AURA:

Managing Deliveries

In Aura 6.3 +

Contents

The Delivery Process

In a delivery store using the Aura point of sale system, delivery orders are designed to operate logically in accordance to the store's delivery procedures. As a result, they follow this basic flow:

1. **Capturing delivery orders**
2. **Capturing customer details**
3. **Assigning the order to a driver for delivery**
4. **Closing the delivery and/or Cashing up the driver**

This document details these steps so that you can ensure that deliveries are being captured correctly according to Aura's design. Additionally, there is further detail on the following:

- **Delivery Reports**
- **Maintaining your Street List**

For more detailed information and to get the most from the software, we recommend you read through the product manuals included with the software, or available on the Aura website (www.cosoft.co.za).

> If you need more information on any section in *Backoffice* or *Invoicing*, you can press **F1** on your keyboard to bring up the page of the manual referring to the screen you're looking at.

For assistance with any errors or problems, contact the **Aura Helpdesk** through the Cosoft Website's online chat support or on the telephone at **0860 994 155**.
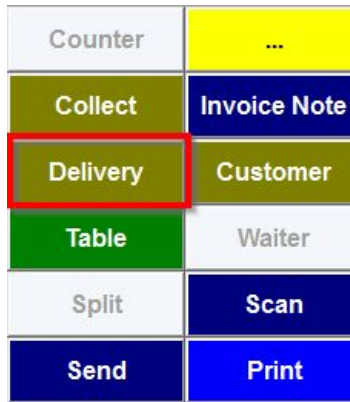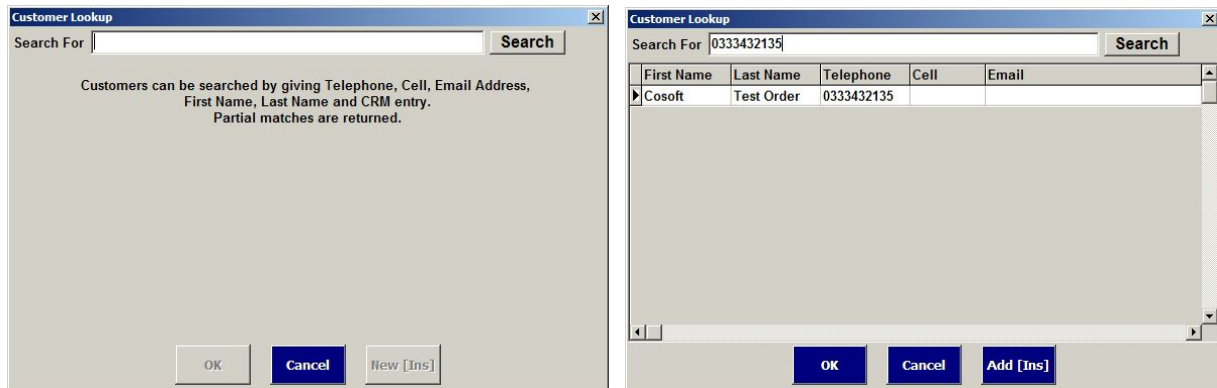
Capturing Delivery Orders

To capture a new delivery, open the **AURA Invoicing** program on your till. Click **New [Space]** or press the spacebar on your keyboard to start a new transaction, then follow these steps.

1. Click the **Delivery** button to change the order type from **Counter** to **Delivery** (in some cases, Delivery may be set to be the Default transaction type).

2. A customer **Search** window will appear. Type the **Phone Number, Name** or any of the other given criteria, and the search window will give the results.

- If there's no existing customer by that name or number, add a new one by clicking **Add [Ins].**
- If it's a new customer, the **Customer Information** screen will appear to capture the customer's details:

Capturing Customer Details

- Capture the customer's name in the **F/Name** and **L/Name** fields. *NB:The **F/Name** field is required as a minimum.*
- Capture the customer's phone number in the **Phone** field. *NB: Any number captured here will be displayed on the invoice details bar on the Invoicing main screen.*
- Capture the street address by typing in the street number in the **Street** field, then selecting the correct street from the dropdown menu. Once a Street is selected the **Suburb**, Delivery area (**Map**) and Delivery Charge (**Del. Chg.**) will be automatically filled in. *NB: This is required for delivery invoices. To alter, rename or fix streets, see the section below on **Maintaining Streets**.*
- Capture additional address information in the **Addr.** field. (**i.e.** Apartment number, Office building etc.)
- Save the info by clicking **Post**.

4. Ring up the order using the menu buttons.
5. Save the order using **Send** (this prints a slip to the kitchen printer only).

Saved Delivery orders are listed under the **Outstanding** tab on the main screen. They are ready to be assigned to a driver.
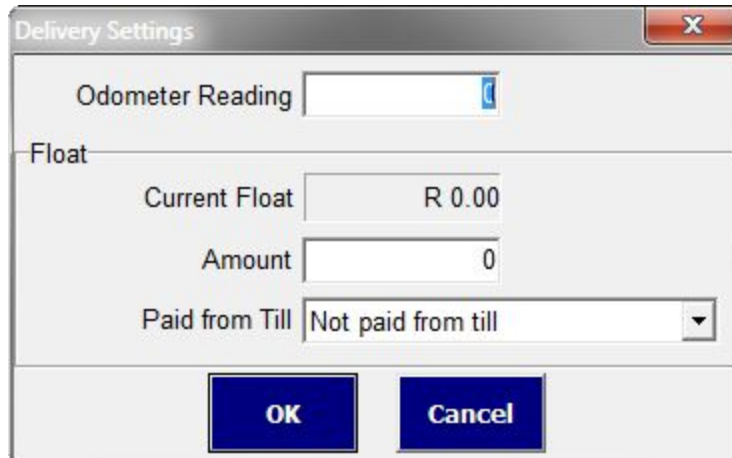
Assigning Deliveries to Drivers

Clocking in Drivers

In order to assign an order for delivery, a **Driver** needs to be clocked in. To do this, any employee that has been set as a driver in the **AURA Backoffice** program (and/or has the **Does Deliveries** option enabled in their employee profile) will need to click on the **Clock In / Out** button in Invoicing.

Clock In / Out

This will open a prompt that will allow you to capture the driver's **Odometer** reading (if necessary) and any money issued as **Float**. Any float issued will need to be **Paid from Till** and the shift it's paid from must be selected from the drop-down menu.

Assigning through Invoicing

Once the driver is clocked in, orders can be assigned to them by selecting the order and clicking the **Assign [F2]** button. The order will move to the **On Delivery** tab.
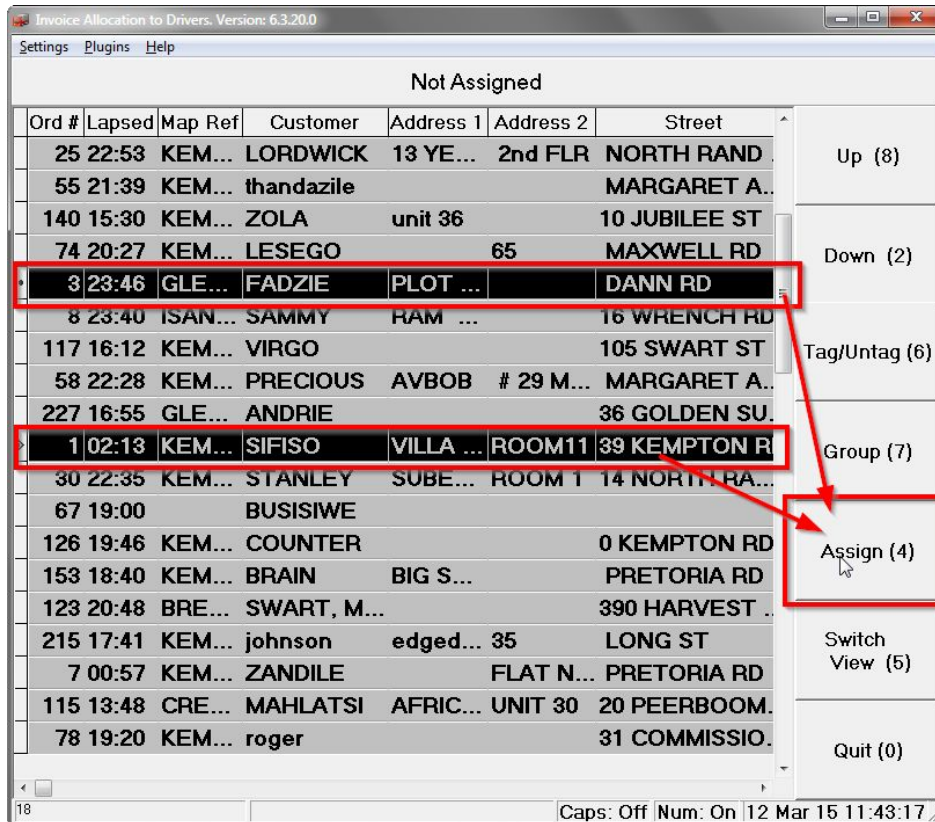
Assign [F2]

Collect orders can also be converted to Delivery orders by selecting the order and clicking **Assign [F2]**. This will apply any delivery charges to the order.

Assigning through Driverstation

Some store environments use the **AURA DriverStation** program, set up on it's own Driver Station machine, to allow drivers to assign deliveries to themselves.

After a delivery order is created, it appears on the DriverStation screen under **Not Assigned**. Multiple orders can be selected, or tagged, by clicking on each order and then clicking **Assign (4)**. The Driver enters their code and the order is assigned to them.

Assigned orders can be viewed and Re-assigned by clicking **Switch View (5)**.

Monitoring Assigned Deliveries

In Invoicing, assigned deliveries show in the **On Delivery** Tab.

By default, all deliveries are displayed here, but they can be filtered by clicking on the **Driver** button on the left to cycle through active drivers. Click **All** to view all deliveries again.

Closing and Cancelling Deliveries

Paying Orders into Till

Delivery orders in the **On Delivery** tab are completed after the delivery is made and the Driver pays in the money. Select the order and click **Pay [F6]** to complete it and bring up the **Payment Screen**. The order will then move to the **Paid** tab.
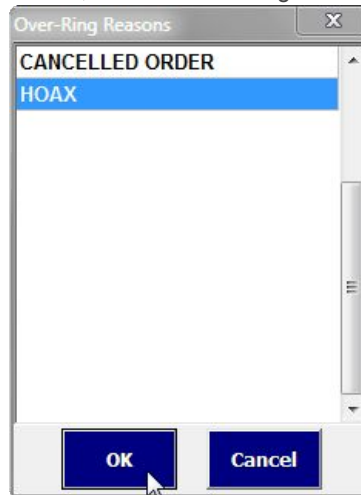

Overrings and Late Deliveries

Deliveries can be overrung (cancelled) by clicking **O/R [F3]**. In the event of a fake or "prank" delivery call, the order can be overrung as a **Hoax** overring. Hoax overrings require a customer to be assigned to the invoice.

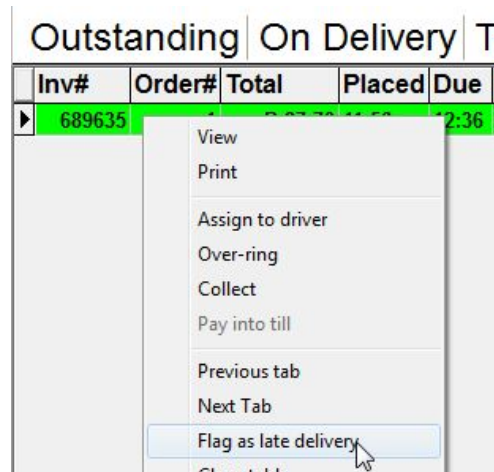To perform a hoax overring, Click **O/R [F3].**

After indicating if the food was made and wasted, select the overring reason as a hoax overring:

After this, the customer assigned to that overring will carry a hoax warning on their details that will keep track of the number of fake calls that they have made:

An order may also be flagged as a **Late Delivery**, if there is an available late delivery discount. To do this, right-click the order and click **Flag as late delivery**.

A list of late delivery Discounts will appear, and the correct one may be chosen. The invoice total will be adjusted according to the discount, after which the invoice can be completed.

> **!** Flagging an order as a late delivery requires system permission to apply discounts as well as the code of the driver that the order was assigned to.
>
> For more information on access permissions, consult the Aura product manual on *Access Permission*s, accessible by pressing **[F1]** in **Backoffice**.

Cashing Up Drivers

To perform a cashup, take the following steps:

Click the **Cashup** button in either **Invoicing** or **Backoffice**.

Cashup

Click **Employee**. Every employee clocked in for the day is displayed here. Any daily wages (As specified in *Lists > Employees >Employees* on each employee's profile) will be displayed here, broken down by type. The value of driver's orders will be displayed on the **Cashup Summary** tab. If the driver has paid the orders into a till already, his/her orders will show as **Paid Already**.

The driver's orders, float, and any wages due to him will be calculated, and the result will be displayed as either **Driver Owes Store**, **Store Owes Driver**, or **Nothing Owed**.

Click **Post** to post the driver's cashup. A dialog prompting you to select which till the driver is posted to will appear. If the driver is paying in any money, or is being paid from the till, then the till you select will show the money difference accordingly.

Delivery Reports

Below are the recommended reports available in Backoffice that allow you to track your delivery sales and the performance of your drivers.

Driver Delivery Reports

- **Reports > Employee > Driver Delivery** - The *Driver Delivery* report displays a list of all drivers clocked in for the selected period, with a list of all the delivery orders taken by each driver.

- **Reports > Employee > Delivery Efficiency** - The *Delivery Efficiency* report can be used to keep track of the times your drivers are taking on their deliveries. For this report to function correctly, the drivers need to ensure that they make full use of the features of **DriverStation**, especially specifying when they leave the store with a certain delivery.

Marketing Reports

- **Reports > Marketing > Orders By Area** - The *Orders By Area* reports will display a breakdown of all orders placed during the selected date range, grouped together by the delivery areas. Thus showing which areas place the most and the least orders.

Adding And Maintaining Streets and Delivery Areas

All delivery customers are assigned to a street which is selected from a prescribed list of streets that is initially created before the store opens. This list is available in **AURA Backoffice** under **Lists > Streets**.
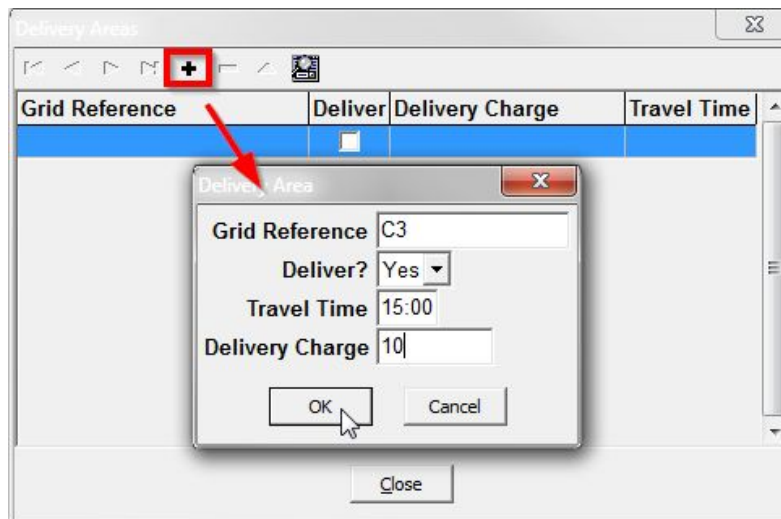
Navigate to the **Streets** screen:

> ➔ *Lists > Streets*

If you want to add a new street, take the following steps:

Adding a new Street

1. If the new street needs a new delivery area with it's own delivery charge or map reference, click **Delivery Areas.** If not, skip to step 3.

Click **[+]** to add a new area. Enter in a **Grid Reference.** This can be a specific map reference, or a just a reference code (*i.e 'C3' or 'MAR' for "Marburg"*). You can then specify if this area is eligible for deliveries by setting **Deliver?** to Yes, set the **Travel Time** and any **Delivery Charge.** Click **OK** to save.

2. If the new street requires a new suburb, click **Suburbs**. Click **[+]** to add a new suburb. Enter the name of the suburb and a postal code if necessary. Click the tick ✓ to save.

3. Add the new street name by clicking **Streets**. Click the **[+]** and type in the new street name. Click the tick ✓ to save.

4. To set up a street reference with current street names and suburbs, click on the **[+]** button on the toolbar. Doing so, should present you with a blank line similar to the following:

5. In the **Street Name** and **Suburb** drop down lists, select the desired name and which suburb it is located in. Then on the **Map Ref** drop down list, select the map reference (*You may need to restart Backoffice before new suburbs load*).

Once all the required information has been entered for this street reference, click on the ✔ button to save. The **Deliver?** and **Travel Time** fields will automatically update with the information linked to the selected **Map Ref**, as seen below:
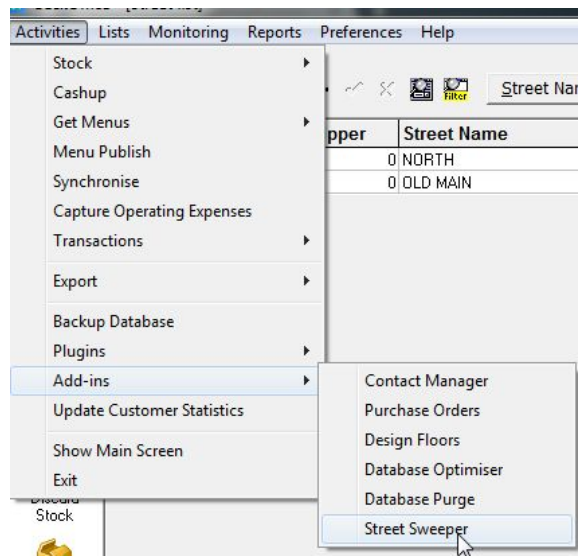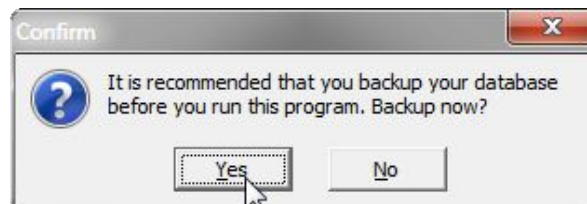

Removing Streets

If you need to remove a street for any reason, select the street reference in the list and click on the **[-]** button. You will only be able to remove a street reference if there are no customers currently linked to the street. If the streets have been set up incorrectly, and you need to merge customers from two street references and remove the incorrect reference, use the **Street Sweeper** tool.
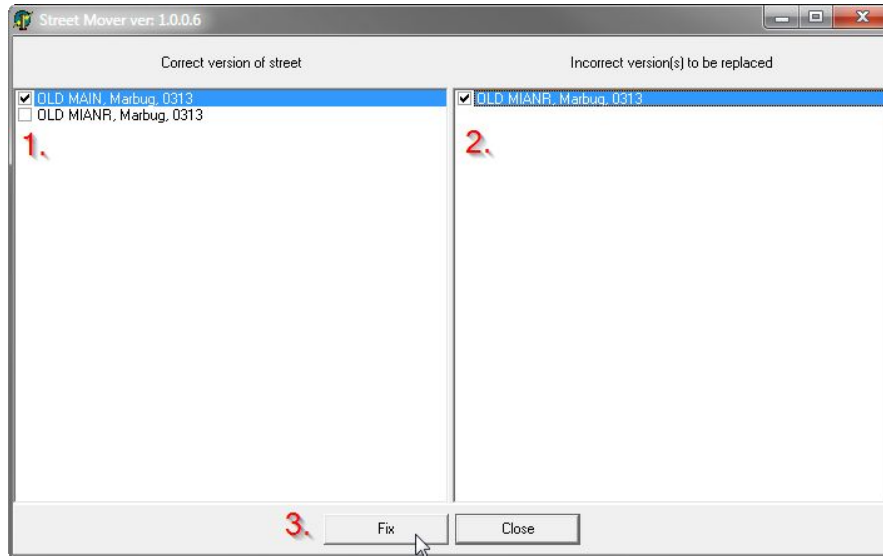
Updating Street names with *Street Sweeper*

To fix or update a street name that has customers assigned to it, use **Street Sweeper**. Click **Activities > Add-Ins > Street Sweeper**.
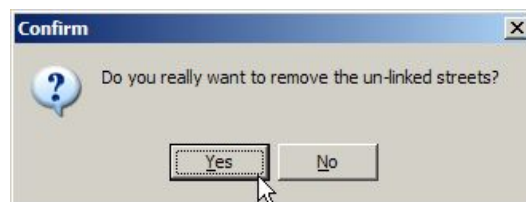

1. When prompted, click **Yes** to backup the database.

2. A window will appear with two identical street lists. On the left select the **correct** version of the street. On the right, select the **incorrect** version.

3. Click **Fix**. You will be given the following prompt:

Click **Yes.** Repeat for any other incorrect streets.

Office Contact Details

Aura Helpdesk

0860 994 155

support@cosoft.co.za

www.cosoft.co.za/support

Aura Helpdesk Hours

6:00am to 11:00pm, 7 days a week

In order to ensure that all calls taken have been logged and are treated with the importance and urgency each one rightfully deserves, please keep the following points in mind when consulting with our helpdesk:

- Ensure that the technician you are speaking to knows which store you are calling from, and that you get the name of the technician you speak to.

- Be clear and concise with what the problem is and when it started appearing. The more information you can provide, the better.

- If the technician does not offer you a reference number for your call, you should ask them for one. Not only does this makes it easier to follow up on the status of the issue later, but also ensures that your call is logged in our system and is being / has been attended to properly.

- Most importantly, please keep in mind that CoSoft provide the Aura Point of Sales Suite; for any other problems such as your email, internet, anti-virus software and the like, please contact the software distributor or supporter related to that application. These contact details can generally be found under the application's *Help > About* or *Help > Contact Us* options.