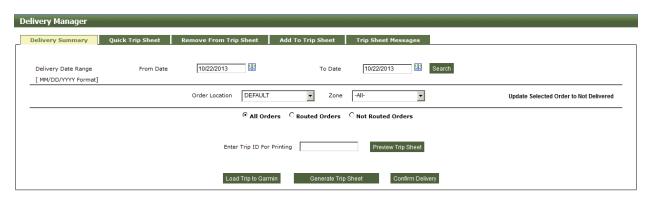# Delivery Manager

Step 1- Log in to **Back Office** with your user credentials. .

Step 2- Open **Delivery Manager** from home page or navigating **System Tools** (see picture below)

Step 3- You will see a **Delivery Manager** page like this having five tabs (see picture below)

Here you can create new trip sheets, manage trip sheets, print and preview trip sheets. Tabs on this page are as follow-

1) **Delivery Summary** – Search Orders, Preview of trip sheets
2) **Quick Trip Sheet** – Create a trip sheet in quick way (multiple orders can be added at once)
3) **Remove From Trip Sheet** – Remove Orders from existing trip sheet
4) **Add To Trip Sheet** – Add orders to existing trip sheet
5) **Trip Sheet Messages** – Add/Edit/Delete messages for a trip sheet.

A detailed description of each tab is described below.

Delivery Summary Tab

This tab allows you to create a new trip sheet and preview already generated trip sheets. Here you can search orders with several available filters to manage and check the delivery status of an order.

Search Filters Available-

> **Delivery Date From**- Orders delivery start date. It will list all orders having a delivery date greater than or equal to this date.
> **Delivery Date To**— Orders delivery end date. It will list all orders having delivery date until this date.
> **Order Location** – Orders having same order location will appear in search list (for multi store users)
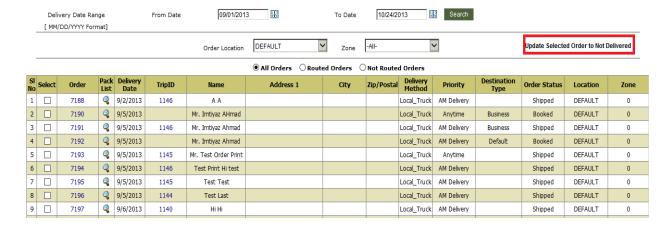> **Zone** – Orders having same the same shipping zone will appear in search list.
> **Order Type** – a) **ALL** – Both orders (added in trip sheets and not added on trip sheets) will appear in the search list.
>> b) **Routed Orders** – Orders added on trip sheets will appear in search list.
>> c) **Non Routed Orders** – Orders, not added on any trip sheets will appear in search list.

When you will click on the **Search** button with search filters, the system will show a list of orders like below

Sl No	Select	Order	Pack List	Delivery Date	TripID	Name	Address 1	City	Zip/Postal	Delivery Method	Priority	Destination Type	Order Status	Location	Zone
1	☐	7188	🔍	9/2/2013	1146	A A				Local_Truck	AM Delivery		Shipped	DEFAULT	0
2	☐	7190	🔍	9/5/2013		Mr. Imtiyaz AHmad				Local_Truck	Anytime	Business	Booked	DEFAULT	0
3	☐	7191	🔍	9/5/2013	1146	Mr. Imtiyaz Ahmad				Local_Truck	AM Delivery	Business	Shipped	DEFAULT	0
4	☐	7192	🔍	9/5/2013		Mr. Imtiyaz Ahmad				Local_Truck	AM Delivery	Default	Booked	DEFAULT	0
5	☐	7193	🔍	9/5/2013	1145	Mr. Test Order Print				Local_Truck	Anytime		Shipped	DEFAULT	0
6	☐	7194	🔍	9/5/2013	1146	Test Print Hi test				Local_Truck	AM Delivery		Shipped	DEFAULT	0
7	☐	7195	🔍	9/5/2013	1145	Test Test				Local_Truck	AM Delivery		Shipped	DEFAULT	0
8	☐	7196	🔍	9/5/2013	1144	Test Last				Local_Truck	AM Delivery		Shipped	DEFAULT	0
9	☐	7197	🔍	9/6/2013	1140	Hi Hi				Local_Truck	AM Delivery		Shipped	DEFAULT	0

This list allows you to select several orders to mark them as not delivered with the button available in red. On clicking order number, you can see a **preview of** the **Work Ticket**. On clicking Trip ID, you can see **preview of Trip Sheet** and on clicking Address 1 you can see the address directly on **Google Maps**.

To see a specific trip sheet preview, you can enter the **Trip Sheet Number** in the text box and click on the **Preview Trip Sheet** button. You will then see preview of that specified trip sheet in separate window. (see picture)

| 14 | ☑ | 7200 | 🔍 | 9/6/2013 | 1149 | Test Test | | | 90004 | Local_Truck | AM Delivery | | Shipped | DEFAULT | 0 |

Enter Trip ID For Printing   1145   [Preview Trip Sheet]

[Load Trip to Garmin]   [Generate Trip Sheet]   [Confirm Delivery]

To generate a new trip sheet, you would click on **Generate Trip Sheet** button. This will open a new page (older method) named **Trip Sheet Generator**. Here you can enter orders manually (one by one) and generate a trip sheet. To follow the new way (faster way) to generate trip sheet, you should read and use the **Quick Trip Sheet** tab.

Quick Trip Sheet Tab

This is a new way and faster way to generate trip sheets. You can select multiple orders at once rather entering and adding orders one by one. .

This tab also allows search filters (dates, order location, zone) to search more specific orders. Default search is available with current date and logged in location.

When you will click on **Quick Trip Sheet** tab, the screen will look like as follows:

Search Filters Available-

>**Delivery Date From**- Orders delivery start date. It will list all orders having delivery date greater than or equal to this date.
>**Delivery Date To**— Orders delivery end date. It will list all orders having delivery date till this date.
>**Order Location** – Orders having same order location will appear in search list
>**Zone** – Orders having same Shipping Zone will appear in search list.

Other Fields Descriptions-

>**Trip ID** – New (auto generated) Trip Sheet ID. Not editable.
>**Driver** – This will show you a list of all drivers available.
>**Vehicle ID** – This will list you a list of all available vehicles.
>**Mileage** – You can enter the mileage here. (optional)

ADDING ORDERS TO CREATE A NEW TRIP SHEET

By default todays orders will show up in the list. Both type of orders (added and not added in any trip sheet) will appear on this list. But you would be able to select only orders those have not been added to any trip sheet. Orders (having trip sheet ID's) are shown here only for your reference.

So when you would search orders based on search criteria available, you will see the screen below:

Here, you can see Order Number 6820 is associated with Trip ID 1137. So this order is not available to add to any new trip sheet.

This list also provide some features like-

> **Order**- On clicking specific Order Number, you can directly view the Work Ticket.
> **Trip ID**- On clicking specific Trip ID Number, you can directly open Trip Sheet preview.
> **Address 1**- This provide a link to view the address in Google Maps
> **Map** – This will also take you to the Google Maps

ADDING Orders to Trip Sheet: When you see the orders on the list, you can select orders by checkboxes and click on **Generate Trip Sheet** button. But you must specify a **Driver, Vehicle ID** before printing. If you don't the system will show a popup message saying to select/enter.

When adding orders you can also specify the **Sorting Order (stop number)** for driver routing in Sorting Order Column.. This will generate the trip sheet accordingly meaning smaller sorting order number will come first in the trip sheet preview. (Picture will be available at the end when you can view how trip sheet preview looks)

e.g. Orders #6807, #6811 are added to this trip sheet #1151 and clicked on **Generate Trip Sheet** button providing other Driver, Vehicle values. Grid will immediately be refreshed and you will see Trip ID is showing up now for these orders and new Trip ID (auto generated) has generated. (see picture below)

Remove Trip Sheet Tab

This tab allows you to remove orders from existing trip sheets. If you do wish to remove orders in previous or old trip sheets you can select that particular trip sheet which will list all orders associated with it and then you would be able to remove those orders from that trip sheet.

This tab provides several search filters. But, these are different in behavior.

Search Filters Available-

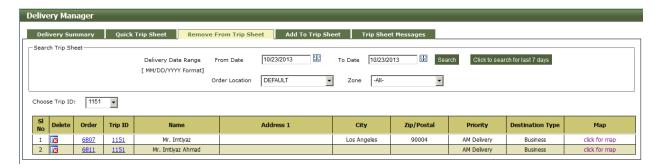**Date From**- trip sheets generated from this date will appear in search list.
Date To— trip sheets generated until this date will appear in search list.
Order Location – trip sheet having orders with the same order location will appear in search list
Zone – trip sheets having orders with same Zone will appear in search list.

Note: All these search filters will work on clicking **Search** button. The **Click to search for last 7 days** button will show you the list for trip sheets generated in the last 7 days only with order location and shipping zone selected.

When you select a trip shit from dropdown list, the system will show you a list of all orders associated with that trip sheet.

Here you can see a list is showing both order (#6807, #6811) those we added on trip sheet #1151 generated earlier. Now you can see grid is providing few links:

Order- On clicking specific Order Number, you can directly view the Work Ticket.
Trip ID- On clicking specific Trip ID Number, you can directly open Trip Sheet preview.
Address 1- This provides a link to view the address in Google Maps
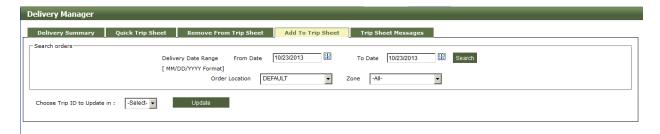**Map** – This will also take you to the Google Maps

To remove an order from list, you can click on icon available in **DELETE** column. If you do so, system will ask for a confirmation to remove and if you are sure then the system will remove the selected order from trip sheet

permanently.

Add To Existing Trip Sheet Tab

This tab allows you to add orders in existing trip sheet. If you do wish to add orders in existing trip sheet, you can search orders with the available search filters and then you can choose the trip sheet you want to add orders in.
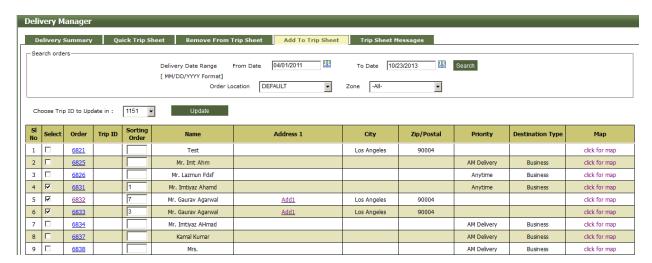

This tab also provides several search filters but these are different in behavior. The Search will show you a list of all non associated/added orders only and the trip sheet generated as a dropdown.

Search Filters Available-

Date From- trip sheets generated and orders having a delivery date from this date will appear in search list.

Date To—trip sheets generated and orders having a delivery date till this date will appear in search list.

Order Location – trip sheet having orders and orders having same order location will appear in search list

Zone – trip sheets having orders and orders having same Shipping Zone will appear in search list.

When you specify search filters the system will show you a list of all non added orders. (See picture below)
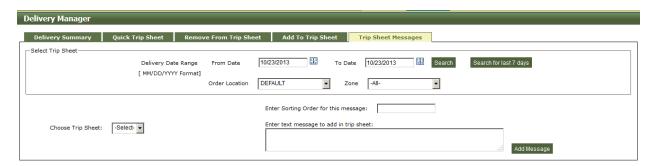

Here, you can see 3 orders (#6831, #6832, #6833) are selected and trip sheet #1151 is also selected. Now you would click **Update** button to add these orders on the trip sheet and then the grid will be refreshed and these selected orders will not show on the list as they have been added on a trip sheet.

Note: Sorting order can also be specified for these orders. You will see later how that works and be able to change the order index (stop number) in trip sheet preview.

Trip Sheet Messages Tab

This tab allows you to **add/edit/remove** messages to a trip sheet. These messages will appear in trip sheet preview as per the sorting order specified..

When you click on **Trip Sheet Messages** tab, you will see a screen like below-

Search Filters Available-

> **Date From**- trip sheets generated from this date will appear on search list.
> **Date To**— trip sheets generated untill this date will appear on search list.
> **Order Location** – trip sheets having orders with the same order location will appear on search list
> **Zone** – trip sheets having orders with the same Shipping Zone will appear on search list.

Note: All these search filters will work by clicking the **Search** button. **Click to search for last 7 days** button will show you the list for trip sheets generated in the last 7 days only with order location and shipping zone selected.
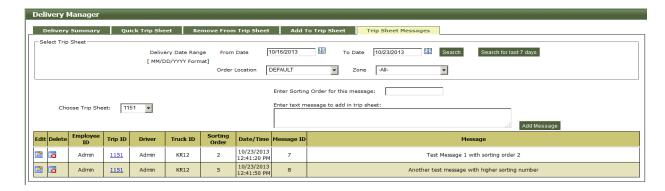
When you select a trip shit from dropdown list, the system will show you a list of all messages associated with selected trip sheet.

HOW TO ADD A MESSAGE

To add a new message follow these steps-

1) Select a Trip Sheet (mandatory)
2) Enter a Sorting Order (not mandatory)
3) Enter a text message in large text box (mandatory)
4) Click on **Add Message** button

Now you will see a screen as follows:

Here you can see two messages were added on Trip Sheet #1151.

DELETE MESSAGE

To delete a message from trip sheet follow steps-

1) Select a Trip Sheet (mandatory)
2) Identify Message from list
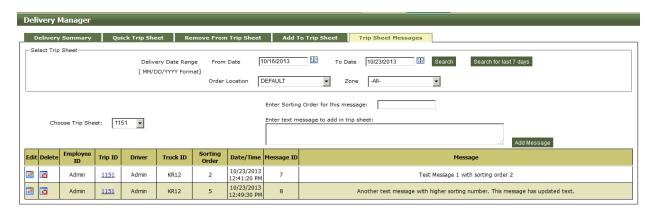3) Click on icon under **DELETE** Column on page

Now the system will ask you for a confirmation and if you confirm, system will delete that message permanently.

UPDATE MESSAGE

To update a message of trip sheet follow steps-

1) Select a trip sheet from list (mandatory)
2) Identify message from list
3) Click on icon under **EDIT** Column in grid

The system will fill all the values (Sorting Order, Text Message) in textboxes and then you can change/update the sorting order and message. Finally you click on the Update Message button to update the change.

Here, you can see Message ID 8 has updated message.

Trip Sheet Preview

You can click on **Trip Sheet ID** to see a preview of the trip sheet. Here is preview of trip sheet #1151. You can also see how the Sorting Order affects the Order index (Stop Number)

Stop 1

6831   Business   Anytime
Mr. Imtiyaz Ahamd

Signature: _____

Time: _____

Status: _____

Item Details

Item Type	Non Stock	Item ID	012(Quantity -1)
Item Name	DESIGN BOWL DOUBLE GREEN #012		
Item Description	DESIGN BOWL DOUBLE GREEN #012		

Driver Notes

Stop 2

7
Message By: Admin
Date/Time: Oct 23 2013 12:41PM

Signature: _____

Time: _____

Status: _____

Message:

Test Message 1 with sorting order 2

Stop 3

6833
Mr. Gaurav Agarwal
Gaurav Company
Add1
Los Angeles CA 90004
Ph: 9818160148 Cell: 9818160148

Signature: _____

Time: _____

Status: _____

You can see indexes (stop number) of orders and messages for this trip sheet has been updated..