Proof of Delivery Manager

The Datalinx Proof of Delivery system utilises the latest in handheld technology typically used by a delivery van driver providing the ability to have signed confirmation of product delivery, collect and process the return of product and add items to client orders whilst on-site.

With our Proof of Delivery Manager we enable you to "take Sage mobile."

As with all the applications from Datalinx, the Proof of Delivery system has been developed and created to be an integral part of the Sage application and an extension to the central business system.

3G/EDGE, Wi-fi or Batch

The application is built around the 3G/EDGE mobile phone network, with an additional option to work on Wi-Fi networks or utilise batch downloads.

This ensures the application can communicate to the Sage host in real time in areas of good wireless coverage, yet is not dependent on a single network connection to operate. This allows mobile workers to continue to use the system whilst in areas of poor or no coverage.

Datalinx Proof of Delivery is designed for use on Smartphones and PDA devices. A 'call list' of clients scheduled for delivery is downloaded to the handheld device, with the user selecting the visiting order. Call lists are viewed in colour coded format and once completed removed from the day's agenda.

Within the Datalinx Mobile applications, mobile users can be updated with changes, actions and messages throughout the working day, ensuring that as business needs change the mobile worker is alerted and provided with accurate information about stock and their customers.

Console Management:

Information is issued from the core Sage accounting or ERP system to the user's handheld device via a Datalinx Console.

The console can be an active part of the business providing additional reporting information or seen as a 'sleeper' tool allowing the business to automatically transfer transactions processed by the remote user directly into the Sage system ensuring the office based team have current knowledge of deliveries and returns.

Core System Functionality

- Proof of delivery with signature capture
- Delivery notes printed 'on demand'
- Returns – pickup and process
- Invoicing of complete deliveries
- Payment "Cash" collection
- Delivery up-sell

Proof of Delivery – Data Collection

- Customer name
- Time & date of delivery
- Order details
- Proof of signature
- Delivery

Additional User Activities

These may be recorded against the visiting client through the handheld device, e.g.

- Daily vehicle checks
- End of day routines
- Mileage recording
- Expenses recording
- Photos of product returns (e.g. damaged goods)

Signature Recording

When goods are signed for the resulting signature is saved against the customer and can be accessed via the Datalinx Console or saved to an appropriate area within the business IT system.

Bar Code Accredited

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sage | Certified Solution

Returns

A similar process is used when collecting and accepting product returns. Details of returns are collected in a free text field and there is an additional option to take photos where relevant e.g. of damaged goods.

Upselling and Placing Additional Orders

Delivery drivers have the option to up-sell from "van' stock" and add additional products to the Sage order. The order taking process presents the user with an "Order Pad" to enter product and quantities.

Once the order is confirmed, client purchase order number, reference numbers and any special notes can be entered. On completion a signature may be collected and if required, the order printed through a portable printer.

Portable Printing

If required portable printed can be used to print delivery notes, invoices, newly generated sales orders and receipts for payments whilst the driver is with the client.
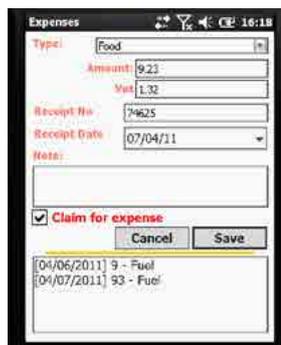
Processing Payments

It may be a requirement for the Proof of Delivery user to collect payments whilst on-site with the client. Cash received is recorded and reconciled both on the hand held and on the central system. These reports are presented in an appropriate format for posting or assigning to accounts within Sage.

If the user solely works with account customers, on completion of the delivery clients will be provided with invoices produced from sage in the normal manner.

Reporting

To assist with the day to day business reporting that mobile employees are required to complete, the system may be configured to capture details on expenses, vehicle mileage, review sales targets, and daily activities.

Follow up notes

When messages are sent to the remote user they are alerted as the handheld 'sync's via the mobile phone network to the arrival of a new message.
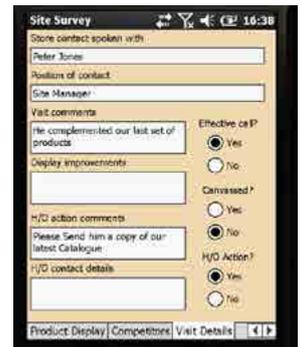

As the message is downloaded to the handheld device the user is required to confirm receipt prior to the handheld re-activating. This ensures that all messages are acknowledged before they are automatically filed against the appropriate customer.

Data Transfer and Sage Updates

At the end of a client call details of all deliveries signed for, returns processed, orders taken and payment collected are updated to the head office and into Sage. This is completed via the mobile network, or if the user is in a poor connection area, held in the mobile device until the network becomes available.

Site Survey and Feedback Notes

A predetermined series of questions and checks can be set up for the delivery person or rep. to complete whilst mobile or with a client. For example, customer feedback forms and damaged part reports.

System Requirements:

Proof of delivery will work with any level of Sage from Sage 50 professional, Sage 200 to Sage 1000.

In summary, the Datalinx Proof of Delivery application allows the user to capture signatures at the point of delivery, add to orders and process returns whilst remote from the office based systems and then immediately update Sage via a wireless connection.

We reserve the right to amend specifications and functionality as part of our commitment to continuous improvement.

If you require further information please contact Datalinx.