# SUPPORT DOCUMENT

**Delivery Cost Pricing & Courier Integration** 





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### Overview

The purpose of this feature is to allow you to charge customers delivery charges based on Item Weights, Volumetric Weights, Number of Units, Fixed Price or Distance to Client. This can be used for personal company deliveries or used to recover costs of 3rd party courier companies. In addition, you can automatically integrate the sales documents to your Courier Company to Create Waybills, eliminating the need for manual capture, improving accuracy and expediting the delivery process from hours to seconds.

### Setup

#### Create Delivery Methods

To create delivery methods, go to the Warehouse Module and select the Delivery Method option. In the screen below you will see that you can actually have multiple delivery methods in one. Once you have selected the service item to invoice you will then select the Billing Method. The billing methods are:

- Fixed Rate this is one set weight for the order regardless of the size
- Total Mass this is based on the order mass and is governed by a minimum fee as well as the ability to create a sliding scale table
- Volumetric Weight this is the item volumetric weight and is governed by a minimum fee as well as the ability to create a sliding scale table
- **Greater of Total Mass or Volumetric Weight** this is the greater of the previous 2 options, and is governed by a minimum fee as well as the ability to create a sliding scale table
- Order Units this is based on the quantity of items order and is also governed by a minimum fee as well as the ability to create a sliding scale table
- **Distance to Client** this is based on the distance to the client as set on the Customer delivery address and is governed by a minimum fee as well as the ability to create a sliding scale table.

very Met	hods Code: Descript	COURIER tion: Courier				
Rate	es (	Optional Fields	Files	Notes		
🗙 Dele	ete					
🔟 Cod	e	Description		Billing Method	Tax Code	Minimum Charge
S102	20	Drafting		Total Mass	√ 04	250.00
*						
Fixed	d Rate		*	0.00		
<ul> <li>Fixed</li> <li>Fixed</li> <li>Total Material</li> </ul>	d Rate d Cost ass		Variable co	0.00 ost Per Mass (Unit)		
Fixed     Fixed     Fixed     Total Ma	d Rate d Cost ass		<ul> <li>Variable co</li> <li>From</li> </ul>	0.00 ost Per Mass (Unit) To		Amount 🔺
Fixed     Fixed     Total Ma	d Rate d Cost ass		Variable co From 1.00	0.00 ost Per Mass (Unit) To 9.99		Amount 10.00
Fixed     Fixed     Total Ma	d Rate d Cost ass		Variable co     From     1.00     10.00	0.00 ost Per Mass (Unit) 70 9.99 29.99		Amount ^ 10.00 9.25
Fixed     Fixed     Total Ma	d Rate d Cost ass		Variable co     Variable co     1.00     10.00     30.00	0.00 ost Per Mass (Unit) 70 9.99 29.99 999,999.99		Amount ^ 10.00 9.25 8.90



#### Rate Table Settings

The rate table setting can either be set as a Fixed Cost for the rate, or as a Variable cost per Mass.

- Fixed Cost Option this will assume a fixed cost for all deliveries that weigh within the weight range. In the table above, an order weighing 19kg will cost 9.25.
- Variable Cost Per Mass Option this will assume a cost per weight for all deliveries that weigh within the weight range. In the table above, an order weighing 19kg will cost 175.75 (19 x 9.25).

#### Customer Setup

You now need to set a default Delivery Method to the Customer as seen below. For more detail you can also set this on a per Customer per Delivery Address basis.

Name: Ashburton Reinforcing								
stomer Information Contacts Shipping I	ocations Settings Taxes History Optional Fields Targets Trends Fil	es Notes Linked Customers						
Credit Control	000.00 🛊 🗌 Credit Hold Interest Rate (APR): 24.00 🐳 %	Remote Sales Terminal Sync						
Temporary Limit:	0.00 🔹 Expiny: 07 March 2015 🗐 🗸	Terminal Numbers: 1,2,3 or 4-10						
Payment Terms	Default Tender Type Invoice Document Form	- Delivery Method						
30 Days From Invoice $\qquad \qquad \lor$	On Account V - None - V	COURIER						
Sales Person	Currency Order Document Form							
None 🗸 🗸	South African Rand V - None - V							
Category	Pricelist Trade Discount							
DEFAULT 🗸 🔗	REGULAR V IN Fixed 0.00 🗘 %							
Profit Center	Department O Matrix Type							
60	- None - V DEFAULT V							
Create Customer Invoice Methods	Contract Pricing Allow Backorders (Partial Deliveries)							
Create New Invoice	- None - V   Allow   Varning  Cancel							
Convert from Delivery Advice	Distribution Method							
Convert from Sales Order	E-Mail V Documents for this Customer							

#### Inventory Item Weight Setup

In order to use the weights it is critical that you setup the item weights on the Inventory Masterfile as depicted below.

ntory Item																	
Numb	er Mask:				🗌 ltem	Numbering (	Conventior	n									
Numb	ier:	Invitem							Barcode 1:	654445	68898743			🖄 Labels			
Descri	iption:	Bicycle							Barcode 2:					🖄 Labels			
item Summary	Vendor	s Pricing Lo	ocation Rel	lated Items	Reorder	Taxes	History	BOM	Files	Optiona	Fields	Ext Description	Notes	Statistics	Targets	Trends	Activity
Item Type	Item Li	nkings				Default Purc	hase Price				-Item Ir	nages					
Item	Cate	gory: DEFAULT		~	60	Last Receive	d Cost				🗹 De	fault Image					
O Service	Remot	e Sales Terminal Syr	nc			Default Item	n Cost:	0	0.0000								
O Buyout			1	Ferminal Numbe 1,2,3 or 4-10	rs:	Item Control	/ Settings										
- Serial / Lot Set	tings					Standard Co	ost:		0.0000								
Serial / Lo	ot Item Typ	e		$\sim$	63	Default Sale	Quantity:		1.00					1	-		
						Repair Cost	Charge:		1.0000						2		
Stork: FA	_					Dimension	Profile	a a Mara					$\rightarrow$		2		
Bung FA	_	1 Buy = 100	* Stork	k Hoits		Dimension	rome	S.S. NOTA	.,,	*							
Solla EA	_	1 Sell = 1.00	• Stock	k Units		Calue Dealer								30 🚺		)	
Sen. DA		1361 - 1.00	- 300	K OTHES		sales Decim	al Quantity	r. 2 '	~					7 /		/	
Weight and D	imension										1				-		
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Volumetric \	Weight:	21.600 🜩	H	80.00	÷	Fact	on	4000.00	•								
Unit of Wei	ght:	Kg	D:	72.00	÷			Calculate			÷ M	<  1 o	f1   ▶ - ▶	+ X			
Inactive																OK	Cancel



#### Courier Integration Setup

To setup the switching of the sales document information to your Courier company, you need to select the related Account integration details as setup with your courier company either at Sales Order or Sales Invoice level.

aill	Code:	COURIER				Print Delivery Costs on Sales Document     O Detail	s
AN AN	Description:	Courier				() Summary () Stam	
Rate	s Optio	nal Fields	Files	Notes	Courier Setup		
Enab	le Courier Integ	gration					
Courier	Integration Se	ettings					
Courie	r:	Dawn W	ïng	~	Method Live	🔿 Test	
Sender	Acc No:	PAL2113			Document	Integration Type	
Sender	Contact Perso	n: John Rey	nolds		Sales In	woice O Sales Order	
Sender	Work Tel:	+ 1 555 2	2198		Prefix For Ir	nvoice Setting	
Site Co	de:	12			S12		
Store C	ode:	3460			Service Type	e Settings	
Sender	Company:	Palladiur	n Business Soluti	ons	EXPRESS	×	
Street:		21 West	Street, Fourways		Test Connec	ction	
City:		Johanne	sburg				
Postal	Code:	2155					
Inactive							



### Processing

Now that you have setup the delivery methods you will now proceed processing a sales document. In the example below you will see that we have selected the Weight button with the Weight details appearing on a separate screen alongside for greater detail.

	] Sales Order																-		<
Ei	ile <u>E</u> dit <u>V</u> iew	Navigate	Sales	Report	Project III 4	Attach Files 3= Lin	es interne	lated Item	. 0.	Change (	lustome				Record	e Liene	rint -	1 20	
c	ustomer:		n - cojast n	Ship To:	Secolar D.	SALE		ER	- 200	, energe				Doc Nur	mber:	SO-000	000002		
Т	ISTO01		60	<< Default >>	~			Account E	alan	ce:		R 1 54	45.84	Date:		29 Feb	ruary	2016	5
	Ashburton Reinforcir	na		Ashburton Reinforcing				Open Ord	iers:			R	0.00	Require	d:	07 M	arch	2016	7
	Level 2, 24 Richardson	n St.		Level 2, 24 Richardson St.			Open Quotes: Available Cred		otes:	s:		R 139.08		Referen	ce #:				1
	WA6872			WA6872					Credi					Addition	nal info:				1
											Bookma	rk			L				
	Document Items		Document	Options Docum	ent Notes						a Buyo	ut Cost	🧳 Item I	mport (	🤨 Item E	nguirie	100	View Image	s
	Number	Location	Descri	ption			Qty	Unit		Price	Discou	int %	Margin % Ta	x Code	•	Tax		Amou	int
	Invitem	DEFAULT	Bicycle				5	i EA 🛛 🕈		986.00		0.00	97.67 01		690.20			4,930	.00
	wheel	DEFAULT	Bicycle	wheel			10	EA		125.00		0.00	100.00 01		175.00			1,250	00
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						113.250		135.0	00										
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v	wheel	Bicy	cle wheel		Kg	50.000		27.0	00	-									
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1									1	Volumetr	ic:	÷	135.000	Cost:			Ð	1,00	.93
										Method:		COURIER	× ×	Tax:			÷	865	.20
														Total:			-	8,053	.13
8									- 1								Samp	le Compan	y:

Select the Delivery cost button will allow the user to adjust the delivery costs as required. Using our same rate table above with the weight of our Items you will see that the total delivery cost as calculated at 113.25kg x 8.90 / kg = 1,007.93.