

# SERVICE - DELIVERY

## What are Deliveries?

A delivery involves the process of receiving goods into a specific location.

## Restricted Access

This area requires a **Service** or **Finance** license to access.

**Users, Super Users, Owners** and **Internal Users** can view and update the data within this area.

## Navigating the Delivery List

In SmartVend, under the **Service** header in the main menu, you can find the **Delivery** section.

On this screen, a set of filters allows you to narrow down the list of deliveries based on specific **locations** or **users**. After applying the relevant filters, the list of deliveries will automatically update to show results that match your selections. This helps in easily managing and tracking deliveries for particular locations or individuals.

In addition to the filters, the Delivery screen in SmartVend includes a **date range** option. When the page first loads, the date range defaults to a **30-day period**, allowing you to view deliveries within that timeframe. You can adjust the date range as needed to focus on specific delivery periods.

Underneath the date picker, you can choose to display deliveries that were either **Created** or **Completed** within the selected date range. This allows you to filter the deliveries based on when they were initiated or when they were finalised.

## Creating a New Delivery

To create a new delivery in SmartVend, select **'Menu'**, then choose **'Add Delivery'**.

After selecting **'Add Delivery'**, you will be prompted to search for a location by either **Location Reference** or **Name**. Once you've found the correct location, simply select it and click **'Add'** to proceed with the delivery setup.

## Training Note



Deliveries can only be processed for locations categorised as a **'Warehouse'**. If the selected location doesn't have this type, you will not be able to complete the delivery.

## Delivery Details

When creating a new delivery in the Delivery Details page, if the location has a large number of parts, you can use filters to narrow the part list to individual items. The table will update based on the applied filters.

Initially, the **counted quantity of all products** will be set to **0**. To hide parts with a counted quantity of 0, you can deselect the option **"Include a Delivered Quantity of 0"**. This will ensure only parts with a recorded delivery quantity are displayed.

You have the option to amend the **Delivery Reference** to something more relevant to your organisation, or you can keep the automatically generated reference if it suits your needs. This allows for greater flexibility in tracking deliveries based on your internal naming conventions.

You can amend the **PO Reference** to match a Purchase Order from outside of the system, but this field is not mandatory and can be left blank if it's not applicable.

Within the part table, each part will be listed with the **Delivered Quantity** defaulted to 0. You can enter the quantity received in both **Cases** and **Singles**.

Part Reference	Part Name	Delivered Quantity	
		Cases	Singles
Part Reference 1	Part Name 1	0	0

If you amend a field, the corresponding row will highlight in blue to indicate that there are unsaved changes.

Part Reference	Part Name	Delivered Quantity		Case Size
		Cases	Singles	
Part Reference 1	Part Name 1	0	0	5

The **Cost Valuation** and **Retail Valuation** will be automatically calculated based on the Part Unit Cost Price and Unit Retail Price, which were set up within the Part Catalogue in Administration.

Part Manufacturer / Brand	Cost Valuation	Retail Valuation
TEST	50.00	250.00

You can overwrite the Cost Valuation and Retail Valuation sections for each part if needed. This is particularly useful if you receive a part from a different supplier and want to adjust the cost or retail valuation accordingly.

## Save Delivery

If you need to navigate away from the delivery page while entering values, make sure to select **"Save Changes"** to ensure your updates are preserved.

Saving your changes ensures that your entered details are retained, allowing you to pick up right where you left off when you return to complete the delivery.

## Add New Part to Delivery

When adding a new part to an uncompleted delivery:

- Select 'Menu'**: This will open the options for managing the delivery.
- Choose 'Add New Part'**: This will allow you to enter details for the new part.

- Search and Select Part**: Use the search functionality to find the part by its name.
- Add Part**: Once selected, choose 'Add' to include the part in the delivery.

The new part will appear at the bottom of the product list with a notification indicating that it does not currently exist on the Location Layout. This allows you to manage and track new parts effectively within the delivery.

Part Reference 1	Part Name 1
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## Submit Delivery

To finalise and submit the delivery:

- Review Values**: Ensure all quantities and valuations are correctly entered.
- Complete Delivery**: Navigate to the **'Menu'** and select **'Complete Delivery'**.

This action will submit the delivery and update the system accordingly.

## Delete Delivery

If you need to cancel and remove a delivery that you no longer wish to submit:

- Navigate to Menu**: Click on the **'Menu'** option.
- Select Delete Delivery**: Choose **'Delete Delivery'** to remove the delivery from the system.

When you select **Delete Delivery**:

- Confirm Deletion**: A prompt will appear asking you to confirm that you are about to delete the delivery.
- Select 'Yes'**: Confirm your decision by selecting **'Yes'**. This will permanently delete the delivery and any unsaved changes.

## Training Note

Once a delivery has been marked as **Completed**, you cannot amend any of the values entered. If incorrect values were submitted:



- Create a Stocktake**:
  - Enter the correct values and submit the stocktake to correct the inventory.
- Adjust Values**:
  - Alternatively, enter the values from the completed delivery back into the stocktake, and then create a new delivery with the correct details.