User Manual

for

Portal Home Delivery Sub System

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Date: 31st August 2005
Version: 1.00

ACCEPTANCE OF CONTENTS

The undersigned hereby accept the contents of this document as defining the Trial Balance Ledger module.

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1 PREFACE

1.1 Scope of this document

This document explains the functionality and setup of Home Delivery sub system in the portal.

1.2 Audience

This document is intended for:

- The AMC CIT business personnel for approval.
- Portal Users

1.3 Related documents

None.

1.4 Definitions

- Customer Number: Reference linking the Customer to all related sub systems
- Card Number: Loyalty customer card number
- Sales - Sales information loaded from POS to the portal.
- PC or notebook that will interface via a browser
- POS - Point Of Sale System

2 OVERVIEW

2.1 General overview

The Home deliver sub system allows goods purchased at the POS to be delivered to a known address.

The portal will include non-editable data, such as sales information and other POS data, along with data manually entered (Editable) by the user.

2.1.1 Security

User access to the reports is controlled via the normal Portal access methods. A user may be entitled to view or edit the Customer Address records. The Company administrator sets the required privileges via the Portal user maintenance screens.

2.1.2 Hardware used

Hardware may be a normal PC or laptop running any standard Internet browser. If using Internet Explorer it must be version 6 or greater. In the case of Firefox it must be version 1.0.4 or greater.

2.1.3 User interface

Standard portal navigation and login is used.

3 Business process

The portal will receive transactions from the POS, with an internal indicator and details for the customer home delivery. The POS will have generated a second receipt to accompany the goods.

The functionality of the Portal is to support known customers, from Lay Buys, Loyalty, Debtors, Customer Orders, allowing quick access for the POS to assign the Home Delivery to a customer. The POS also allows generation of new customers.

Portal reports allow for historical reporting and control of goods actually delivered.

4 Reports

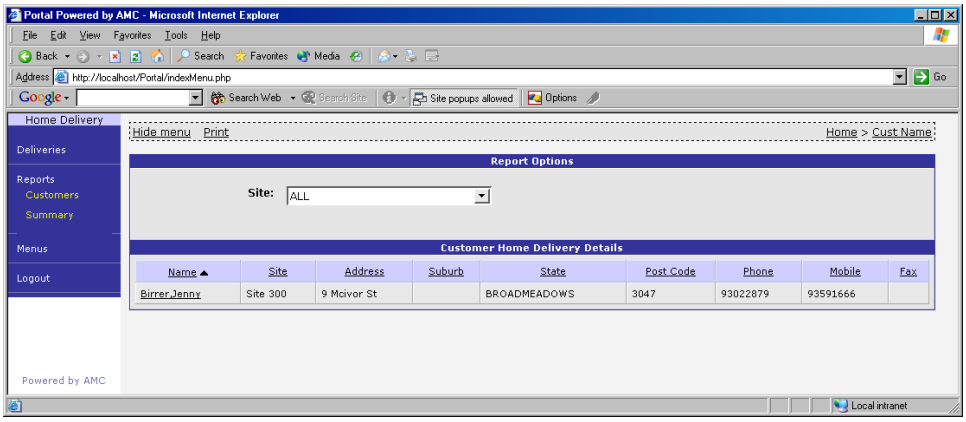
4.1 Purpose

To report on customer activity given a users selection.

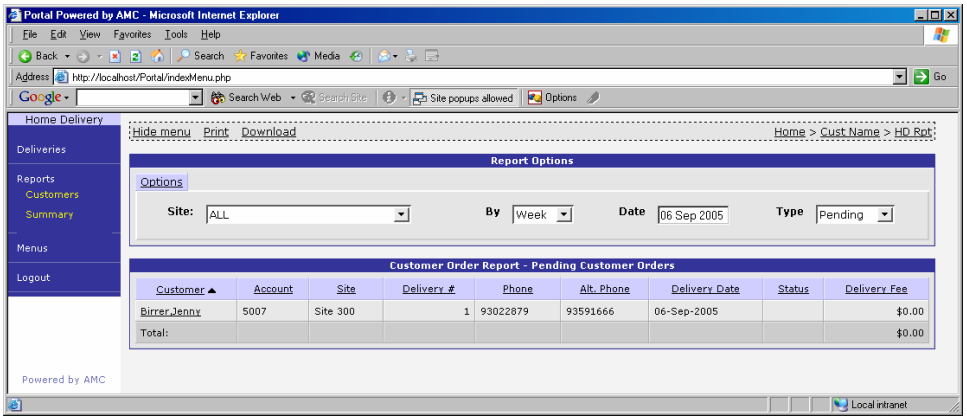
4.1.1 Type of reports

There are two types of reports available.

1. Customers
   This report allows all previous customers that have used the home delivery system to be reported on.



2. Summary
   The Summary report allows a selection of current activity and status to be reported on



5 Maintenance

5.1 Purpose

To allow user updates, add or change Customer address or details.

5.2 Maintenance Sections

The user may find the maintenance screens under the menu Home Deliveries. The customer edit / new feature may be used to edit customers for Lay buys, Home Delivery and customer orders provided the options are subscribed to and enabled.

6 Navigation

6.1 Selecting Multiple Rows

Multiple row selections may be done via the standard ‘Windows’ selection sort cuts.

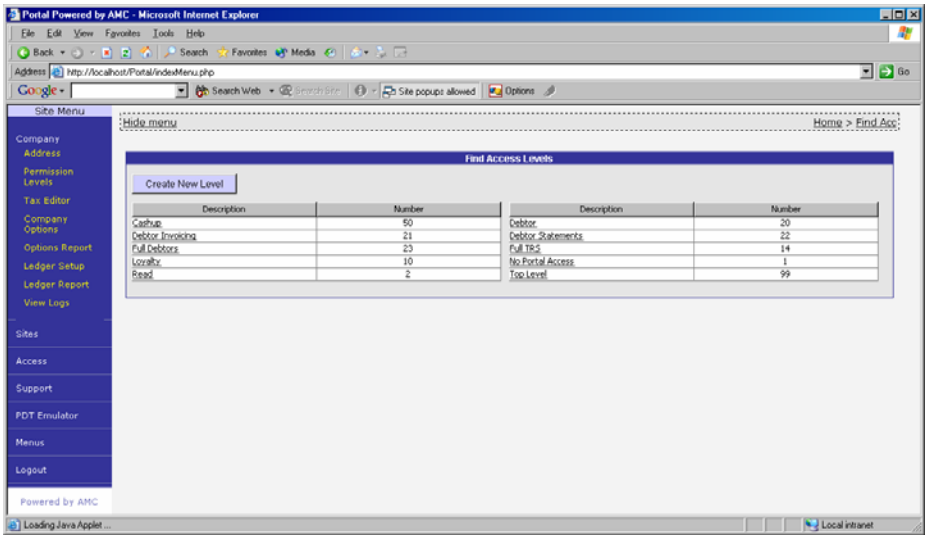
Multiple selections

1. Click first required line, then with shift key down click last. All lines between will be selected.
   Or
2. Click each line required with control key pressed. This selects each line clicked.
   Or
3. A combination of both shift and control keys will select a group between the clicks

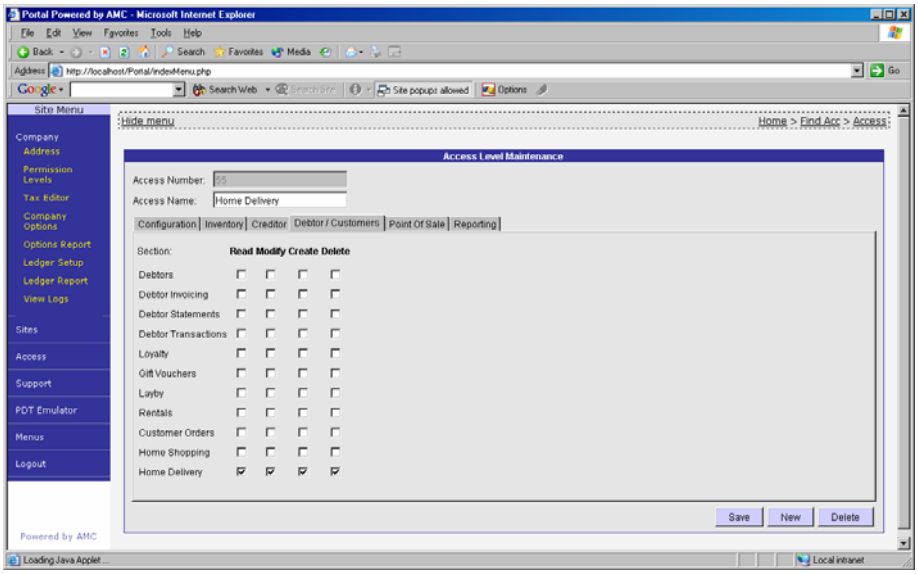
6.2 Security

Select the Site Menu via the side menu. Note, the name of the menu may be some other description as this is a soft option within the portal. Examples are Store Menu, Branch Menu etc

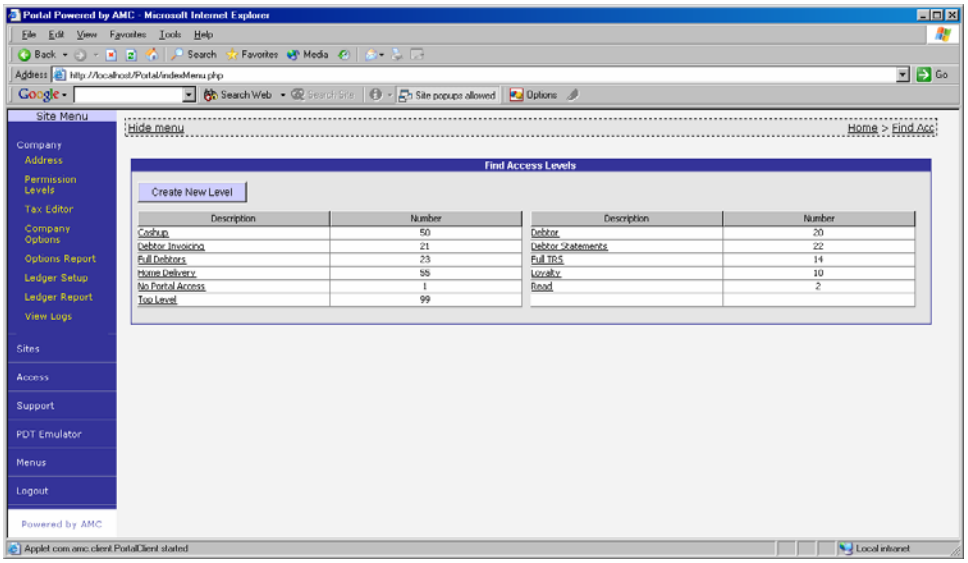
Click on ‘Permission Levels’



If a Home Delivery exists, then *click* on it, else click on 'Create New Level' and create the required permissions level.



The user is required to have at least read permissions to run the reports and edit permission to change any of the settings or to add new Customers.



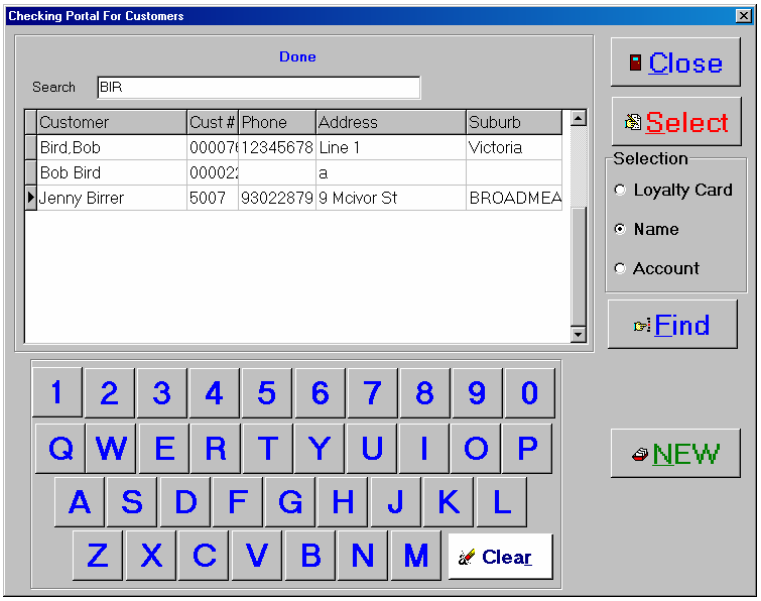
7 Data Entry

7.1 POS

The sales transaction at the POS is processed as normal. However, before tender is complete, the home delivery sub system is invoked by the operator on request of the customer for home delivery.

The Home Delivery sub system is normally configured on the functions page.

The delivery system will activate a customer search screen



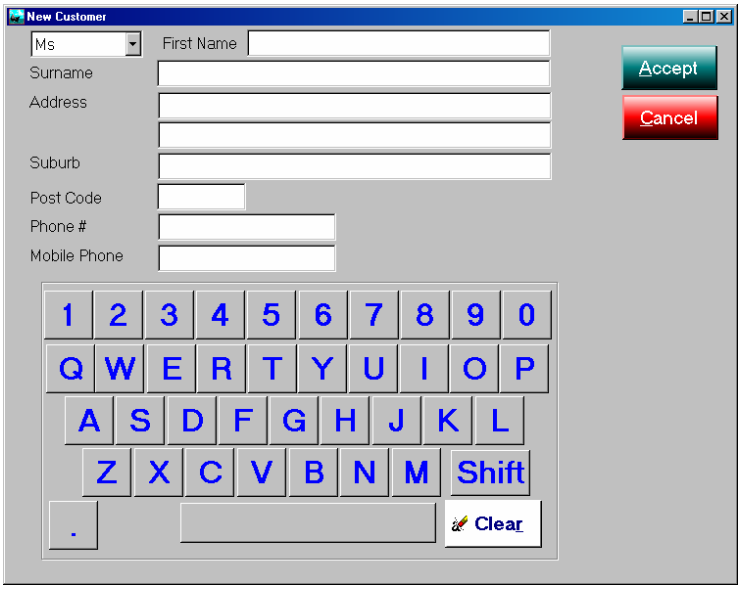
The operator selects the search criteria depending on information given by the customer. Normally it is expected to be a loyalty card which can be swiped or scanned.

The other search methods are by customer number, or customer name. All three search methods support partial searches. i.e. RED will find Fred Smith, Alan Redled etc.

The operator enters in at least three characters and clicks find. The system will then return all matching records from the Portal.

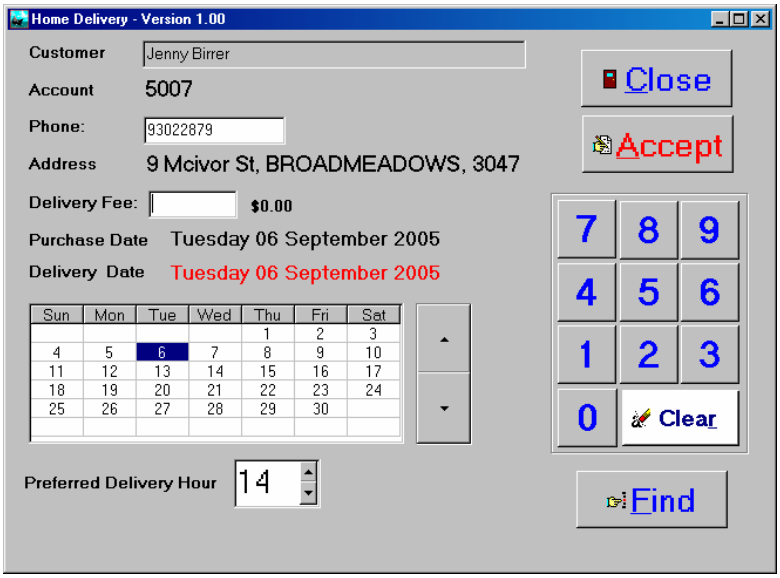
To select the required customer, click or touch their details line and ‘Select’

If the customer is a new one, then the operator clicks ‘New’ and starts to enter in the customer details.



When done, click ‘Accept’.

The POS will then return back to the details of the home delivery screen to capture the required information.



A minimum delivery fee may be set. The date and time of required delivery is then captured and then ‘Accept’ is clicked to complete the transaction.

The transaction is now tendered as normal.

The POS generates a special receipt to be attached to the purchased goods.

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Please Staple This Copy to Delivery

*******  Home Delivery *******

Delivery # 1

Name      Jenny Birrer
Account   5007

Address   9 Mcivor St
          BROADMEADOWS, 3047

Phone     93022879

Delivery Date Tuesday 06 Sep 2005
Preferred Delivery Time 14

      Please retain your receipt as proof of
        purchase for refunds and exchanges

OPERATOR: Alicia
ITEMS:    3
TERMINAL: 1
JOURNAL:  00378 06-Sep-2005 15:07

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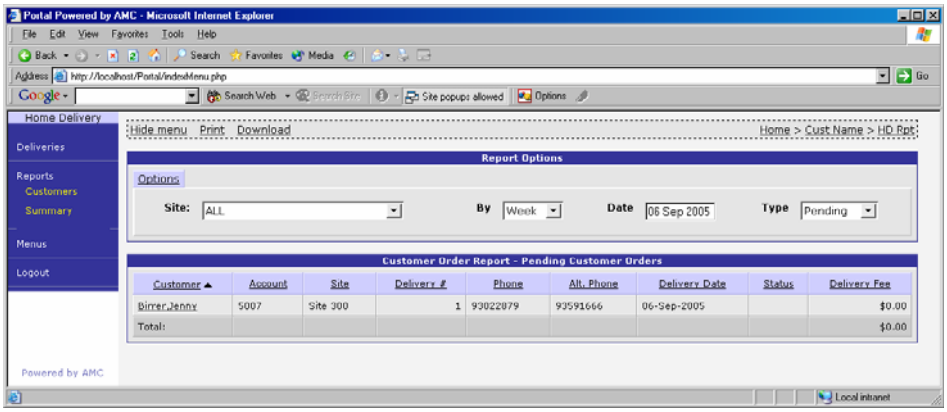
The POS is free to proceed with the next transaction.

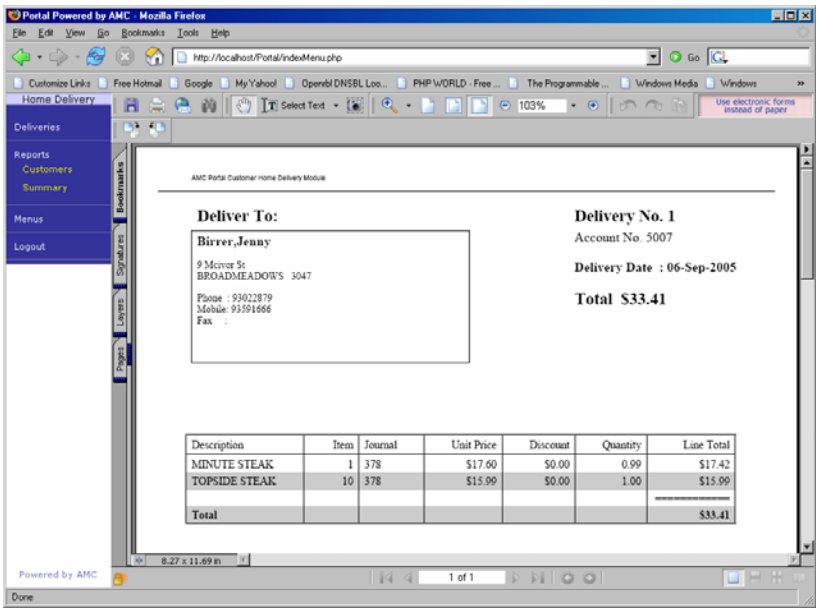
7.2 Portal

7.2.1 Report



Reporting of pending or delivered home delivery is obtained via the summary option under the Home Delivery reports.

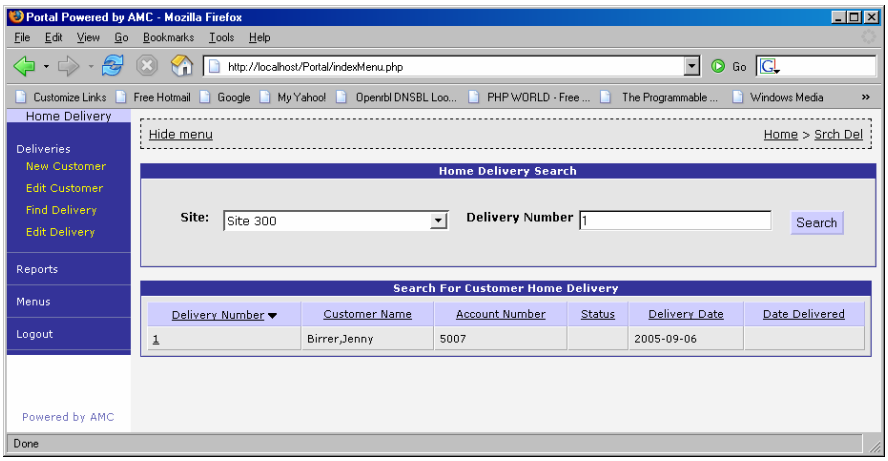
Drilling down from the summary, allows reprinting of the home delivery details

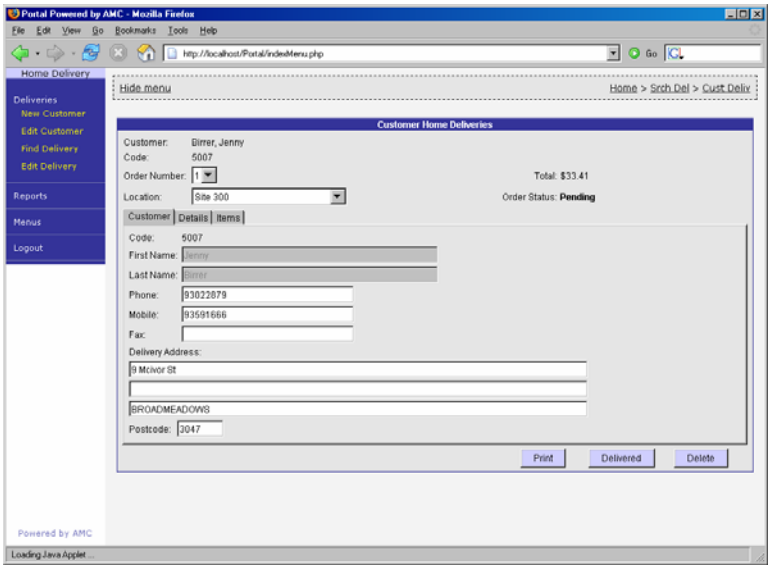


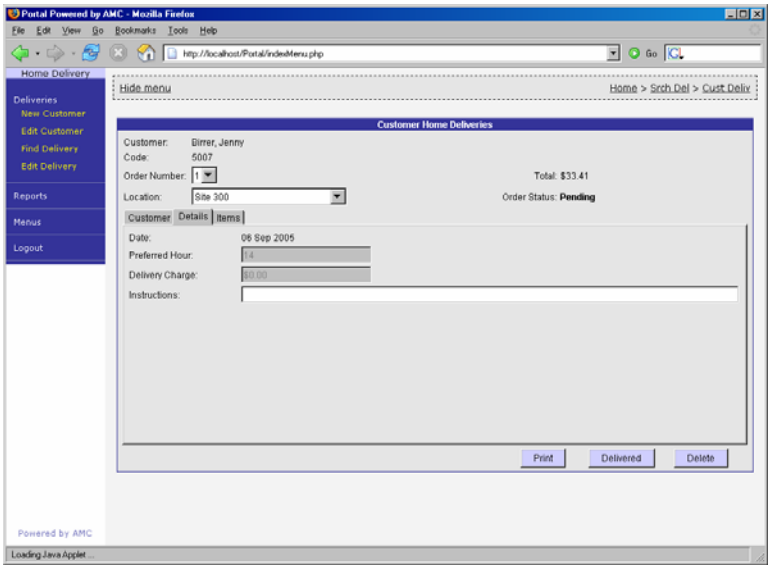
7.3 Confirmation of Delivery

The last phase of the home delivery sub system is to record that the delivery has been completed.

The portal user may find the delivery either by the customer or by the delivery number


Portal Powered by AMC - Mozilla Firefox
File Edit View Go Bookmarks Tools Help
http://localhost/Portal/indexMenu.php
Home Delivery
Deliveries
New Customer
Edit Customer
Find Delivery
Edit Delivery
Reports
Menus
Logout
Powered by AMC
Hide menu
Home > Srch Del
Home Delivery Search
Site: Site 300
Delivery Number 1
Search
Search For Customer Home Delivery
Delivery Number
Customer Name
Account Number
Status
Delivery Date
Date Delivered
1
Birrer,Jenny
5007
2005-09-06
Done


Portal Powered by AMC - Mozilla Firefox
Hide menu
Home > Srch Del > Cust Deliv
Customer Home Deliveries
Customer: Birrer, Jenny
Code: 5007
Order Number: 1
Total: $33.41
Location: Site 300
Order Status: Pending
Customer Details Items
Code: 5007
First Name: Jenny
Last Name: Birrer
Phone: 93022879
Mobile: 93591666
Fax:
Delivery Address:
9 McIvor St
BROADMEADOWS
Postcode: 3047
Print
Delivered
Delete
Loading Java Applet ...


Portal Powered by AMC - Mozilla Firefox
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Customer: Birrer, Jenny
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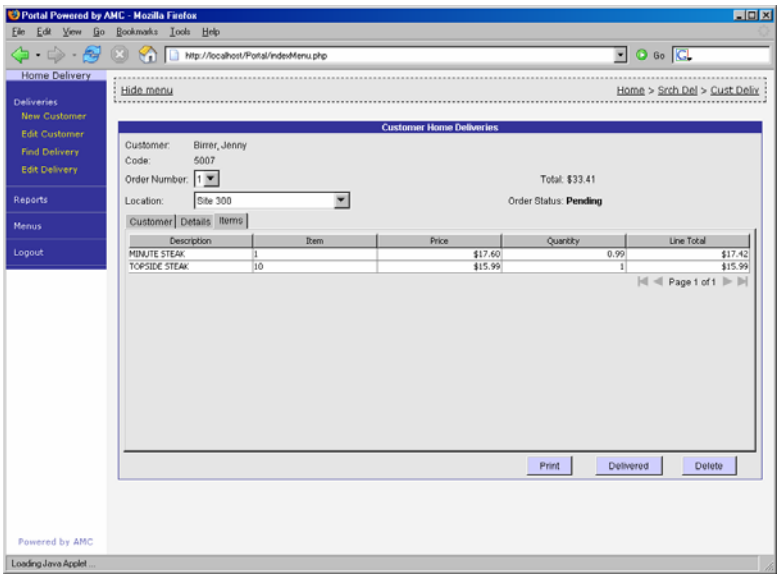
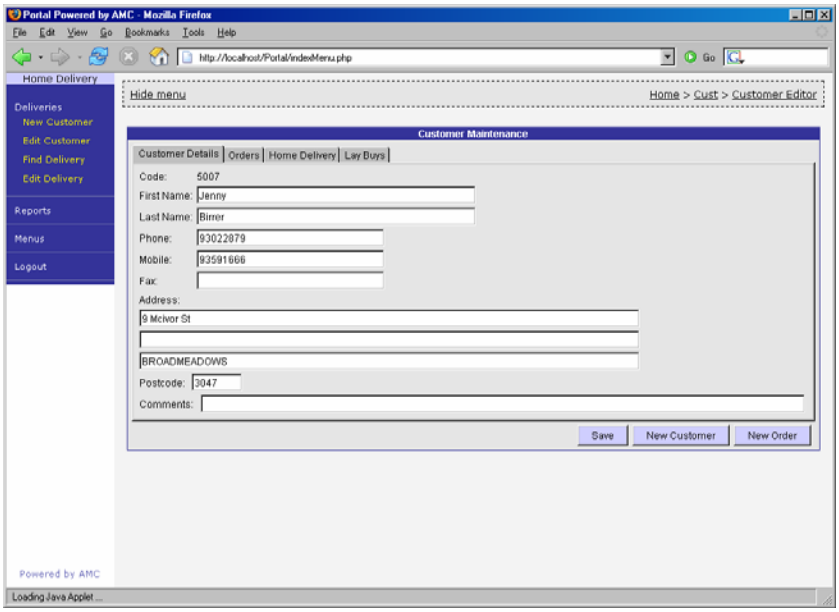
Order Number: 1
Total: $33.41
Location: Site 300
Order Status: Pending
Customer Details Items
Date: 06 Sep 2005
Preferred Hour:
Delivery Charge:
Instructions:
Print
Delivered
Delete
Loading Java Applet ...

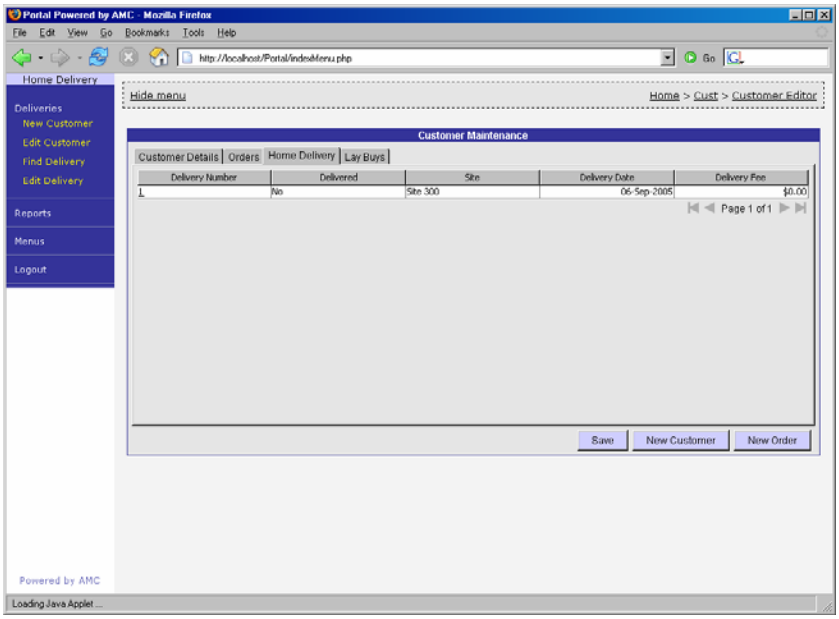


To set the delivery as delivered, click the ‘Delivered’ button.

7.4 Customer Edit

The Lay Buy, Customer Order and Home Delivery systems are integrated, allowing a ‘one’ stop data entry point.





Drill down to Orders, Deliveries or Lay Buys is available from the customer edit screen. If the customer is a Loyalty or Account customer as well, the updating of the address details will also update the other sub systems respectively.