



## Delivery Scheduling System

EasyChair Software’s Delivery Scheduling System has been greatly enhanced. You can now schedule deliveries, assign delivery trucks, pull inventory, and load the trucks in a logical fashion. The picking lists, delivery tickets, delivery log sheets have been revised and enhanced. The concept of “Just-in-Time” inventory control is now a reality. Items scheduled for delivery need not be ordered until they are actually needed, and items not scheduled for immediate delivery need not be allocated from stock. Your cash flow will be the primary beneficiary; but even if you decide not to use the “Just-in-Time” system, your warehouse and delivery personnel will be greatly impressed with the other new & improved delivery scheduling features.

The primary feature of the “Just-in-Time” delivery scheduling is the new ability to assign Stock Allocation Cutoff (SAC) days per department. For example, suppose you have a Bedding Department comprised of mattresses and box springs, and suppose you normally receive bedding items within two business days of your order. In this case, you would not want to allocate a mattress from stock unless the customer wanted immediate delivery. Cash flow would be best served by keeping only enough inventory on hand to cover the expected demand for two business days. Any customer wishing future delivery of a bedding item would have a special order created for him/her. The limited quantity of on-hand merchandise would be allocable only for customers who desire immediate delivery.

To set up the Stock Allocation Cutoff (SAC) times, go to the EasyChair Software Main Menu and select “I” for “Inventory”, and then “S” for “Setup.” Then select “D” for “Departments” and use the index to locate the desired department. Instead of pressing “U” to update, choose “M” for menu, and then select the new “Stock Allocation Cutoffs” option. You will then see a new screen that allows you to enter for each day of the week the number of days allowed for stock allocation.

Consider the following example:

	Mon	Tue	Wed	Thu	Fri	Sat	Sun
Stock Allocation Cutoff:	3	3	3	5	5	4	3

In this case, if a customer orders an item on Monday, the salesperson could allocate the item from stock only if the customer desires delivery on Monday, Tuesday, or Wednesday—three days. However, if a customer orders an item on Thursday, the salesperson will be allowed to allocate the item from stock as long as the customer

desires delivery on Thursday, Friday, Saturday, Sunday, or Monday—five days. If the delivery will not take place until Tuesday or later, the system would not allow the salesperson to allocate from stock; rather, a special order would be generated. Items sold on Thursday, in our example, might not be ordered until Friday. Counting Friday as the first business day, and counting Monday as the second, any item sold on Thursday could be expected to arrive from the manufacturer/distributor on Monday, and available for Tuesday delivery. Similarly, if an item is sold on Saturday it would not be ordered until Monday (the first business day), it would not arrive until Tuesday (the second business day), and it would not be available for customer delivery until Wednesday. Thus, the Saturday sale could be allocated from stock only if the customer desired delivery on Saturday, Sunday, Monday, or Tuesday (four days).

There is another field on the SAC (Stock Allocation Cutoff) screen: the “Hour at which the day moves forward” field allows you to indicate the time of day at which no more purchase orders can be processed for that same day. For example, suppose your “Move Forward” time is set for “16:00” (four o’clock in the afternoon, according to military format, where AM hours are indicated as expected, and PM hours are entered as “12” plus the actual PM hour). This would indicate that any sale processed up until 4:00pm can be considered as a sale for that same day; a sale processed after 4:00pm would be considered—for delivery scheduling purposes, but not for accounting purposes—as a sale for the next day.

Note: if you need to remove the SACs for any department, just go to the SAC screen and blank out the cutoff days for each and every day of the week. When you exit the SAC file, the department will return to its original state, before any SACs had been entered.

When you sell an item that belongs to a department for which you have established SACs, you may allocate the item as usual on Screen 2 of the sales order; however, when you go to Screen 3 of the sale, any attempt to schedule delivery beyond the cutoff time will result in the following message:

Scheduling conflicts have forced the deallocation of previously allocated items. Press <ENTER> to acknowledge:

The item will be deallocated. If you then go back to Screen 2 and try to allocate, you will be forced to special order the item. If you make a mistake with the scheduled delivery date, you can always correct the date and reallocate the item.

To the right of the “Scheduled Delivery Date” column, there is another column that allows you to enter a letter “E” for estimated delivery dates, or a letter “S” for scheduled delivery dates. The letter “E” indicates that the customer is not expecting a firm delivery on any particular date; the date in the Scheduled Date column is simply an estimate. The letter “S”, on the other hand, indicates that the customer is firmly expecting to receive the merchandise on the given date. As long as you have an “E” (for estimated) date, you can allocate merchandise and enter any date you wish in the Scheduled Date column. You cannot assign a truck for the delivery until you have changed the “E” to an “S”,

indicating that the customer is expecting delivery on that date. If you change the “E” to an “S”, the system checks the scheduled date and lets you know if stock merchandise has to be deallocated so that a special order can be generated for a “just-in-time” delivery.

When you have to allocate a sale as a special order, you have a new option in the Purchase Order procedure that creates P.O.’s for special orders. When you print the items to order (P, P, 6, 1 or 2, from the Main Menu), you will be asked to enter a scheduled date cutoff. If you just press the <ENTER> key in response to this question, the report will behave exactly as it always has in the past; however, if you enter a cutoff date, the report will only show the items that are scheduled or estimated for delivery on or before the date you specify. The same prompt and functionality will appear when you run the process to create the P.O.’s for the special order items.

Whether or not you decide to use the new “Just-in-Time” inventory allocation/special order features, you will very likely want to take advantage of the new Delivery Truck Scheduling system features. As before, when you are in Screen 3 of the sales order, you can press the <F3> key from within the Scheduled Date column, the Scheduled/Estimated column, or the Delivery Truck column. This will bring up the Delivery Truck Scheduling screen, and the screen will be set to view only the deliveries that are scheduled for the zip code of the customer on the current sales order. If you wish, you can move the cursor into the “Delivering To” section, and into the “Sel(ect)” column of the Zip Code row, and delete the zip code so that all deliveries to all zip codes are displayed.

The next new feature of the Delivery Truck Scheduling screen is the ability to edit the driver name for any truck. Just move the cursor into the desired row of the Truck Number column and press the <F6> key to view the truck information. Then press the letter ‘E’ if you need to edit any of the information. Since it is now possible to enter all of your drivers’ names into a file, you can press the <F6> key from within the “Current Driver” field of the truck’s record; use the <ARROW> keys to highlight the desired driver and then press <ENTER> to select it.

Note: to enter the driver names and information, so that the information is available to select from an <F6> Pick List, select options D-S-4-3 from the Main Menu.

The next new enhancement of the Delivery Trucks Scheduling system is the ability to enter Stop Numbers—i.e., the sequence in which the truck driver is to proceed from one delivery address to the next. If you move the cursor into the desired truck’s row, and then proceed to the desired delivery date, you can press the <F6> key to display a list of customer delivery addresses. Simply highlight the customer whose merchandise should be delivered first and press the number “1” for stop #1. Then go to the next customer and press “2” to place them second in line for delivery. Go to each customer in the list and press the desired stop number (“1” through “9”). If you need to insert a new customer in the middle of the stop sequence, no problem—just highlight that customer and type the desired stop number. Any customers at or after that stop number will be bumped back in the sequence. If you need to enter a stop #10, you may use the number “0” to indicate the tenth stop. For stop sequences 11 through 20, highlight the desired customer and press the

dash “-“ and then the stop number digit: for example, “-1” indicates stop #11, “-9” indicates stop number #19, and “-0” indicates stop #20. You cannot schedule more than twenty stops per truck. If you press the <SPACE> key after the dash key, you will remove the stop number for the highlighted customer. If you press the dash key twice, a stop number of “-9” will appear, indicating that the delivery has been canceled for that customer.

After the stop numbers have been established, you may press the letter “L” to print the Delivery Logsheet. It doesn’t matter which of the customers is highlighted when you press the letter “L”, but you do have to have the Customer Pick List displayed. If it is not displayed, simply move the cursor to the desired truck row and the desired delivery date and press <F6>. Then you can press the letter “L” to print the Delivery Logsheet.

If you have entered the Delivery Truck Scheduling screen from within the sales order, you cannot print a warehouse picking list. You have to enter the Delivery Truck Scheduling system from the “D” and “M” choices, in sequence, from the Main Menu. Then you can press <ESC><ESC> and the letter “P” to print the warehouse picking list. Alternatively, you can select options “D”, “R”, “2” and “4” from the Main Menu. The warehouse picking list will sort all of the merchandise according to the stop number for the truck on which it will be delivered. This allows the warehouse personnel to obtain the merchandise and load it onto the truck in the desired stop number order—i.e., the merchandise for the last stop will be loaded first, and the merchandise for the first stop will be loaded last. This means that when the driver arrives at his first stop, the merchandise for the customer will be the easiest to unload off the truck.

The final item of interest for the Delivery Truck Scheduling system is the ability to see items scheduled for return—i.e., items that the customer currently has, but which the customer desires to return. If you schedule a pending return for the customer, the return items will appear in the Delivery Truck Scheduling system as “pickup items”. You can assign a stop number for the pickup, and the items will appear on the Delivery Ticket so that the driver will know to pick the item up from the customer’s address and return it to the store. Note: the date scheduled for pickup will be the pending return date for the sales order. You cannot simultaneously schedule two or more different pickup dates for merchandise that is being returned from the same sales order. You have to process the first pending return for the sale, and then process the next pending return for that same sales order. Fortunately, there should not be many occasions where more than two or more things will need to be picked up (returned) on separate days from the same sales order.