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Date	October 17, 2023
Subject	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:

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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***

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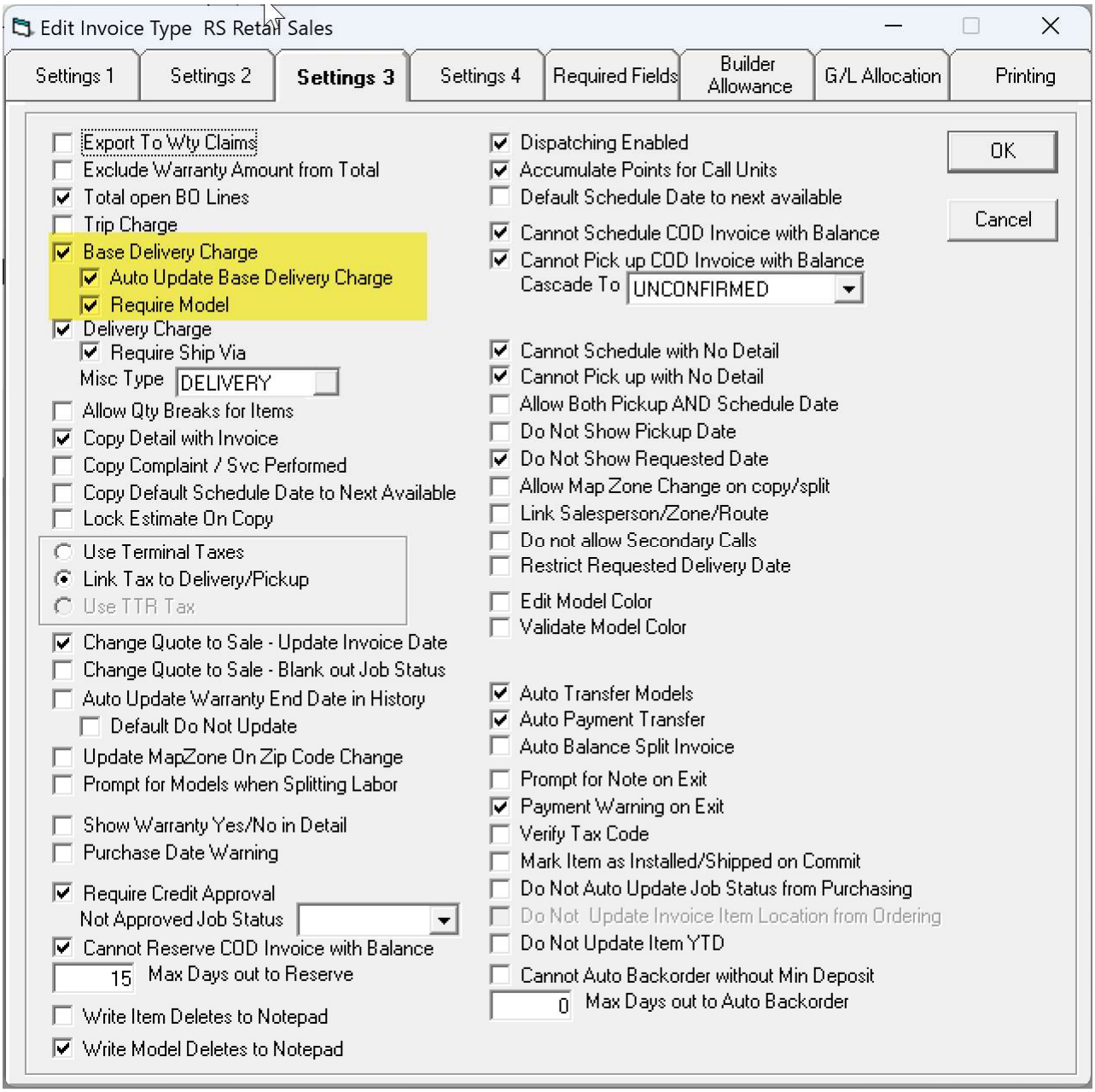

Map Zone

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.

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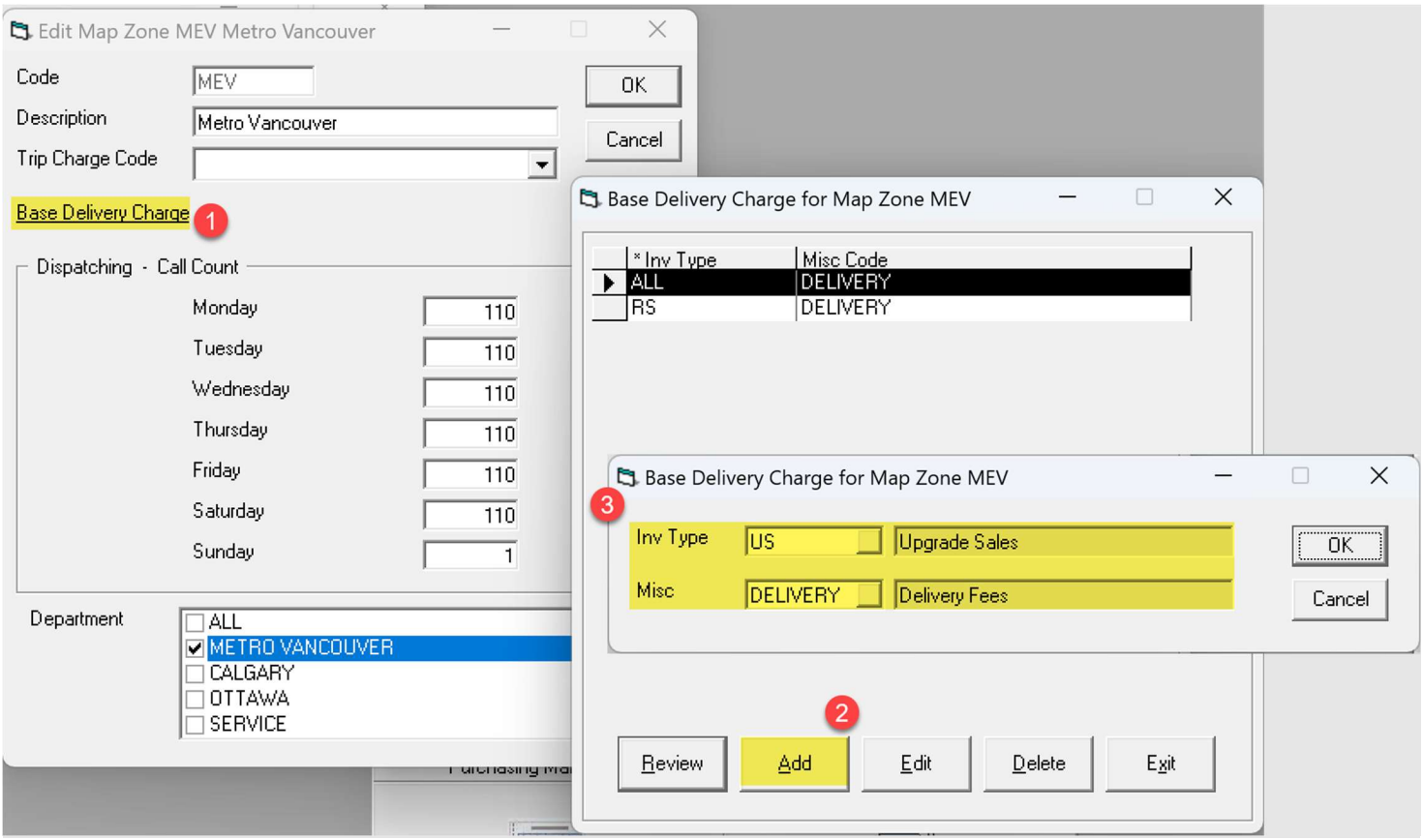

Click Exit and click OK.

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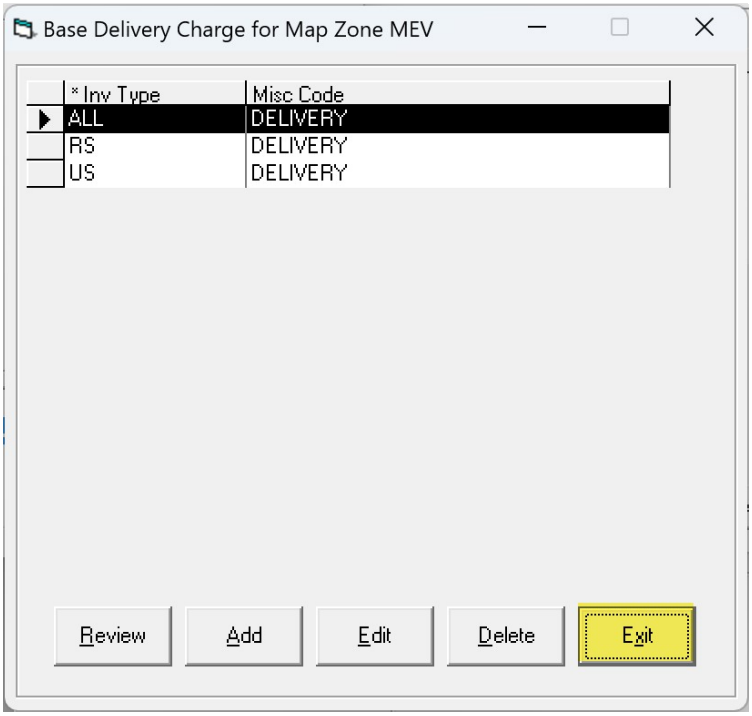
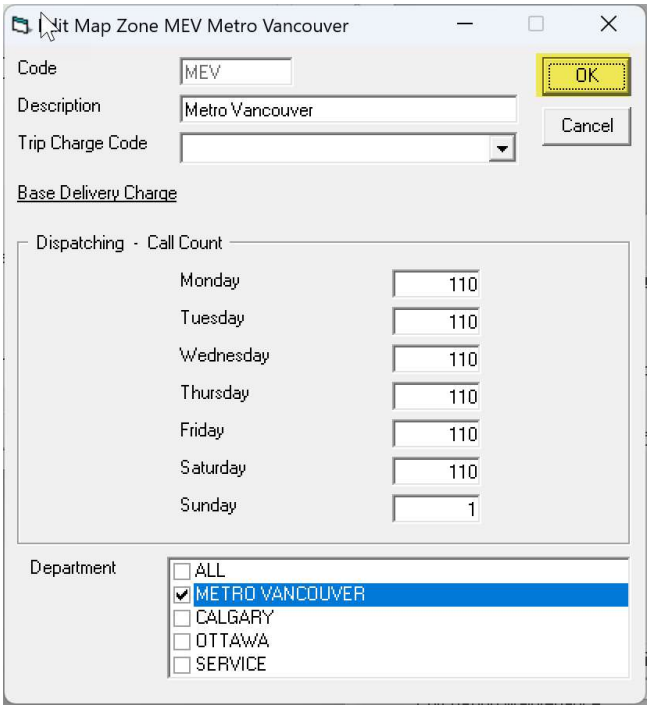
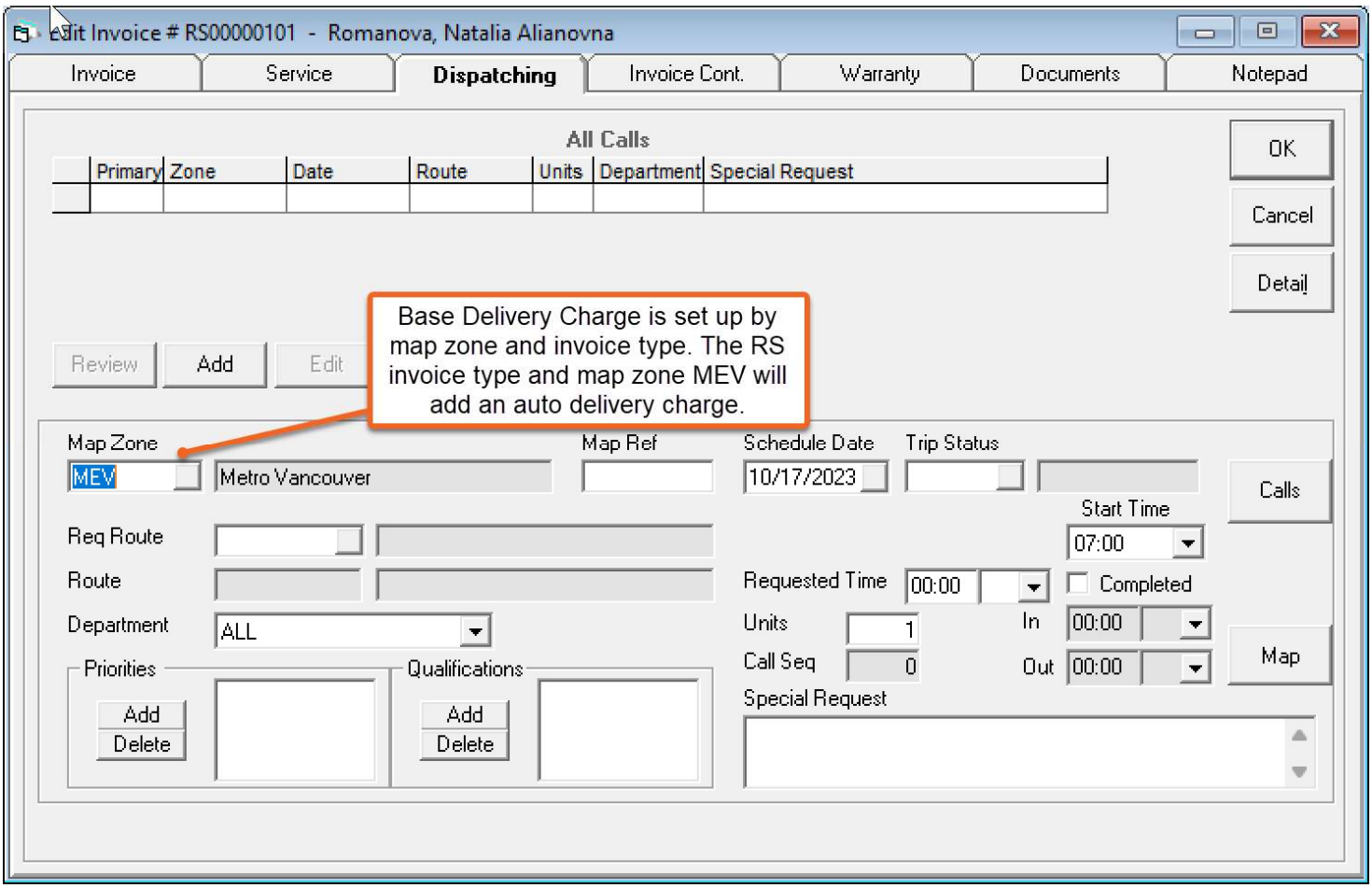
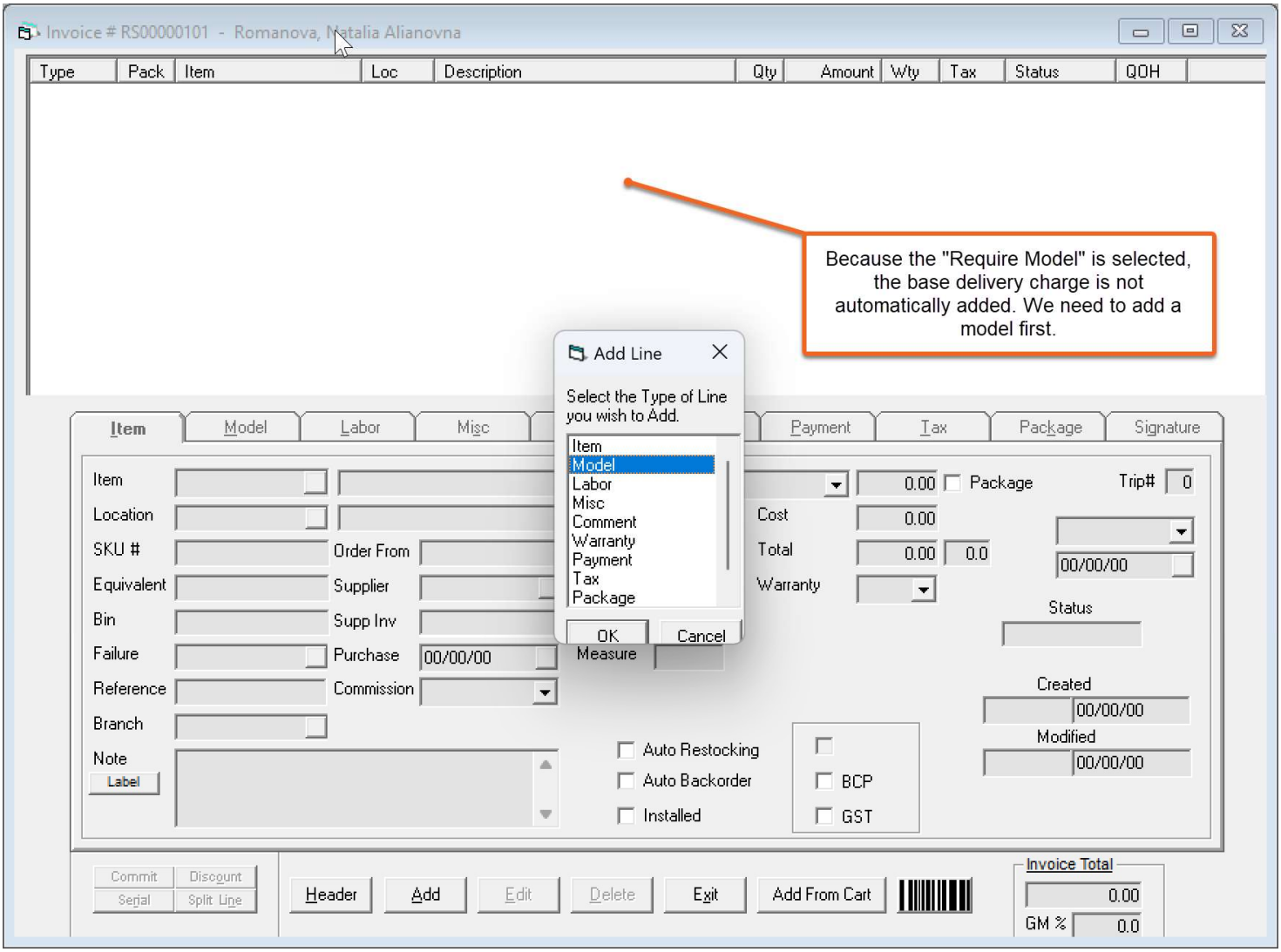




Create an Invoice





Add model WVW51UC0HV and click Exit.

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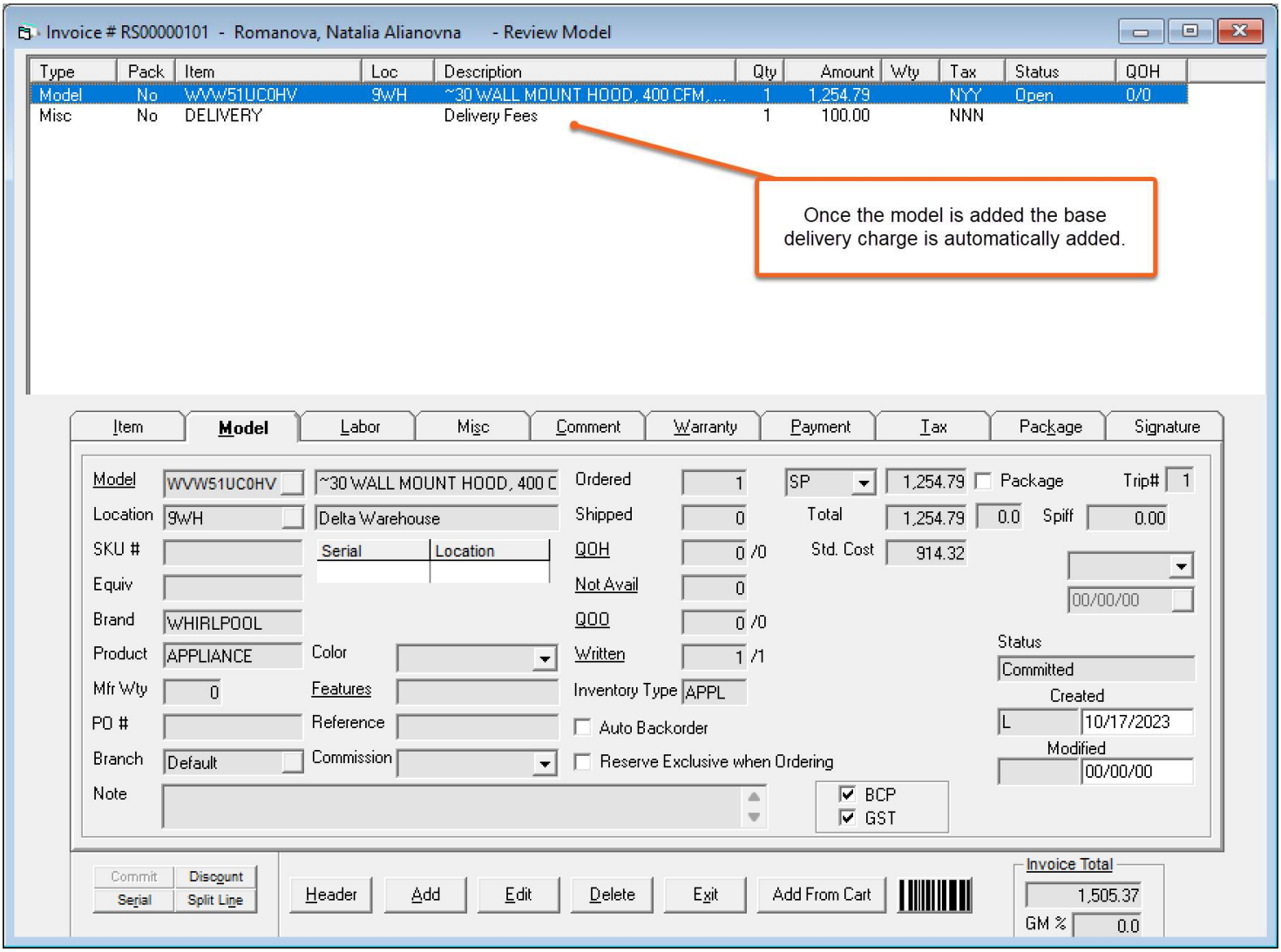

Edit the invoice and add a model.

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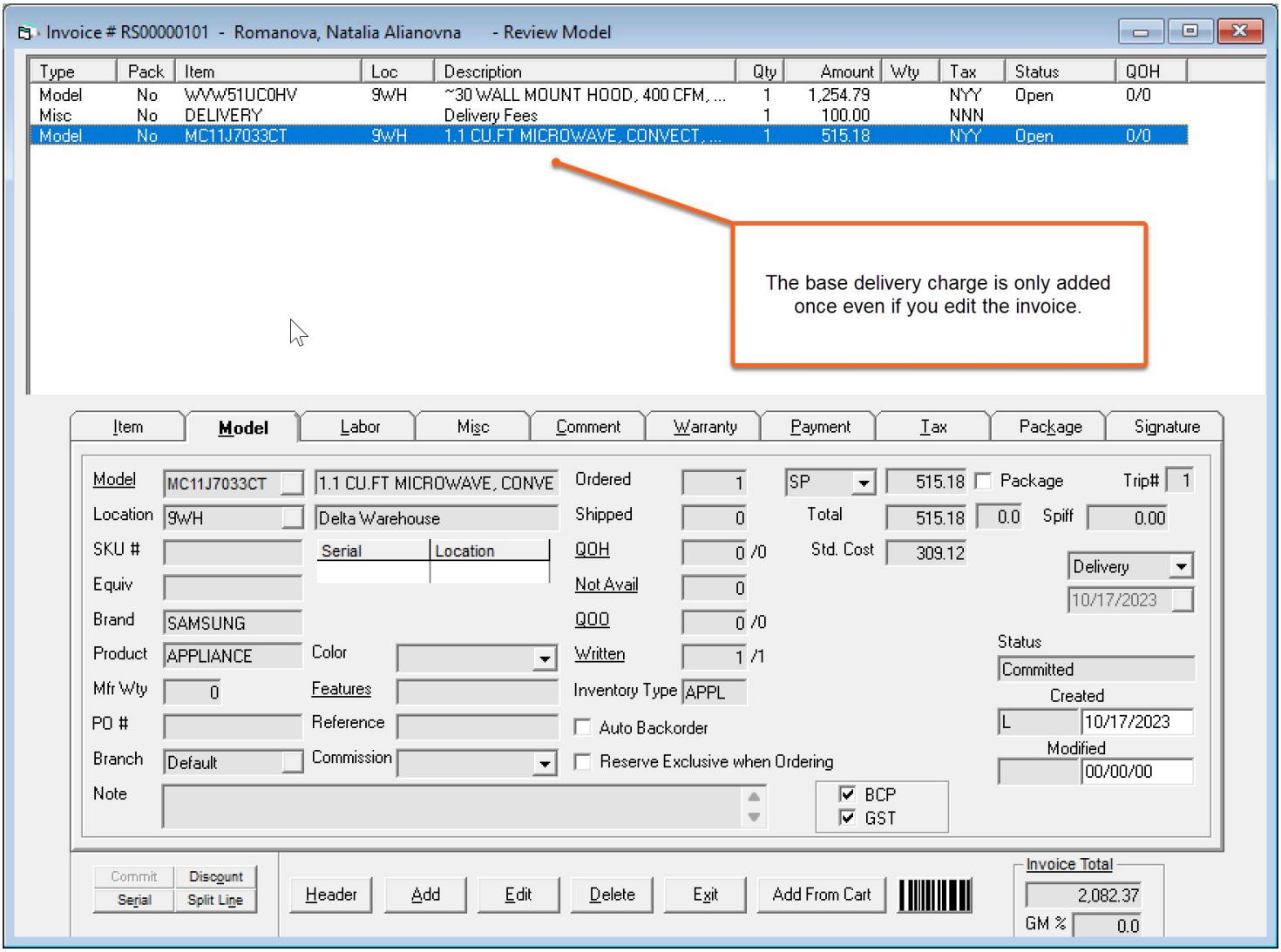

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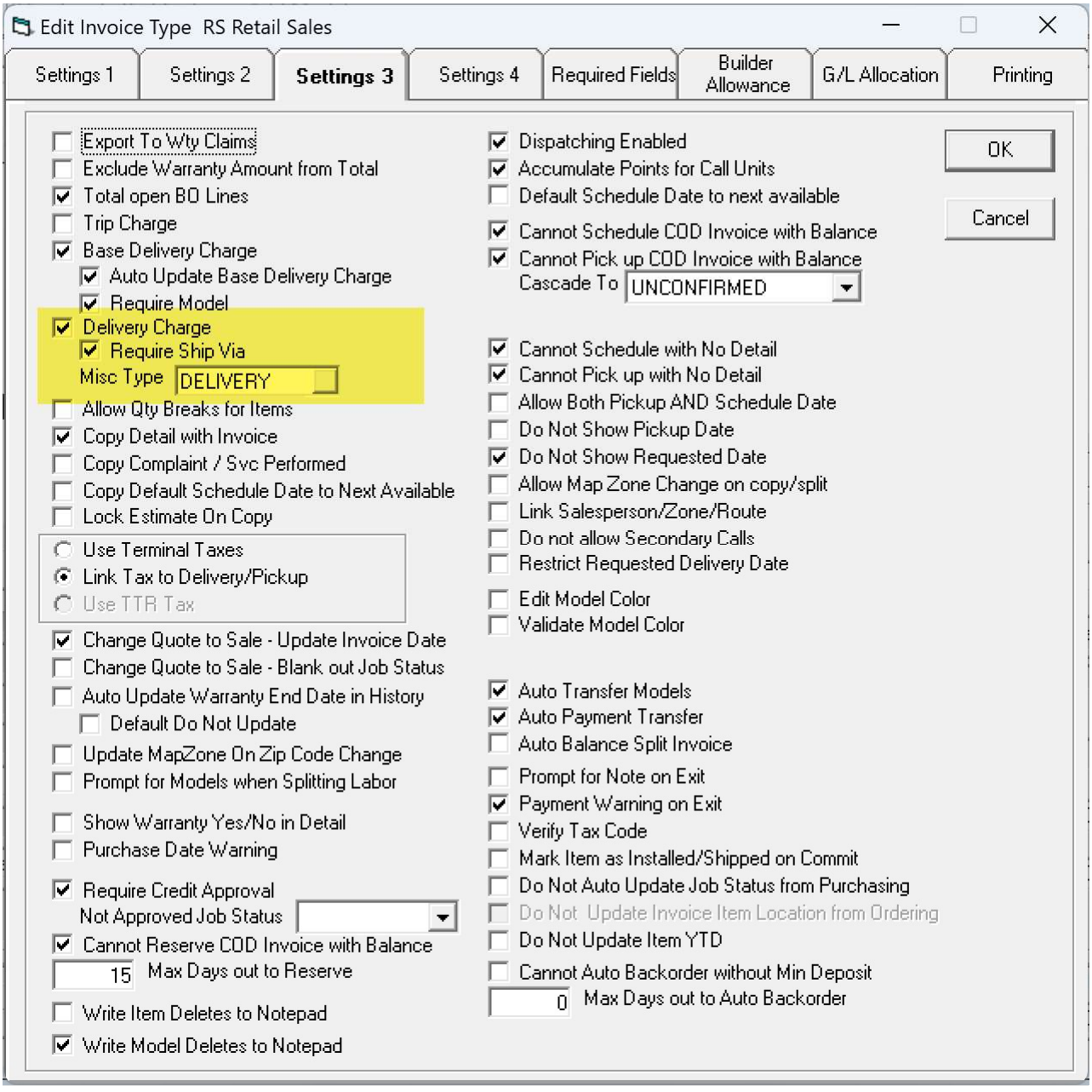
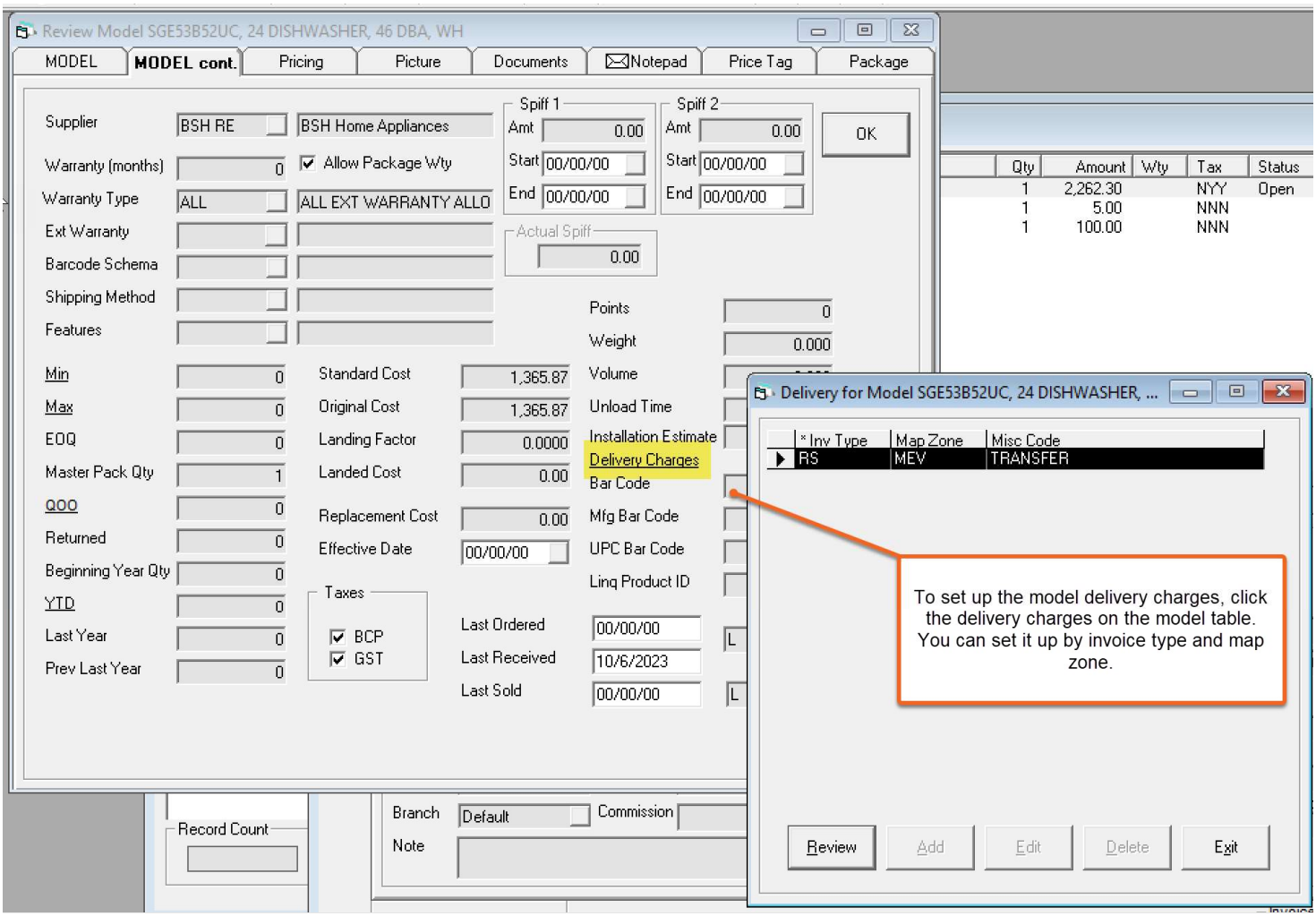
Model Delivery

Setup





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

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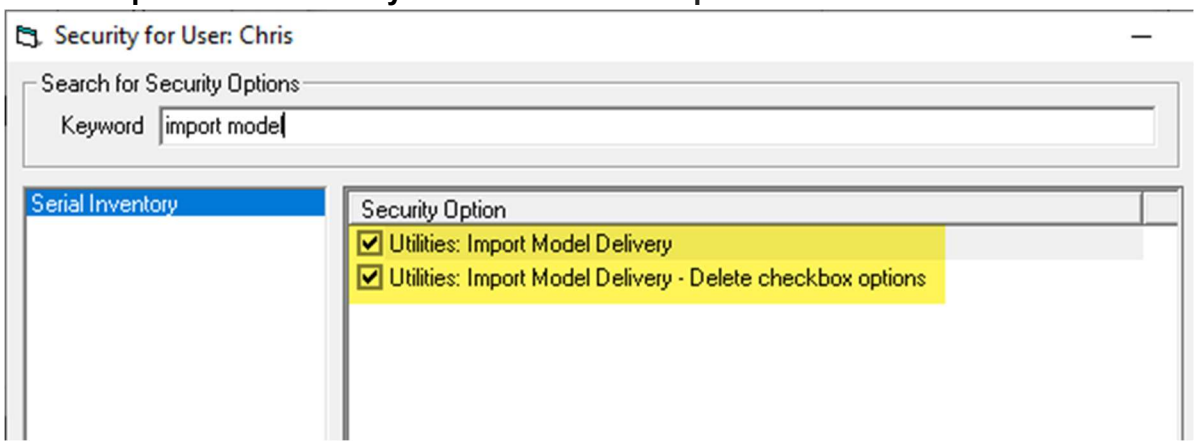
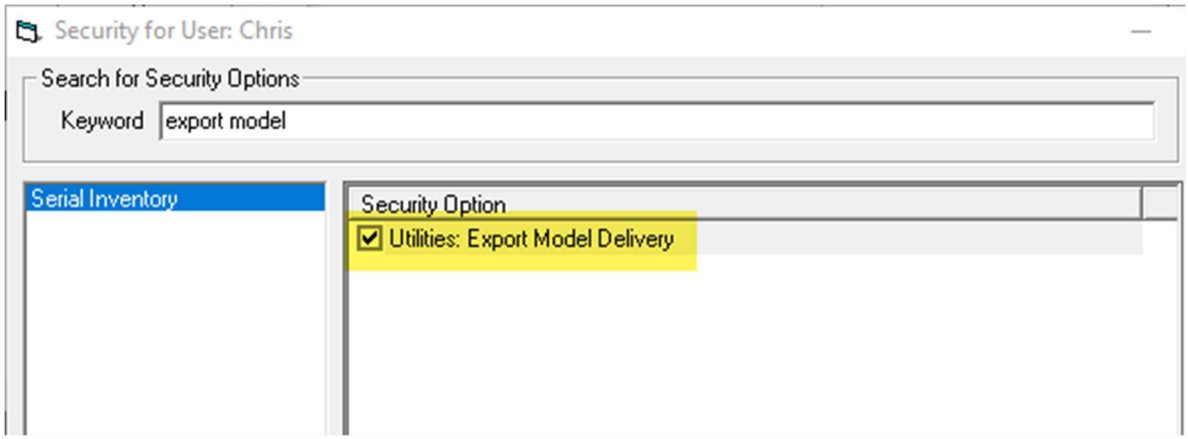
To Enable the Security Options:

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:

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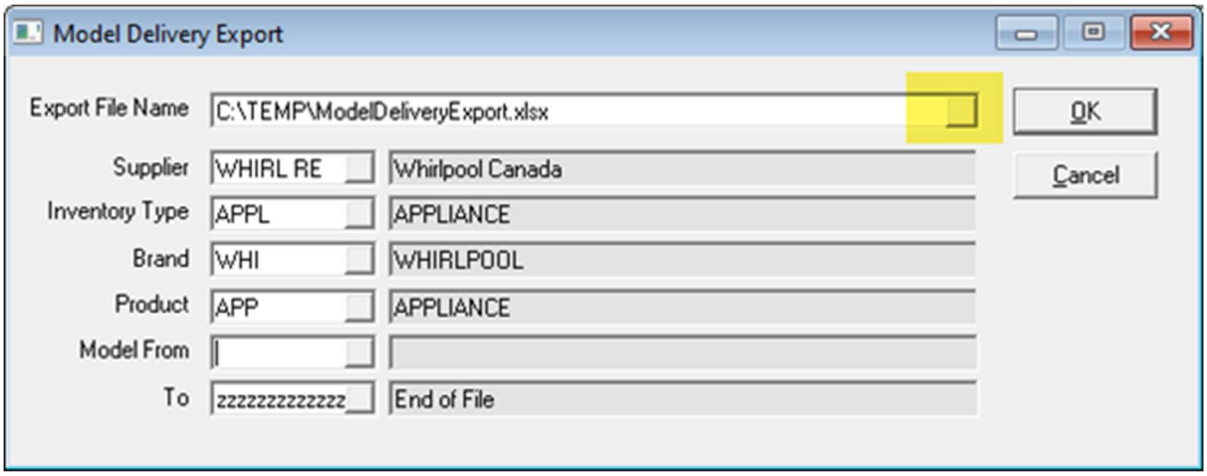
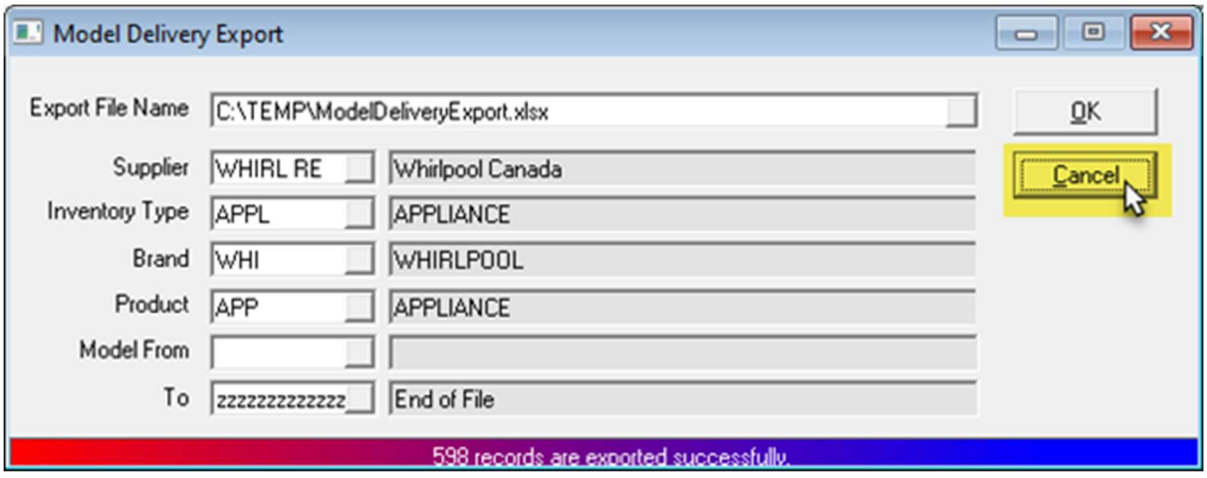


i. Click the **Browse** button (highlighted) and select where you want to save the export file and what you want to call it.
ii. Use the **Supplier**, **Inventory Type**, **Brand**, and **Product** dropdowns to filter the model selection.
iii. Use the **Model From** and **To** dropdowns to select a range of models, or leave it as is to include all model records.
iv. Click **OK**. Once the export is complete, click **Cancel** to close the **Model Delivery Export** window.



Edit the Export File:

1. Locate the export file and open it in Excel. It will look similar to this:

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	A	B	C	D	E	F	G
1	Model Delivery						
2							
3	ModelCode	ModelDescription	InvTypeCode	MapZoneCode	MiscCode	ProductCode	ProductDescription
4	261827	BACKSPLASH, SS				APP	APPLIANCE
5	3392235A	8 DRAIN HOSE				APP	APPLIANCE
6	3404351	DRYER DRYING RACK				APP	APPLIANCE
7	3406839	DRYER DRYING RACK, WH				APP	APPLIANCE
8	4396096RB	2-BURNER COOKTOP GRIDDLE				APP	APPLIANCE
9	49572A	GAS DRYER CONVERSION KIT				APP	APPLIANCE
10	49971	STACKING KIT				APP	APPLIANCE
11	8212450A	DRYER DRYING RACK				APP	APPLIANCE
12	8212546RP	WASHER FILL HOSES				APP	APPLIANCE

2. Do the following:
   a. Locate each model that you want to trigger an automatic delivery charge and fill in the InvTypeCode, MapZoneCode, and MiscCode columns.
   b. 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:

Model Delivery

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

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

Model Delivery

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

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

Import the Excel File into EPASS:

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

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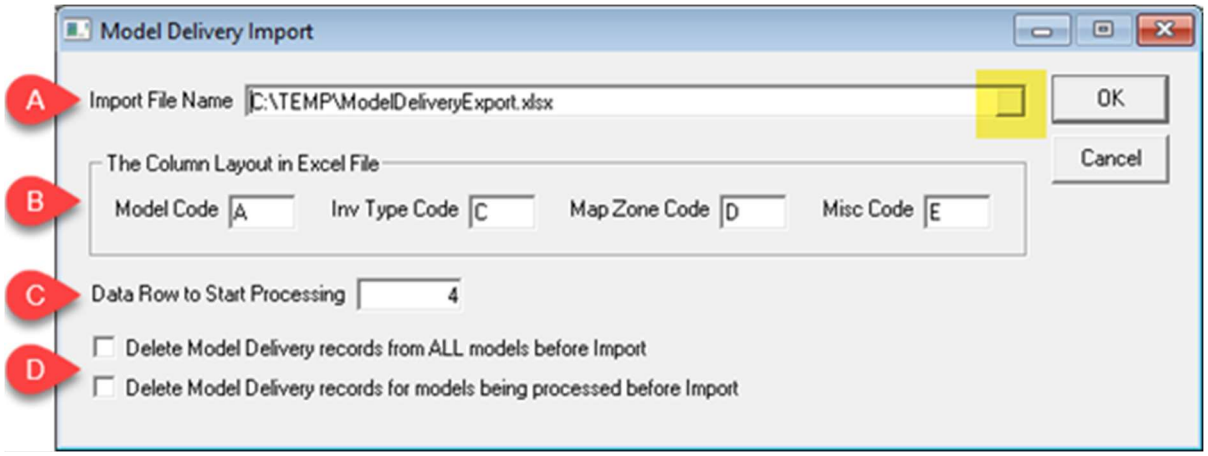

a. Click the **Browse** button (highlighted) and select your Excel file.
b. Map the Model Code, Inv Type Code, Map Zone Code and Misc Code columns. (If you didn't adjust the Excel columns, the default column letters are shown in the screenshot.)
c. Enter the data row number that the import should start 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

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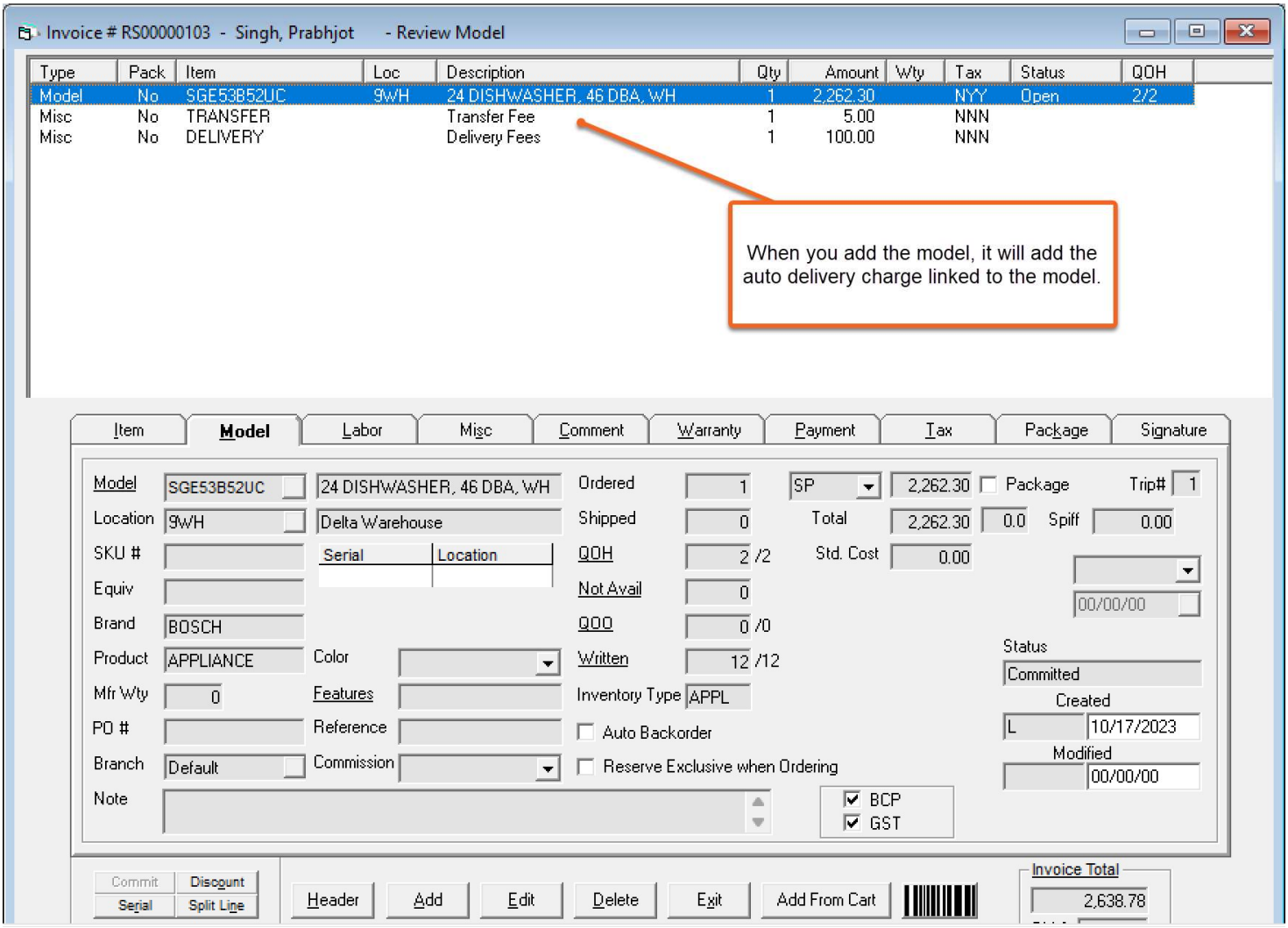

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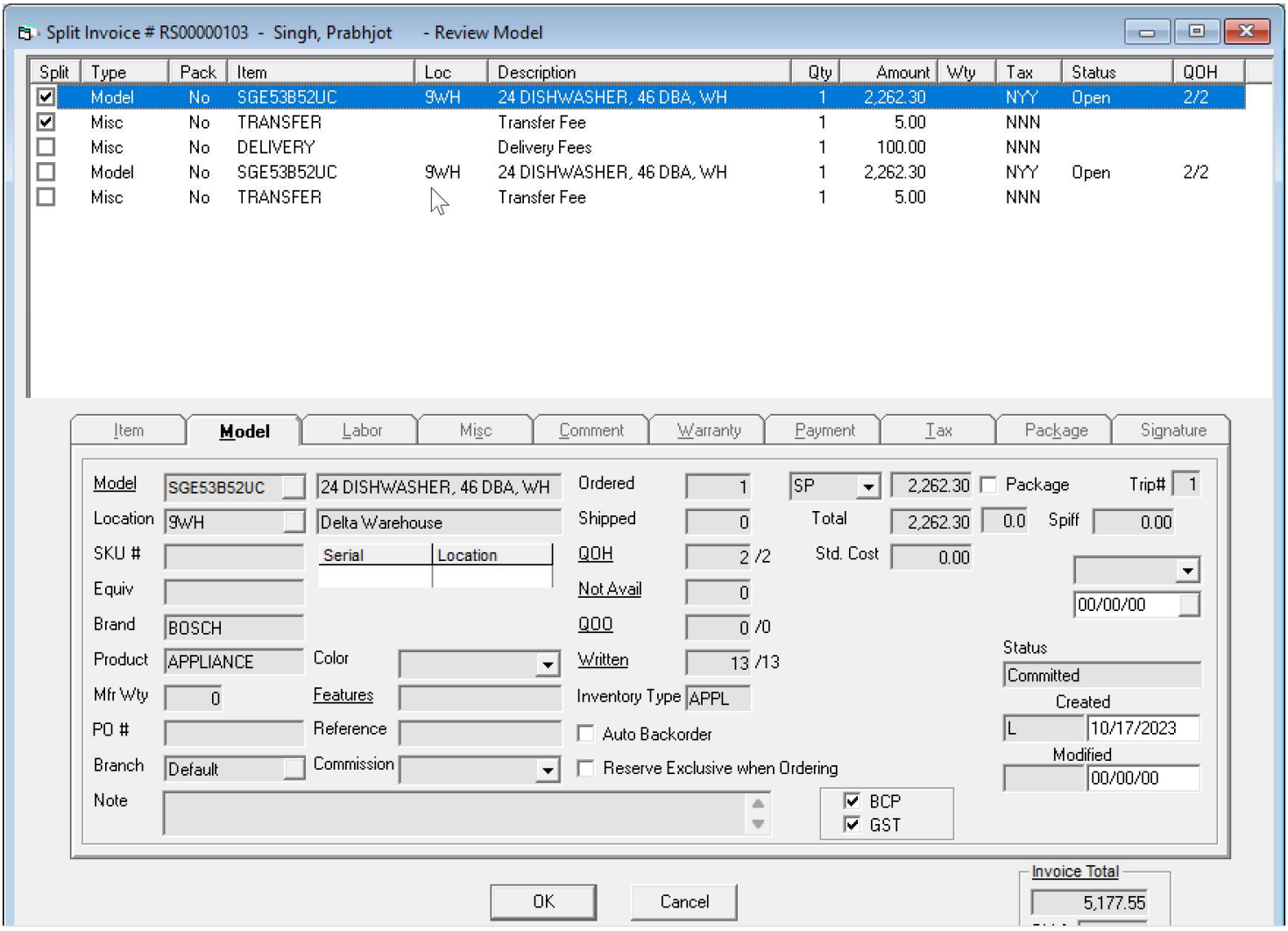
Split the Invoice



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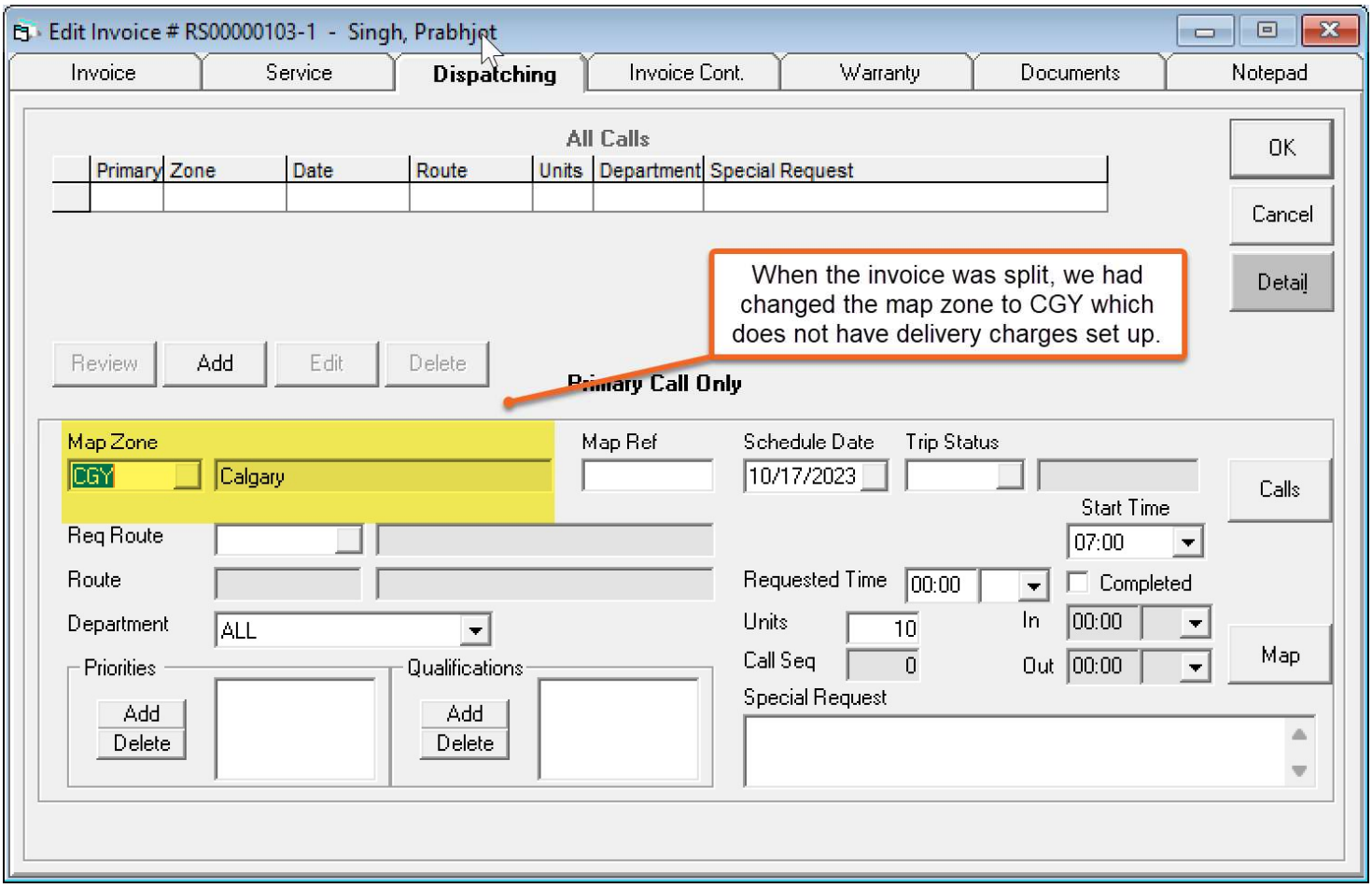


Overriding Automatic Delivery Charges

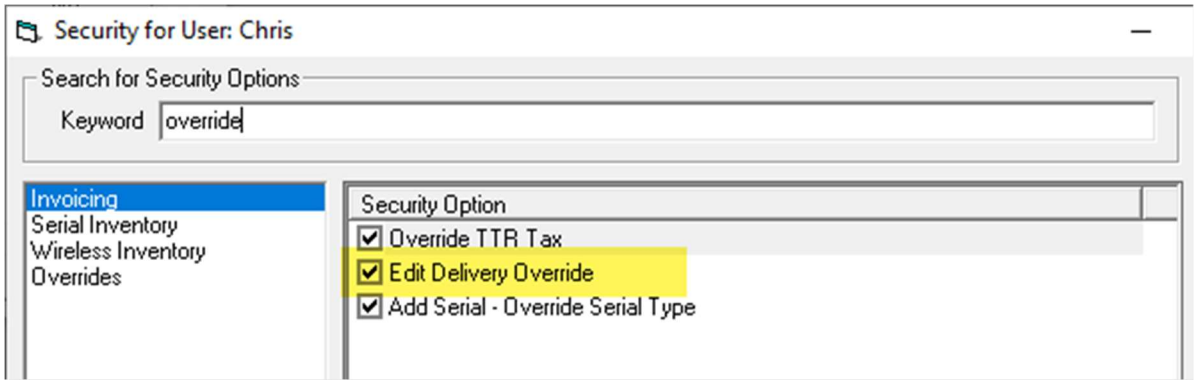
If you don't want delivery charges to automatically apply to an invoice, you can choose to suppress them with the override feature. This feature prevents all delivery charges from automatically applying to the invoice, regardless of map zone or model. You can still manually add them if you need to.

Before Starting:

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

To Enable the Security Options:

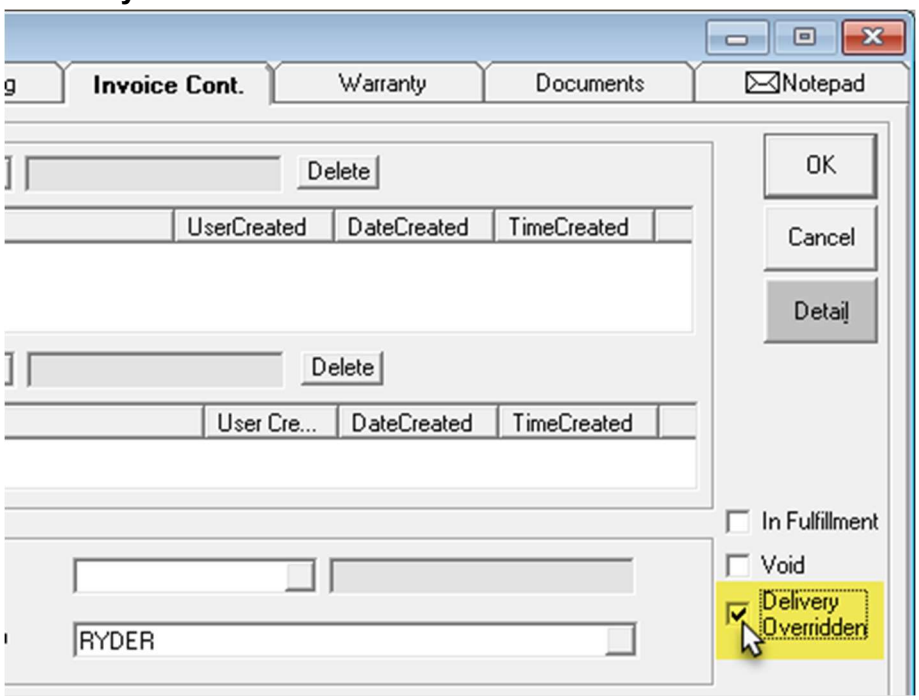
1. Go to **Tools** > **System Maintenance**. On the **Tables** tab, select **User Security**, and then click **Open**.
2. Select a User Group from the list, and then click **Security**.
3. In the **Keyword** search box, enter **OVERRIDE**. Select **Edit Delivery Override**.



4. Click **OK**.

Override the Automatic Delivery Charges:

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



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

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