

# Delivery Notifications in Sales Order Entry

For companies which have had their database modernized, Delivery Notifications can now be entered on the “Items” tab of Sales Order Entry, by clicking the button shown below:

The screenshot shows the Winsupply Sales Order Entry interface. The 'Items' tab is selected, and the 'F8-Delivery Notifications' button is highlighted with a red box. The interface displays order information such as Sales Order 472096, Order Date 10/18/24, and Job Name STEPHEN TESTING. Below the items table, there is an 'INVENTORY INFORMATION' section with columns for Line, Item Number, Item Description, Qty Ordered, Qty Available, Qty To Ship, Qty On Backorder, Unit Price, Average Cost, Extended Price, Extended Cost, and GM%.

When the user clicks that button, the screen below will load. Please note, the user can enter the SMS Phone Number and Email Address independently of one another. They are not linked to one another. In other words, the SMS Phone Number might be for Jane Doe, but the Email Address entered to the right of it might be for John Doe.

The screenshot shows the 'DELIVERY NOTIFICATIONS' dialog box. It has two columns: 'SMS Phone Number (optional)' and 'Email Address (optional)'. There are six rows of input fields. The first row has an active text input field for the phone number. Below the input fields are two buttons: 'F5=Reload All' and 'F3=Save & Exit'.

The Primary driver for notifications is the Work flow Status (**WFS**) on the shipment. Notifications should be triggered when WFS is updated. Only this sub-set of WFS codes will generate a SMS notification: Scheduled for Delivery, Out for Delivery, Staged, and Delivered.

### Scheduled for Delivery

Example Notification: ***“Shipped: Your Order<order number> from < company number> will arrive today via local delivery”***

A shipment will be considered Scheduled for Delivery when:

- Picking Active – If the shipment is a Delivery and is staged after being picked.
- Sales Order Entry – A shipment will be considered scheduled for delivery when tracking information is entered on that shipment from the shipments tab. This is Independent of manifest and picking.
- Shipment Manifest – If a shipment is on a “generated” manifest.

### Out for Delivery

Example Notification: ***“Out for Delivery: Your Order<Order number>from<company number> will arrive today via local delivery”***

A shipment will be considered “Out for Delivery” when:

- Shipment Manifest – This will only be triggered if a shipment is on a manifest that has been started by a driver.

### Staged / Ready for Pickup

Example Notification: Shipped: ***“Pick up now: Your <Order Number > from <Company Number> is ready for pickup. Open today 7:00AM to 5:30pm”***

A shipment will be considered Staged / Ready for Pickup when:

- Picking-Active:
  - When a shipment is marked “Pick up” and staged through the picking process
  - When a shipment is marked “Pick up” and is counter picked from sales order entry
- Non-Picking Active
  - If a shipping label is printed

### Delivered

Example Notification: ***“Delivered: Your Order<Order Number from <Company Number> was Delivered.”***

A shipment will be considered Delivered when:

- Manifest:
  - The Driver has marked the shipment delivered in manifest
- Sales order Entry(Both Picking and Non Picking):
  - If shipment type is Delivery and If the next action is “Direct” and all of the back-ordered items have been received.
  - If shipment type is Delivery and If there is positive quantity to ship on the shipment and a customer has digitally signed for the material from the POS device *\*Note\* Credit card signatures will also trigger this*
  - If shipment type is Delivery and If a shipment has been invoiced and closed.
  - If shipment type is Delivery and If the “Is Delivered?” flag has been changed in the SOE shipments tab; Quantity to ship must be positive on the material.