded of the Insurance Policy expiry

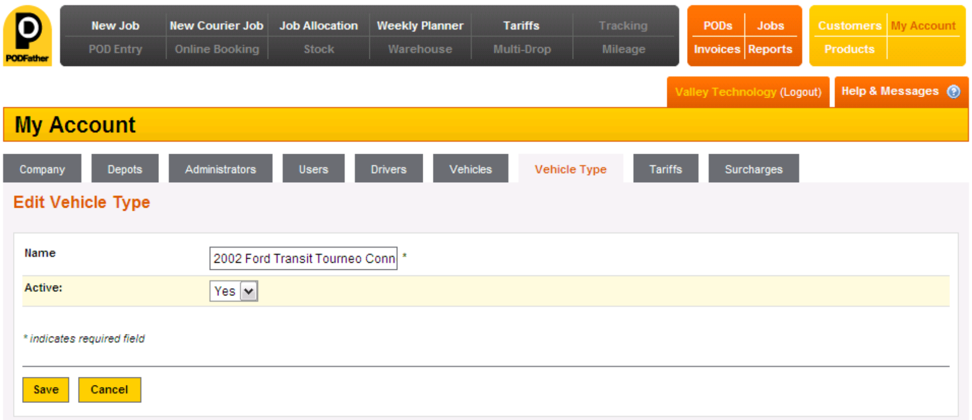
Car Road Tax Expiry Date (Optional) The date the Car Road tax will expire

Car Road Tax Expiry Date Reminder (Optional) A date to be reminded of the Car Road Tax Expiry

When all the required information and all known dates are filled in, click the Save button.



(a) Editing a Vehicle



(b) Editing a Vehicle Type

Figure 3.2: Vehicles and Vehicle Types

3.6.2 Update or deactivate a vehicle

From the **Vehicle** tab within the **My Account** module, click the name of the vehicle you wish to update. You will be brought to the form to change any of the information. To set the vehicle to inactive, select ”Inactive” from the drop-down list. Click Save when you have updated all the vehicle information.

3.6.3 Delete a vehicle

From the **Vehicle** tab within the **My Account** module, click the delete button in the Actions column to the right of the vehicle you wish to delete. You will be asked to confirm the delete - click Yes.

3.7 (Optional) Vehicle Types

If the Vehicle Module is enabled, Vehicle Types is required. If you wish to enable the Vehicle Module, speak to your accounts manager.

Vehicle types are user-created vehicle categories. These types are then assigned to vehicles entered in the Vehicles section and are used for assigning Tariffs which are vehicle type-specific.

These types may be as generic (‘Van’) or specific (’2002 Ford Transit’) as required for the purposes of your business.

Vehicle types cannot be deleted but can be set as inactive. A vehicle type that is no longer in use should be set to inactive to remove it as an option in a drop-down list. Vehicles which are associated with inactive vehicle types will remain active until they, too, are set to inactive.

3.7.1 Create a new Vehicle Type

From the **Vehicle Type** tab within the **My Account** module, click the Add New Vehicle Type button. You will be given a form to enter a name for your vehicle type. Click Save when you have entered your vehicle type.

3.7.2 Edit or deactivate a Vehicle Type

From the **Vehicle Type** tab within the **My Account** module, click the name of the vehicle type you wish to edit or deactivate. You will be given the form where you will be able to change the name or select ”Inactive” to deactivate the vehicle type. Click Save when you have finished.

3.8 (Optional) Tariffs and Surcharges

For information on Tariffs and Surcharges, see section 7 on page 32.

Section 4

Customers

In the **Customers** module, customer and site details can be added, edited, or set to inactive.

> Customers and Sites cannot be deleted but can be set to inactive. Inactive customers and sites will not appear in the customer lists by default. To view the inactive customers, use Filter and tick the box marked `Show inactive?`.

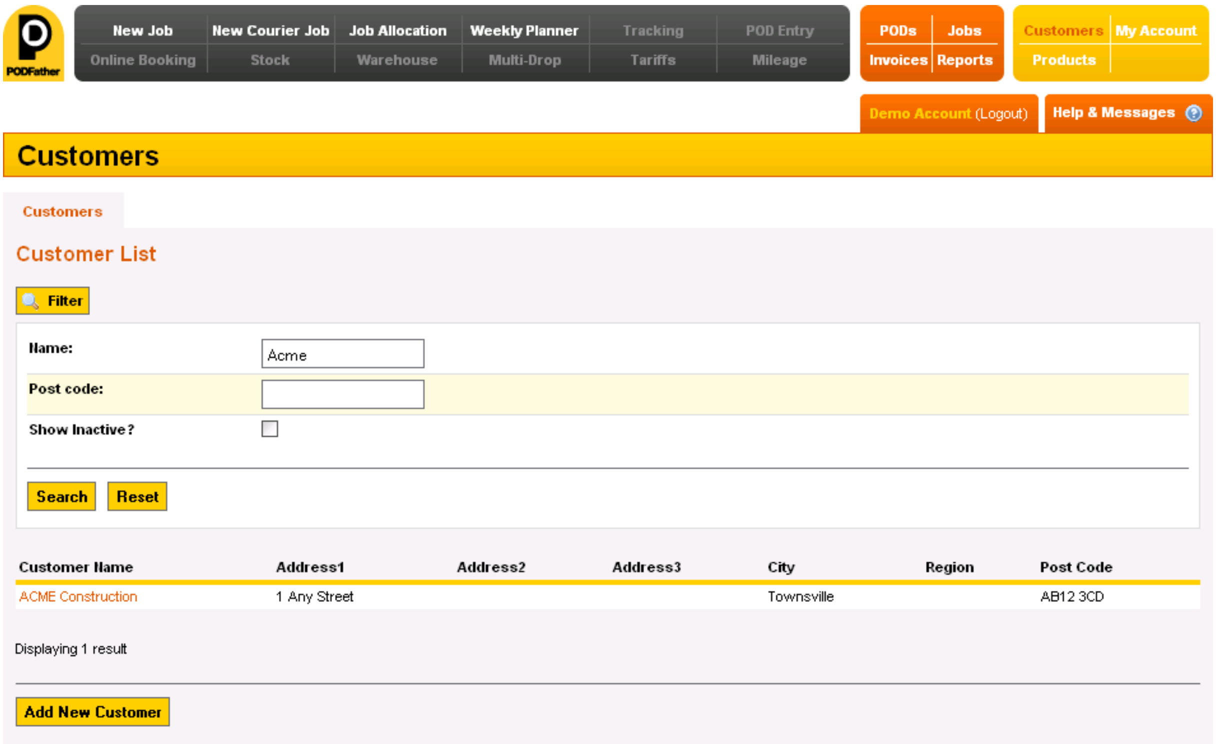


Figure 4.1: The Customers Tab

4.1 Creating or editing customers

4.1.1 Create a new customer

1. Below the list of customers in the **Customers** module, click the Add New Customer button
2. You will be brought to a "Create new customer" form

   Enter the details for the new customer
3. When the form is completed, click the Save button

   > A default site will be created for the customer using the customer's address.

4.1.2 View or edit a customer or the customer's related sites

1. (Optionally) Filter the customer list by clicking the Filter button and entering information to filter by.
2. Click on the Customer Name
3. View or edit details
4. Click Save when you are finished

4.1.3 View, edit, or create new sites

1. Click the **Sites** section tab after clicking on the Customer Name in the list of Customers in the **Customers** module
2. Click on the Site's Name to edit the site details or click Add New Site to fill in new site details

   > If a region has been set up, use the Customer Region drop-down to select a region for the site to be associated with. Customer users using the Customer Portal will only be able to see PODs from regions they have been associated with.
3. Click Save when you are finished

4.1.4 Set multiple sites to inactive

1. Click the **Sites** section tab after clicking on the Customer Name
2. Click the tickboxes beside all the sites you wish to set as inactive
3. Click the Deactivate Sites button at the bottom of the page

4.1.5 Create a new customer region

1. Click the **Regions** section tab after clicking on the Customer Name
2. Click Add New Region
3. Enter a name into the field and click Save

4.1.6 Edit an existing customer region

1. Click the **Regions** section tab after clicking on the Customer Name
2. Click name of the region
3. Edit the region name and click Save

4.2 Creating a customer user

The Customer Portal allows a customer to view the PODs associated with that customer. If a unique Portal Username and Portal Password are created for the customer, that customer will be able to view only their PODs. (*See Section 5 on page 23 for more information on how to use the Customer Portal.*)

1. Click the **Users** section tab after clicking on the customer name
2. Click Add New User
3. Complete the form, including name, email (which will be used as the user's Customer Portal login), and password

   > If a customer user has been associated with a region, that customer user will only see the PODs that have also been associated with sites in that region. If no region has been specified, the customer will see all the PODs.

4. Click Save when you have filled in all fields

4.3 Editing a customer user

1. Click the **Users** subsection tab after clicking on the customer name
2. Click Add New User
3. Update the customer user details
4. Click Save when the form is up-to-date

Section 5

The Customer Portal

The Customer Portal allows your customers to log in and view PODs that are relevant to them, print them out, or email them. Because the PODFather is real-time, your customers won't need to wait to view PODs. The Customer Portal will show the PODs as soon as they are sent back to The PODFather from the driver's handheld.

The PODFather Customer Portal is accessible from:
https://portal.thepodfather.eu

Enter in the customer user email and password and click Login.

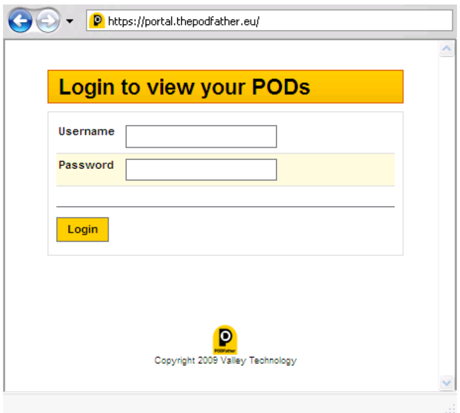


Figure 5.1: Logging into the PODFather Customer Portal

5.1 Viewing PODs

When you first log in, you will be viewing the View PODs section of the Customer Portal. This section will list all your available PODs.

Some of the jobs will have icons in the far right column:
- Photos included in POD
- The quantity delivered does not match order quantity OR job comments have been entered

5.1.1 View a POD

To view a POD as a PDF, click on the Job number. The POD PDF will appear in a new browser window.

To view a POD as a webpage in the same window, click on the POD number.

If you wish to download multiple POD PDFs to view them together, tick the boxes in the leftmost column next to the PODs you wish to download and click Create PDF.

To only view the photos of the POD, click the button in the rightmost column.

5.1.2 Email the POD as a PDF

To email a POD, tick the boxes beside the PODs you wish to email. In the lower-left corner of the window, there is a box for the recipient email address. Fill in the email address and click the Email PDF button.

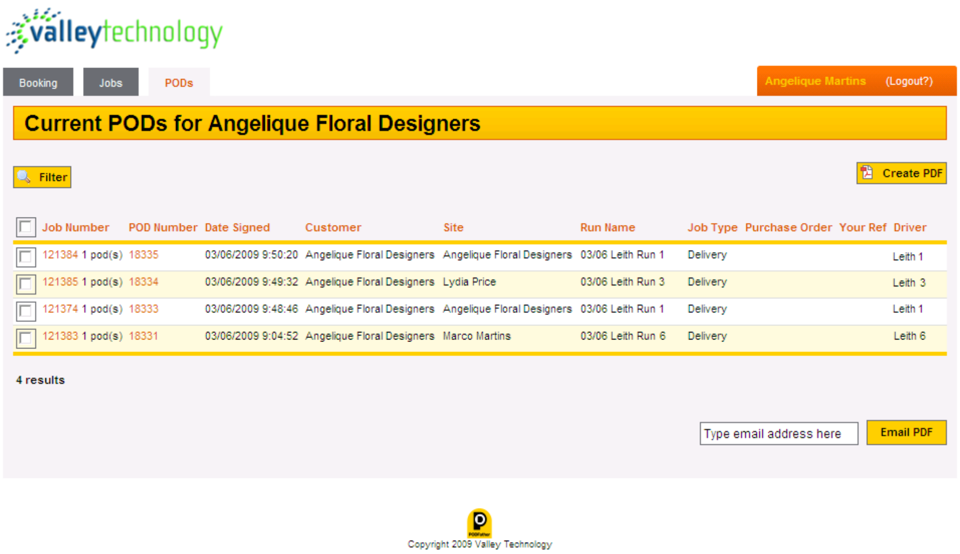


Figure 5.2: A list of available PODs for the customer

5.2 Booking Jobs

By clicking on the **Booking** tab, you will be able to book a job for the courier company. You will need to enter in collection and delivery addresses, some due-by dates and times, a descriptive comment about the type of delivery and/or any special instructions, and the total number of items to be collected. When all the required information is entered, click Save Job to save the job.

Jobs that have been booked will appear in the Pending section of the **Jobs** page both in the Customer Portal for the customer to view and the **Jobs** section of the main PODFather site where it will need to be confirmed. (*See Section 12.1 on page 56 for more information on confirming pending jobs created through the customer portal.*)

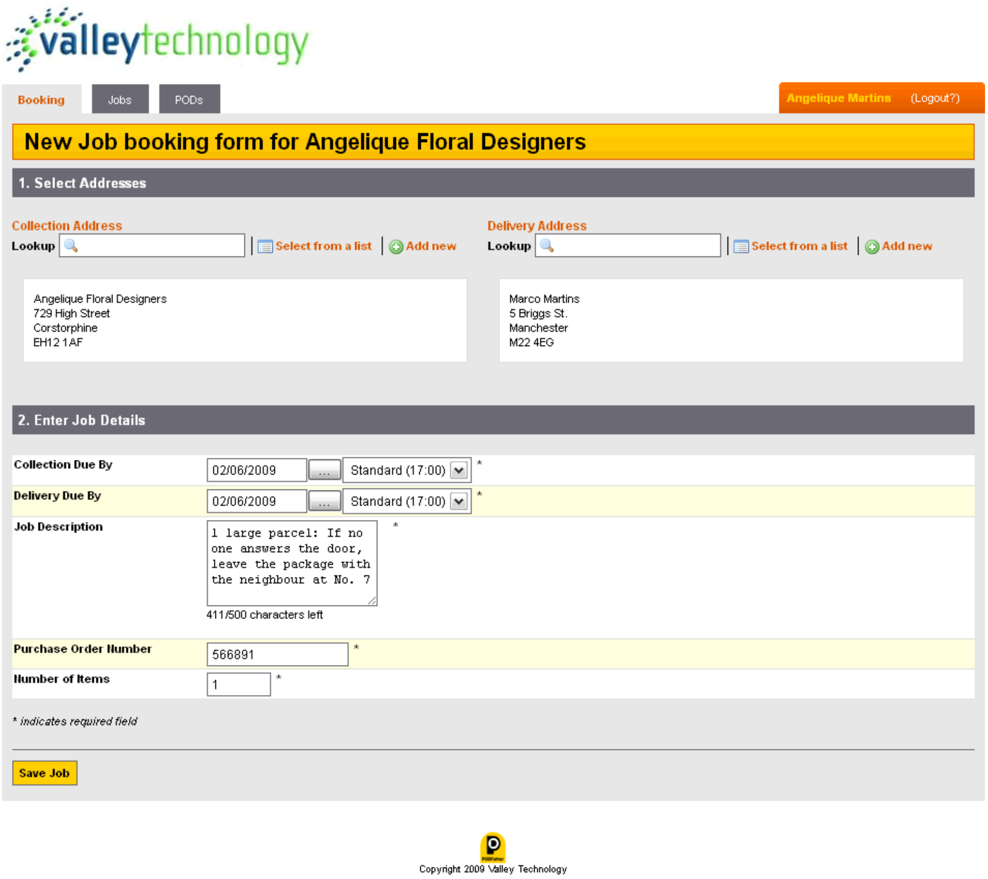


Figure 5.3: The Customer Portal Booking page

5.3 Viewing Current Jobs

The **Jobs** tab will bring you to a page to view the Jobs that are currently in-progress. Similar to the Jobs screen in the main PODFather, the Customer Portal's Current Jobs section organises the jobs based on their status - Processing, With Driver, and Complete. Complete jobs will not appear in the list unless the list is filtered to show only completed jobs. Jobs that have been completed will also be found in the **PODs** section as completed Jobs will have an associated POD.

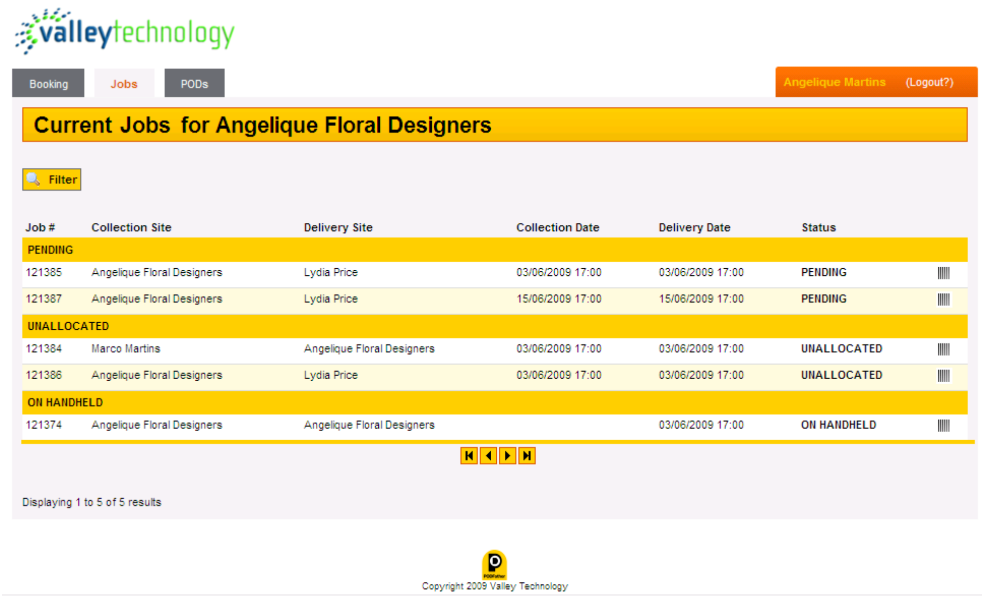


Figure 5.4: The list of all Jobs that are currently in-progress for the customer

5.3.1 Print a Shipping Label

Shipping labels can be created whilst on the Current Jobs page. To the right of the Job is a barcode icon. Click the barcode to be redirected to a PDF of the shipping label. The shipping label clearly shows the customer's address, the collection and delivery addresses, and the box number. If the job calls for multiple items, the PDF will contain multiple pages. This PDF can be then printed out and taped to the boxes.

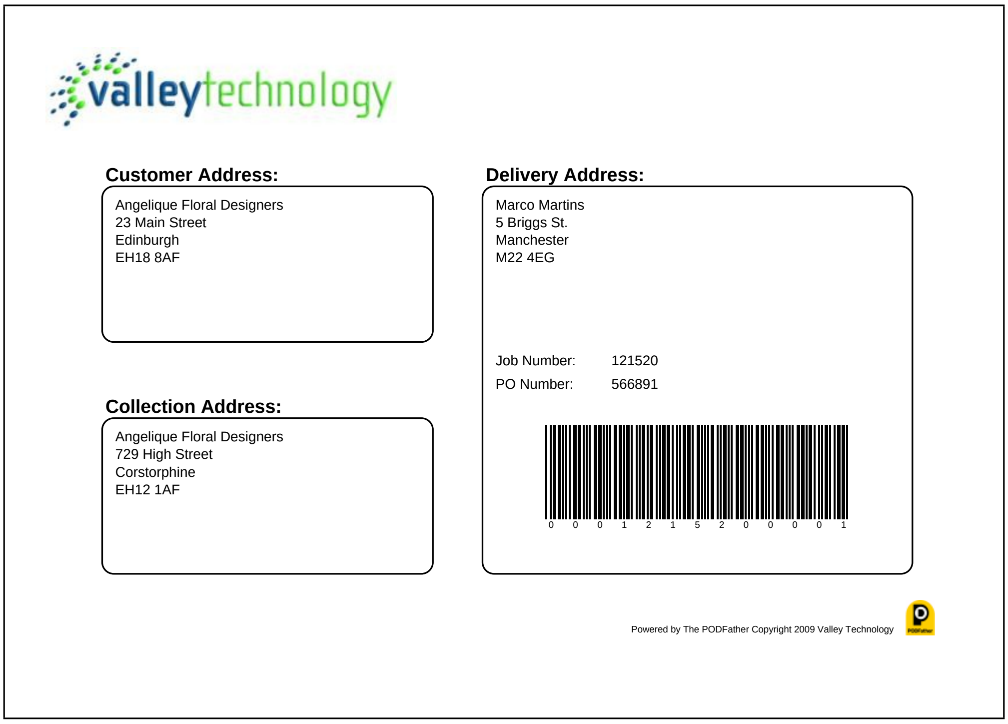


Figure 5.5: Sample shipping label

Section 6

(Optional) Products Database

To make a product list easily available when filling out the New Job form, the products must be added within the Products Database.
When creating a New Job, in lieu of typing in the Product Code, Product Name, and Price for each item, the user can

- Use the text box in the column "Product Code" to search for the product (*See Figure 6.1(a)*)
- Select the product from a list (*See Figure 6.1(b)*)
- Create a new product (*See Figure 6.1(c)*)
- Click the "Text" tab to enter text instead of a product item

6.1 Products

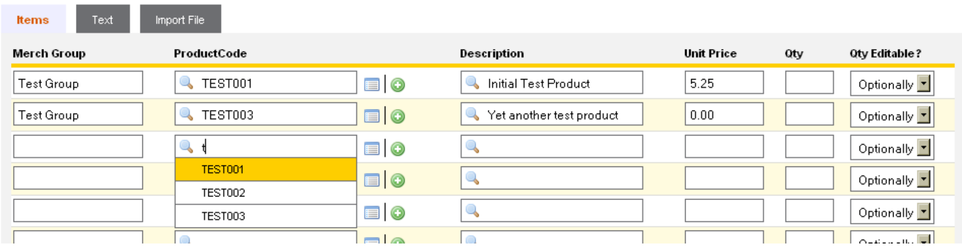
Click on the **Products** module button to access your Products Database.

6.1.1 To create a new Product

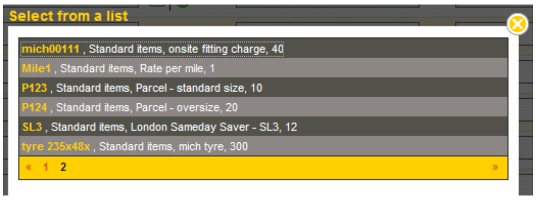
1. Click the Add New Product button
2. Select the Merchandising Group, Enter a Product code, a description, and a unit price
3. Click Save

6.1.2 To edit an existing Product

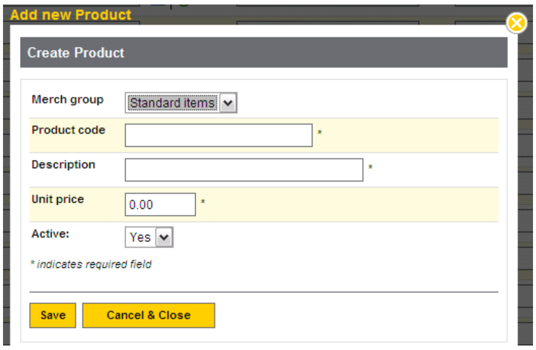
1. Click on the product number of the item in the list you want to edit
2. Edit the appropriate information
3. Click Save



(a) Search for Product

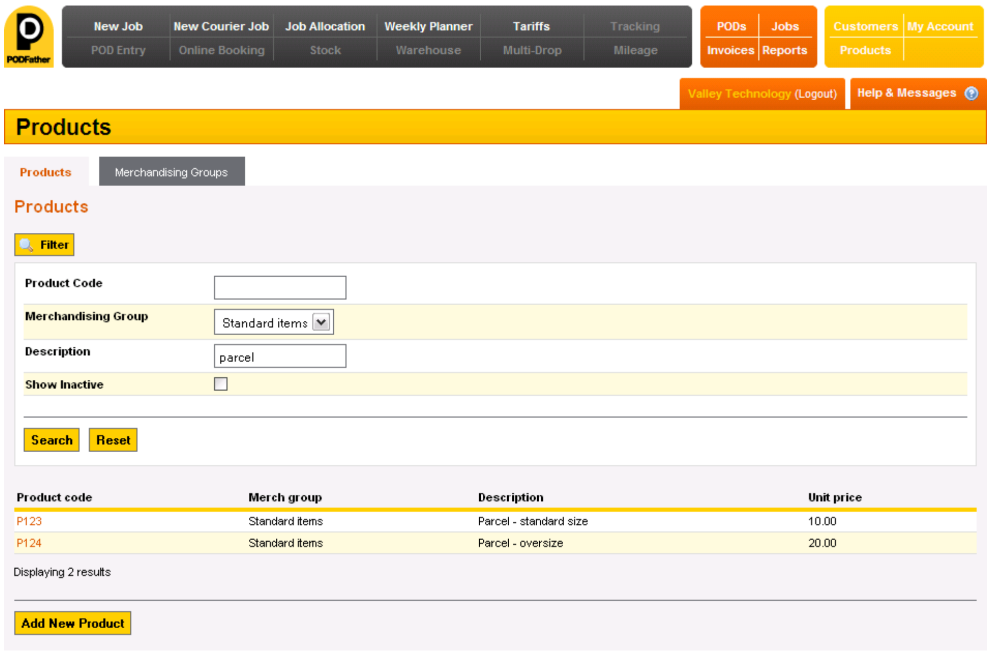


(b) Select Product from List

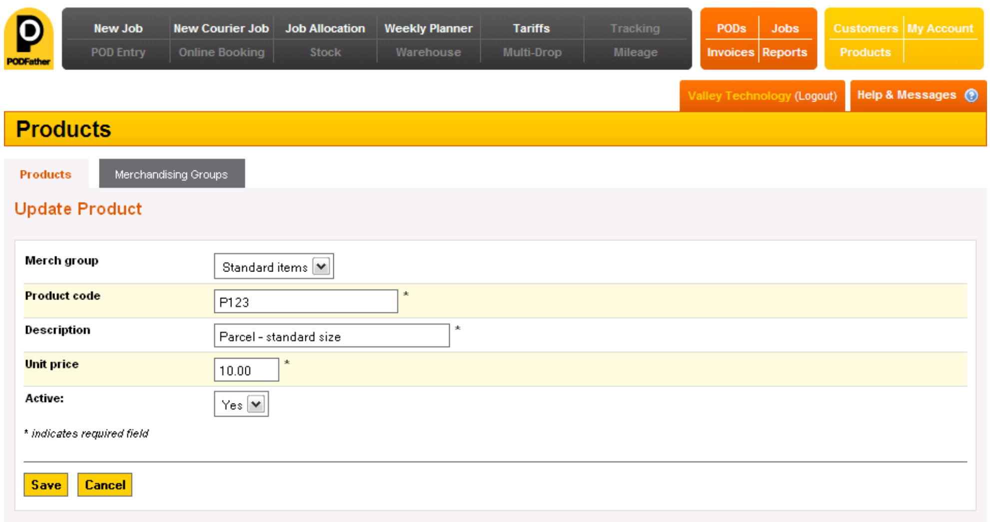


(c) Create New Product

Figure 6.1: Adding Products to an Order when creating a new Job or Courier Job



(a) Products Page



(b) Edit Product

Figure 6.2: View, Create, and Edit Products

6.2 Merchandising Groups

Merchandising Groups are primarily used to group products together for the ease of the driver using the handheld. When a driver opens a job description, products from different merchandising groups will appear in different tabs to keep the job easier to navigate on a small screen.

Merchandising Groups can also be used to filter the products available for a customer when creating a New Job or Courier Job. When creating a New Job, only the products in a group marked “ALL” or for the selected customer will appear in the product list.

6.2.1 Create a new Merchandising Group

1. Click the **Merchandising Groups** section tab within the **Products** module
2. Click the Add New Merchandising Group button
3. Enter the name of the new Group
4. Select the customer for the Merchandising Group using the drop-down list

6.2.2 Edit an existing Merchandising Group

1. Click on the name of the test group to be edited
2. Edit the details

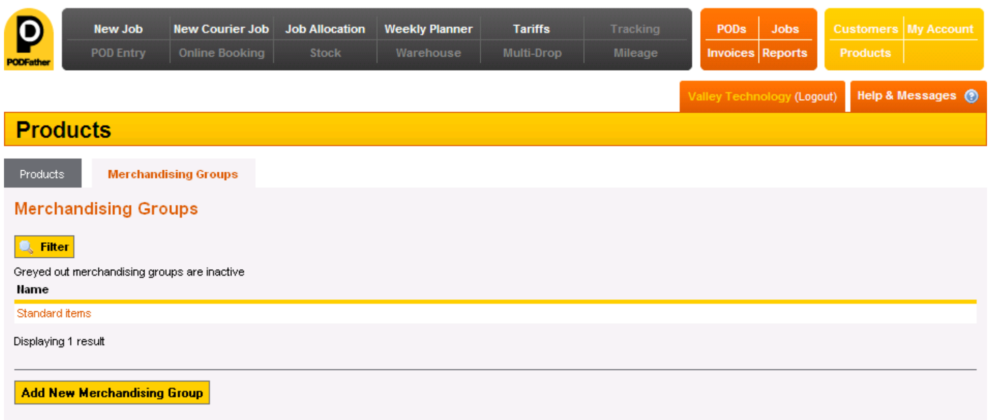


Figure 6.3: Merchandising Groups

Section 7

(Optional) Tariffs and Surcharges

If the Tariffs module is enabled, there will be the option, when creating a New Courier Job, to include a tariff and/or surcharges. Only one tariff can be added to a job but any number of applicable surcharges can be added to the job.
The Tariffs module can be accessed by clicking **Tariffs** in the Navigation Bar, or through the **Tariffs** tab in the **My Account** module.

7.1 Tariffs

7.1.1 Create a New Tariff

Below the list of Tariffs, click the Add New Tariff button. You will be taken to a form to create the new Tariff.

Name Use a descriptive name for the Tariff

Customer Set a Tariff to apply to only one customer or to all customers

Type Associate the Tariff with a Vehicle Type

Rate Per Mile The Tariff value per mile

Minimum Charge The minimum Tariff charge

When all Tariff information has been added, click the Save to be returned to the List of Tariffs

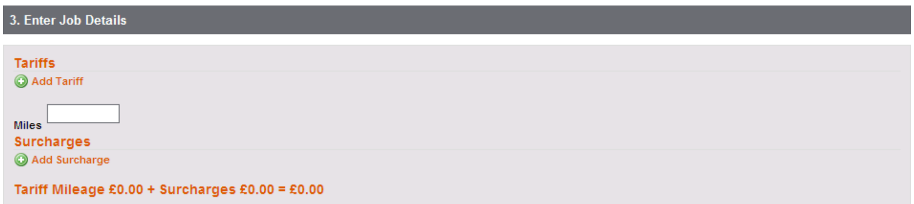
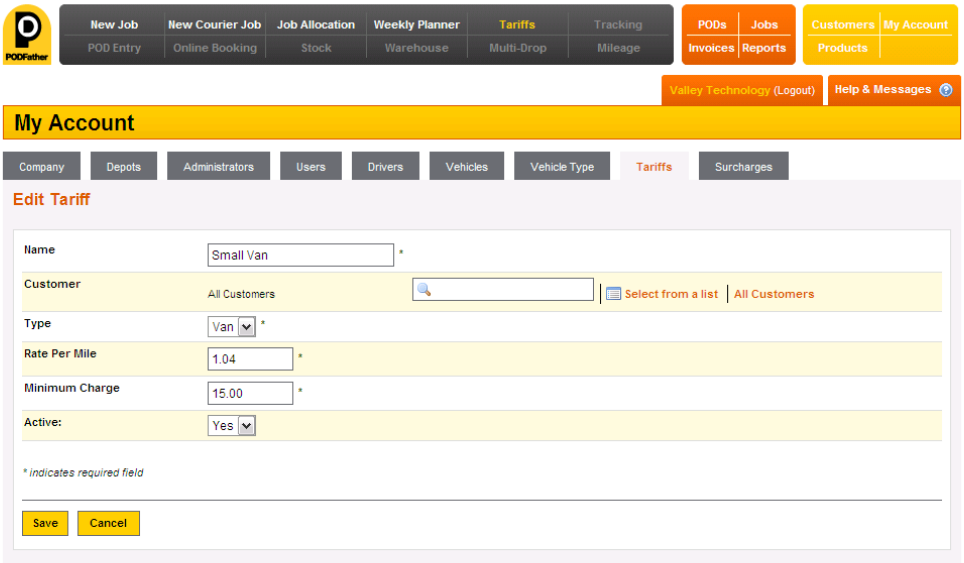
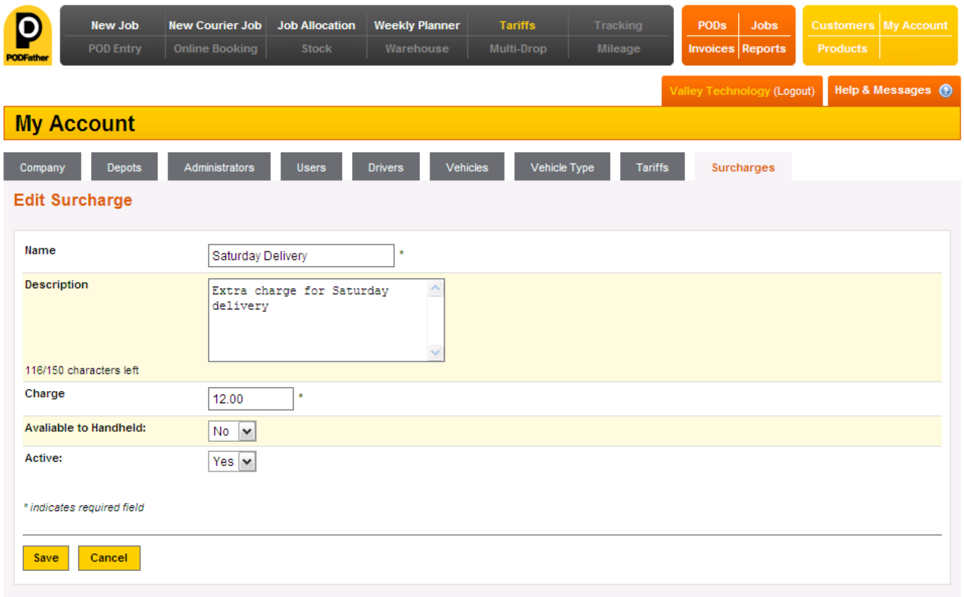


Figure 7.1: Adding a tariff and/or surcharges to a New Courier Job in the Job Details



(a) Editing a Tariff



(b) Editing a Surcharge

Figure 7.2: Editing Tariffs and Surcharges

7.1.2 Edit or deactivate a Tariff

In the list of Tariffs, click the Tariff you wish to edit or deactivate. You will be given the form with all the Tariff details. Change any details that need updating. Select `Inactive` from the drop-down menu to set the Tariff to inactive. Click the Save button when you have finished.

7.2 Surcharges

Surcharges can be accessed by either clicking **Tariffs** in the Navigation Bar and then clicking the **Surcharges** tab, or through the **Surcharges** tab in the **My Account** module.

7.2.1 Create a New Surcharge

Below the list of Surcharges, click the Add New Surcharge button. You will be brought to a form to enter the details for the surcharge.

Name Use a descriptive name for the Surcharge

Description Give a thorough description for the reason for the Surcharge

Description Give a thorough description for the reason for the Surcharge

Charge Enter the value of the Surcharge

Available to Handheld Select `Yes` from the drop-down menu if drivers should be allowed to add this surcharge to handheld jobs at job completion

After all the details have been filled in, click the Save button to be returned to the list of Surcharges.

7.2.2 Edit or deactivate a Surcharge

In the list of Surcharges, click the Surcharge you wish to edit or deactivate. You will be given the form with all the Surcharge details. Change any details that need updating. Select `Inactive` from the drop-down menu to set the Surcharge to inactive. Click the Save button when you have finished.

Section 8

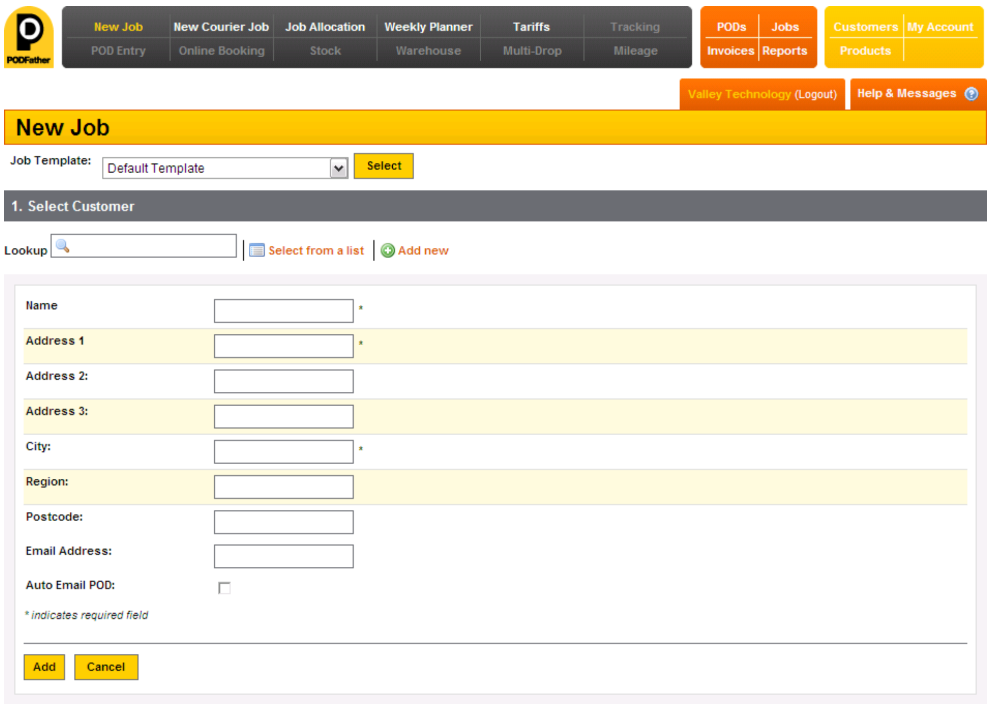
New Job

A job consists of an activity where a driver going to a site where a signature is received. This may be a delivery of a parcel, a delivery of a load of gravel, or the completion of a survey. At the conclusion of the job, the signature is received and sent back to the PODFather and the job is considered completed.

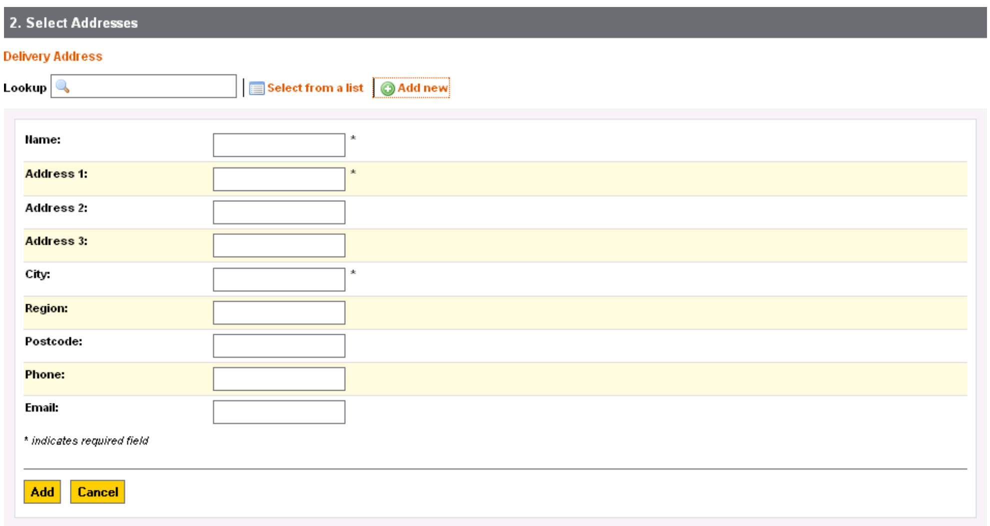
1. Click the **New Job** module button
2. (Optional)Select your template from the drop-down menu
   Click Select to confirm your choice of template

   > The PODFather comes with a default template. To customise your paperwork by using a template tailored to your company, contact your Account Manager.

3. Select a Customer:
   - Use the text box to search for a customer, select the customer from a list or add a new customer
   - To add a new customer, click the Add New button and a form will appear (*See Figure 8.1(a)*)
4. Use the lookup text box to type a keyword of the delivery address, select the address from a list or add a new delivery address
   - To add a new customer address, click the Add New button and a form will appear
     (*See Figure 8.1(b)*)



(a) Create a New Customer



(b) Create A New Customer Address

Figure 8.1: New Customer Forms

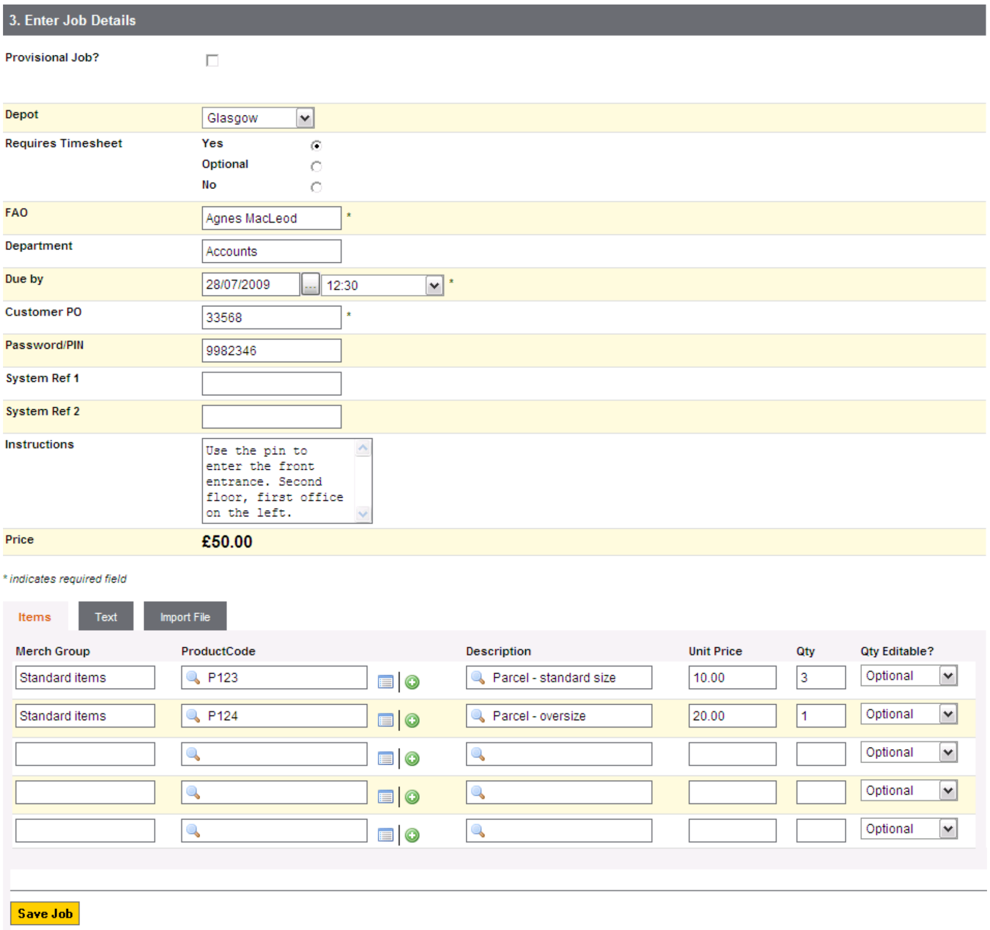


Figure 8.2: Job Details

5. Enter the Job Details (*See Figure 8.2*)

   - Tick box **`Provisional Job?`** if the job is provisional

     > Provisional items will be visible in both the Weekly Planner and the Allocate Jobs list. Provisional Jobs are used for scheduling of likely courier jobs or deliveries. Provisional jobs cannot be downloaded to a driver's handheld and cannot be completed. A provisional job must be either deleted or edited and the **`Provisional Job?`** box unticked

   - If you have more than one depot, select a depot from the drop-down list. Choose the timesheet option and select a due-by date and time. All other items are optional but should be filled in where applicable
   - Fill in Product information and quantities and select whether that delivery quantity can be altered. Text may also be entered instead of a Product Code and quantities by selecting the **`Text`** mini tab or a products file imported by selecting the **`Import File`** mini tab

     > To have products saved in a list to be searched when entered, the **`Products Database`** must be installed. Items will otherwise need to be hand-entered. For use of the **`Products Database`**, contact your Account Manager. If you do not have the **`Products Databse`** installed, you will need to manually enter items into the Items list or enter a block of text in **`Text`**

6. Click the Save Job button

Section 9

(Optional) Courier Jobs

Whereas a New Job consists of taking an item to a site and receiving a signature for its delivery, a Courier Job calls for taking an item from one site to another site. Only one signature is received after the item has been finally delivered.

9.1 Create a New Courier Job

1. Click the **New Courier Job** module button.
2. (Optional) Select your template from the drop-down menu
   Click Select to confirm your choice of template

   > The PODFather comes with a default template. To customise your paperwork using a template tailored to your company, contact your Account Manager.

3. Select a Customer:
   - Use the text box to search for a customer, select the customer from a list or add a new customer
   - To add a new customer, click the Add New button and a form will appear (*See Figure 8.1(a) on page 36*)
4. Use the lookup text box to type a keyword of the collection address, select the address from a list or add a new delivery address
   - To add a new customer address, click the Add New button and a form will appear. (*See Figure 9.1(a) on page 41*)
5. Use the lookup text box to type a keyword of the delivery address, select the address from a list or add a new delivery address
   - To add a new customer address, click the Add New button and a form will appear

6. Enter the Job Details (*See Figure 8.2 on page 37*)

   - (Optionally) Add a Tariff and/or any Surcharges that apply by clicking the ⊕ button and selecting the Tariff or Surcharge from the list. Tariffs or Surcharges can be removed by clicking the ⊖ delete icon to the right of the Tariff or Surcharge you wish to remove.

     > To add Tariffs and Surcharges, the Tariff Module must be enabled. Contact your Account Manager to enable this module. For further information on the Tariff Module, see section 7 on page 32

   - Tick box **`Provisional Job?`** if the job is provisional

     > Provisional items will be visible in both the Weekly Planner and the Allocate Jobs list. Provisional Jobs are used for scheduling of likely courier jobs or deliveries. Provisional jobs cannot be downloaded to a driver's handheld and cannot be completed. A provisional job must be either deleted or edited and the **`Provisional Job?`** box unticked

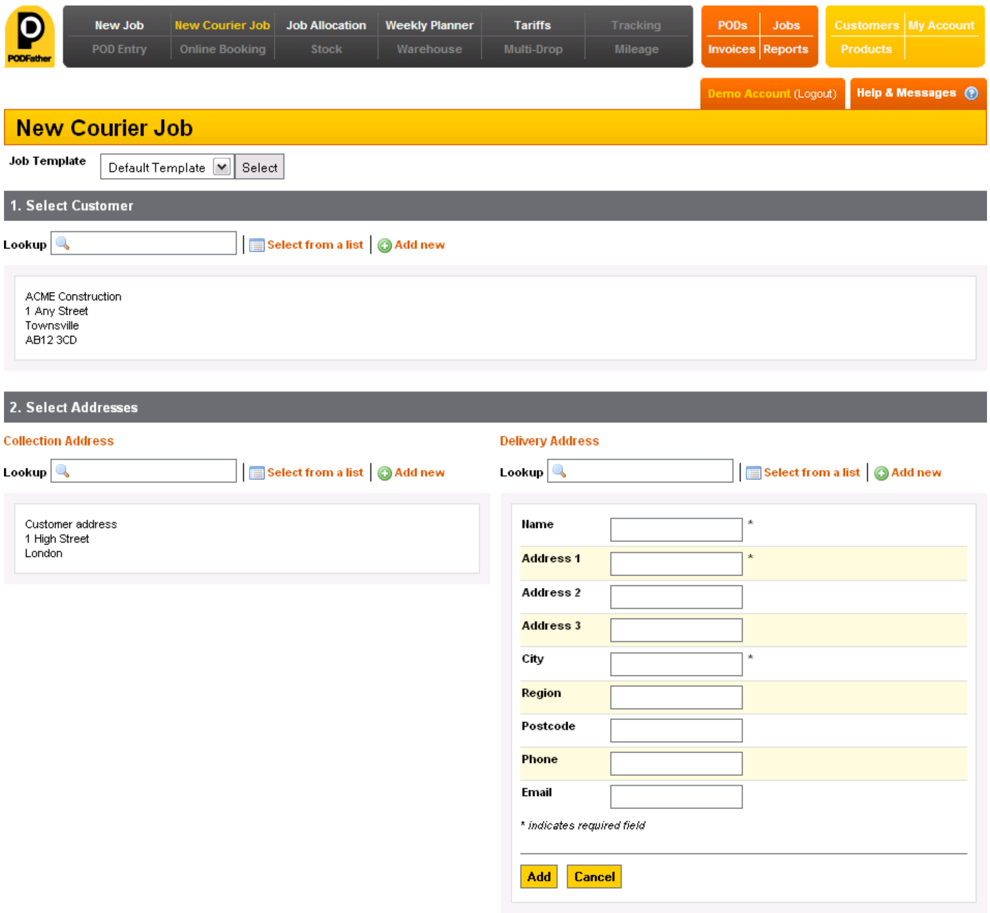
   - Select a depot from the drop-down list, choose timesheet option, select a due-by date and time. All other items are optional but should be filled in where applicable
   - Fill in Product information and quantities and select whether that delivery quantity can be altered. Text may also be entered instead of a Product Code and quantities by selecting the **`Text`** mini tab or a Products file imported by selecting the **`Import File`** mini tab

     > To have products saved in a list to be searched when entered, the **`Products Database`** must be installed. Items will otherwise need to be hand-entered. For use of a **`Products Database`**, contact your Account Manager. If you do not have the **`Products Databse`** installed, you will need to manually enter items into the Items list or enter a block of text in **`Text`**

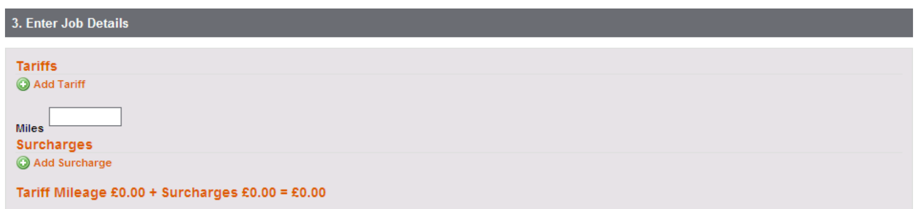
   - (Optionally) As items are added to the job, the price should total the value of the items included in the job, as well as any surcharges and tariffs that were added to the job. This value can be overridden by entering a new value into the red box that reads **`Override Price`**. A Price Comment should then be added to explain the reason for overriding the price. The Price Override option is only available to those who have the Tariffs Module enabled.

7. Click the Create Job button.

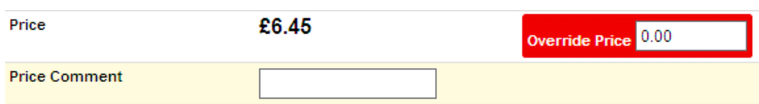
   > To have products appear in a list to be selected, the **`Products Database`** must be installed. Items will otherwise need to be hand-entered. For use of a **`Products Database`**, contact your Account Manager.



(a) Creating a New Courier Job



(b) Adding a tariff and/or surcharges to a New Courier Job in the Job Details with the Tariffs Module enabled



(c) Overriding the price for a New Courier Job

Figure 9.1: The ways in which a Courier Job differs from a regular Job

Section 10

Allocate Job

The **Job Allocation** module is where jobs that have been created are allocated to a job and where jobs are allocated to a driver. Current and past runs can also be searched here and their details viewed.

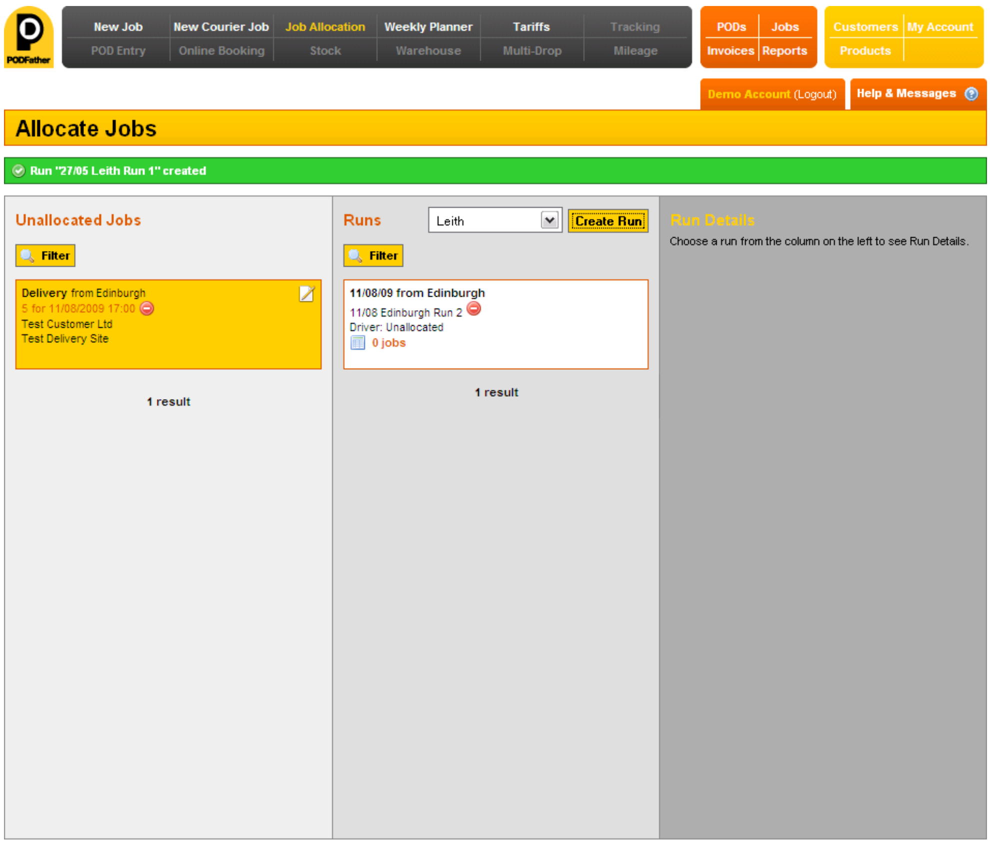


Figure 10.1: Job Allocation Screen

10.1 Filter Jobs and Runs

The Unallocated Jobs column lists all the jobs that are not yet allocated.

- To shorten the Unallocated Jobs list to view only certain jobs, filter the Unallocated Jobs Column
- To shorten the list of current runs or to view past runs, filter the Runs column

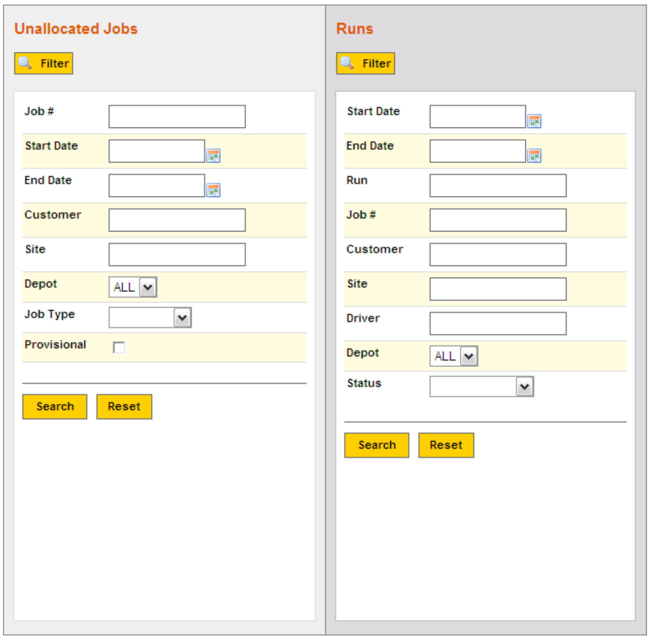


Figure 10.2: Filtering Jobs and Runs

To filter both the Jobs and Runs columns:

1. Click on Filter beneath the header of the column
2. Fill in the details of the search
3. Click Search
4. Click on Filter beneath the header of the column to hide the search criteria and leave the filtered list

   - Searching by `Run Status` will sort the runs by:

   Building All jobs that have not been allocated to a driver

   Allocated All current jobs that have been allocated to a driver

   Complete All jobs that have been completed

   > The default Runs column will show the most recent runs created and will not display runs that have been completed.

   Not Complete All jobs that have not been completed

10.2 Create a New Run and Allocate Jobs

Jobs that have been created will automatically appear in the Unallocated Jobs column.

1. Use the drop down to select a depot and click the Create Run button at the top of the Runs column. The run will appear at the top of the list
2. To optionally rename the run, click on the text of the run in the Run column and a text box will appear. Change the text to the desired Run name
3. Click and drag the job in the Unallocated Jobs column and drop it over the desired run in the Runs column

> NB: Jobs can only be assigned to a run from the same depot.

10.2.1 Provisional Jobs

Provisional Jobs will appear in the Allocate Jobs list with a (P) written beside the name of the job.

Provisional Jobs are used for scheduling of likely courier jobs or deliveries. Drag the Provisional Job into the run as you would any other job as a placeholder until the job is either cancelled or confirmed.

Provisional jobs cannot be downloaded to a driver's handheld and cannot be completed. A provisional job must be either deleted or edited and the `Provisional Job?` box unticked.

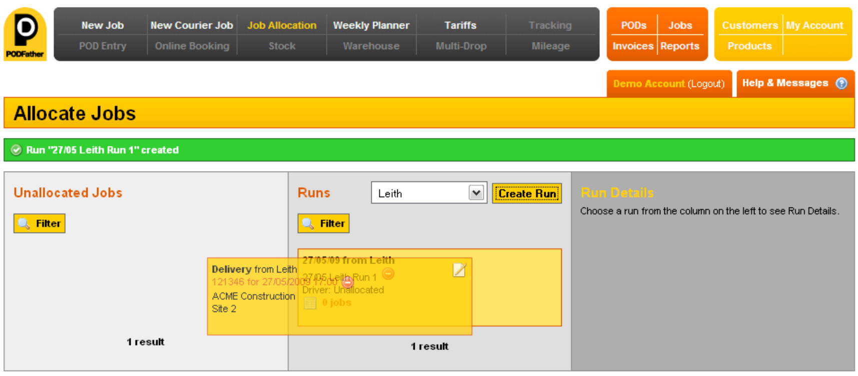


Figure 10.3: Drag Unallocated Jobs to New Run

10.3 Allocate Driver to a Run

When a driver is allocated, the driver's mobile device will receive the jobs included in the run.

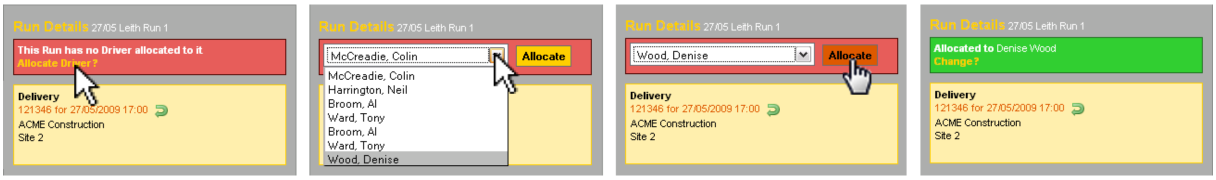
1. Click on the list icon in the run box within the Runs column

   The details for the run will appear in the Run Details column

2. Click the text `Allocate Driver` in the Run Details column

3. Select the driver from a drop-down list. Click Allocate

(a) Viewing Run Details



(b) Assign Driver to a Job

Figure 10.4: Run Details

10.4 View Run Details

- Reorder Jobs within a run by clicking and dragging them higher or lower in the Run Detail list
- View Completed PODs for Jobs within a run by clicking the View PODs button
- View Job details by clicking on the Job name within the Run Details list

Some of the jobs will have icons beside them to identify :

 Job has been downloaded to the driver's handheld

 The quantity delivered does not match order quantity
OR job comments have been entered

 Cancel button — Click to Cancel the job

10.5 Create a Job or Run Picklist

A picklist allows the user to create an easy-to-read list as a PDF that can be printed and used to find items for delivery.

To create a picklist for all the jobs within a run, click the  PDF icon within the box containing that run's information in the Runs column. The picklist PDF will appear in another window.

To create a picklist for one specific job within a run, click on the run to view the run details. Click on the  PDF icon within the box containing the job's details in the Run Details column. The picklist PDF will appear in another window.

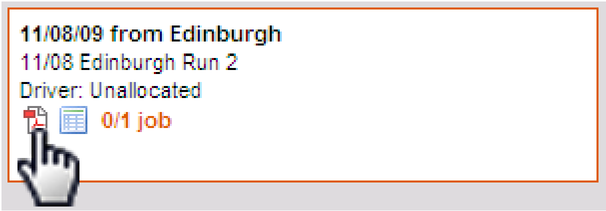


Figure 10.5: Click the PDF icon to create the picklist for the run

Pick List

Run Details (Page 1 of 1)

Run Name: 11/08 Edinburgh Run 2 **Driver:** Unallocated
Date: 11/08/2009 **Depot:** Edinburgh

Job 5

Invoice Address
1 High Street
Edinburgh
EH1 1SX

Collection Address
123 Lowe Street
Edinburgh

Delivery Address
321 High Street
Edinburgh

Merch Grp	Prod Code	Description	Unit Price	Qty	Picked
	4412681413 184	ITEM 1/3	0.00	1	
	4412681413 185	ITEM 2/3	0.00	1	
	4412681413 186	ITEM 3/3	0.00	1	

Generated Tue, 11 Aug 2009 12:41:42 by Valley Technology

Figure 10.6: Sample picklist for an entire run

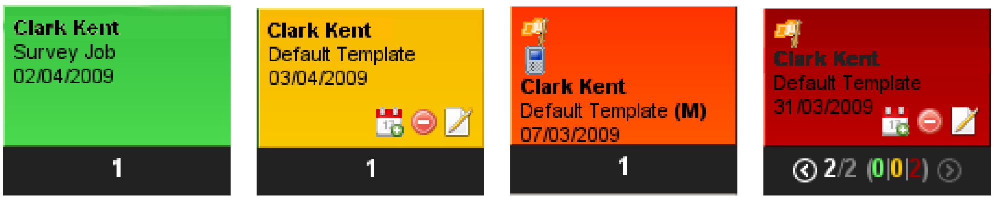
Section 11

(Optional) Weekly Planner

The **Weekly Planner** module provides an alternate method for allocating jobs. Here, unallocated jobs will appear at the top, to be dragged and dropped into a calendar below. This view is more useful when there are fewer runs or runs are arranged over a longer period of time.

Clicking on the `Show/Hide` text to the right in the Unallocated Jobs header will collapse all the unallocated jobs to give more screen space to the calendar.

The job blocks are colour-coded in the weekly planner:



(a) Green (b) Yellow (c) Orange (d) Red

Figure 11.1: Colours of Weekly Planner

Green Green items are completed jobs. When a job is green, it cannot be moved to another driver as it is already completed

Yellow Yellow items are incomplete jobs. They can be moved around until they are completed

Orange The job has been downloaded to a mobile. It will also have a  mobile icon to signify that it's been uploaded to a mobile

Red Red items are jobs that have a problem that should be followed up

11.1 Multiple Allocated Jobs for one driver

When multiple jobs are allocated to one driver, they will all appear “stacked” in one box within the weekly planner. *(See figure 11.2*)

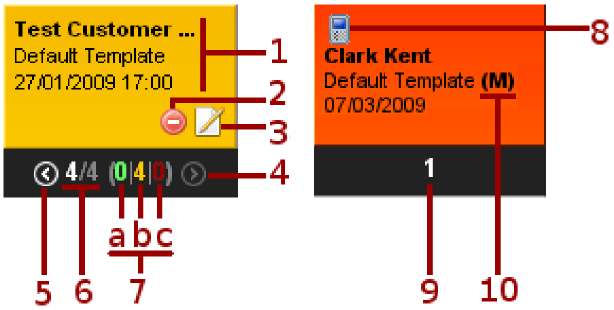
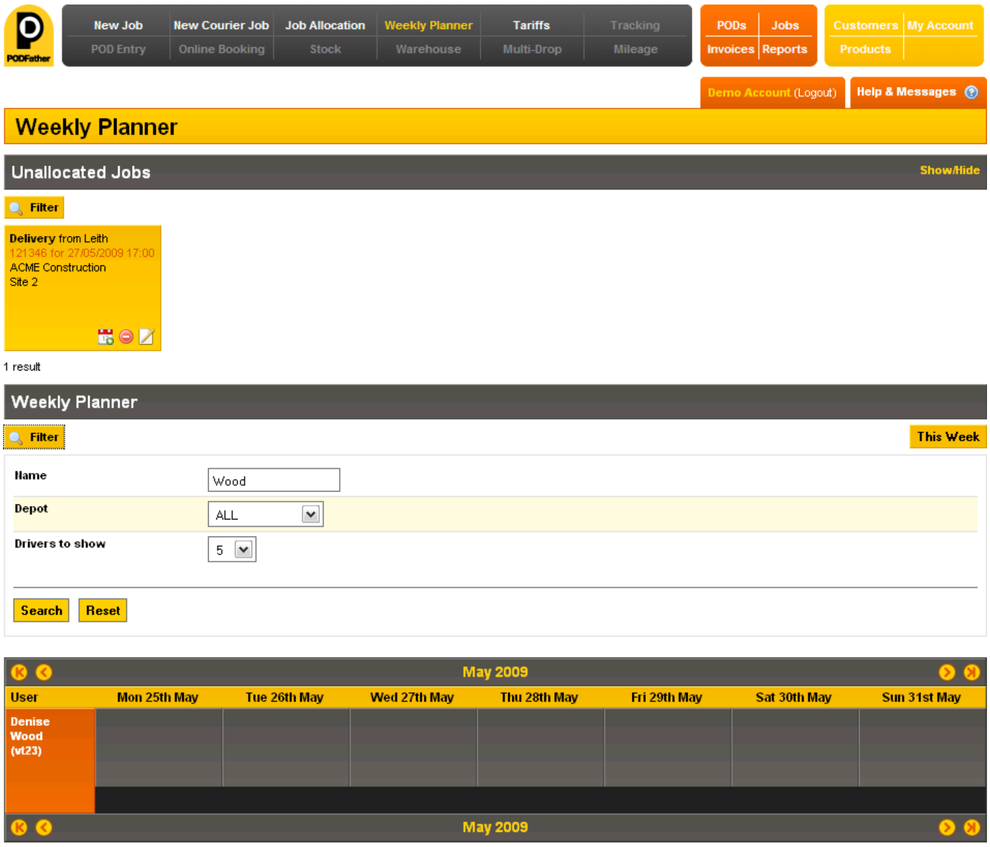
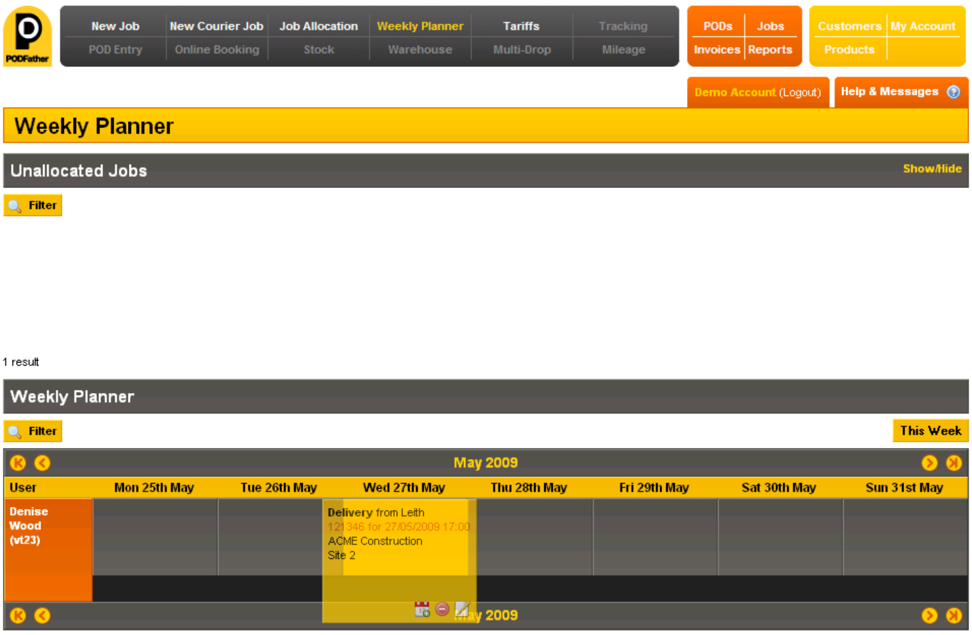


Figure 11.2: Multiple jobs allocated to one driver as contrasted with a single job

1. Details of a job
2. Remove allocated job
3. Edit Job
4. View the next job’s details in the box
5. View the previous job’s details
6. The job’s number out of the total number of jobs
7. Job statuses
    (a) Complete Jobs
    (b) Incomplete Jobs
    (c) Problem Jobs
8. Mobile icon
9. A single job allocated to this driver for this day
10. (M) signifies that it’s a multiple-part job (*See section 11.5 for more information on repeat jobs*)
    (P) would signify that it was a provisional job



(a) View Weekly Planner



(b) Drag to Allocate Jobs

Figure 11.3: Weekly Planner

11.2 Filtering the list of drivers

When allocating jobs to drivers, the job is dragged and placed in the appropriate box for the date and the driver. With a large number of drivers, this may involve significant amounts of scrolling to find the appropriate driver.

If you have a large number of drivers, you may wish to filter your list of drivers to find the driver or small subset of drivers you wish to allocate to at a time.

To filter the driver list:

1. Under the subsection heading of **Weekly Planner** and immediately above the calendar, click the Filter to view the filter for the drivers
2. You will be able to filter to only drivers for a given Depot, for a specific driver, or simply limit the number of drivers that appear on a page
   - If you filter by Depot, you may find it useful to also filter the Unallocated Jobs by depot, to be certain that the jobs you are allocating are for the correct depot as well
3. When you have selected your filter, click Search

11.3 Allocate a Job with the Weekly Planner

To allocate a job when in the Weekly Planner view:

1. Change the calendar to the appropriate week using the forward and back buttons or the This Week button

Change the week

Change the month

Return to the Current Week

11.3.1 Dragging to schedule jobs

Click and drag the unallocated job into the desired day and driver. Drivers are vertically listed in the table. (*See Figure 11.3(b)*)

11.3.2 Provisional Jobs

Provisional Jobs will appear in the Allocate Jobs list with a **(P)** written beside the name of the job.

Provisional Jobs are used for scheduling of likely courier jobs or deliveries. Drag the Provisional Job into the run as you would any other job as a placeholder until the job is either cancelled or confirmed.

Provisional jobs will not be downloaded to a driver's handheld and cannot be completed. A provisional job must be either deleted or edited and the `Provisional Job?` box unticked to make it actionable.

11.4 Unallocate job and reallocate to a different driver

To unallocate a job and return it to the Unallocated Jobs section of the page, click the Remove Job icon in the box containing the job information. The job can then be dragged to allocate it to a different driver.

A job could also be reallocated by clicking it and dragging it to a different driver or date.

11.5 Repeat jobs across multiple days and/or drivers

(M) written beside the the Job Name signifies that it has been copied and is a multiple. The original job will not have this **(M)**.

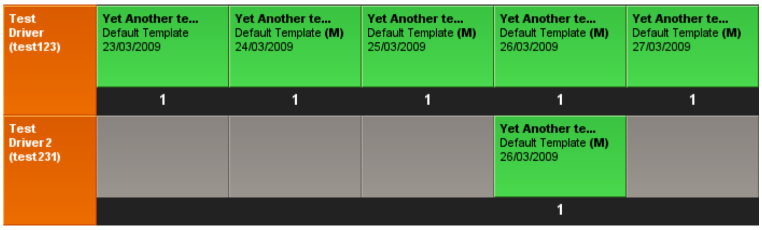


Figure 11.4: A job that has been repeated across 5 days and 2 drivers

There are two methods to repeat jobs over multiple days or drivers:

- Hold down your SHIFT key on your keyboard whilst dragging and dropping the job onto the appropriate days and drivers
- Use the button on the original job

  Tick `Copy`, to copy the job to the selected driver/days instead of moving it

  (*see Section 11.5.1 for futher information*)

11.5.1 Using the calendar scheduler

The calendar schedule is another method that allows you to quickly assign multiple jobs to a driver. Rather than dragging to repeat the job over multiple days for one driver and then clicking and dragging to reassign each day to a different driver, the calendar scheduler will allow you to select a different driver from a drop-down and select the days you wish that new driver to be assigned the job.

If you select a different date without ticking the box beside `Copy?`, your job will be moved instead of repeated on the selected date.

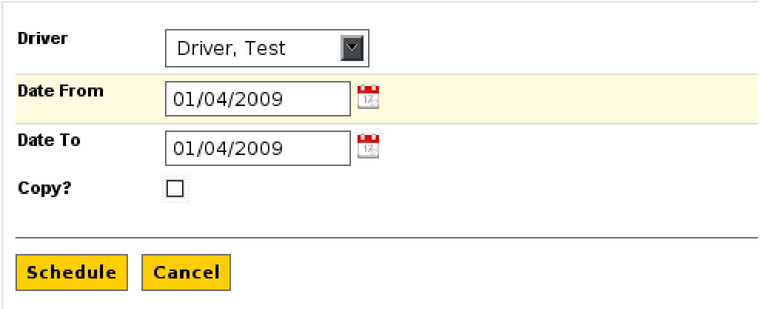


Figure 11.5: Job scheduler after clicking the calendar button

1. Whilst looking at the allocated job you wish to repeat, click the button in the job block. A window will pop up giving you options for how to repeat the job
2. Use the drop-down menu to select the driver you'd wish to take the repeat jobs. This may be the same driver or a different driver
3. Type in the `From` and `To` dates for that driver to begin and finish those jobs. Tick the box beside `Copy` if you wish to have the job repeat across several days

11.6 Delete or Edit a Job

	Remove/Delete Button
	Edit Button

- To edit a job, click the Edit Icon
- To return an allocated job to Unallocated Jobs, click the remove button found in the allocated job
- To delete a job, click the delete button when the job is unallocated. If the job is already allocated, it must be unallocated first

Section 12

(Optional) Jobs

The **Jobs** module allows a user to get a quick view of all the jobs in the system that are still in progress. Jobs which are overdue will appear in dark pink.

Categories

Jobs will fall into a number of categories:

Online Bookings - Pending Approval The job has been created by a customer via the customer portal (*See section 5 on page 23) and requires confirmation before it can be allocated*

Unallocated The job has been created but has not been assigned to a run

On Run The job has been allocated to a run but the run has not been yet assigned to a driver

Allocated The job is in a run that has been allocated to a driver but has not yet been picked up by the driver’s handheld

On Handheld The job is currently on a driver’s handheld and cannot be altered

Actions

Depending upon the status of the job, different actions can be performed on it:

Edit and confirm a Job (Provisional Jobs only)

Edit a Job (Except Provisional and On Handheld)

Delete a Job (Except On Handheld)

Create a picklist PDF for a Job

Receipt a Job (Except Provisional and On Handheld)

Create a blank POD PDF

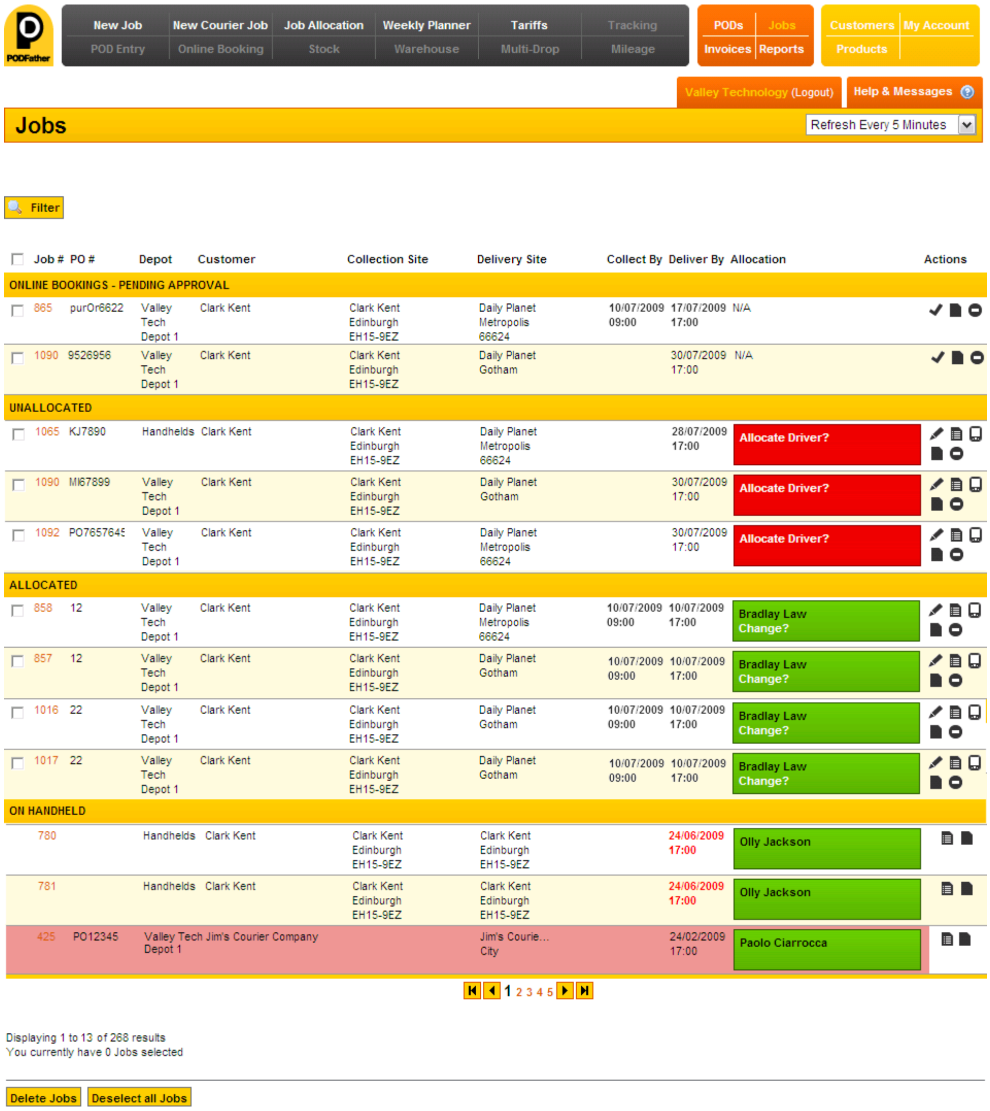


Figure 12.1: The Jobs Module. Note the overdue job in dark pink

Refreshing the List of Jobs

Below the Navigation Bar and to the right side of the page is a drop-down menu that will allow you to select the frequency with which the page automatically updates:

- Every 5 minutes
- Every 10 minutes
- Every 20 minutes
- Every 30 minutes
- Every 60 minutes

12.1 Edit and Confirm Pending Jobs

When viewing jobs, click on the tick mark (✔). You will be brought to the form containing all the details for the job. Check over the details and select either Save Job to save any details and keep the job provisional you've changed or Save and Confirm to save the changes you've made and change the status of the job to "Unallocated".

12.2 Editing Unallocated Jobs

> Only pending and unallocated jobs can be edited. All other jobs will not have an (edit) button available.

To edit an unallocated job, click the (edit) button to the right of the job you wish to edit.

You will then be brought to the job's form for it to be edited. When you have finished editing, click Save Job at the bottom of the page

12.3 Deleting Jobs

> Jobs that have been uploaded to a handheld cannot be deleted from this screen.

12.3.1 Delete a single job

To delete a single job, click the (delete) button to the right of the job you wish to delete. A window will pop up to confirm that you wish to delete the job. Click the Yes button.

12.3.2 Delete multiple jobs

Deleting multiple jobs is easiest when you've filtered to only the jobs you wish to delete.

To delete multiple jobs:

1. Tick the boxes to the left of each job you wish to delete.

   To select all the boxes in view, tick the box in the header row beside `Job #`.

2. Click Delete Jobs.

At any point, you can untick all the jobs you've selected by clicking Deselect Jobs.

12.3.3 Undeleting deleted Jobs

Using the filter, tick the box that reads `Show Deleted?` and click filter. The list should now show all jobs, including those that have been deleted.

Include extra information into the filter to find the job(s) you wish to undelete. After you have filtered the list, select the (undelete icon) in the column of action buttons. Your job will then be undeleted. Reset the filter to stop viewing the deleted jobs.

12.4 Allocating jobs from the Jobs Module

The column immediately to the left of the actions column is the Job Allocation column. From this column, jobs can be allocated or reallocated until the job has been uploaded to the driver's handheld. Unallocated jobs will be listed in red and will read `Allocate Driver?` and jobs that have already been allocated will be listed in green and will read the driver's name and `Change?`.

To allocate a driver (or change the driver allocated to a job), click the link in the Allocated Jobs column. A list of drivers who are able to take that job by being associated with the relevant depot will appear. Click on the driver you wish to allocate to the job and click OK to confirm your selection.

When a job is allocated to a driver, it is included in a run for that driver and the current date. Any additional jobs allocated to that driver on that date will be added to this run.

12.5 Create a Job Picklist

A job picklist is used primarily for finding the items needed in a warehouse to be delivered for a job. The picklist for the job can be retreived by clicking the (Picklist PDF) button in the actions column to the right of the required Job. The picklist will appear in another window where it can be saved or printed out for use. (*To view a sample picklist, see figure 10.6 on page 47.*)

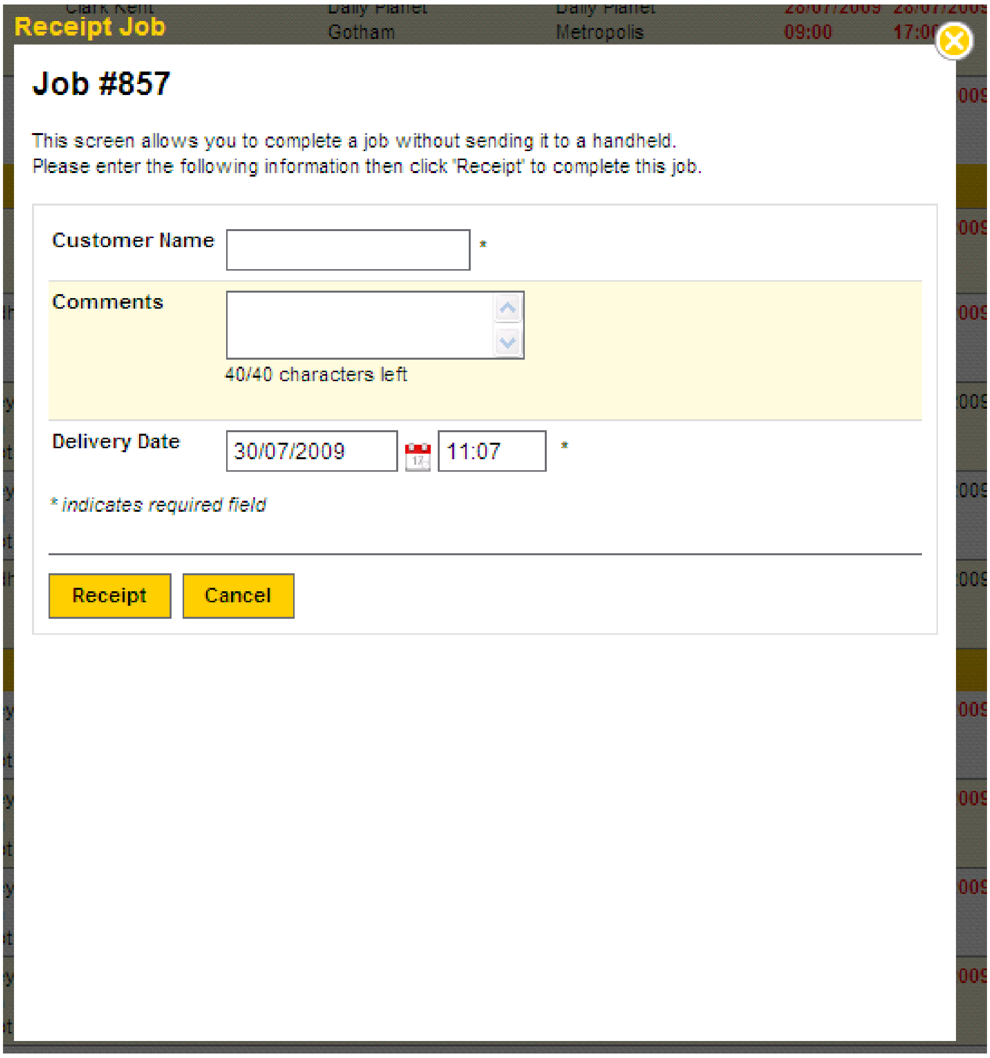
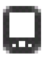


Figure 12.2: The Receipt Job Modal Box

12.6 Receipt a Job

Receipt Job allows you to complete a job without sending it to a handheld. When you click the  (Receipt Job) button, a box will appear for you to enter the details for the job completion. When you have filled in all the information, click the Receipt button to complete the job. A POD will then be created for the job.

12.7 Create a Blank POD

A blank POD will show all the job details without the final signature and job completion details. This is useful should a driver not have a PDA. The blank POD can be printed out and given to the driver to fill out. When the driver returns, the data can be then entered into The PODFather using the Receipt a Job function

Section 13

View PODs

The **View POD** module is a list of all the PODs submitted, from the most recent at the top to the oldest. The rightmost column has small pictures to identify PODs with warnings or images.

Job was late

Quantities altered or comments entered

POD includes images. Click icon to view only the POD images

13.1 Filter PODs

PODs can be filtered for easy searching.

- PODs can be sorted by Job Number, POD Number, Customer Name, Site, Run Name, Job Type, Date, Purchase Order, Reference Number, or Driver Name
- Click Filter to toggle between the POD List and the POD List with Filter

13.2 View a POD or the POD PDF

To view the POD as a webpage in the same browser window, click on the POD #. To view the POD PDF in a separate browser window, click the Job #.

13.3 View Job Photos

To view the photos from a job, click on the photos icon in the rightmost column for the appropriate job.

If the photos in a POD are not oriented correctly, they can be manually rotated by clicking the [] button in the right-most column. A window will pop up with the photos for that POD. Rotate arrow buttons will appear below the photo. Click the appropriate arrow until the photo is oriented correctly.

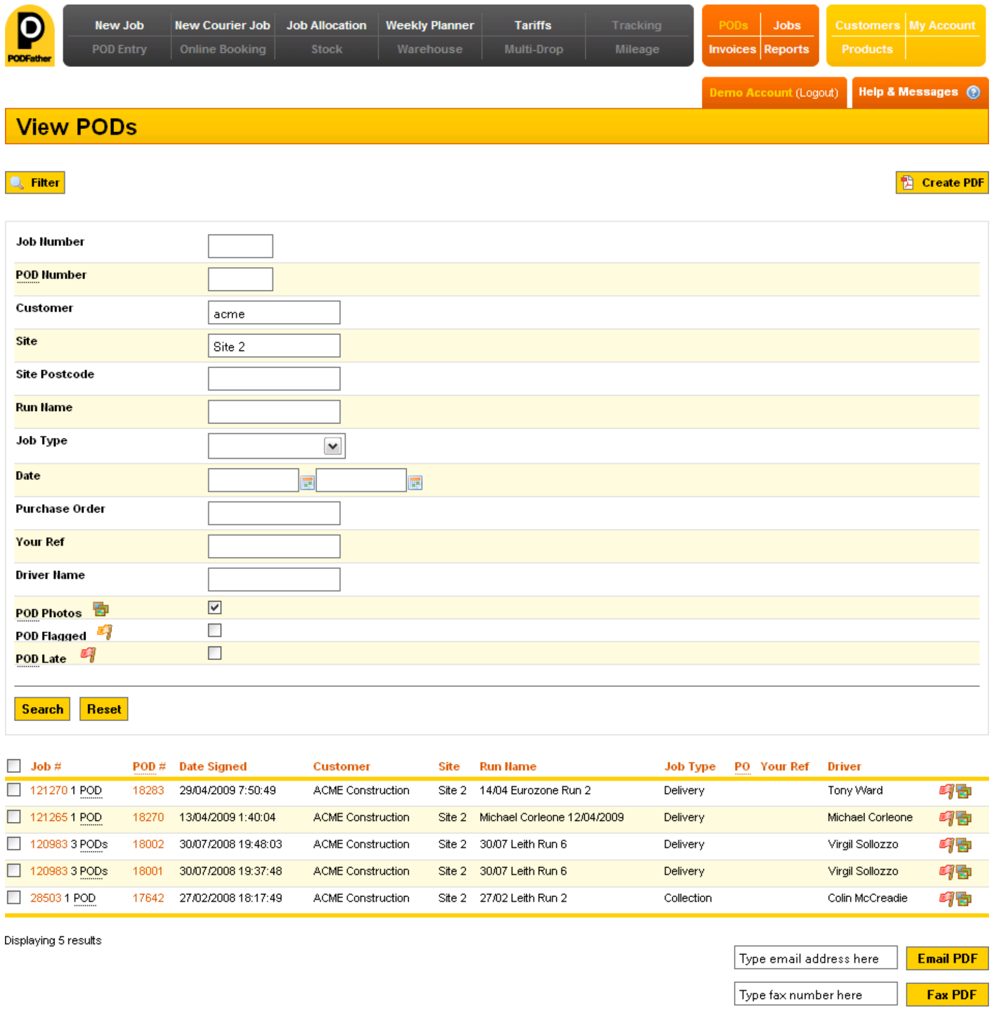


Figure 13.1: View POD screen

13.4 Create POD PDF

PDF printouts of one or multiple PODs can be created from the list of PODs.
To create a PDF of a single POD:

- Tick the box to the left of the POD Number to select that POD

  Click the Create PDF button in the top right corner of the screen

- Click the Job # of the job you want the POD PDF for

  You will be redirected to the POD PDF

To create a PDF of multiple PODs:

1. Tick the box to the left of the POD Number to select that POD. Multiple PODs can be selected to output multiple POD PDFs
2. Click the Create PDF button in the top right corner of the screen

13.4.1 Fax or Email POD PDF

PODs can be emailed or faxed without needing to export or print the PDF.

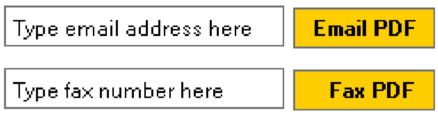


Figure 13.2: Email or Fax PDF

To email the POD:

1. Tick the box beside the POD(s) to be sent
2. At the bottom of the page, enter the email address in the boxed that reads `Type email address here`
3. Click the button Email PDF to the right

To Fax the POD:

1. Tick the box beside the POD(s) to be sent
2. At the bottom of the page, enter the fax number in the boxed that reads `Type Fax number here`
3. Click the button Fax PDF to the right

Section 14

(Optional) Invoicing

The **Invoicing** module of the PODFather creates invoices that can be emailed, faxed, or printed to mail to your customers. The Invoicing Module also integrates the PODs received with your company's Accounting software.

Setting up the Invoicing module involves entering account numbers for your customers, creating Invoices from PODs, and batching the Invoices to send them to SAGE.

14.1 Setting Up Invoicing

The Invoicing Module must be enabled in My Account and any customer you wish to invoice will need to be given an invoice account number.

14.1.1 Enabling Invoicing in My Account

Because SAGE will overwrite invoices if a new one is created with the same number, the PODFather requires that invoices created through the PODFather be given a separate prefix. Invoicing will not be enabled until a prefix is entered.

To enter in the Invoice Number Prefix:

1. Click on the **My Account** module button
2. Click the Edit Company Details button at the bottom of the page
3. Fill in the Invoicing Information

   The Invoice Number will prefix the Invoice numbers when entered into the SAGE program. All other details entered will appear on the final invoices as can be seen in Figure 14.6.

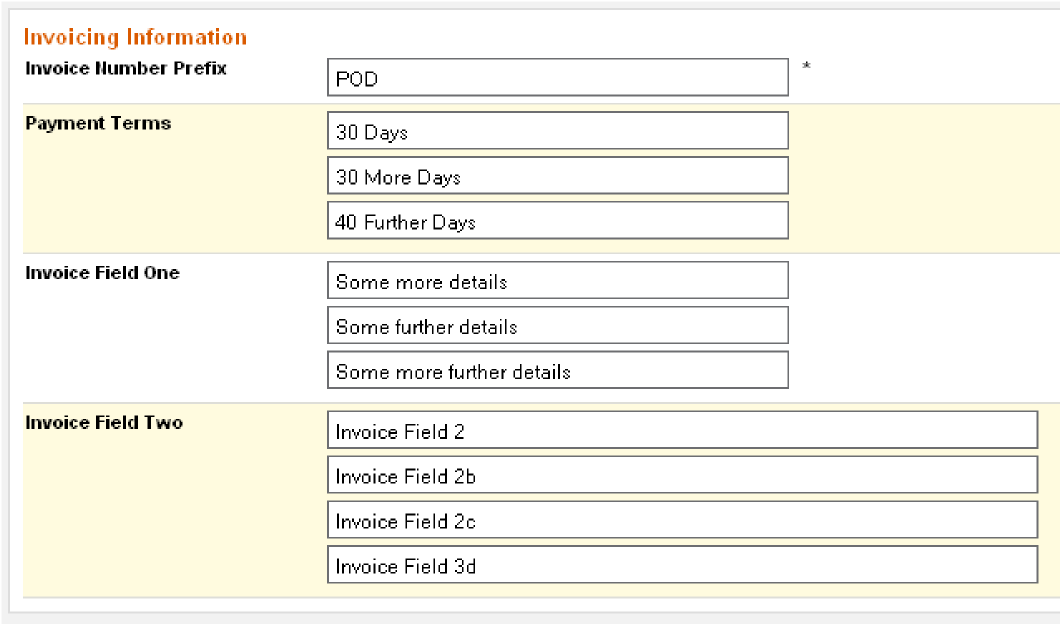


Figure 14.1: Adding invoice information. Note where the information appears later in the invoice in Figure 14.6. Also note that the Invoice Number Prefix is required.

14.1.2 Setting up the customer's account number

A customer's PODs cannot be invoiced until their SAGE account information is first entered into their Customers Details. When viewing the Invoice tab, if a customer does not have an account number, a tick box will not appear to create an invoice from the POD.
To set up a Customer's account number:

1. Click on the **Customers** module button
2. Filter the customer list to find the customer you want to edit
3. Click the name of the customer
4. At the bottom of the form is a textbox to enter the customer's invoicing account number for the customer.(*see Figure 14.2*)

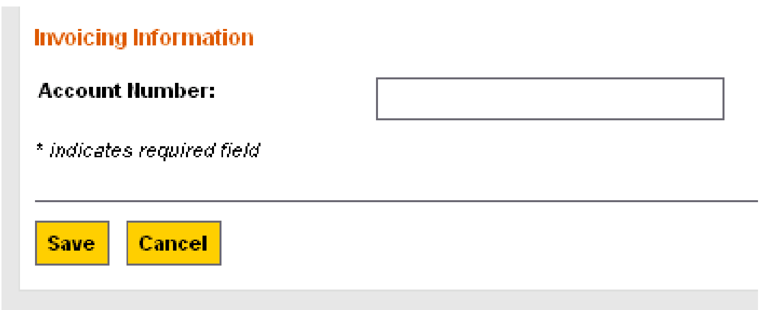


Figure 14.2: Enter a SAGE account number for the customer in their Customer Details

14.2 Uninvoiced PODs

14.2.1 Add a Surcharge to an Uninvoiced POD

> Surcharges can only be added to uninvoiced PODs if the Tariffs Module is enabled. To enable the Tariffs Module, please speak to your Accounts Manager.

Click on the **Invoices** Module button in the Navigation Bar. You will first see the Uninvoiced PODs page.

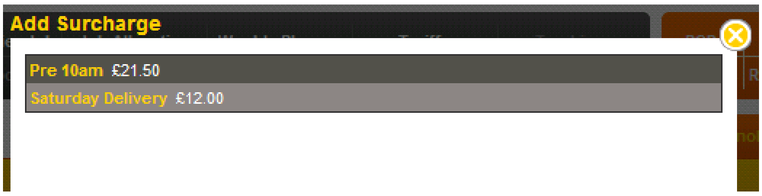
If the Tariffs Module is enabled, you will see a Surcharges column in the list of Unallocated PODs. Identify the POD you wish to add a Surcharge to. Click ⊕ in the Surcharges column to view the box which will contain a list of available Surcharges. Click on the surcharge you wish to add to the POD. The modal box will close.

To view Surcharges that have already been added to a POD, click the icon in the Surcharges column. You will see a list of Surcharges that have been already added to the POD.

To remove a surcharge from one of the invoices, click the icon in the Surcharges column. You will see the list of included surcharges. Click the ⊖ icon to the right of the surcharge in the list to remove the surcharge.

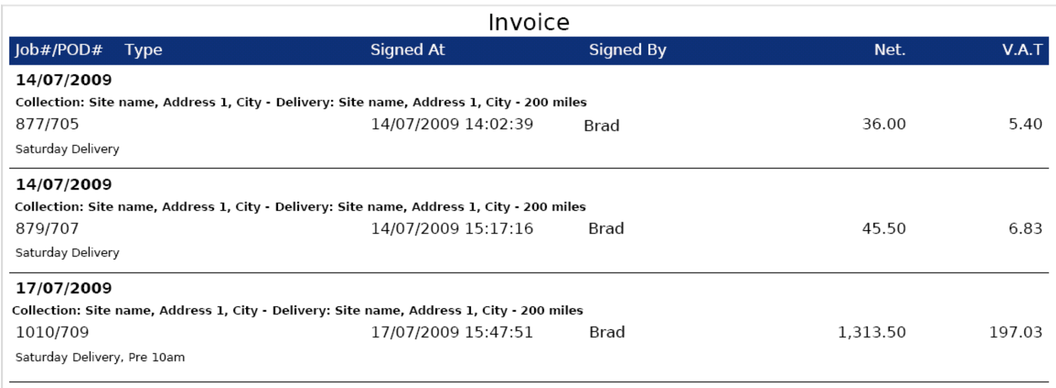
> Note that surcharges that were added at job creation CANNOT be removed from the POD. Only surcharges that were added to the POD after job completion can be removed.

(a) The Surcharge column and Surcharge Action Icons



(b) Adding a Surcharge

(c) Viewing Surcharges included in a POD



Invoice

Job#/POD#	Type	Signed At	Signed By	Net.	V.A.T
14/07/2009					
Collection: Site name, Address 1, City - Delivery: Site name, Address 1, City - 200 miles					
877/705		14/07/2009 14:02:39	Brad	36.00	5.40
Saturday Delivery					
14/07/2009					
Collection: Site name, Address 1, City - Delivery: Site name, Address 1, City - 200 miles					
879/707		14/07/2009 15:17:16	Brad	45.50	6.83
Saturday Delivery					
17/07/2009					
Collection: Site name, Address 1, City - Delivery: Site name, Address 1, City - 200 miles					
1010/709		17/07/2009 15:47:51	Brad	1,313.50	197.03
Saturday Delivery, Pre 10am					

(d) A final invoice that has an included surcharge

14.2.2 Adjust the value of an uninvoiced POD

To adjust the value of an Uninvoiced POD, click the value in the **Amount** column for the POD. You will then be able to enter a new value for the whole POD. A description should be entered to explain the price change. When you have finished, click the Update button to save and close the modal box.

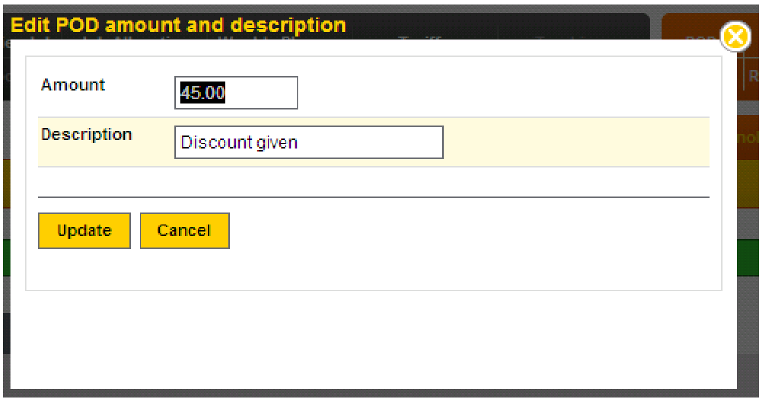


Figure 14.3: Changing the Job amount

14.2.3 Viewing the POD Breakdown

In the Uninvoiced PODs section of the Invoicing Module, you can get a quick overview of the value of the POD before invoicing the POD.

To get the quick overview, click the POD #. A box will appear, listing all surcharges and tariffs that have been added to the Job. When you are finished viewing the POD Breakdown, click the **x** in the top right corner of the box.

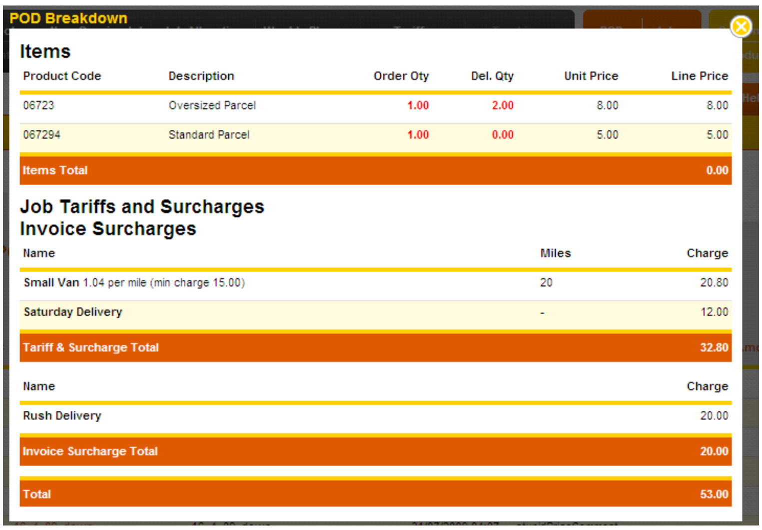


Figure 14.4: Viewing the POD Breakdown

14.2.4 Create an Invoice from a POD

Invoices will be created within the **Invoices** module. The first view of the **Invoices** module is a list of uninvoiced PODs.

The invoices created from uninvoiced PODs will remain drafts until the invoices are batched and the information is sent to the accounting software.

To create an invoice from a POD:

1. Click on the Invoices module button. You will be brought to the **Uninvoiced PODs** section of the module. Only PODS that have not yet been invoiced will appear here
2. Filter the list of PODs (if necessary):

   Job number The number assigned to the job

   POD number The number assigned to the POD for the job

   Customer Customer Name

   Site Site Name

   Driver PODFather ID The driver's PODFather login name

   Date The date the POD was created

   Show deleted? Show PODs that have been deleted
3. Tick the PODs you wish to turn into an invoice. The PODS must all be for the same customer

   > The SAGE account number must be entered in the Customer's information or there will be no tick boxes available.
4. Click Generate Invoice at the bottom of the page. A window will pop up to confirm the POD numbers and the total value of the PODs
5. Click Create Invoice. You will then be brought to the Invoices subsection

14.3 Invoices

14.3.1 Add a comment to an Invoice

Once an invoice has been created, comments or notes can be added to the invoice. This can be done from within the **Invoices** section of the **Invoices** module.

1. Click the  comment button that appears to the right of the invoice you wish to add a comment to
2. A pop-up box will appear with a textbox. Write in your comment
3. Click Update when you've finished

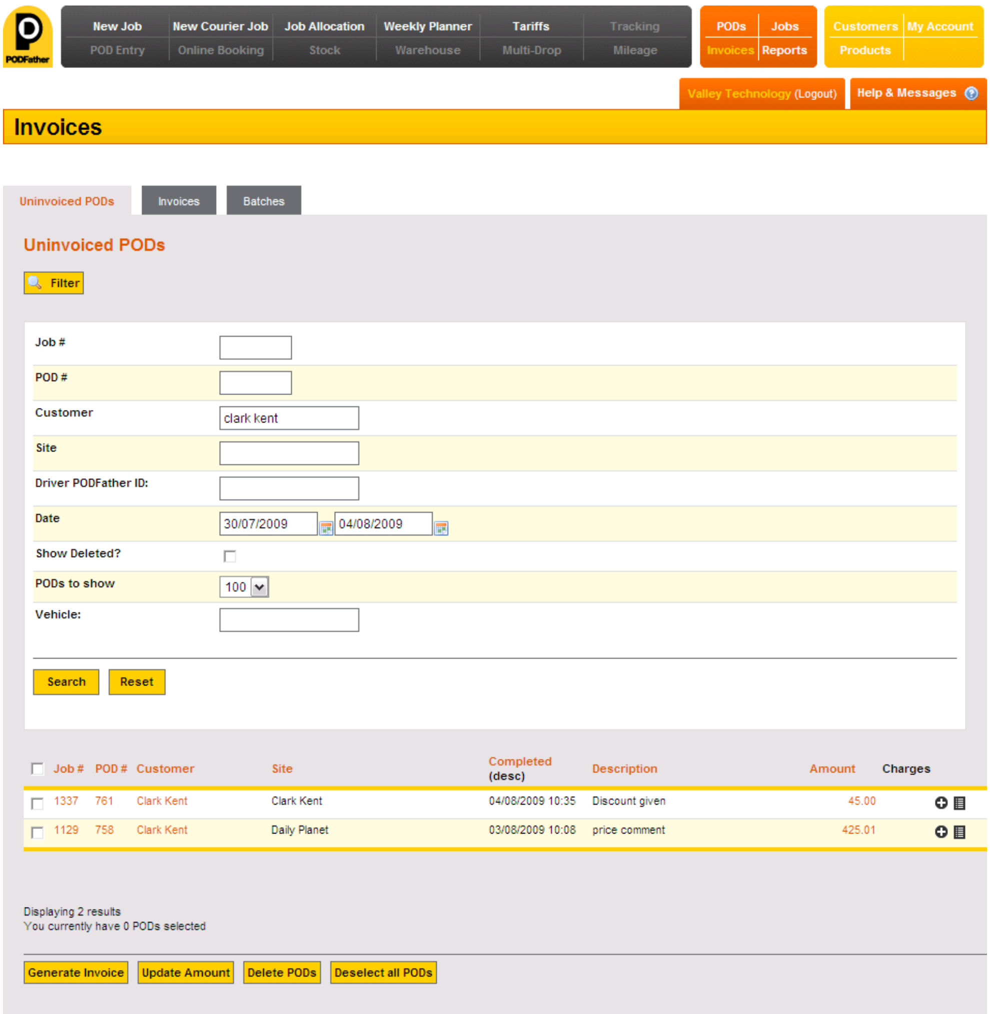


Figure 14.5: Invoicing section

14.3.2 Download a Draft Invoice

NB: Until an invoice is batched, it will be considered a draft. Invoice PDFs created from drafts will have a “DRAFT” watermark

1. From the **Invoices** section of the **Invoicing** module, click on the invoice number of the invoice you wish to download. A window will pop up showing you the contents of the invoice
2. Click the Generate PDF button

Batching the invoices will change the invoices from Draft to Final copies and they will be given invoice numbers. If your company has asked to integrate Invoicing with an accounts program, batching will submit a group of invoices to that accounting program.

Within the Invoices tab and the Invoices subsection, a list of all the invoices is available. All the invoices which have a tick box to the left of the Invoice number have not yet been batched.

Once an Invoice has been batched, it is no longer considered a draft document. Because of this, no changes can be made to the invoice.

14.3.3 Batch a group of Invoices

To batch an invoice:

1. Click on the **Invoices** module button and then the **Invoices** section tab
2. Filter the list of invoices to find the invoices you wish to batch
3. Tick the boxes beside the invoices to batch

   Once a box has been ticked, it will remained ticked until it is again unticked. Multiple invoices over different pages can be ticked and the filter changed without the previously ticked boxes becoming unticked

4. Click Batch Invoices. A window will pop up confirming the invoices you have selected. Click Batch Invoices to confirm. The batch of invoices created will then be found in the Batches subsection

14.4 Batch Invoices

14.4.1 Download Invoices from a Batch of Invoices

If you are looking for a specific batch of invoices in the **Batches** section of the **Invoices** module, the list can be filtered by either batch number or by the batch creation date.

To have a quick look at the contents of a batch, click on the batch number in the leftmost column. A window will pop up and give you (for each invoice) the date, invoice number, company, and invoice total.
To create invoices from a batch, click on the appropriate action button to the right of the batch you wish to get invoices from:

Download the spreadsheet of the batched invoices.
A Sage file will open on your computer as a CSV file.

Download the PDFs of the batched invoices.
A PDF will open on your computer in a PDF viewer.

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Angelique Floral Designers
23 Main Street
Edinburgh
EH18 8AF

Invoice No.	VT135
Date	11/08/2009
A/C Ref	4N63L1Q
VAT No	GB 743 4916 21
Company No	SC205666

Invoice field 1: 1
Invoice field 1: 2
Invoice field 1: 3

payment terms 1
payment terms 2
payment terms 3

Invoice

Job#/POD#	Type	Signed At	Signed By	Net.	V.A.T
03/06/2009 - PO: 554687					
Collection: Angelique Floral Designers, 23 Main Street, Edinburgh - Delivery: Angelique Floral Designers, 729 High Street, Corstorphine					
121374/18333	Delivery	03/06/2009 09:48:46	Angelique Martins	80.00	12.00
03/06/2009					
Collection: Angelique Floral Designers, 23 Main Street, Edinburgh - Delivery: Marco Martins, 5 Briggs St., Manchester					
121383/18331	Delivery	03/06/2009 09:04:52	Marco Martins	20.00	3.00
03/06/2009					
Collection: Marco Martins, 5 Briggs St., Manchester - Delivery: Angelique Floral Designers, 729 High Street, Corstorphine					
121384/18335	Delivery	03/06/2009 09:50:20	Terry Hopper	0.20	0.03
03/06/2009					
Collection: Angelique Floral Designers, 23 Main Street, Edinburgh - Delivery: Lydia Price, 25 F3 Point Ave, Edinburgh					
121385/18334	Delivery	03/06/2009 09:49:32	Lydia Price	20.00	3.00
03/06/2009					
Collection: Angelique Floral Designers, 729 High Street, Corstorphine - Delivery: Lydia Price, 25 F3 Point Ave, Edinburgh					
121386/18351	Delivery	09/06/2009 15:56:57	Johnsmith	0.30	0.05
11/06/2009 - PO: 11212313 - Angelique Floral Designers					
121409/18372	Delivery	24/06/2009 13:03:08	Tony	108.00	16.20
08/07/2009					
Collection: Angelique Floral Designers, 729 High Street, Corstorphine - Delivery: Lydia Price, 25 F3 Point Ave, Edinburgh					
121454/18395	Delivery	07/07/2009 20:05:55	Rose	35.00	5.25

Invoice field 2: 1
Invoice field 2: 2
Invoice field 2: 3
Invoice field 2: 4

Sub Total	263.50
VAT 15%	39.53
Gross	303.03

Figure 14.6: Sample invoice. The company information and details are all edited in the My Account section of the PODFather.

Section 15

(Optional) Reports

The **Reports** module allows you to produce PDF or CSV reports of PODs based upon different categories of data. These may include:

- PODs by Customer
- PODs by Driver
- PODs by Job Template
- PODs by Depot

1. Click on the **Reports** module button
2. Decide which criteria to search on and enter in all available data for the report data you wish to extract
3. Select the begin and end dates for the search
4. Choose either PDF or CSV formats for the final report

   CSV This will open the report as a spreadsheet in Excel

   PDF This will open the report as a PDF document within the browser

5. Click the Download Report button to request the report

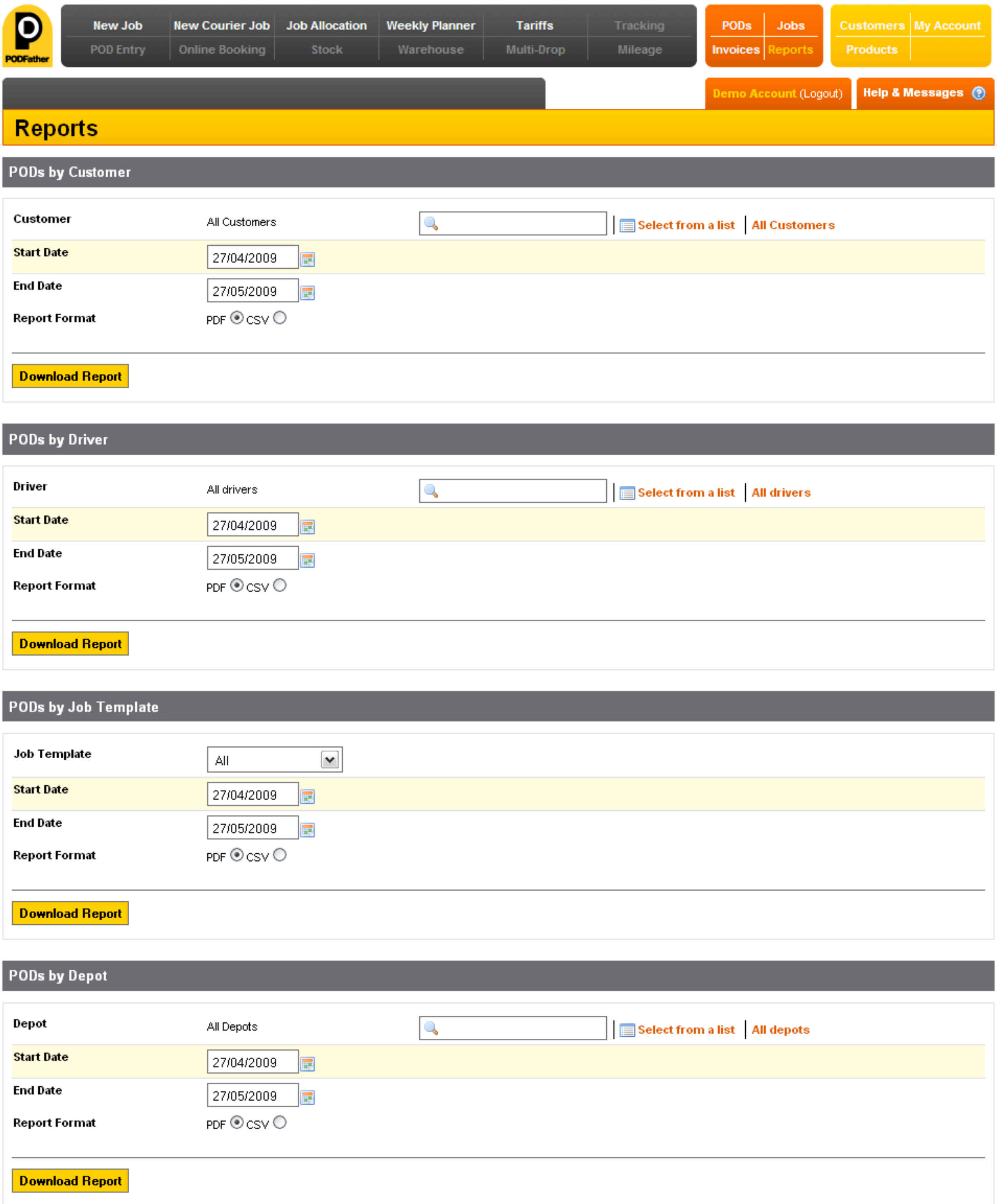

Figure 15.1: The **Reports** tab

valleytechnology

PODs by Customer
15/01/2008 to 04/02/2009

Sybil Ramkin

Date	POD #	From	To	Value
24/09/2008	88	VT Dev Depot 1	Sybil Ramkin	£5.25
08/10/2008	97	BCW Group	Sybil Ramkin	£5,275.77
22/10/2008	149	VT Dev Depot 1	Sybil Ramkin	£5.25
23/10/2008	170	BCW Group	Sybil Ramkin	£5,225.29
23/10/2008	171	BCW Group	Sybil Ramkin	£0.00
23/10/2008	172	BCW Group	Sybil Ramkin	£0.00
30/10/2008	251	BCW Group	Sybil Ramkin	£0.00
05/11/2008	252	Depot 2	Sybil Ramkin	£5.25

Total PODs: 8 **Total: £10,516.81**

Figure 15.2: Section of a PDF report for a customer

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