

<b>Date</b>	October 17, 2023
<b>Subject</b>	Auto Delivery

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## Purpose

Having left thousands of freight dollars on the table, Andersons Appliances has decided to set up a base and model auto delivery charge.

There are 2 different types of auto delivery charges:

1. Base Delivery Charge
2. Model Delivery Charge

## Base Delivery Charge

Field	Purpose
Base Delivery Charge	Enabling this field will turn on the auto delivery base delivery charge.
Auto Update Base Delivery Charge	Enabling this field will update the base delivery upon editing, copying or splitting the invoice
Require Model	A base delivery charge will only be added after a model has been added to the invoice.

## Setup

### Invoice Type

To trigger the auto delivery function, go to **Tools > System Maintenance > Invoice Type**

Edit Invoice Type RS Retail Sales

Settings 1 Settings 2 **Settings 3** Settings 4 Required Fields Builder Allowance G/L Allocation Printing

Export To Wty Claims  
 Exclude Warranty Amount from Total  
 Total open BO Lines  
 Trip Charge  
 Base Delivery Charge  
 Auto Update Base Delivery Charge  
 Require Model  
 Delivery Charge  
 Require Ship Via  
 Misc Type   
 Allow Qty Breaks for Items  
 Copy Detail with Invoice  
 Copy Complaint / Svc Performed  
 Copy Default Schedule Date to Next Available  
 Lock Estimate On Copy  
 Use Terminal Taxes  
 Link Tax to Delivery/Pickup  
 Use TTR Tax  
 Change Quote to Sale - Update Invoice Date  
 Change Quote to Sale - Blank out Job Status  
 Auto Update Warranty End Date in History  
 Default Do Not Update  
 Update MapZone On Zip Code Change  
 Prompt for Models when Splitting Labor  
 Show Warranty Yes/No in Detail  
 Purchase Date Warning  
 Require Credit Approval  
 Not Approved Job Status   
 Cannot Reserve COD Invoice with Balance  
 Max Days out to Reserve  
 Write Item Deletes to Notepad  
 Write Model Deletes to Notepad  
 Dispatching Enabled  
 Accumulate Points for Call Units  
 Default Schedule Date to next available  
 Cannot Schedule COD Invoice with Balance  
 Cannot Pick up COD Invoice with Balance  
 Cascade To   
 Cannot Schedule with No Detail  
 Cannot Pick up with No Detail  
 Allow Both Pickup AND Schedule Date  
 Do Not Show Pickup Date  
 Do Not Show Requested Date  
 Allow Map Zone Change on copy/split  
 Link Salesperson/Zone/Route  
 Do not allow Secondary Calls  
 Restrict Requested Delivery Date  
 Edit Model Color  
 Validate Model Color  
 Auto Transfer Models  
 Auto Payment Transfer  
 Auto Balance Split Invoice  
 Prompt for Note on Exit  
 Payment Warning on Exit  
 Verify Tax Code  
 Mark Item as Installed/Shipped on Commit  
 Do Not Auto Update Job Status from Purchasing  
 Do Not Update Invoice Item Location from Ordering  
 Do Not Update Item YTD  
 Cannot Auto Backorder without Min Deposit  
 Max Days out to Auto Backorder

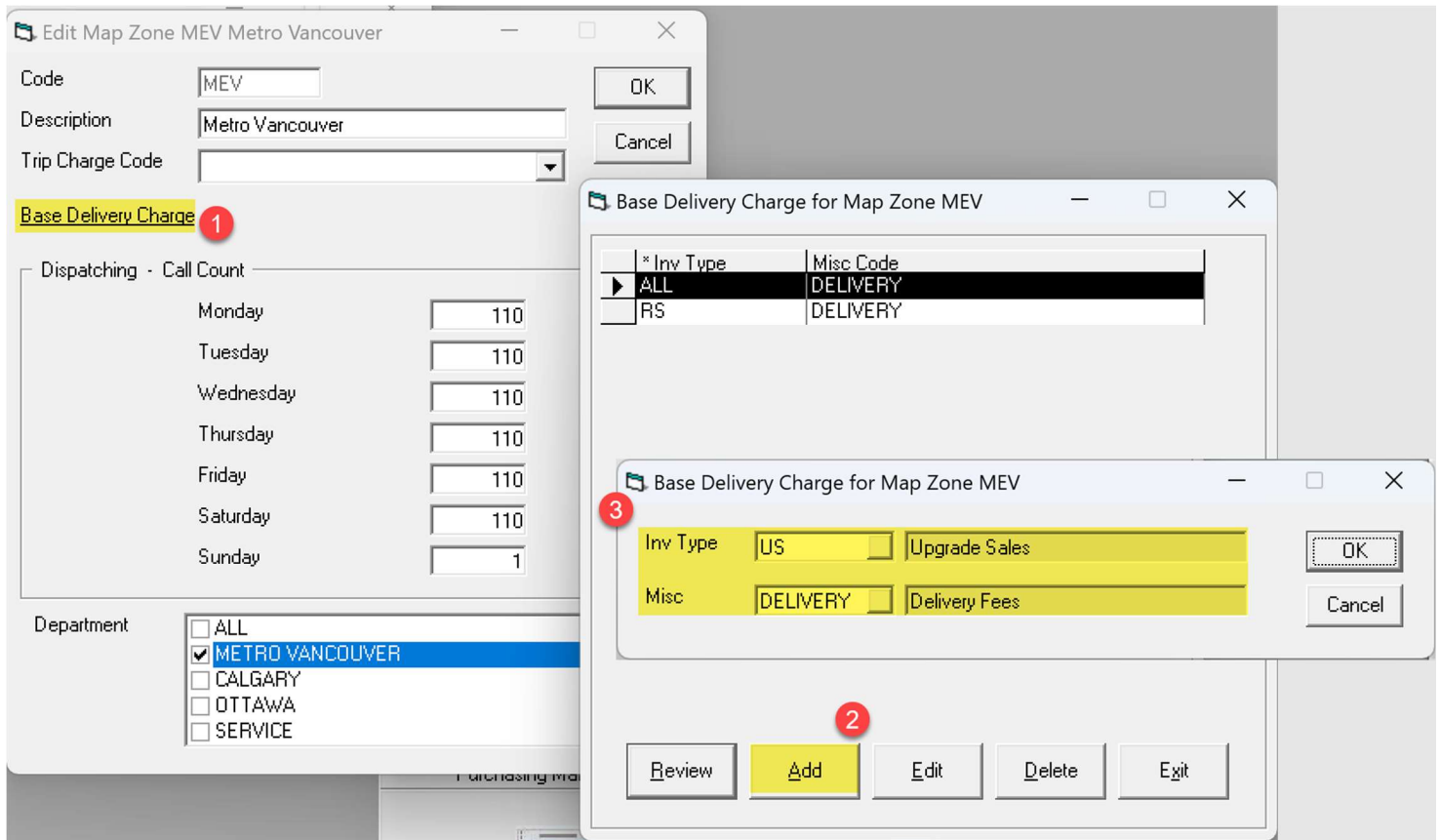
OK  
Cancel

## Map Zone

To set up the base delivery charge by map zone and invoice type. Go to **Tools > System Maintenance > Map Zone**. Edit a map zone and click the Base Delivery Charge link.

You can set up the same delivery charge for all the map zones and invoice types or you can set it up by map zone and invoice type.

Click Add and enter the invoice type and the delivery miscellaneous charge.



Click Exit and click OK.

Base Delivery Charge for Map Zone MEV

* Inv Type	Misc Code
<input checked="" type="checkbox"/> ALL	DELIVERY
<input type="checkbox"/> RS	DELIVERY
<input type="checkbox"/> US	DELIVERY

Review Add Edit Delete Exit

Map Zone MEV Metro Vancouver

Code:

Description:

Trip Charge Code:

Base Delivery Charge

Dispatching - Call Count

Monday	<input type="text" value="110"/>
Tuesday	<input type="text" value="110"/>
Wednesday	<input type="text" value="110"/>
Thursday	<input type="text" value="110"/>
Friday	<input type="text" value="110"/>
Saturday	<input type="text" value="110"/>
Sunday	<input type="text" value="1"/>

Department

- ALL
- METRO VANCOUVER
- CALGARY
- OTTAWA
- SERVICE

## Create an Invoice

edit Invoice # RS00000101 - Romanova, Natalia Alianovna

Invoice Service **Dispatching** Invoice Cont. Warranty Documents Notepad

**All Calls**

Primary	Zone	Date	Route	Units	Department	Special Request

Review Add Edit

Base Delivery Charge is set up by map zone and invoice type. The RS invoice type and map zone MEV will add an auto delivery charge.

Map Zone:  MEV  Metro Vancouver

Map Ref:

Schedule Date: 10/17/2023

Trip Status:

Start Time: 07:00

Req Route:

Route:

Department: ALL

Requested Time: 00:00

Units: 1

Call Seq: 0

Special Request:

Completed:

In: 00:00

Out: 00:00

Map

Priorities: Add Delete

Qualifications: Add Delete

OK

Cancel

Detail

Invoice # RS00000101 - Romanova, Natalia Alianovna

Type	Pack	Item	Loc	Description	Qty	Amount	Wty	Tax	Status	QOH

Because the "Require Model" is selected, the base delivery charge is not automatically added. We need to add a model first.

**Add Line** X

Select the Type of Line you wish to Add.

- Item
- Model**
- Labor
- Misc
- Comment
- Warranty
- Payment
- Tax
- Package

OK Cancel

Item: [ ] Model: [ ] Labor: [ ] Misc: [ ]

Location: [ ]

SKU #: [ ] Order From: [ ]

Equivalent: [ ] Supplier: [ ]

Bin: [ ] Supp Inv: [ ]

Failure: [ ] Purchase: 00/00/00

Reference: [ ] Commission: [ ]

Branch: [ ]

Note: [ ]

Auto Restocking     BCP  
 Auto Backorder     GST  
 Installed

Cost: 0.00    Package: [ ]    Trip#: 0

Total: 0.00    0.0    00/00/00

Warranty: [ ]    Status: [ ]

Created: 00/00/00

Modified: 00/00/00

Commit    Discount    Header    Add    Edit    Delete    Exit    Add From Cart    Barcode

Serial    Split Line

Invoice Total: 0.00  
GM %: 0.0

Add model WVV51UC0HV and click Exit.

Invoice # RS00000101 - Romanova, Natalia Alianovna - Review Model

Type	Pack	Item	Loc	Description	Qty	Amount	Wty	Tax	Status	QOH
Model	No	WWW51UC0HV	9WH	~30 WALL MOUNT HOOD, 400 CFM, ...	1	1,254.79		NYN	Open	0/0
Misc	No	DELIVERY		Delivery Fees	1	100.00		NNN		

Once the model is added the base delivery charge is automatically added.

Item	Model	Labor	Misc	Comment	Warranty	Payment	Tax	Package	Signature
Model	WWW51UC0HV	~30 WALL MOUNT HOOD, 400 C	Ordered		1	SP	1,254.79	Package	Trip# 1
Location	9WH	Delta Warehouse	Shipped		0	Total	1,254.79	0.0	Spiff 0.00
SKU #		Serial Location	QOH		0 /0	Std. Cost	914.32		
Equiv			Not Avail		0				00/00/00
Brand	WHIRLPOOL		QOO		0 /0				
Product	APPLIANCE	Color	Written		1 /1				Status
Mfr Wty	0	Features	Inventory Type	APPL					Committed
PD #		Reference							Created
Branch	Default	Commission							L 10/17/2023
Note									Modified
									00/00/00

Commit Discont  
Serial Split Line

Header Add Edit Delete Exit Add From Cart

Invoice Total  
1,505.37  
GM % 0.0

Edit the invoice and add a model.



Invoice # RS00000101 - Romanova, Natalia Alianovna - Review Model

Type	Pack	Item	Loc	Description	Qty	Amount	Wty	Tax	Status	QOH
Model	No	WW51UC0HV	9WH	~30 WALL MOUNT HOOD, 400 CFM, ...	1	1,254.79		NYN	Open	0/0
Misc	No	DELIVERY		Delivery Fees	1	100.00		NNN		
Model	No	MC11J7033CT	9WH	1.1 CU.FT MICROWAVE, CONVECT, ...	1	515.18		NYN	Open	0/0

The base delivery charge is only added once even if you edit the invoice.

Item	Model	Labor	Misc	Comment	Warranty	Payment	Tax	Package	Signature
Model	MC11J7033CT	1.1 CU.FT MICROWAVE, CONVE	Ordered		1	SP	515.18	<input type="checkbox"/> Package	Trip# 1
Location	9WH	Delta Warehouse	Shipped		0	Total	515.18	0.0	Spiff 0.00
SKU #		Serial Location	QOH		0 / 0	Std. Cost	309.12		Delivery
Equiv			Not Avail		0				10/17/2023
Brand	SAMSUNG		QOO		0 / 0				Status
Product	APPLIANCE	Color	Written		1 / 1				Committed
Mfr Wty	0	Features	Inventory Type	APPL					Created
PD #		Reference	<input type="checkbox"/> Auto Backorder						L 10/17/2023
Branch	Default	Commission	<input type="checkbox"/> Reserve Exclusive when Ordering						Modified
Note									00/00/00

Invoice Total	
	2,082.37
GM %	0.0

## Model Delivery

### Setup

Edit Invoice Type RS Retail Sales

Settings 1 Settings 2 **Settings 3** Settings 4 Required Fields Builder Allowance G/L Allocation Printing

Export To Wty Claims  
 Exclude Warranty Amount from Total  
 Total open BO Lines  
 Trip Charge  
 Base Delivery Charge  
 Auto Update Base Delivery Charge  
 Require Model  
 Delivery Charge  
 Require Ship Via  
 Misc Type   
 Allow Qty Breaks for Items  
 Copy Detail with Invoice  
 Copy Complaint / Svc Performed  
 Copy Default Schedule Date to Next Available  
 Lock Estimate On Copy  
 Use Terminal Taxes  
 Link Tax to Delivery/Pickup  
 Use TTR Tax  
 Change Quote to Sale - Update Invoice Date  
 Change Quote to Sale - Blank out Job Status  
 Auto Update Warranty End Date in History  
 Default Do Not Update  
 Update MapZone On Zip Code Change  
 Prompt for Models when Splitting Labor  
 Show Warranty Yes/No in Detail  
 Purchase Date Warning  
 Require Credit Approval  
 Not Approved Job Status   
 Cannot Reserve COD Invoice with Balance  
 Max Days out to Reserve  
 Write Item Deletes to Notepad  
 Write Model Deletes to Notepad

Dispatching Enabled  
 Accumulate Points for Call Units  
 Default Schedule Date to next available  
 Cannot Schedule COD Invoice with Balance  
 Cannot Pick up COD Invoice with Balance  
 Cascade To   
 Cannot Schedule with No Detail  
 Cannot Pick up with No Detail  
 Allow Both Pickup AND Schedule Date  
 Do Not Show Pickup Date  
 Do Not Show Requested Date  
 Allow Map Zone Change on copy/split  
 Link Salesperson/Zone/Route  
 Do not allow Secondary Calls  
 Restrict Requested Delivery Date  
 Edit Model Color  
 Validate Model Color  
 Auto Transfer Models  
 Auto Payment Transfer  
 Auto Balance Split Invoice  
 Prompt for Note on Exit  
 Payment Warning on Exit  
 Verify Tax Code  
 Mark Item as Installed/Shipped on Commit  
 Do Not Auto Update Job Status from Purchasing  
 Do Not Update Invoice Item Location from Ordering  
 Do Not Update Item YTD  
 Cannot Auto Backorder without Min Deposit  
 Max Days out to Auto Backorder

OK  
Cancel

The screenshot shows the 'Review Model' window for SGE53B52UC, 24 DISHWASHER. The 'Installation Estimate' section of the model table is highlighted, with 'Delivery Charges' selected. A callout box provides instructions on how to set up these charges.

Qty	Amount	Wty	Tax	Status
1	2,262.30		NYN	Open
1	5.00		NNN	
1	100.00		NNN	

**Delivery for Model SGE53B52UC, 24 DISHWASHER, ...**

* Inv Type	Map Zone	Misc Code
▶ RS	MEV	TRANSFER

To set up the model delivery charges, click the delivery charges on the model table. You can set it up by invoice type and map zone.

## Adding Automatic Delivery Charges with the Import/Export Utility

If you want to add automatic delivery charges to a large number of models, use the Import/Export utility to add them all at once, rather than manually adding them to each model.

Using the utility is a three-step process: you'll export your model records as an Excel file, edit the file, and then import it back into EPASS.

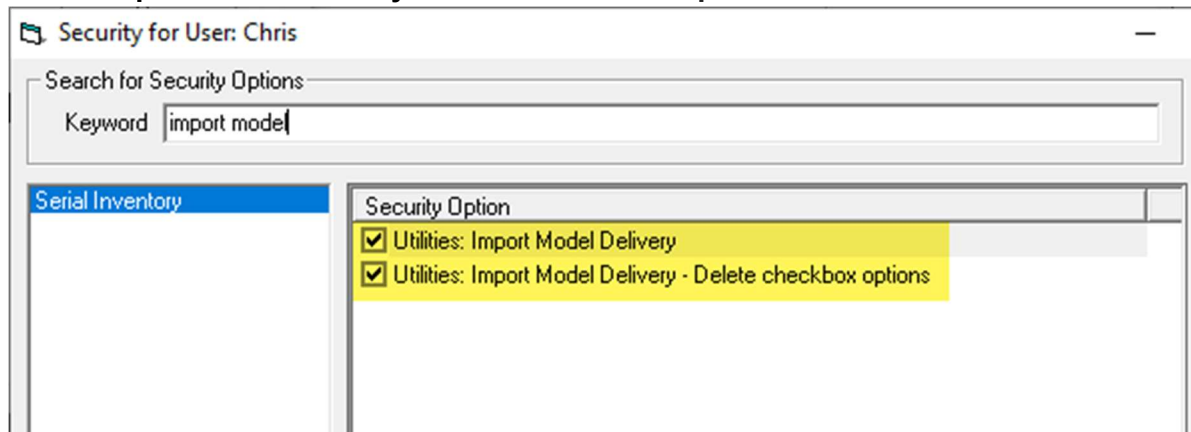
### Before Starting:

There are several security options that you need to enable to use the Import/Export utility:

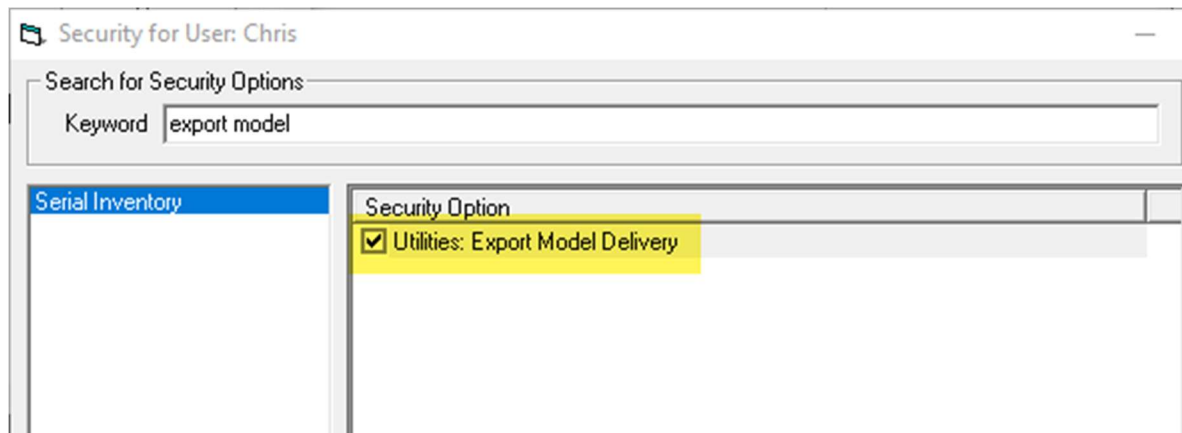
- Serial Inventory Utilities – Export Model Delivery
- Serial Inventory Utilities – Import Model Delivery
- Serial Inventory Utilities – Import Model Delivery – Delete Checkbox Options

*To Enable the Security Options:*

1. Go to **Tools > System Maintenance**. On the **Tables** tab, select **User Security**, and then click **Open**.
2. Select a User Group from the list, and then click **Security**.
3. In the **Keyword** search box, enter **IMPORT MODEL**. Select **Utilities: Import Model Delivery** and **Utilities: Import Model Delivery – Delete checkbox options**.



4. In the **Keyword** search box, enter **EXPORT MODEL**. Select **Utilities: Export Model Delivery**.



5. Click **OK**.

**Export the Model Records:**

1. Go to **Serial Inventory > Utilities > Export Model Delivery**.
2. Do the following:



ModelCode	ModelDescription	InvTypeCode	MapZoneCode	MiscCode	ProductCode	ProductDescription	Supp
261827	BACKSPLASH, SS				APP	APPLIANCE	WHI
3392235A	8 DRAIN HOSE				APP	APPLIANCE	WHI
3404351	DRYER DRYING RACK				APP	APPLIANCE	WHI
3406839	DRYER DRYING RACK, WH				APP	APPLIANCE	WHI
4396096RB	2-BURNER COOKTOP GRIDDLE				APP	APPLIANCE	WHI
49572A	GAS DRYER CONVERSION KIT				APP	APPLIANCE	WHI
49971	STACKING KIT				APP	APPLIANCE	WHI
8212450A	DRYER DRYING RACK				APP	APPLIANCE	WHI
8212546RP	WASHER FILL HOSES				APP	APPLIANCE	WHI
8717638DD	WASHER FILL HOSES				APP	APPLIANCE	WHI

2. Do the following:

- Locate each model that you want to trigger an automatic delivery charge and fill in the InvTypeCode, MapZoneCode, and MiscCode columns.
- The InvType and MapZoneCode are the conditions that trigger the automatic delivery charge. Enter the InvType code and MapZoneCodes that you want to use.

For example, if an automatic delivery charge should be applied to the invoice when ModelCode 261927 is added to a RETAIL SALES invoice type in the MEV Map Zone area, then you would enter the codes in the Excel columns like this:

ModelCode	ModelDescription	InvTypeCode	MapZoneCode
261827	BACKSPLASH, SS	RS	MEV
3392235A	8 DRAIN HOSE		
3404351	DRYER DRYING RACK		

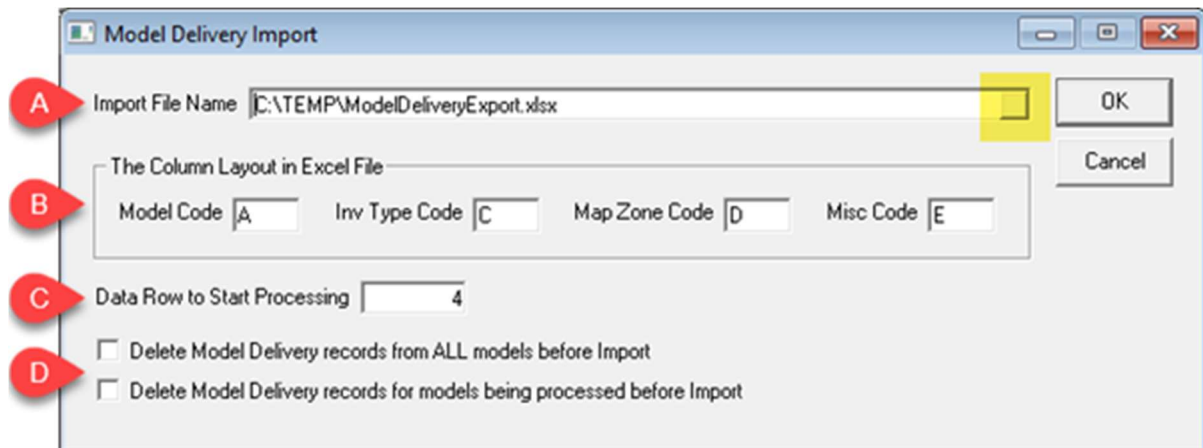
- The MiscCode is the misc charge that's applied to the invoice. Enter its code in the MiscCode column:

ModelCode	ModelDescription	InvTypeCode	MapZoneCode	MiscCode
261827	BACKSPLASH, SS	RS	MEV	DELIVERY
3392235A	8 DRAIN HOSE			
3404351	DRYER DRYING RACK			

3. Once you are finished, save and close the Excel file.

**Import the Excel File into EPASS:**


- In EPASS, go to **Serial Inventory > Utilities > Import Model Delivery**.
- Do the following:



- a. Click the **Browse** button (highlighted) and select your Excel file.
- b. Map the Model Code, Inv Type Code, Map Zone Code and Misc Code columns. (If you didn't adjust the Excel columns, the default column letters are shown in the screenshot.)
- c. Enter the data row number that the import should start from (default value is 4).
- d. You can select to delete current model delivery charges before importing the new data. The first option deletes the delivery charges from ALL models in EPASS (even models that are not on the imported Excel file). The second option deletes the delivery charges from only the models that are included in the imported spreadsheet. ► [Why would I need to delete current delivery charges?](#)

*The import utility only adds or changes existing delivery charges—it won't remove a delivery charge. To completely remove a delivery charge from a model during import, you'll need to select one of the deletion options.*

3. Click **OK**. The utility imports the data from the Excel sheet and a PDF report of the results automatically opens when finished. Review the report to identify any errors that need correcting.

 **Note:** *If you intentionally left a model's InvTypeCode, MapZoneCode, and MiscCode blank, the report identifies the row as a "Cannot be found in the database" error. These can be ignored.*

## Add Invoice

Add model SGE53B52UC

Invoice # RS00000103 - Singh, Prabhjot - Review Model

Type	Pack	Item	Loc	Description	Qty	Amount	Wty	Tax	Status	QOH
Model	No	SGE53B52UC	9WH	24 DISHWASHER, 46 DBA, WH	1	2,262.30		NYN	Open	2/2
Misc	No	TRANSFER		Transfer Fee	1	5.00		NNN		
Misc	No	DELIVERY		Delivery Fees	1	100.00		NNN		

When you add the model, it will add the auto delivery charge linked to the model.

Item	Model	Labor	Misc	Comment	Warranty	Payment	Tax	Package	Signature
Model	SGE53B52UC	24 DISHWASHER, 46 DBA, WH	Ordered		1	SP	2,262.30	<input type="checkbox"/> Package	Trip# 1
Location	9WH	Delta Warehouse	Shipped		0	Total	2,262.30	0.0 Spiff	0.00
SKU #		Serial Location	QOH		2/2	Std. Cost	0.00		
Equiv			Not Avail		0				00/00/00
Brand	BOSCH		QOO		0/0				
Product	APPLIANCE	Color	Written		12/12			Status	Committed
Mfr Wty	0	Features	Inventory Type	APPL				Created	L 10/17/2023
PD #		Reference	<input type="checkbox"/> Auto Backorder					Modified	00/00/00
Branch	Default	Commission	<input type="checkbox"/> Reserve Exclusive when Ordering						
Note			<input checked="" type="checkbox"/> BCP						
			<input checked="" type="checkbox"/> GST						

Commit Discont  
Serial Split Line

Header Add Edit Delete Exit Add From Cart

Invoice Total  
2,638.78



## Split the Invoice

Split Invoice # RS00000103 - Singh, Prabhjot - Review Model

Split	Type	Pack	Item	Loc	Description	Qty	Amount	Wty	Tax	Status	QOH
<input checked="" type="checkbox"/>	Model	No	SGE53B52UC	9WH	24 DISHWASHER, 46 DBA, WH	1	2,262.30		NY	Open	2/2
<input checked="" type="checkbox"/>	Misc	No	TRANSFER		Transfer Fee	1	5.00		NNN		
<input checked="" type="checkbox"/>	Misc	No	DELIVERY		Delivery Fees	1	100.00		NNN		
<input type="checkbox"/>	Model	No	SGE53B52UC	9WH	24 DISHWASHER, 46 DBA, WH	1	2,262.30		NY	Open	2/2
<input type="checkbox"/>	Misc	No	TRANSFER		Transfer Fee	1	5.00		NNN		

Item	Model	Labor	Misc	Comment	Warranty	Payment	Tax	Package	Signature		
Model	SGE53B52UC			24 DISHWASHER, 46 DBA, WH	Ordered	1	SP	2,262.30	Package	Trip# 1	
Location	9WH			Delta Warehouse	Shipped	0	Total	2,262.30	0.0	Spiff	0.00
SKU #				Serial	Location	QOH		Std. Cost	0.00		
Equiv					Not Avail	0					
Brand	BOSCH				QOO	0 /0					
Product	APPLIANCE	Color			Written	13 /13				Status	Committed
Mfr Wty	0	Features			Inventory Type	APPL				Created	L 10/17/2023
PO #		Reference			<input type="checkbox"/> Auto Backorder					Modified	00/00/00
Branch	Default	Commission			<input type="checkbox"/> Reserve Exclusive when Ordering						
Note										<input checked="" type="checkbox"/> BCP	
										<input checked="" type="checkbox"/> GST	

Invoice Total: 5,177.55

OK Cancel

Invoice # RS00000103-1 - Singh, Prabhjot

Invoice | Service | **Dispatching** | Invoice Cont. | Warranty | Documents | Notepad

All Calls							
Primary	Zone	Date	Route	Units	Department	Special Request	

When the invoice was split, we had changed the map zone to CGY which does not have delivery charges set up.

Review | Add | Edit | Delete

**Primary Call Only**

Map Zone: **CGY** | Calgary | Map Ref: | Schedule Date: 10/17/2023 | Trip Status: | Start Time: 07:00

Req Route: | Route: | Department: ALL

Priorities: | Add | Delete | Qualifications: | Add | Delete

Requested Time: 00:00 | In: 00:00 | Out: 00:00 | Units: 10 | Call Seq: 0 | Special Request:

## Overriding Automatic Delivery Charges

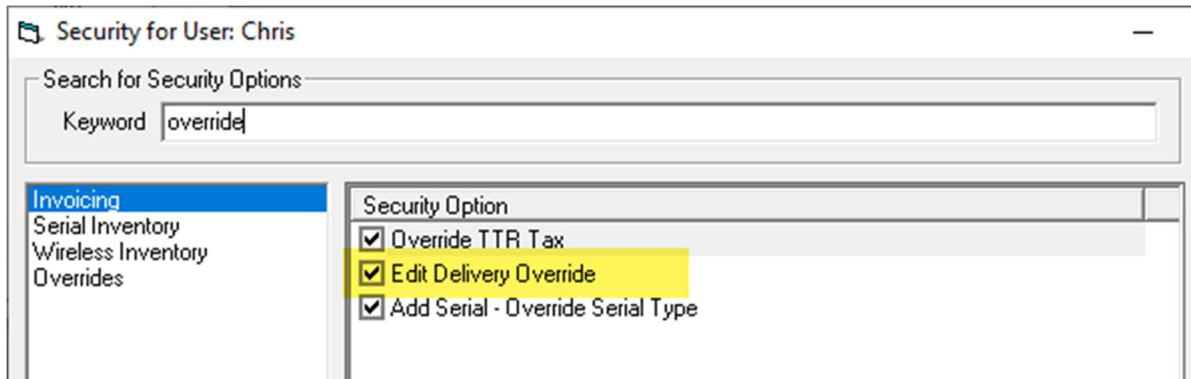
If you don't want delivery charges to automatically apply to an invoice, you can choose to suppress them with the override feature. This feature prevents all delivery charges from automatically applying to the invoice, regardless of map zone or model. You can still manually add them if you need to.

### Before Starting:

To use the override feature, you need to enable this security option: Invoicing – Edit Delivery Override.

### To Enable the Security Options:

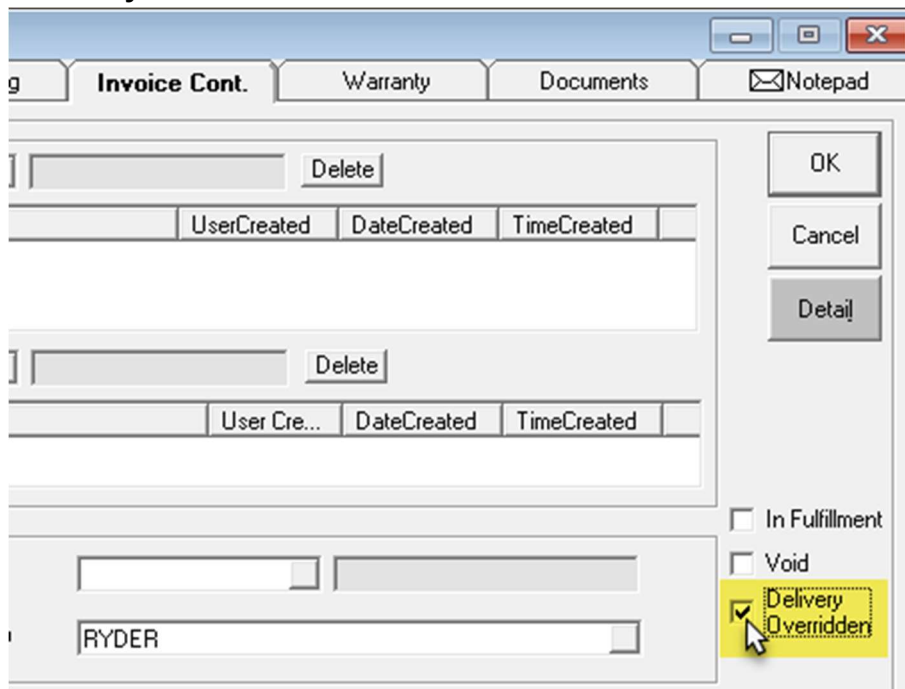
1. Go to **Tools > System Maintenance**. On the **Tables** tab, select **User Security**, and then click **Open**.
2. Select a User Group from the list, and then click **Security**.
3. In the **Keyword** search box, enter **OVERRIDE**. Select **Edit Delivery Override**.



4. Click **OK**.

### Override the Automatic Delivery Charges:

1. Open an invoice.
2. Click the **Invoice Cont.** tab.
3. Select **Delivery Overridden**.



4. Automatic delivery charges won't be triggered, regardless of the map zone or model.

