

SUPPORT DOCUMENT

Delivery Cost Pricing & Courier Integration



palladium
Accounting

Delivery Cost Pricing & Courier Integration

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Overview

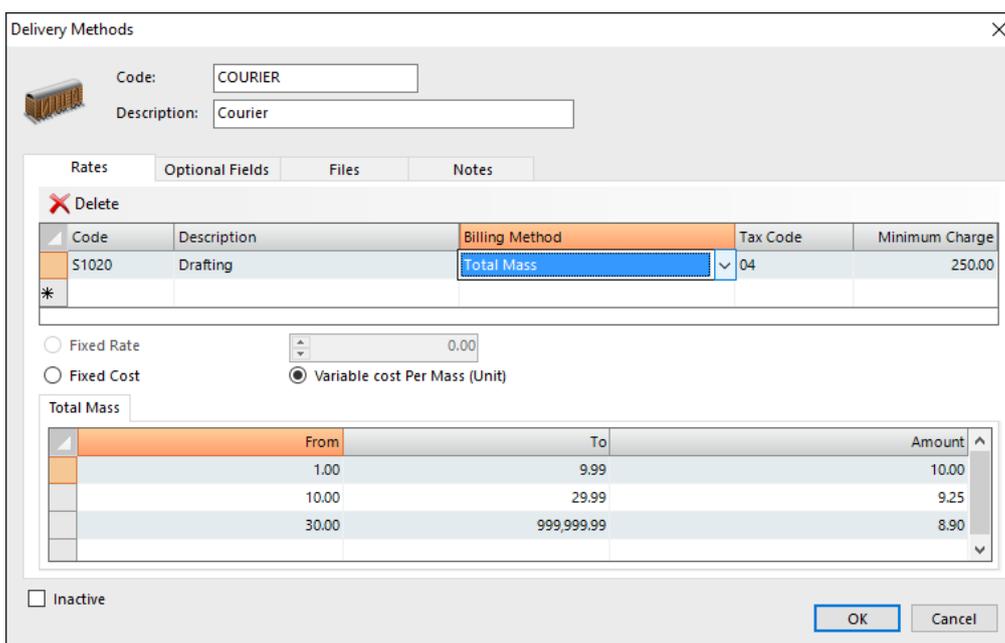
The purpose of this feature is to allow you to charge customers delivery charges based on Item Weights, Volumetric Weights, Number of Units, Fixed Price or Distance to Client. This can be used for personal company deliveries or used to recover costs of 3rd party courier companies. In addition, you can 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.



Code	Description	Billing Method	Tax Code	Minimum Charge
S1020	Drafting	Total Mass	04	250.00

From	To	Amount
1.00	9.99	10.00
10.00	29.99	9.25
30.00	999,999.99	8.90

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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.

Customer Setup window showing the 'Delivery Method' dropdown menu set to 'COURIER'.

Inventory Item Weight Setup

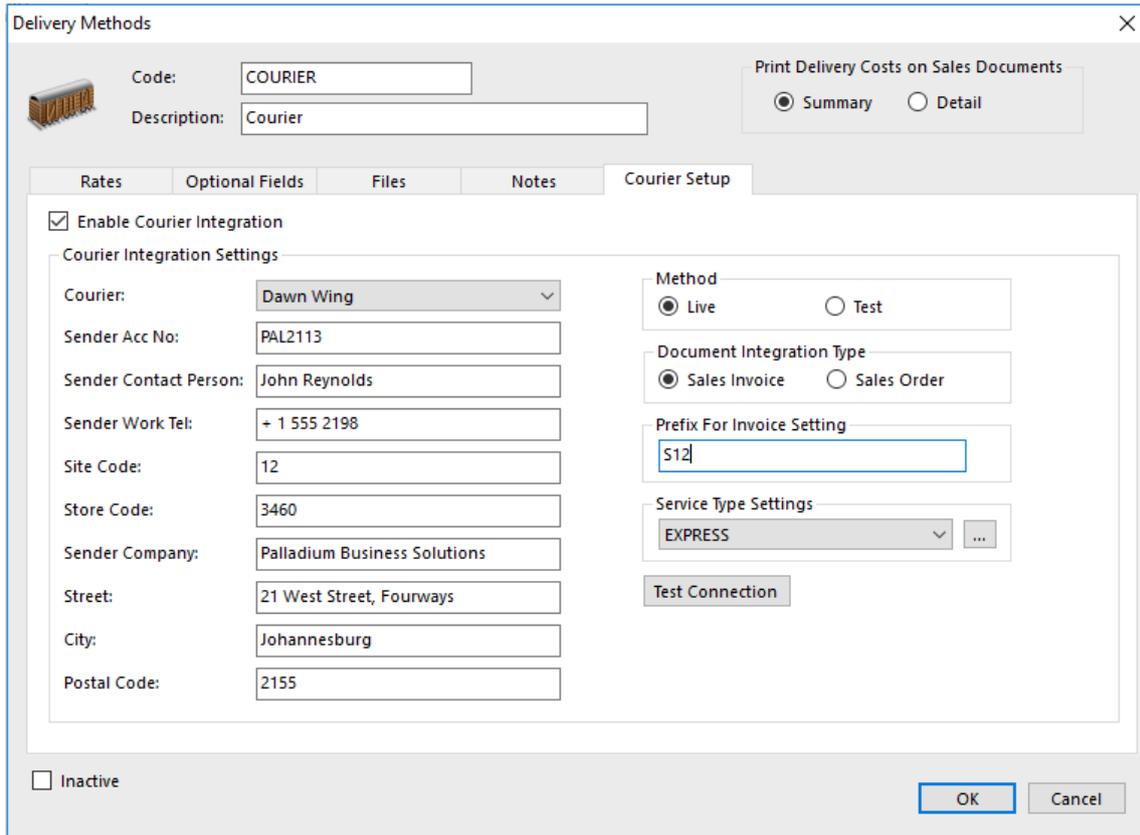
In order to use the weights it is critical that you setup the item weights on the Inventory Masterfile as depicted below.

Inventory Item Setup window showing the 'Weight and Dimension' section highlighted with a red box.

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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.



The screenshot shows the 'Delivery Methods' window with the 'Courier Setup' tab selected. The 'Enable Courier Integration' checkbox is checked. The 'Courier Integration Settings' section contains the following fields:

- Courier: Dawn Wing (dropdown)
- Sender Acc No: PAL2113
- Sender Contact Person: John Reynolds
- Sender Work Tel: + 1 555 2198
- Site Code: 12
- Store Code: 3460
- Sender Company: Palladium Business Solutions
- Street: 21 West Street, Fourways
- City: Johannesburg
- Postal Code: 2155

Additional settings on the right include:

- Method: Live (selected), Test
- Document Integration Type: Sales Invoice (selected), Sales Order
- Prefix For Invoice Setting: S12
- Service Type Settings: EXPRESS (dropdown)
- Test Connection button

At the top right, there is a section for 'Print Delivery Costs on Sales Documents' with radio buttons for 'Summary' (selected) and 'Detail'. At the bottom left, there is an 'Inactive' checkbox. At the bottom right, there are 'OK' and 'Cancel' buttons.

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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.

The screenshot displays the 'Sales Order' window in Palladium Accounting. The main window shows customer details for 'Ashburton Reinforcing' and a list of items including 'Bicycle' and 'Bicycle wheel'. An 'Items Weight' dialog box is open, showing a table with columns for Number, Description, Unit, Weight, and Volumetric. The 'Bicycle' item has a weight of 63.250 kg and a volumetric weight of 108.000. The 'Bicycle wheel' item has a weight of 50.000 kg and a volumetric weight of 27.000. The total weight is 113.250 kg and the total volumetric weight is 135.000. Below the dialog box, a summary table shows the 'Delivery Cost' as 1,007.93, which is calculated based on the total weight and the selected 'COURIER' method.

Number	Location	Description	Qty	Unit	Price	Discount %	Margin %	Tax Code	Tax	Amount
InvItem	DEFAULT	Bicycle	5	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

Number	Description	Unit	Weight	Volumetric
InvItem	Bicycle	Kg	63.250	108.000
wheel	Bicycle wheel	Kg	50.000	27.000
			113.250	135.000

Total Margin %:	98.14	Subtotal:	6,180.00
Weight:	113.250	Discount %:	0.00
Volumetric:	135.000	Delivery Cost:	1,007.93
Delivery Method:	COURIER	Tax:	865.20
		Total:	8,053.13

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 $113.25\text{kg} \times 8.90 / \text{kg} = 1,007.93$.