SERVICE - DELIVERY

What are Deliveries?

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

Restricted Access

area.

Last Updated:

04/10/2023 10:20

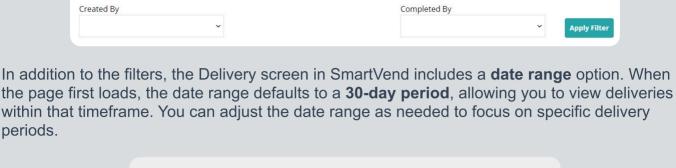
On this screen, a set of filters allows you to narrow down the list of deliveries based on specific

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

Navigating the Delivery List

update to show results that match your selections. This helps in easily managing and tracking

Delivery List Location Status



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'.

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Date Created Date Completed

Add Delivery

Export Delivery List

Menu ···



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.

When creating a new delivery in the Delivery Details page, if the location has a large number of

Part Reference

Part Name

Part Reference

Part Reference 1

Part Reference

Part Reference 1

retail valuation accordingly.

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

Delivery Details

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.

Include A Delivered Quantity of 0

Apply Filter

Delivered Quantity

Singles

Case Size

5

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.

Part Category

Part Manufacturer / Brand

You have the option to amend the **Delivery Reference** to something more relevant to your

unsaved changes. **Delivered Quantity**

Cases

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

Part Name

Part Name 1

Part Manufacturer / Retail Valuation Cost Valuation Brand 250.00 TEST 50.00

is particularly useful if you receive a part from a different supplier and want to adjust the cost or

Save Delivery

< Back **Save Changes** Menu 🗸 Saving your changes ensures that your entered details are retained, allowing you to pick up right

Add New Part to Delivery

Valuation

Part Reference 1

Menu ^

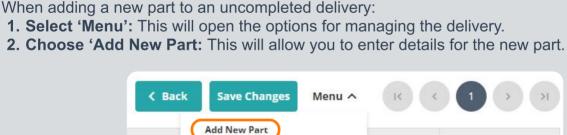
Retail Valuation

Part Name 1

Part Name Cases Singles Part Name 1 0

0

You can overwrite the Cost Valuation and Retail Valuation sections for each part if needed. This



The new part will appear at the bottom of the product list with a notification indicating that it does

Save Changes

Add New Part

Delete Delivery

Delete Delivery

2. Select Delete Delivery: Choose 'Delete Delivery' to remove the delivery from the system.

Export Delivery Details

Complete Delivery

not currently exist on the Location Layout. This allows you to manage and track new parts

Export Delivery Details

Category

effectively within the delivery.

Submit Delivery

where you left off when you return to complete the delivery.

Export Delivery Details Category Complete Delivery

Toffee

< Back

< Back **Save Changes** Menu ^ Add New Part

Category

Delete Delivery offee 1. Confirm Deletion: A prompt will appear asking you to confirm that you are about to delete 2. Select 'Yes': Confirm your decision by selecting 'Yes'. This will permanently delete the delivery and any unsaved changes. **Complete Delivery**

Delivery cannot be amended after the Delivery is marked as

- values entered. If incorrect values were submitted:
- 1. Create a Stocktake: Enter the correct values and submit the stocktake to correct the inventory.

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

locations or users. After applying the relevant filters, the list of deliveries will automatically deliveries for particular locations or individuals.

Delivery Reference

periods.

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

parts, you can use filters to narrow the part list to individual items. The table will update based on the applied filters. only parts with a recorded delivery quantity are displayed.

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.

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.

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.

After selecting the part to add: **1. Search and Select Part:** Use the search functionality to find the part by its name. **2. Add Part:** Once selected, choose 'Add' to include the part in the delivery.

To finalise and submit the delivery: 1. Review Values: Ensure all quantities and valuations are correctly entered. 2. Complete Delivery: Navigate to the 'Menu' and select 'Complete Delivery'. This action will submit the delivery and update the system accordingly.

If you need to cancel and remove a delivery that you no longer wish to submit: 1. Navigate to Menu: Click on the 'Menu' option.

When you select **Delete Delivery**:

the delivery.

Completed, continue? **Training Note**

2. Adjust Values:

· Alternatively, enter the values from the completed delivery back into the stocktake, and then create a new delivery with the correct details.

Once a delivery has been marked as **Completed**, you cannot amend any of the