



# **IQ EPOD**

## **(Electronic Proof of Delivery)**

# **ENTERPRISE, BUSINESS, POS, K8 TRADER**

## IQ EPOD (ELECTRONIC PROOF OF DELIVERY)

A seamless, integrated electronic Proof of Delivery solution. Connects to your IQ system via Wi-Fi or mobile data. Working offline; your changes are cached and will automatically sync when you have connectivity.

The IQ ePod was created to compliment the IQ Deliveries and Collections module.

The IQ Deliveries and Collection Module enables you to manage all aspects of your delivery cycle, from initial planning and optimising the route through to loading vehicles and onward delivery to customers.

A key component of this solution is K8 ePod, an app that is installed on the drivers Smartphone or other suitable device. This provides the ability for the driver to manage the customer delivery cycle, check off and confirm the delivery, capture recipient names and signatures and to automatically inform staff immediately of any issues that have arisen.

We know that delivering the right goods at the right time to your customer is key to ensuring that your business remains at the forefront of customer service. Ensuring that deliveries are error free, or errors that have occurred are resolved quickly and efficiently, is important for ensuring accurate and timely invoicing. Capturing customer signatures for all deliveries made and having the signed PODs instantly available is vital to ensuring that queries are speedily resolved.

With the option to deploy the ePod solution on a Smartphone, you can choose the technology that best supports your delivery requirements. As ePod can operate in online or offline mode, your drivers can be assured that all updates happen as close to real time as possible when they are driving in and out of network coverage.

Depending on how you choose to operate, drivers can either pull a pre-prepared manifest from IQ for their route and vehicle or they may simply scan deliveries as they load the vehicle to create the manifest.

Drivers can review the manifest to ensure that all is correct, complete, and then download to their device. They can then begin the journey to complete their route, selecting each drop-in turn.

On arrival at the drop, the driver can easily scan the delivery ticket, record the recipient's name, and request their signature. Once completed, the delivery is updated within IQ, with a signed copy of the POD being emailed to the customer.

In the event of a problem arising with a delivery, the driver can record any problem lines directly on the device – issues such as shortages, damaged goods, etc, can be easily identified. Once the customer signature has been captured, then the delivery is automatically updated within IQ and problem lines are highlighted immediately to the staff. They can then view the reasons, notes and any images captured by the driver, and they can determine the right course of action to resolve the issue, including updating line quantities and organising another delivery.

If the device is connected to the mobile network at the time that the drop is completed, the updates will occur immediately meaning that you can take action to resolve the problem even before the driver has left the customer's premises.

## PROOF OF DELIVERY FEATURES:

- Download your delivery manifest to your device, including customer and delivery information
- View and complete deliveries
- Photo capture
- Signature capture
- Your system will require additional configuration to allow connections from the app.

## KEY BENEFITS

- Improved service / timing /communication
- No manual scanning or filing of POD's
- Electronic POD's to the right customer contact
- Reduced POD requests, held invoices and debtor days
- Make the POD's available for customers on the web
- Simple to use, yet powerful delivery management app

## BUSINESS REQUIREMENT

- Easy to use delivery confirmation solution
- Mobile "stand alone"
- Electronic drivers manifest with signature capture
- Automatic delivery confirmation
- Electronic POD to the customer

## IQ EPOD REQUIREMENTS

- Public Server domain name
- SSL Certificate from a valid CA authority (Require the files below after this is obtained)
- Certificate file (.pem)
- Private Key file (.key)
- CA Root/Intermediate Certificate file (.pem)
- Password used for Private Key file when generating the CSR (certificate request)
- Port selected in ePod.ini must be open

## **COST REQUIREMENTS**

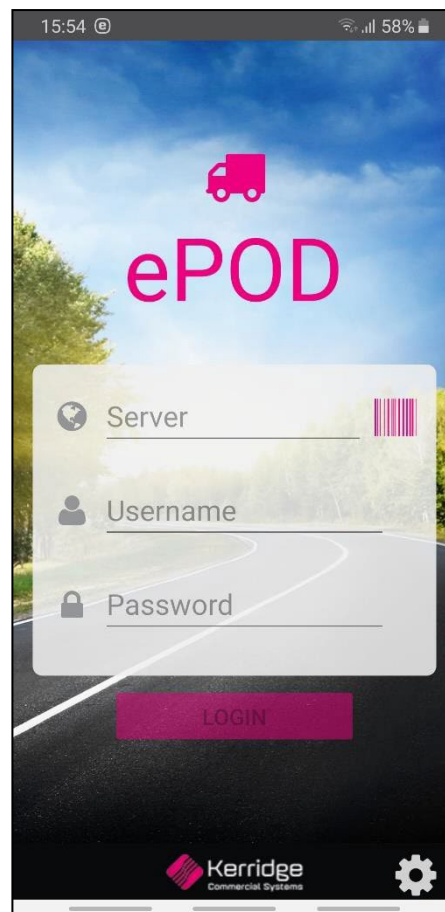
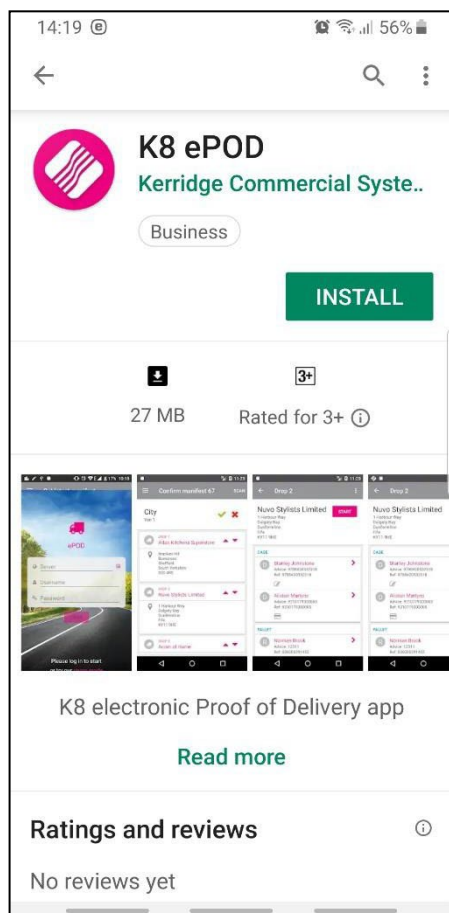
- All Deliveries and Collections clients
  - IQ Enterprise – included – only need registration
  - IQ Business & IQ POS – at a cost with registration
- Will require a device Registration
- The K8 ePod software for the phone or device is free but will be a charge per device bundle.
- Server Security Certificate and Hosting – Customer & BP responsibility.
  - The cost of the certificate will vary depending on the client's requirements.
  - The SSL can be supplied by the ISP.

## **STEP TO FOLLOW:**

1. Download ePod from Play Store or App Store
2. Register of ePod Module
3. Setup - Default Setting 1
4. Setup - Module Parameters
5. Setup - Server Service
6. Device Setup
7. Processing - Invoicing for Deliveries and Collections
8. Deliveries and Collections - Issue stock & Send manifest
9. Deliveries and Collections - Manifest Maintenance
10. Processing - ePod Software
11. Processing -Short deliveries
12. Processing -Failed deliveries
13. Processing – Managing short Deliveries
14. Processing - Reissue Short Delivered Goods
15. Processing - Credit Note
16. Manifest Maintenance Completion

**STEP 1****DOWNLOAD EPOD FROM PLAY STORE OR APP STORE**

Install the K8 ePod software onto your device from App Store or Play Store.



## STEP 2

### REGISTER THE EPOD MODULE

This module is an add-on module that requires additional licencing and registration. You will only get access to the IQ ePod, when you have received the additional registration.

Contact the Sales Department at IQ Retail for the latest prices on the software.

Select the Support Menu Option → Register IQ → Package Details

Tick the box for 'Register' IQ ePod under Module Details.

Module Name	Is Registered	Register/UnRegister
Report Writer - ADD	<input type="checkbox"/>	<input type="checkbox"/>
Services - OneOne Loyalty	<input type="checkbox"/>	<input type="checkbox"/>
Alacitly Data Uploads	<input type="checkbox"/>	<input type="checkbox"/>
IQ CRM	<input type="checkbox"/>	<input type="checkbox"/>
IQ API	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
IQ Workshop	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
IQ Offline	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Single View	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
IQ FTP and Data Export	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
IQ Projects	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Sure Swipe	<input type="checkbox"/>	<input type="checkbox"/>
MDR	<input type="checkbox"/>	<input type="checkbox"/>
Cash Back World	<input type="checkbox"/>	<input type="checkbox"/>
Signature Pad	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
EP0D	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Deliveries and Collections for POS	<input type="checkbox"/>	<input type="checkbox"/>

If the Save & Export option is used, email the reg.txt file to [iqregistration@kerridgecs.com](mailto:iqregistration@kerridgecs.com).

If the Save & E-mail is used, select the button at the bottom of the screen.

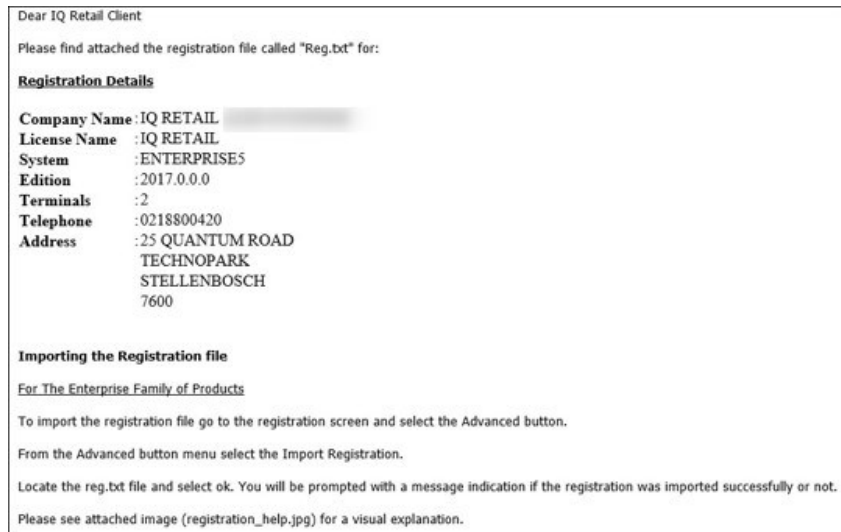
The End User Licence Agreement will appear on the screen. You must agree to the Terms and Conditions in the End User Licence Agreement by ticking the box and selecting the Accept button to continue to the e-mail setup screen and send the email as per normal.

Please send the Proof of Payment for the registration to [igaccounts@kerridgecs.com](mailto:igaccounts@kerridgecs.com).

After payment has been received, the registration will be sent back to the listed email in the registration details.

## REGISTRATION EMAIL

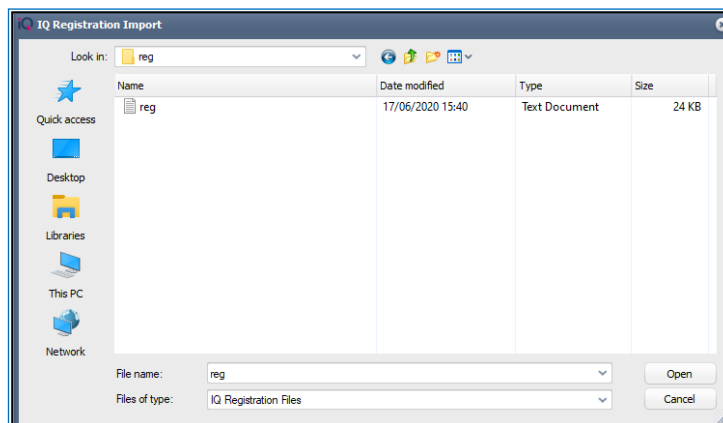
You will receive an email, save the reg.txt attachment to e.g. Desktop.  
Example of email below:



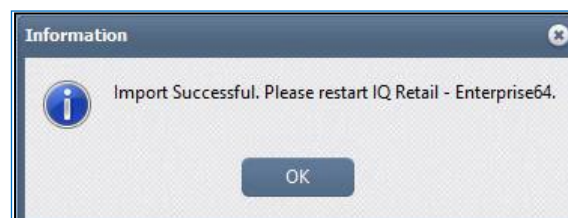
Select Support → Register IQ Enterprise → Click Advance → Import Registration.  
Re-type the confirmation code (remember it is case sensitive) and select OK.



Go back to where the reg.txt file was saved and open it.



Select ok to complete the registration process.

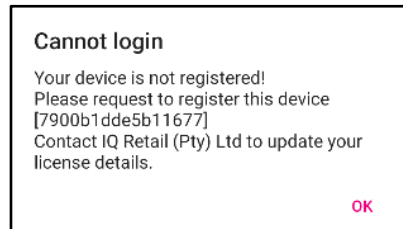


## STEP 3

### REGISTER - DEVICES

Once you have setup your phone with the e POD app and registered as an ePOD user, you will need to register the mobile device for IQ to integrate with it.

You will need the device name - When you try log in with the administrator username and password provided, the app will tell you that you have not registered it and to contact IQ Retail. Within the message it will give you a device ID. Note: This ID is case sensitive.



To submit the registration, go to IQ and select Support → Register



Capture the server details from the ePod Service.

This will be an IP Address or the domain registered with your SSL Certificate.

Make sure that the port is open for incoming as well as outgoing communication on your firewall.

ePOD Server Host	http://10.0.0.52
ePOD Server Port	8090
Username	IQ
Password	****
Enable Proxy	<input type="checkbox"/> Tick For Yes
Host (Proxy)	
Username	
Password	
Port (Default 443)	443

This device ID can be manually captured into IQ or updated through a 'Get Device List' option in the registration screen. The following setup can only be done after the devices have been installed. Phone installation will be addressed later in this manual.



The screenshot shows the 'TRAINING' application window with the 'Devices' tab selected. The interface includes a table for device management and a configuration panel on the right.

Device Id	Device Name	Is Registered	Register/UnRegister

Configuration Panel:

- ePOD Server Host:
- ePOD Server Port:
- Username:
- Password:
- Enable Proxy: ☐ Tick For Yes
- Host (Proxy):
- Username:
- Password:
- Port (Default 443):

Buttons: Get Device List, Add Device, Delete Device, Back, Next, About, Advanced, Save & Send.

The following setup can only be done after the mobile app has been installed on the device.

If a device is entered manually, click on the 'Add Device' option and capture the device id. Edit the name and click accept, this will then give you the device name to register.

The screenshot shows the 'Enter Device Identification' dialog box with the following fields and buttons:

- Device Id:
- Device Name:
- Selection:
  - ESC Cancel (Red X button)
  - F10 Accept (Green Checkmark button)

Capture the server details from the ePod Service.

This will be an IP Address or the domain registered with your SSL Certificate.

Capture the Device ID for example 'UTKDU19505003003'

Edit the name and click accept

This will then give you the device name to register.

Then select the option to register the device by selecting Save & Send

The screenshot shows the bottom of the ePod interface with the following buttons and menu:

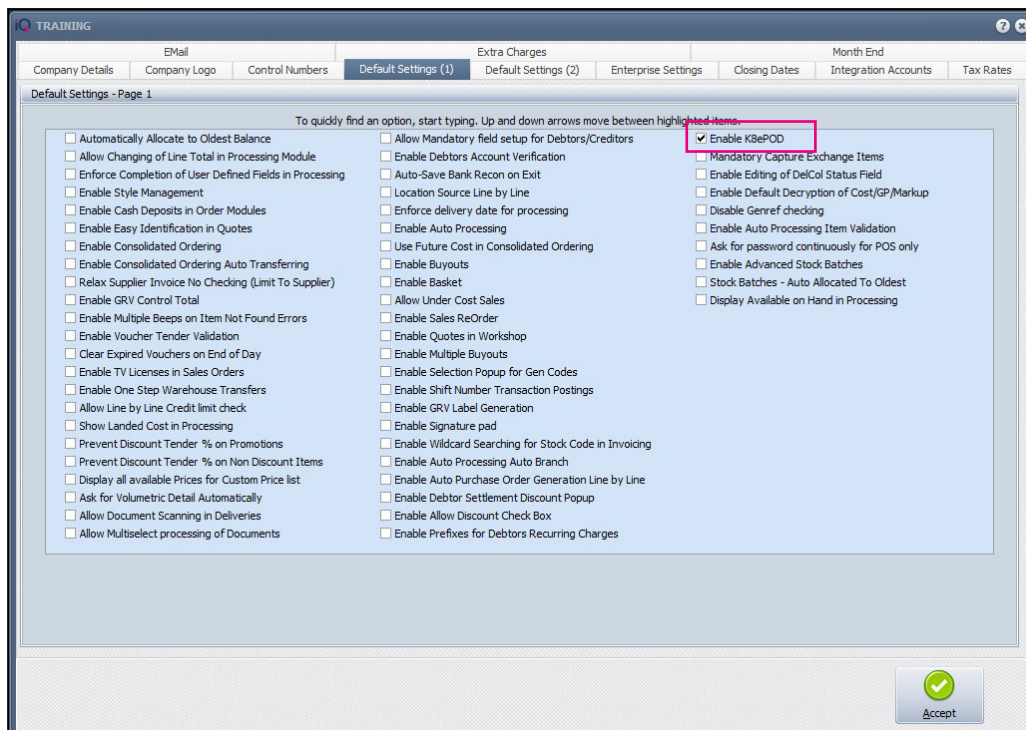
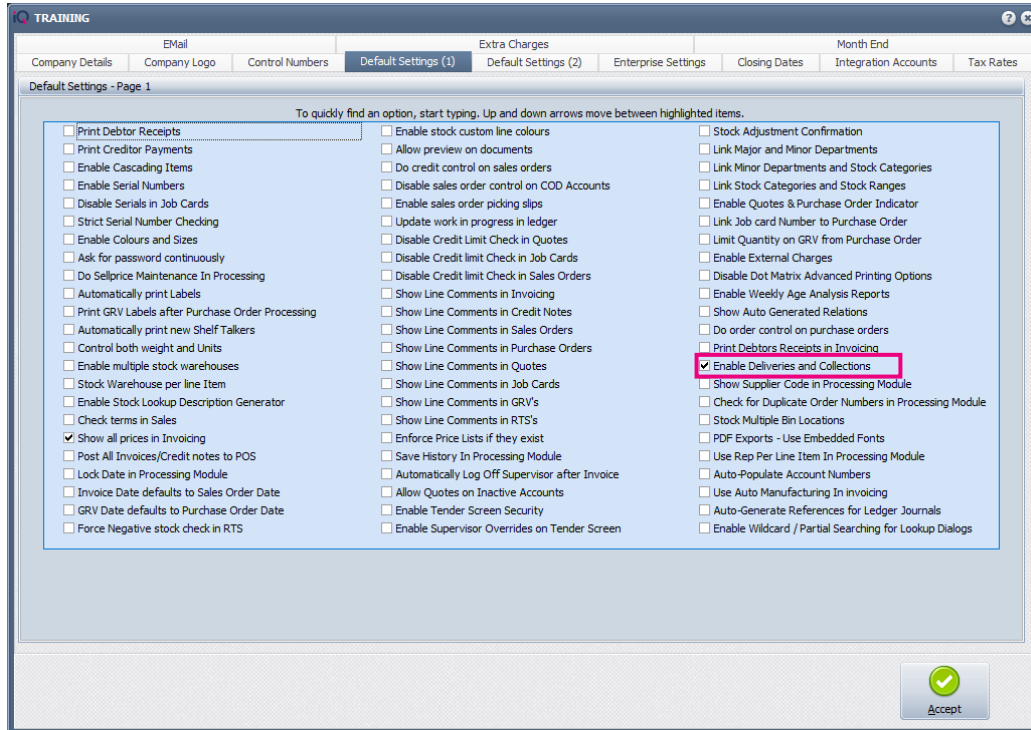
- Back, Next, About, Advanced, Save & Send (highlighted)
- Save & Send dropdown menu:
  - Send via Web
  - Send via Email
  - Export to File

- Click on the Save via Web
- Click on the Save via Email
- Click on the Save via File

## STEP 4

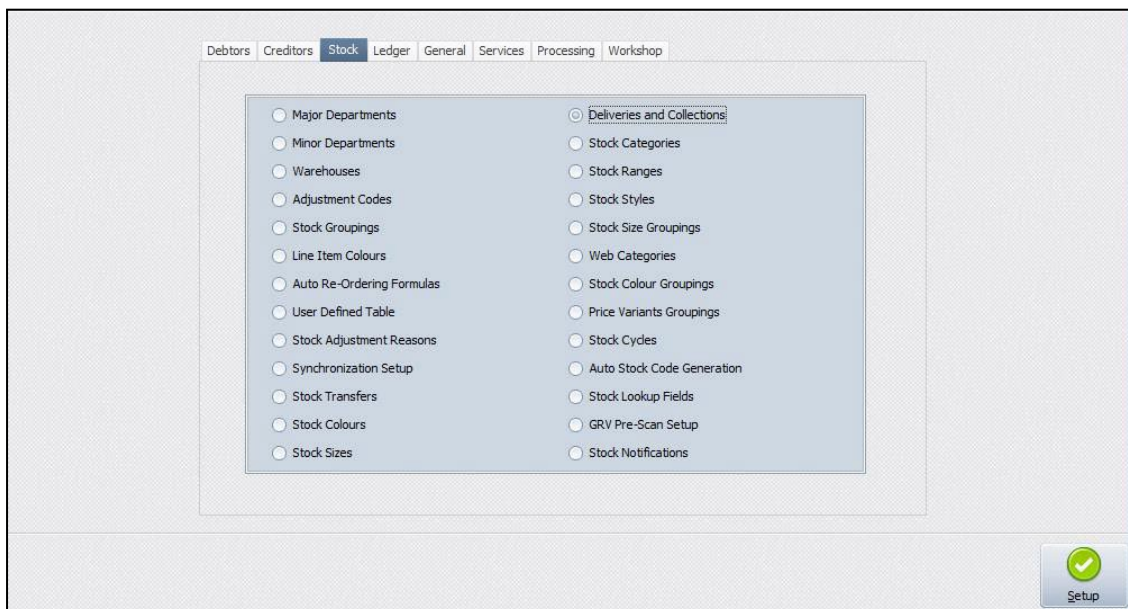
## SETUP – DEFAULT SETTING 1

From the IQ main menu → Utilities → Setup → Company Details → Default Setting 1 → Enable Deliveries and Collections as well as Enable K8ePOD

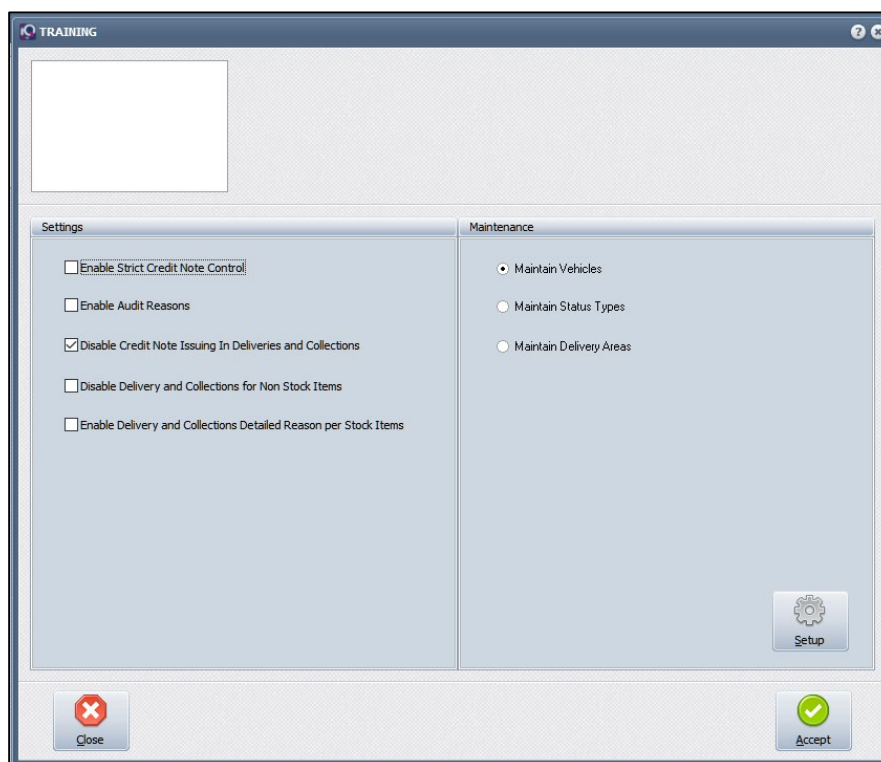


**STEP 5****SETUP - MODULE PARAMETERS**

From the IQ main menu → Utilities → Setup → Module Parameters → Stock → Deliveries and Collections  
→ Setup



Select Maintain Vehicles and proceed to Setup



Add new Delivery Vehicle or Edit and existing vehicle.

Registration	Description	Load Capacity	Unit Meas...	Charge Out Rate	Route Description
CFM1123	CFM1123	1	Kilograms		1 1

Vehicle Details

Registration No

CFM1123

Description

CFM1123

Load Capacity

1.00

Kilograms

Charge Out Rate

R1.00

Route Description

1

Cancel

Accept

Fill in the Registration Number, Description.

The load Capacity, Charge Out Rate and Route Description are required fields

The Registration No and Description will be use for the K8 ePod software for the driver's device.

All the standard Deliveries and Collections setup setting must be applied.

In other words, ensure that the Maintain Status Type has been created, making sure you have a delivery status type

TRAINING

Status Type Details

Code

TBD

Description

To be Delivered

Stock Has Left the Store

☐ Tick For Yes

Must Save Info when Processing

☒ Tick For Yes

Must Print Info when Processing

☒ Tick For Yes

Printer type

Report Printer

Layout Number

Default Delivery And Collect

Processing Modules

Processing Module	Allowed	Default
Invoices	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Credit Notes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Sales Order	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Quotes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
POS	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Cancel


Accept



## STEP 6

### SETUP - SERVER SERVICE

The ePod server service is available in your C:\IQRetail\IQEnterprise folder.

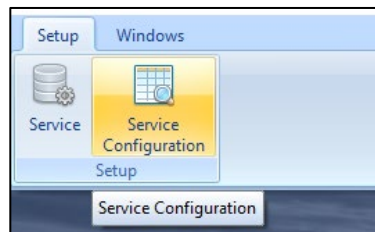
 IQEnterprise	09/02/2021 09:08
 IQePODServer	09/02/2021 09:04
 IQePODServer_log	12/03/2021 12:30

Right click on the IQePODServer application and Run as Administrator.

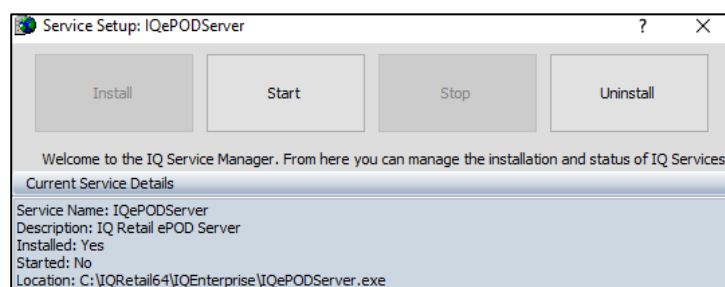
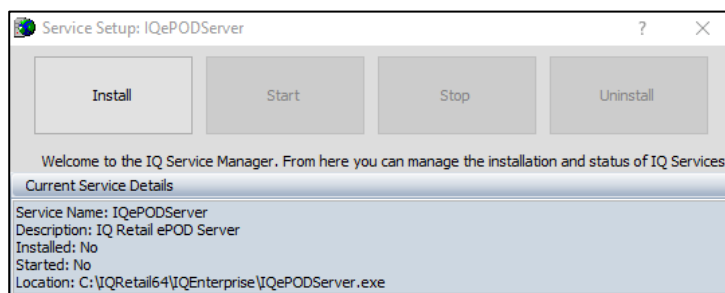


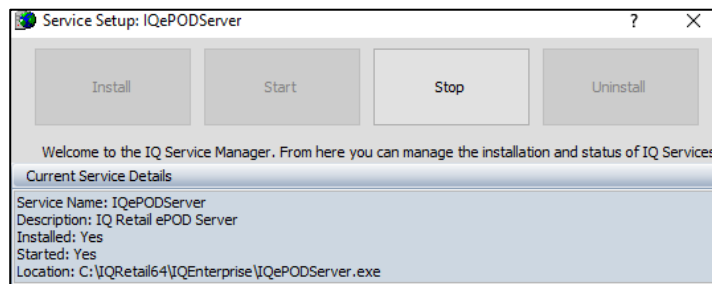
Log in with an IQ Administrator User and Password

From the IQ main menu → Setup → Service Configuration



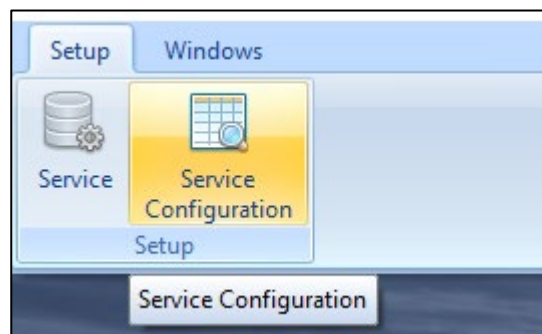
Install and Start the Service



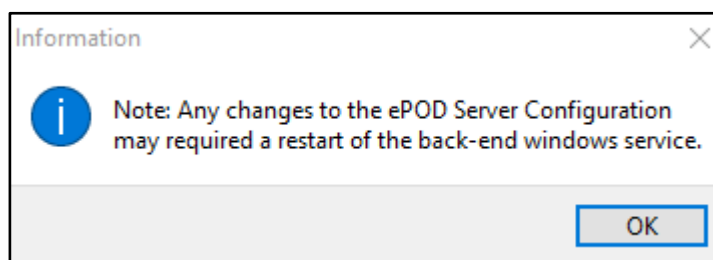


## SERVICE CONFIGURATION

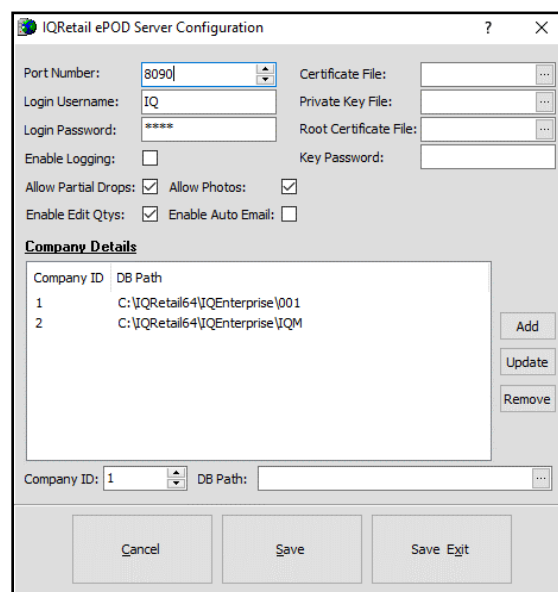
From the menu, select Setup then Service Configuration.



An information screen will appear



Click OK



The port needs to be selected for this application, as you can see, we have made use of the generic 443 port. This is not advised as it is an unsecure port.

Select a username and password. This will be used to log into your device to link to the company.

The information needs to be the same as the information registration setup of IQ.

<b>ENABLE LOGGING</b>	This will keep track of all transactions in a log file.
<b>ALLOW PARTIAL DROPS</b>	This will allow you to deliver a partial amount of the issued goods. This is ideal for damages in transit.
<b>ENABLE EDIT QTYS</b>	This allows you to edit the quantity that is being delivered and works in conjunction with the above option.
<b>ALLOW PHOTOS</b>	Allows you to take photos with your smart device to send back to IQ.
<b>ENABLE AUTO EMAIL</b>	Allows you to email the proof of delivery once signed.

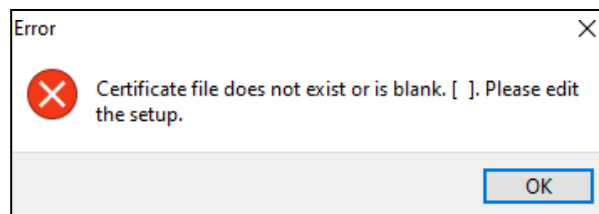
The SSL Information must be requested and coordinated by your IT Specialist.

A company needs to be linked to the server for the manifest to be processed.

- Company id is an identifier within the server and not the company number within IQ.
- Company path needs to be the IQ company that will be making use of the ePod solution.

It is important that ePod has SSL Mode enabled.

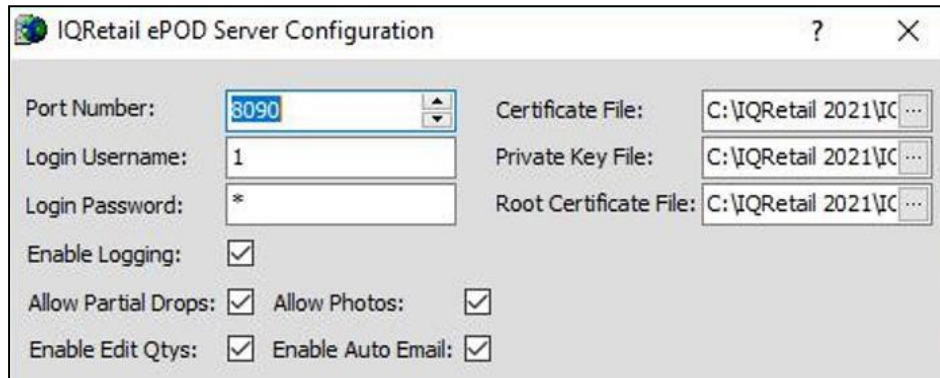
Should this be enabled and not completed, the following error will display.



Once you have received your four SSL Certificates you will need to save them into your Enterprise folder.

cert1.pem	02/03/2021 9:24 AM	PEM File	2 KB
chain1.pem	02/03/2021 9:24 AM	PEM File	2 KB
fullchain1.pem	02/03/2021 9:24 AM	PEM File	4 KB
privkey1.pem	02/03/2021 9:24 AM	PEM File	2 KB

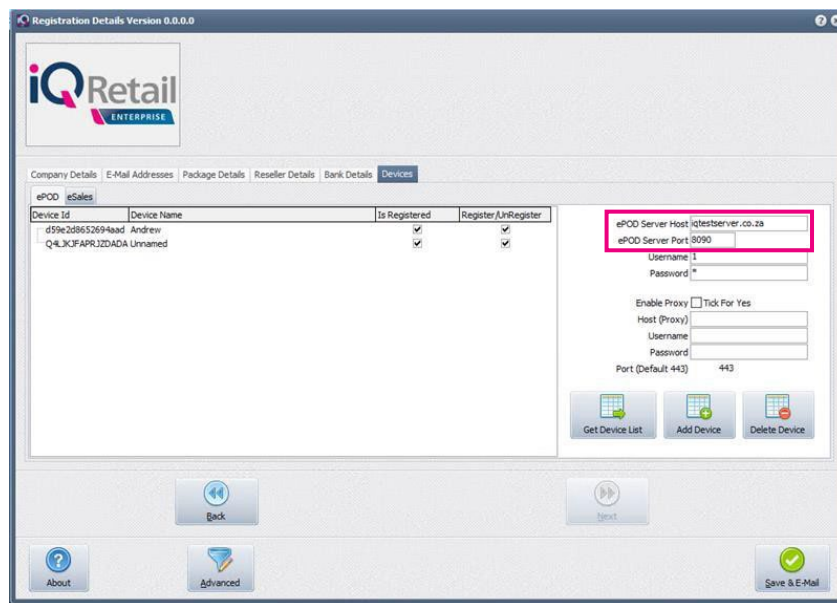
You will then need to add this information to the configuration screen.



The screenshot shows the 'IQRetail ePOD Server Configuration' window. It contains the following fields and options:

- Port Number: 8090
- Login Username: 1
- Login Password: \*
- Enable Logging: ☒
- Allow Partial Drops: ☒ Allow Photos: ☒
- Enable Edit Qtys: ☒ Enable Auto Email: ☒
- Certificate File: C:\IQRetail 2021\IC...
- Private Key File: C:\IQRetail 2021\IC...
- Root Certificate File: C:\IQRetail 2021\IC...

Once this has been done and you return to your registration screen in IQ, the Server Host information will be updated.



The screenshot shows the 'Registration Details Version 0.0.0.0' window. The 'ePOD' tab is selected, and the 'eSales' sub-tab is active. The 'ePOD Server Host' field is highlighted with a red box and contains the value 'icretserver.co.za'. The 'ePOD Server Port' field contains the value '8090'. The 'Username' field contains '1' and the 'Password' field contains '\*'. The 'Enable Proxy' checkbox is unchecked. The 'Host (Proxy)' field is empty. The 'Username' field is empty. The 'Password' field is empty. The 'Port (Default 443)' field contains '443'. The 'Get Device List', 'Add Device', and 'Delete Device' buttons are visible. The 'Back' button is also visible. The 'About' and 'Advanced' buttons are at the bottom left. The 'Save & E-Mail' button is at the bottom right.

Device Id	Device Name	Is Registered	Register/UnRegister
d59e2d8652694aad	Andrew	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Q4L3CFAPR32DADA	Unnamed	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>



## STEP 7

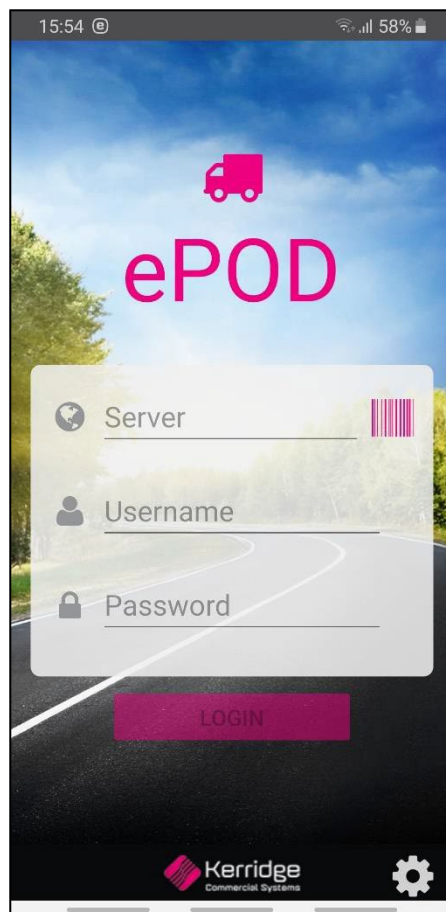
### DEVICE SETUP

Fill in the server information and the Port Number separating the two with a :

For example, `http://10.8.8.888:44`

Vehicle Registration Number and password.

This will be the same as the setup in Module Parameters.



## STEP 8

## PROCESSING – INVOICING FOR DELIVERIES AND COLLECTIONS

The deliveries and collections process will be the same, starting at a Sales Order and proceeding to an Invoice remembering to select the status type.

Processing Debtors Creditors Stock Ledger Utilities Support Point of Sale Workshop Projects Windows Help Shortcuts

Document Details

Account Details

Account No. 4002001

Name and Address Details

JAC Stone Pty Ltd

78 Main Road

STELLENBOSCH

Tel 021 456 1234

Email jac@jretail.co.za

VAT

Invoice Details

Invoice Date 13/07/2009

Invoice Number

Delivery Method

Order Number

Rep Number 1

VAT Type 1

Invoice Memo

Delivery Note No

Additional Details

Store Department

Source Document Not Applicable

Project Reference

Stock Item Detail

Item Code BM004

Description SAND

Pack Size

Pack Description

Dept/Group 001

Sub Unit 0

Deliveries 0

Current Stock 0

Regular Supplier

Cost Price 0.00

GP Marking % 0.00

Totals

Invoice Inclusive

Yes No

Internal Order No

Goods Total 9054.25


Discount Amnt 0.00


Vat Amount 1180.99

Total Quantity 50.00

Code	Description	Type	Unit Price	Qty	Status	Disc %	Total
BM001	CEMENT PPC 50KG	P1	191.30	25.00	TBD	0.00	4 782.50
BM002	TILES WHITE	P1	260.87	10.00	TBD	0.00	2 608.70
BM003	WOOD	P1	104.35	10.00	TBD	0.00	1 043.50
BM004	SAND	P1	123.51	5.00	TBD	0.00	618.55
Total							9054.25

Accountant Logout Import P11 Long Desc P18 Item Details Amendments Actions Flash P16 Process & Display P17 Process & Print

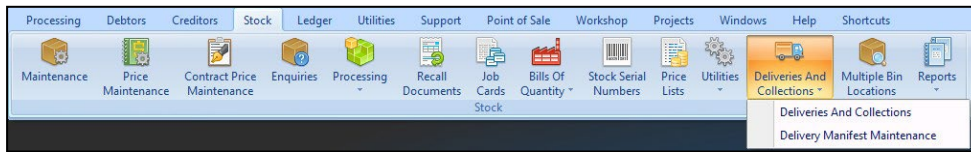
Tax Invoice Instruction - To be Delivered							
<b>Invoice From</b>							
The Training Company 1st Floor, Moonstone House 25 Quantum Street Stellenbosch					Telephone    0218800420 Fax             0218800486 E Mail         retal@retal.co.za Vat Registration No    451111111111111 Invoice Date          13/07/2020		
<b>Invoice To</b>				<b>Deliver To</b>			
ABK Store (Pty) Ltd 5465-615 STELLENBOSCH			ABK Store (Pty) Ltd 78 Main Road STELLENBOSCH				
<b>Account No</b>	<b>Invoice Date</b>	<b>Order Number</b>	<b>Representative</b>	<b>Invoice Number</b>	<b>Page</b>		
ABC001	13/07/2020		1 Rep 1	INV0	1 of 1		
Item Code	Description	Quantity	Unit Price	Disc. %	Vat Amt	Line Total	
BW001	CEMENT PPC 50KG	25.00	166.35		623.80	4 158.70	
BW002	TILES WHITE	10.00	228.94		940.27	2 288.43	
BW003	WOOD	10.00	90.74		136.11	907.39	
BW004	SAND	5.00	107.75		80.81	538.74	

Tax Invoice						
<b>Invoice From</b>						
The Training Company 1st Floor, Moonstone House 25 Quantum Street Stellenbosch						
			<b>Telephone</b> 0218800420 <b>Fax</b> 0218800488 <b>E Mail</b> retail@retal.co.za <b>Vat Registration No</b> 451111111111111 <b>Invoice Date</b> 13/07/2020			
<b>Invoice To</b>			<b>Deliver To</b>			
ABC Store (Pty) Ltd 546555 STELLENBOSCH			ABC Store (Pty) Ltd 78 Main Road STELLENBOSCH			
<b>Account No</b>	<b>Invoice Date</b>	<b>Order Number</b>	<b>Representative</b>	<b>Invoice Number</b>	<b>Page</b>	
ABCO01	13/07/2020	1	Rep 1	INVVO	1 of 1	
<b>Item Code</b>	<b>Description</b>	<b>Quantity</b>	<b>Unit Price</b>	<b>Disc %</b>	<b>Vat Amtt</b>	<b>Line Total</b>
BH001	CURRENT PPC SONG	25.00	186.35		423.80	4 136.70
BH002	TILES WHITE	10.00	226.84		240.27	2 268.43
BH003	WOOD	10.00	90.74		136.11	907.39
BH004	SAND	5.00	107.75		80.81	538.74

## STEP 9

## DELIVERIES AND COLLECTIONS – ISSUE STOCK &amp; SEND MANIFEST

From the IQ main menu → Stock → Deliveries and Collections → Deliveries and Collections

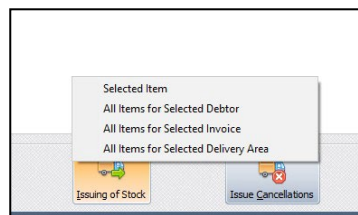


The new delivery Invoice will be at the bottom of all documents.

Document	Inv Num	Req By	Final Dest	Status	Doc Date	Acc	Acc Name	Del Date	Code	Stock Descrpt	Inv Qty	Ref Qty	Iss Qty	Cl Left Qty	Total Delivered	To Be Del
INVO				TBD	13/07/2020	15-4 ABC001	ABC Store (Pty) Ltd	30/12/2019	BM001	CEMENT PPC 50KG	25	0	0	0	25	0
INVO				TBD	13/07/2020	15-4 ABC001	ABC Store (Pty) Ltd	30/12/2019	BM002	TILES WHITE	10	0	0	0	10	0
INVO				TBD	13/07/2020	15-4 ABC001	ABC Store (Pty) Ltd	30/12/2019	BM003	WOOD	10	0	0	0	10	0
INVO				TBD	13/07/2020	15-4 ABC001	ABC Store (Pty) Ltd	30/12/2019	BM004	SAND	5	0	0	0	5	0

## Issue the stock

Select the correct Invoice and Issue the Stock.



Once the Invoice Issue screen is open, Enable Editing and select the Delivery Vehicle, and Issue the Quantity for all or individually, if not all quantities are issuing the outstanding quantities can be issue to a vehicle at a later stage.

Stock Item	Stock Desc	Document	Credit Note	Deliv Area	Status	Status Desc	Status Qty	Avl Qty	Delivery Veh	Iss Qty
BM001	CEMENT PPC 50KG	INVO			TBD	To be Delivered	25	25	CFM1123	25
BM002	TILES WHITE	INVO			TBD	To be Delivered	10	10	CFM1123	10
BM003	WOOD	INVO			TBD	To be Delivered	10	10	CFM1123	10
BM004	SAND	INVO			TBD	To be Delivered	5	5	CFM1123	5

## Process &amp; Preview the transaction

**TRAINING**

Parameters: Issue Date: 13/07/2020

Vehicle Capacity: CFM1123 CFM1123

Vehicle Capacity:

Unit Measure:

Loaded:

Available:

Auto Populate Values: Delivery Veh: CFM1123

Clear Del Veh:  Iss Qty:

Colour Legend: Items in Green are Goods that have already left the store and thus cannot be Issued. Credit Note exists for Invoice

Stock Item	Stock Desc	Document	Credit Note	Deliv Area	Status	Status Desc	Status Qty	Avl Qty	Delivery Veh	Iss Qty
BM001	CEMENT PPC 50KG	INV0			TBD	To be Delivered	25	25	CFM1123	25
BM002	TILES WHITE	INV0			TBD	To be Delivered	10	10	CFM1123	10
BM003	WOOD	INV0			TBD	To be Delivered	10	10	CFM1123	10
BM004	SAND	INV0			TBD	To be Delivered	5	5	CFM1123	5

Allocate Status:  Enable Editing:  Disable Editing:  Recon Report:  Design:  Re-Assign Location:  Process & Preview:  **Process & Print:**  Cancel:

Select Yes to Accept the changes or No to return to the issue screen.

**Confirm**

Are you sure you want to Accept the Changes made?

Yes  No

Select Yes to create a Driver Delivery manifest.

If no is selected the Manifest will not be created, thus not using the ePod module.

TRAINING

Parameters: Issue Date: 13/07/2020

Vehicle Capacity: CFM1123 CFM1123

Unit Measure:

Loaded:

Available:

Auto Populate Values: Delivery Veh: CFM1123

Clear Del Veh:  Iss Qty:

Colour Legend: Items in Green are Goods that have already left the store and thus cannot be issued. Credit Note exists for Invoice.

Stock Item	Stock Desc	Document	Credit Note	Deliv Area	Status	Status Desc	Status Qty	Avl Qty	Delivery Veh	Iss Qty
ADA02	ST LAB USB TO PARAL INV38695				TBC	To be delivered	10	10	CFM1123	10
CAB04	5 METER POWER EXTN INV38695				TBC	To be delivered	5	5	CFM1123	5
ANTI02	ANTI-VIRUS - ENLARG INV38695				TBC	To be delivered	2	2	CFM1123	2
BACPLA000	BACK PLATE 3 PIECE INV38695				TBC	To be delivered	1	1	CFM1123	1

Confirm: Do you want to create a driver delivery manifest now?

Yes No Cancel

Allocate Status Enable Editing Disable Editing Recon Report Design Re-Assign Location Process & Preview Process & Print Cancel

Delivery Note  
Stock Issue Document

Invoice To: ABC Store (Pty) Ltd

Deliver To: 78 Main Road  
STELLENBOSCH

Account No: ABC001 Issue Date: 13/07/2020 Issue Number: DEL 1 Original Inv Document No: INVO Page: 1 of 1

Item Code	Description	Status	Quantity
BM001	CEMENT PPC 50KG	Collecting	25.00
BM001	TILES WHITE	Collecting	10.00
BM001	WOOD	Collecting	10.00
BM001	SAND	Collecting	5.00

Loaded By: NAME \_\_\_\_\_ SIGNATURE \_\_\_\_\_

Checked By: NAME \_\_\_\_\_ SIGNATURE \_\_\_\_\_

Comments:

Received BY in good order;

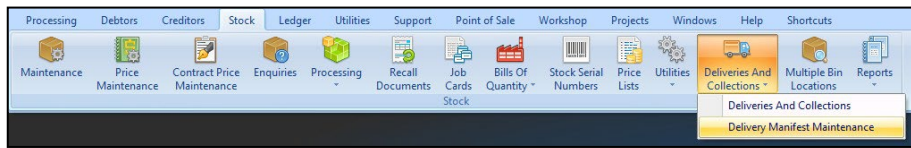
Name: \_\_\_\_\_ Date: \_\_\_\_\_

Signature: \_\_\_\_\_

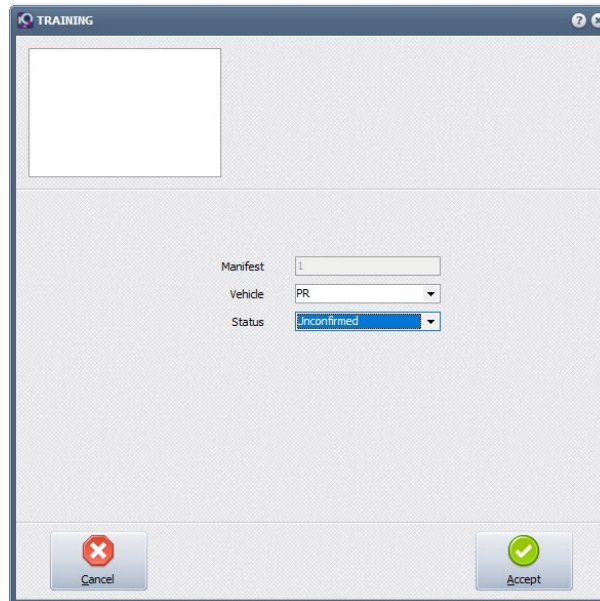
Customer Remarks: \_\_\_\_\_

**STEP 10****DELIVERY AND COLLECTION - MANIFEST MAINTENANCE**

From the IQ main menu → Stock → Deliveries and Collection → Deliveries and Collections



Change the Status of the Vehicle from Unconfirmed to Confirmed. The manifest will only be sent to the Vehicle once the Status has been changes.



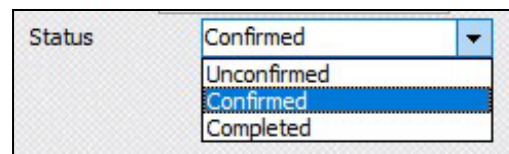
Once the status has been confirmed the manifest will be available on the driver's device.

The status will change to Confirmed.

**STATUS TYPES**

There are three status types:

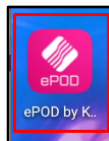
- Unconfirmed – Manifest was sent from Deliveries and Collections
- Confirmed – Will send Manifest to Driver's device.
- Completed – Once the drop has been completed the status will update from the driver's device.





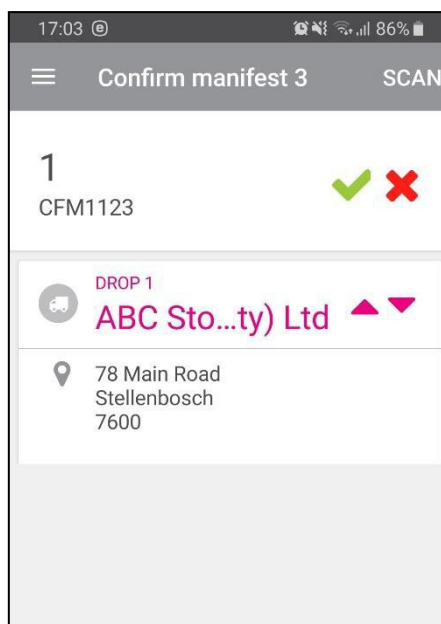
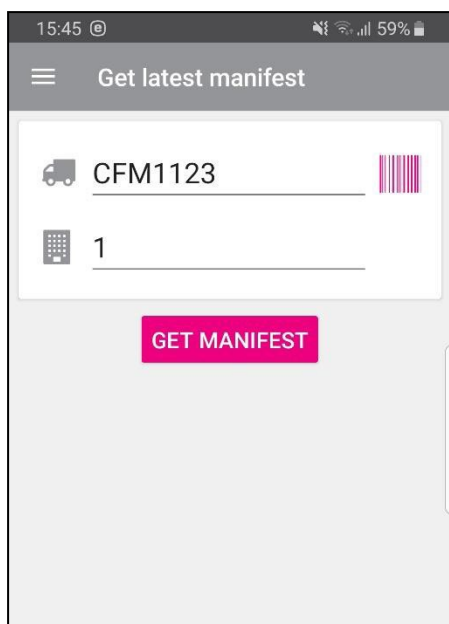
**STEP 11****PROCESSING - EPOD SOFTWARE ON DEVICE**

Open the ePod application.



Type the Vehicle registration and branch number. Choose Get Manifest.

The manifest will be loaded with all the orders to be delivered.



If you choose the drop, the information of the drop will display in detail, notes and lines.

10:38 @ 48%

← Delivery

DETAILS   NOTES   LINES (4)

CONTACT NAME  
ABC Store (Pty) Ltd

PHONE NUMBER  
**021 456 1234**

ORDER REFERENCE

PAYMENT REQUIRED  
R0,00

INSTRUCTIONS

16:06 @ 57%

← Delivery

DETAILS   NOTES   LINES (3)

**CEMENT PPC 50KG (BM001)**

BM001   15  
Cement PPC 50kg

**SAND (BM004)**

BM004   19  
Sand

**WOOD (BM003)**

BM003   50  
Wood

Click on the green ✓ to confirm the drop.

1
✓
✗

CFM1123

Once the drop is selected, click Start



The Get Signature button will allow the driver to capture the clients signature.  
Select done once to proceed.

10:39 @ 48%


Complete drop 1 ✕

ABC Store (Pty) Ltd GET SIGNATURE

**BOX INV409**

 **ABC Store (Pty) Ltd**   
Advice: INV409

**NOTES**

extra notes 

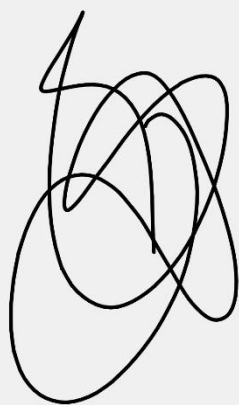
**PHOTOS**

Photos are not allowed

10:39 @ 48%

← Signature DONE

Clear



Sign here



**NOTE:** At delivery, photos of goods can be taken.  
Complete the delivery. Continue with all other drops.

Once all the deliveries for the day is complete Finish the Manifest.

**Mark drop 1 as:**

Complete

Failed

**CANCEL**

16:07

57%

Complete manifest 2

×

START

2019/04/04 4:05 PM

**FINISH**

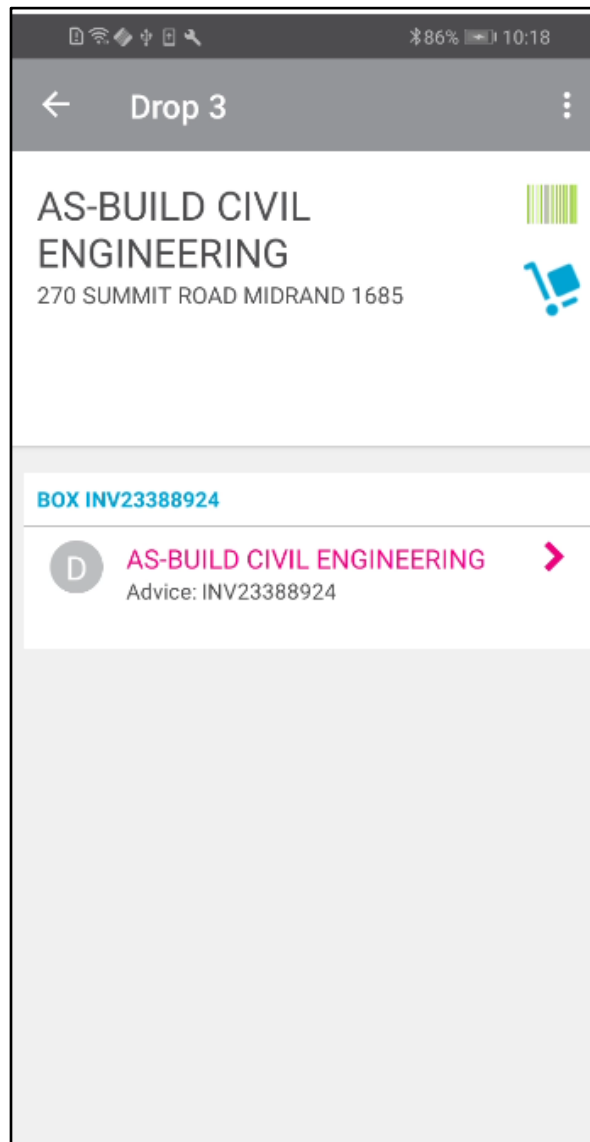
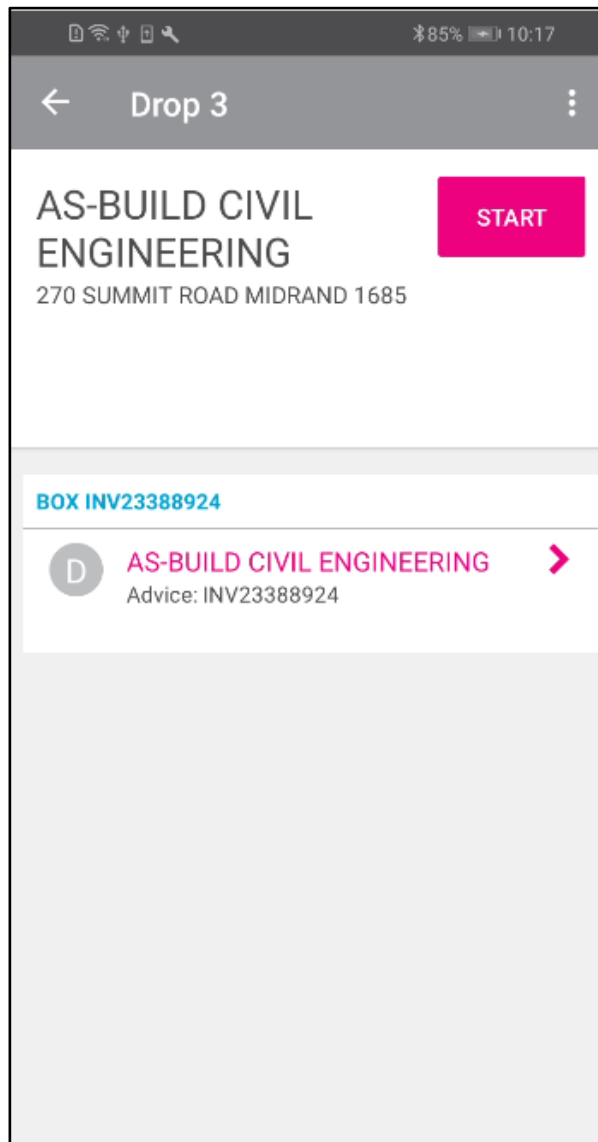
FINISH

2019/04/04 4:07 PM

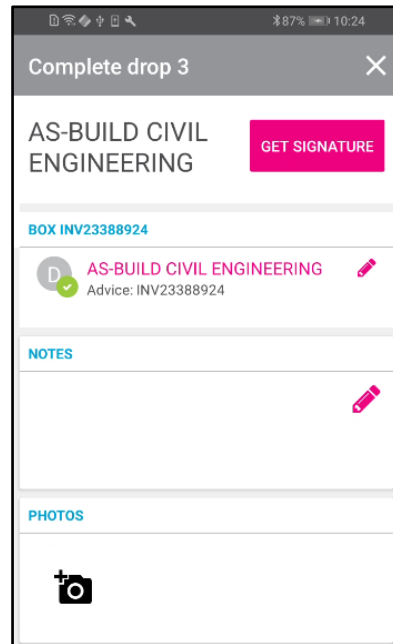
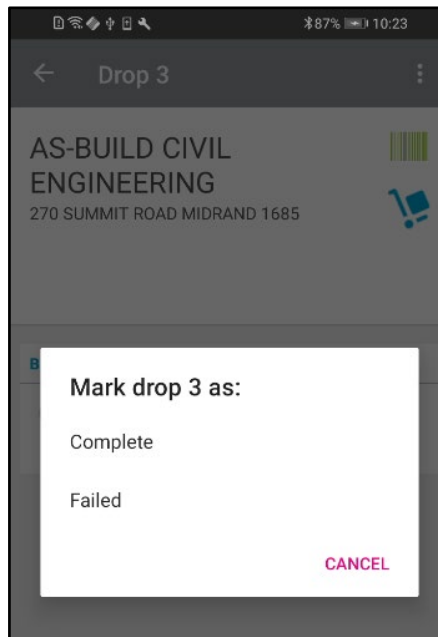
**STEP 12****PROCESSING - SHORT DELIVERIES**

If an item is short delivered, say if the goods are missing, damaged, rejected by the customer or the customer can't be reached, then this can be recorded on the device.

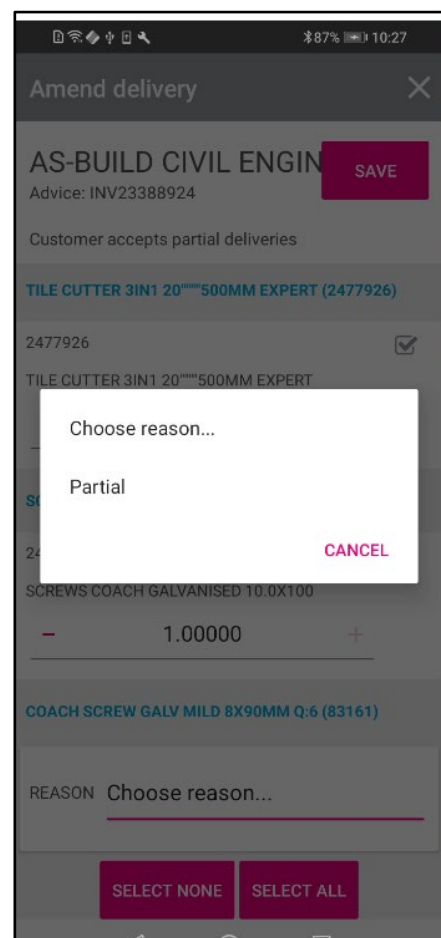
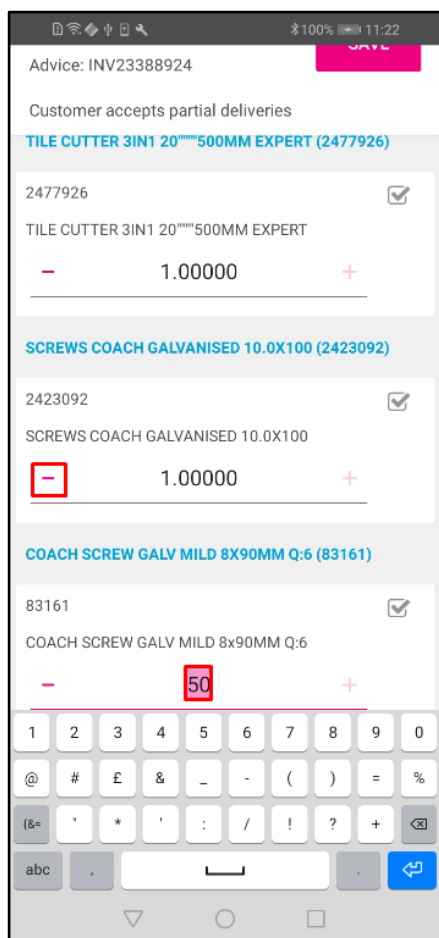
Select Start to begin the drop then select the blue sack truck.



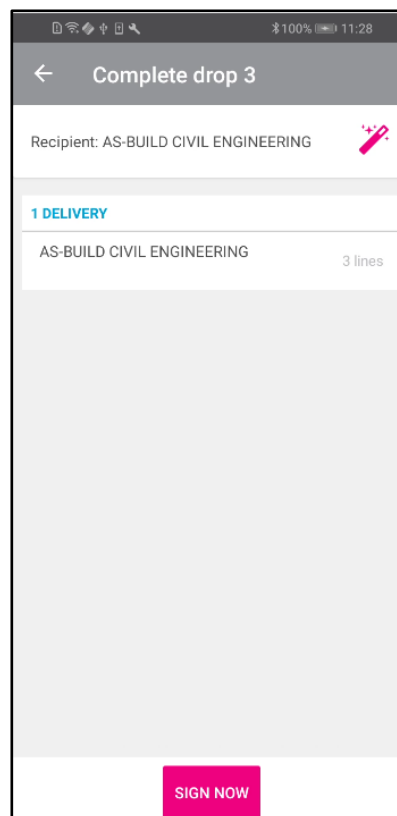
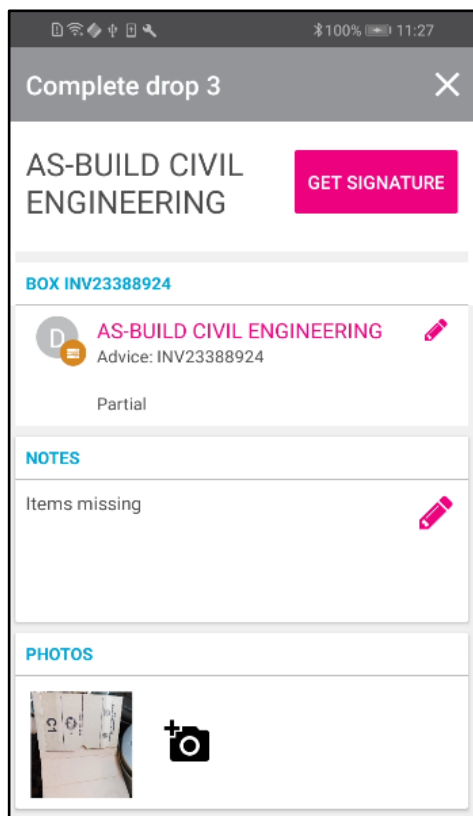
Select Mark drop as complete then click on the pencil icon next to the customer's name.



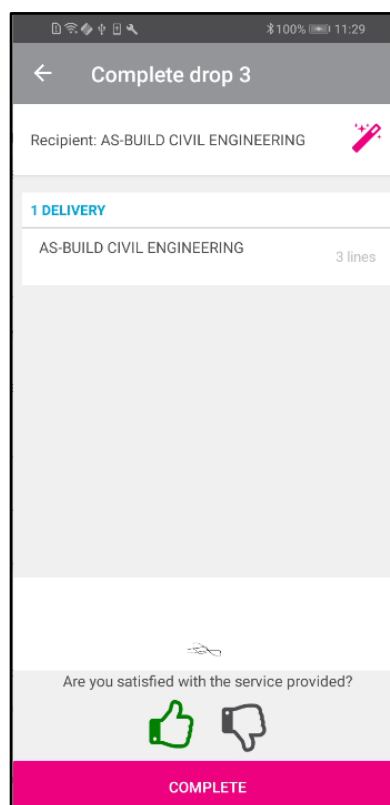
Either click on the minus sign next to the item if it is not to be delivered or click on the item itself to reduce the number delivered. Chose a reason for the short delivery.



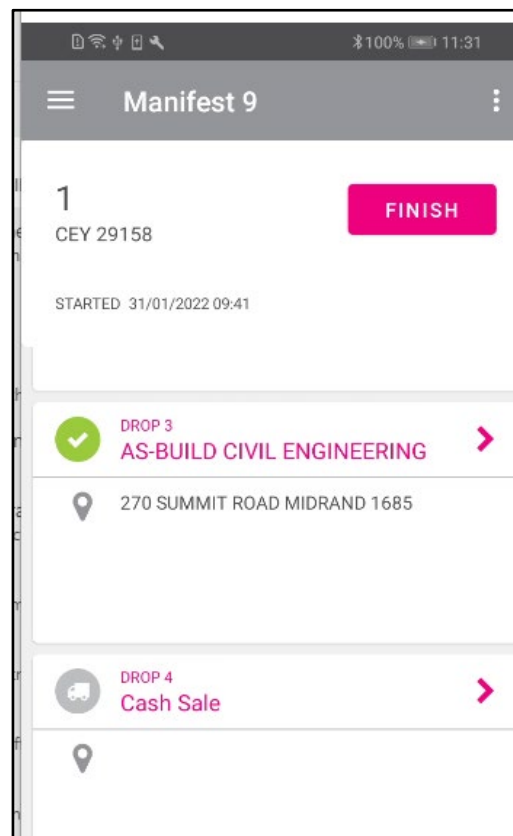
Save the changes then add notes or photo as required. Select Get Signature then Sign Now



Once the signature is received select Done then complete the drop.

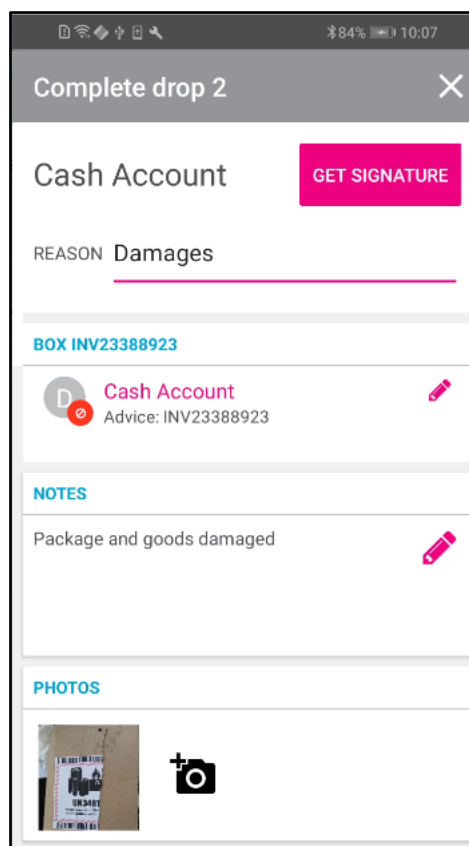
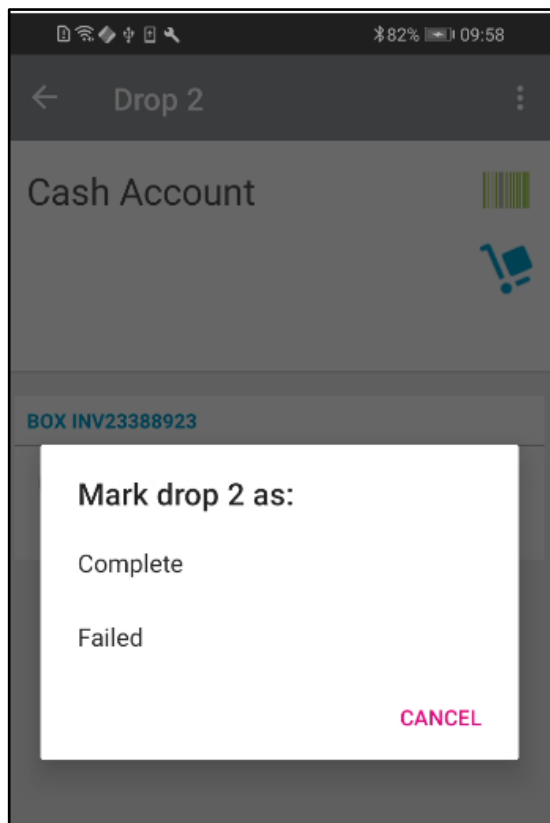


The delivery will show as complete even though there were short deliveries.

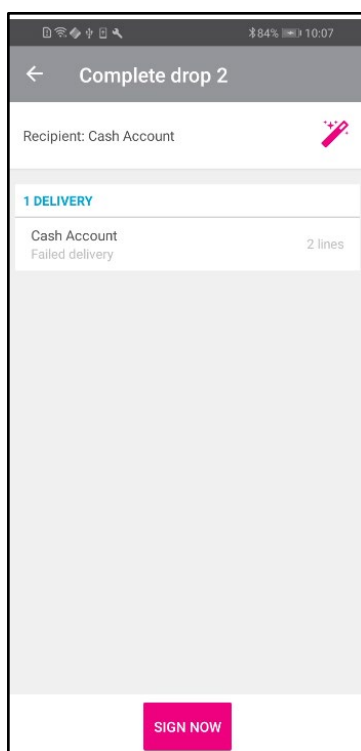


**STEP 13****PROCESSING - FAILED DELIVERIES**

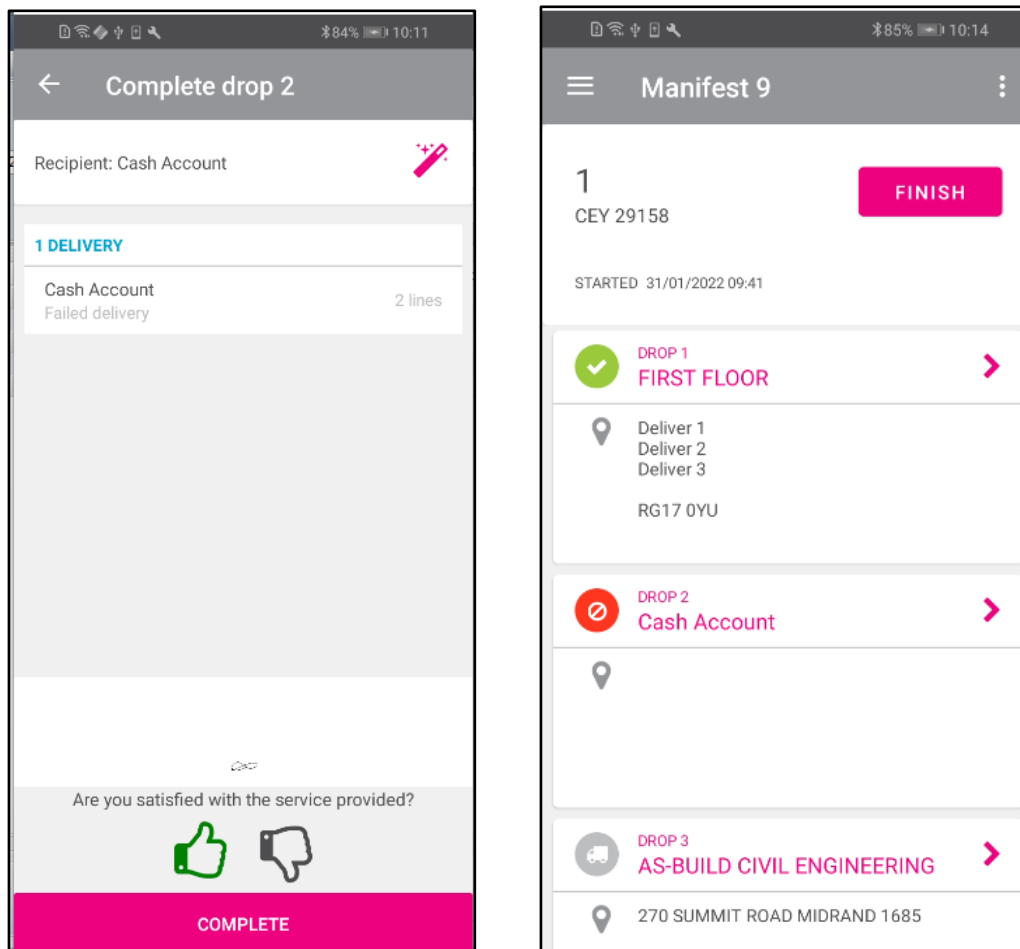
The whole drop can be rejected. Click on the blue sack truck icon and select Mark drop as Failed. Enter a reason, any notes required and pictures if applicable then select Get Signature.



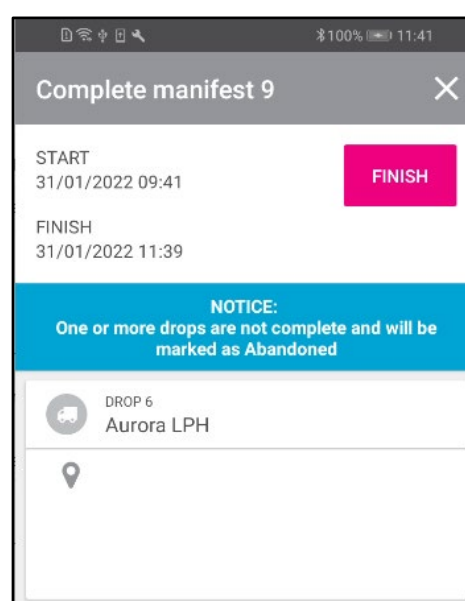
Select sign now and once signed select Done



Complete the failed drop – it is marked with a red circle rather than a green tick.



If the Manifest is completed before all the drops are made, a notice will be shown that one or more drops are not complete and will be marked as abandoned. The driver can choose to go back and complete the manifest or click Finish again. The manifest will show as Completed/Delivery Failed.



## STEP 14

## PROCESSING - MANAGING SHORT DELIVERIES

Different steps can be taken for short deliveries depending on whether the customer is to be credited or whether the goods are to be reissued.

In the main menu go to Stock → Deliveries and Collections → Delivery Manifest Maintenance. Select Manifest details.

This will show the status of deliveries on the manifest.

Clicking on the Report icon will produce a report showing the items delivered and not delivered.

\*\*\*Demo Company\*\*\*

Date Printed: 31/01/2022 11:55:43

Page 1 of 1

Deliveries And Collections Manifest Items

Manifest No:9

Delivery Date & time	Drop Seq	Account	Name	Document	Code	Description	Status	Original Order Qty	DelQty
31/01/2022 09:55:22	1	FIR001	FIRST FLOOR	P.O.S 1-342	103731	CEMENT WHITE SKG	Delivered	2,000	2,000
31/01/2022 10:13:27	2	C	Cash Account	INV23388923	90036	Ceramic Tile 600mmx500mm	Failed	26,400	0,000
31/01/2022 10:13:27	2	C	Cash Account	INV23388923	14000001	TILE GROUT DARK GREY 1KG	Failed	5,000	0,000
31/01/2022 11:29:59	3	ASB001	AS-BUILD CIVIL ENGINEERING	INV23388924	83161	COACH SCREW GALV MILD	Delivered	50,000	40,000
31/01/2022 11:29:59	3	ASB001	AS-BUILD CIVIL ENGINEERING	INV23388924	2423092	SCREWS COACH	Delivered	1,000	0,000
31/01/2022 11:29:59	3	ASB001	AS-BUILD CIVIL ENGINEERING	INV23388924	2477926	TILE CUTTER 3IN1	Delivered	1,000	1,000
31/01/2022 11:34:46	4	239910000508	Cash Sale	P.O.S 1-343	1515.112	ACDC CABLE JOINTING KIT	Delivered	3,000	2,000
31/01/2022 11:34:46	4	239910000508	Cash Sale	P.O.S 1-343	1515.332	ACDC DB SURFACE DIN	Delivered	2,000	2,000
31/01/2022 11:34:46	4	239910000508	Cash Sale	P.O.S 1-343	1515.315	ACDC LED 1 IN-GROUND	Delivered	2,000	2,000
31/01/2022 11:38:07	5	FIR001	FIRST FLOOR	P.O.S 1-344	2423092	SCREWS COACH	Delivered	5,000	5,000
31/01/2022 11:38:07	5	FIR001	FIRST FLOOR	P.O.S 1-344	2423086	SCREWS COACH	Delivered	1,000	0,000
31/01/2022 11:38:07	5	FIR001	FIRST FLOOR	P.O.S 1-344	828496	6 IN 1 SCREWDRIVER SET	Delivered	1,000	0,000
31/01/2022 11:38:07	5	FIR001	FIRST FLOOR	P.O.S 1-344	380157	TILE CUTTER VITRIX	Delivered	1,000	1,000
0	6	AURLPH01	Aurora LPH	INV23388925	1515.112	ACDC CABLE JOINTING KIT	Failed	2,000	0,000
0	6	AURLPH01	Aurora LPH	INV23388925	1515.333	ACDC DB SURFACE DIN	Failed	1,000	0,000
0	6	AURLPH01	Aurora LPH	INV23388925	1515.315	ACDC LED 1 IN-GROUND	Failed	2,000	0,000
								105,400	55,000

Alternately, run the report straight from the manifest details page.

The deliveries and collections POD variance report.

Deliveries And Collections POD Variance Report									
Manifest No: 9									
Delivery Date & Time	Account	Name	Document	Code	Description	Iss Qty	Del Qty	Variance	
31/01/2022 09:55:22	FIR001	FIRST FLOOR	P.O.S 1-342	103731	CEMENT WHITE SKG	2,00	2,00	0,00	
31/01/2022 10:13:27	C	Cash Account	INV23388923	90036	Ceramic Tile 600mmx500mm	26,40	0,00	26,40	
31/01/2022 10:13:27	C	Cash Account	INV23388923	14000001	TILE GROUT DARK GREY 1KG	5,00	0,00	5,00	
31/01/2022 11:29:59	ASB001	AS-BUILD CIVIL ENGINEERING	INV23388924	83161	COACH SCREW GALV MILD 8x90MM Q15	50,00	40,00	10,00	
31/01/2022 11:29:59	ASB001	AS-BUILD CIVIL ENGINEERING	INV23388924	2423092	SCREWS COACH GALVANISED 10.0X100	1,00	0,00	1,00	
31/01/2022 11:29:59	ASB001	AS-BUILD CIVIL ENGINEERING	INV23388924	2477926	TILE CUTTER 3IN1 20"***500MM EXPERT	1,00	1,00	0,00	
31/01/2022 11:34:46	239910000508	Cash Sale	P.O.S 1-343	1515.112	ACDC CABLE JOINTING KIT 1.5-4MM 6-20MM	3,00	2,00	1,00	
31/01/2022 11:34:46	239910000508	Cash Sale	P.O.S 1-343	1515.332	ACDC DB SURFACE DIN 12-WAY PRE-WIRED WHT	2,00	2,00	0,00	
31/01/2022 11:34:46	239910000508	Cash Sale	P.O.S 1-343	1515.315	ACDC LED 1 IN-GROUND LIGHT 50X30MM	2,00	2,00	0,00	
31/01/2022 11:38:07	FIR001	FIRST FLOOR	P.O.S 1-344	2423092	SCREWS COACH GALVANISED 10.0X100	5,00	5,00	0,00	
31/01/2022 11:38:07	FIR001	FIRST FLOOR	P.O.S 1-344	2423086	SCREWS COACH GALVANISED 10.0X75	1,00	0,00	1,00	
31/01/2022 11:38:07	FIR001	FIRST FLOOR	P.O.S 1-344	828496	6 IN 1 SCREWDRIVER SET ROLSEN	1,00	0,00	1,00	
31/01/2022 11:38:07	FIR001	FIRST FLOOR	P.O.S 1-344	380157	TILE CUTTER VITRIX	1,00	1,00	0,00	



## STEP 15

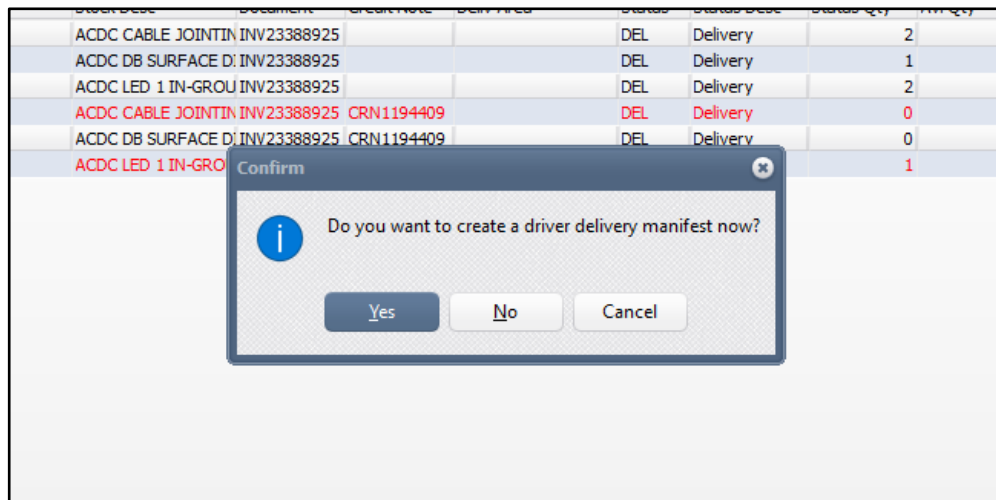
### PROCESSING - REISSUE THE SHORT DELIVERED GOODS

In the main menu go to Stock → Deliveries and Collections. You will be able to see which items were short delivered – either they will be coloured green for partial delivery or blue/green for failed delivery.

Select Issuing of Stock

Select all items for selected delivery.

Create the delivery manifest.



The goods will be delivered on the next run.

## STEP 16

### PROCESSING - CREDIT NOTES

Enabling the Strict Credit Note Control to assist the user in keeping better track of the stock that was delivered to a client, but it was received back, and a credit note can be processed to refund the customer only if an "Issue Cancellation" has been passed for the stock item in Deliveries and Collections.

To process the Credit Note, the user can close the Deliveries and Collections module and from the IQ main menu → Processing → Credit note.

Select the appropriate debtor's account. It is advisable to import the original invoice. The user can then delete all the unnecessary lines and process a credit for the stock received back and for which the refund should be done.

## STEP 17

### MANIFEST MAINTENANCE CONCLUSION

Once the driver has completed this drop the status in the Manifest screen will update from Out for Delivery to Complete.

### MANIFEST DETAILS

Report Selection will allow two choices. Manifest Items Report or POD Report.

Drop Sequence	Document	Doc Date	Account	Account Name	Address	Area	Issued Qty	Delivered Qty	Status
1	BWO	13/07/2020	ABC001	ABC Store (Pty) Ltd	78 Main Road, STELLENBOSCH	7600	50	0	Waiting

## MANIFEST ITEMS REPORT

The Training Company


Date Printed: 13/07/2020 16:01:45

Page 1 of 1

Deliveries And Collections Manifest Summary

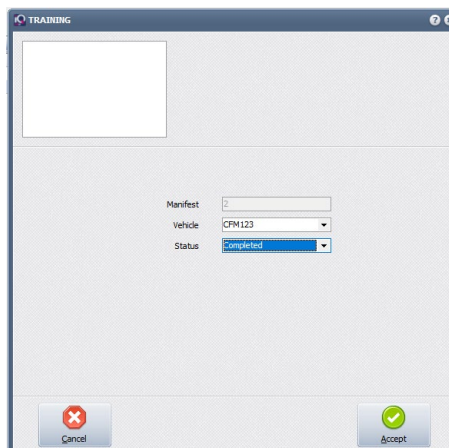
<u>No</u>	<u>Delivery Date</u>	<u>Vehicle</u>	<u>Drops Issued</u>	<u>Issued Items</u>	<u>Drops Delivered</u>	<u>Items Delivered</u>	<u>Status</u>
1	13/07/2020	CFM1123	1	50	0	0	Completed

## POD REPORT

Training Demo - Branch 1			Date Printed: 16/04/2019 13:58:52			Page 1 of 1								
<b>Deliveries And Collections POD</b>														
<b>Manifest No:9 Drop Seq: 1</b>														
<u>Delivery Date &amp; Time</u>	<u>Account</u>	<u>Name</u>	<u>Document</u>	<u>Code</u>	<u>Description</u>	<u>Address</u>	<u>DelQty</u>							
16/04/2019 13:51:03	ABCD01	ABC Store (Pty) Ltd	INV413	BM001	Cement PPC 50kg	78 Main Road, Stellenbosch, 7600	9,00							
Notes:														
							9,00							
 Customer Signature														

Once the manifest from the driver has been completed and the driver is online the status in IQ will update. If the driver is offline the status can be update manually.

To Change the Status to Completed Select Change Status/Vehicle and Choose Completed. This process is only needed if the driver's device is offline.



TRAINING

Manifest: 2

Vehicle: CFM1123

Status: Completed

Cancel Accept

--- End of Document ---