

FeneTech, Inc.

FeneTech® Delivery User Manual



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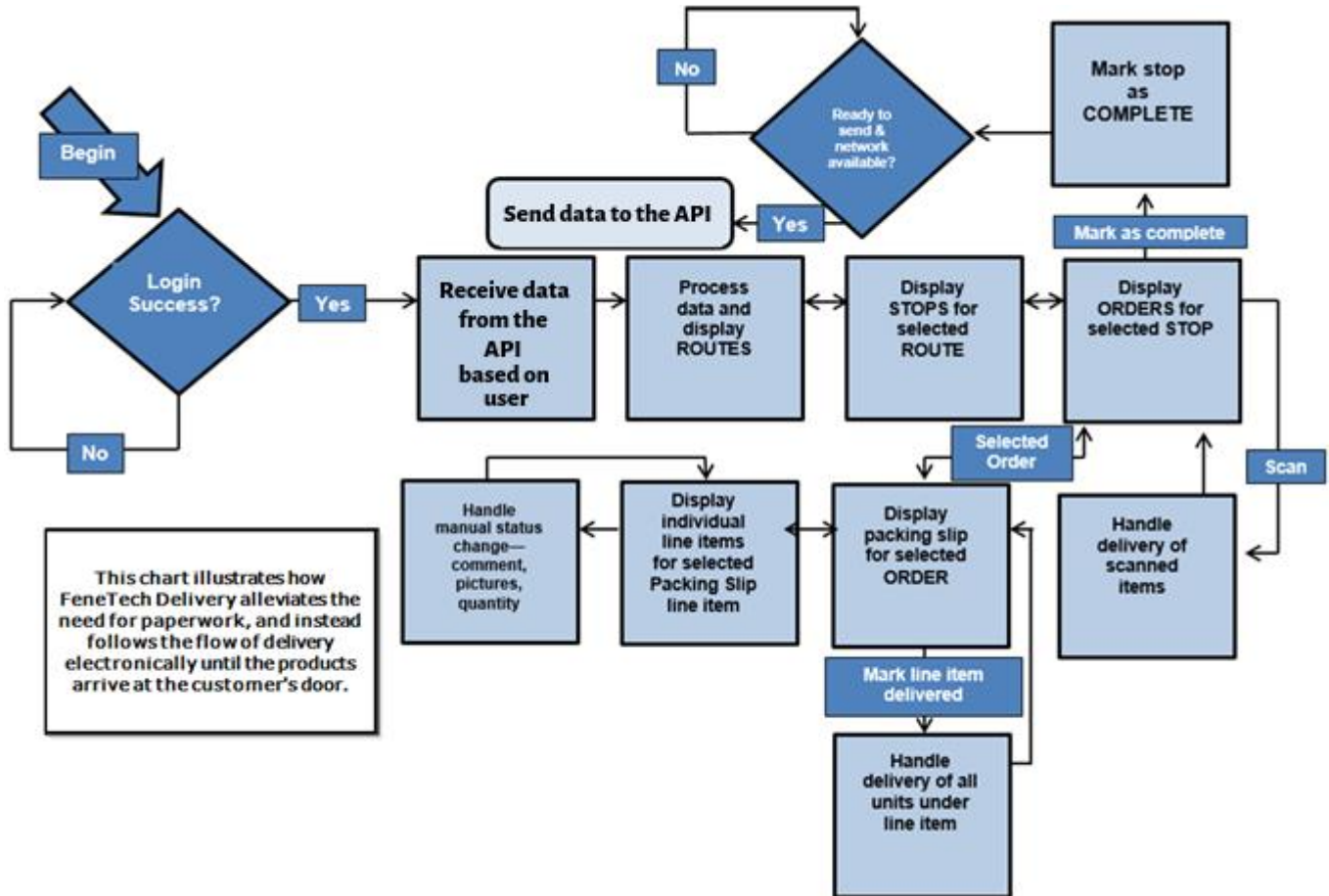
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Overview

FeneTech Delivery is an iOS and Android application that provides the user with the ability to display the trucking manifest on a device after the user has scheduled delivery via FeneVision Route Builder. A supplementary application to FeneVision Trucking, Delivery works independently from the user's network, and utilizes 3G/4G or Wi-Fi network technology to communicate with the FeneVision database server. Truck drivers will be able to see the delivery displayed on screen, and the application allows the customer to digitally sign for the delivery directly on the device. Additionally, any rejects or broken units can be reported remotely. Devices must be purchased separately.

Using Delivery

The data collected during delivery by FeneTech Delivery will initially be stored locally on the user's device until internet connectivity is available. Use the IP address of the server, [http://\[ipaddress\]/DT](http://[ipaddress]/DT), when configuring the device. Once connectivity is established, the data will be sent to the FeneVision software through the FeneVision Delivery API.



FeneTech Delivery Step by Step

1. Users should configure the network path using their respective IP address on the 'Network' screen.

Note: After the first network configuration, there is no need to do this step again unless the network information changes.

2. Routes must be shipped through FeneVision Trucking or FeneVision Core's Route Builder and have the correct truck driver assigned to the routes.
3. The user opens the application and enters the appropriate login information.

Note: The user logging into Delivery must be set up in FeneVision Core as a truck driver with a minimum login type of Delivery. Users who have a login type of FeneVision will automatically have the type Delivery, as well.

4. FeneVision Delivery API determines what routes are available to the user, and that information is sent to the FeneTech Delivery application
5. Delivery displays the 'Routes'.
6. The user selects "depart" on the route being delivered to.
 - a. The user chooses from a list of messages to send to the customer to notify them that the driver is en route.

Note: The depart button is hidden by default and only enabled if delivery messages are configured in FeneVision CORE.

7. The user selects a route and Delivery transitions to the 'Stops' screen.
8. The user selects a stop and Delivery navigates to the 'Orders' view.
9. The user begins scanning items. Delivery updates the delivered quantities for each scanned item.
 - a. During the delivery process, the user may select a particular order by tapping on the desired order.
 - b. Delivery navigates to the 'Items' view.
 - c. On the 'Items' screen, the user can mark all units associated with a given line item as delivered by using the 'Deliver' function for that line item.
 - d. Additionally, the user can tap a line item, and the application will transition to the 'Units' view.
 - e. The user enters comments, takes pictures, and changes the delivered quantity for a given individual unit in the 'Units' view.
10. Once the user is finished with delivery for a stop, the delivery can be marked as 'Complete'.
11. Enter a name for the receiver of the items and any comments for the stop. Signatures can be obtained but are not required. This can be achieved even if all items were not scanned or manually marked as delivered since any items not accounted for will be considered "not delivered" or "returned".
12. FeneTech Delivery sends the new data to the FeneVision Delivery API at the next opportunity when an internet connection is established.
13. Upon receiving confirmation from the FeneVision Delivery API, Delivery updates the status of the completed stop and associated route.
14. The user moves on to the next stop and must send a departure message.

Note: This will only happen if delivery messages are configured in FeneVision CORE.

15. Once the user is finished with a session of Delivery, the user will log out of the application. In most cases, this would occur at the end of the user's deliveries for the day. Once the user logs out, the device's local data for Delivery is deleted; therefore, all data must have been previously sent to the FeneVision Delivery API, or the user will be prompted when attempting to log out. The app will save data locally in case of a crash or closing the app without logging out, and it will load up the previous session once logged back in.

Logging In

Open the FeneTech Delivery application by tapping the icon on the device.



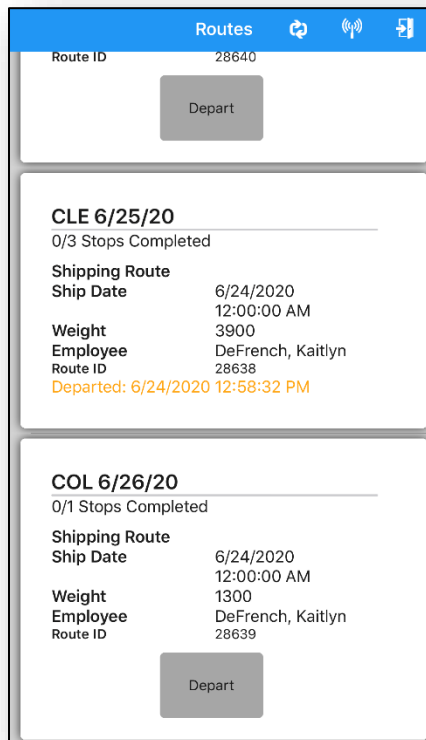
The login screen will appear. Users will type in the username and password configured from FeneVision Core. Clicking sign-in will bring the user to the Routes screen for any routes assigned to them.



Note: Before logging in, the user must correctly configure the network path for the application. See the Toolbar >> Network section below for more information.

Routes

After logging in, the user will be presented with a screen that will show the routes to be delivered. This screen displays all information relating to the route, including how many 'Stops' have been completed. At any time, a user may select the refresh button (🔄) to ensure all routes assigned to them are showing.



The following data will be retrieved from the FeneVision Delivery API:

- **Route ID** – Numeric identifier of the route.

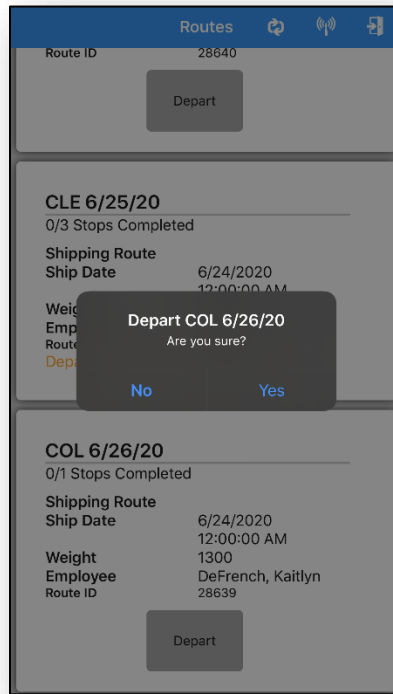
- **Route Name** – Name of the route, e.g., ‘8/8/19 Chicago’.
- **Employee Name** – Name of the person responsible for processing the shipment.
- **Shipping Route** – The route assignment for the customer.
- **Ship Date** – The required date generated from ‘Order Entry’.

Note: If a route’s ship date says ‘release’, the route has not yet been shipped and will be a read-only view.

- **Total Weight** – Shipment’s total weight.

Departure

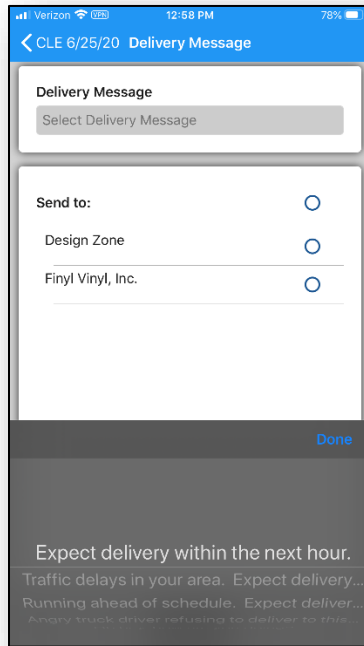
When the truck driver is ready to depart, they must select the ‘depart’ button on the routes screen. This will allow the driver to send a message to the customer notifying them of delivery. The ‘depart’ button is only visible if Delivery Messages are configured in FeneVision CORE. On systems not using delivery messages there is no need to ‘depart’ a route.



Once selecting yes to the “are you sure?” message, the driver will be taken to the “Messages” page.

Messages

The driver can use the messages page to send messages of departure for a delivery, as well as to update the customer about any delays with the delivery. These messages are configured through FeneVision Core’s Notifications screen.



To get to the messages screen, the driver can:

1. Select “Depart” on the routes screen.
 - a. This will automatically select the customer to send to.
 - b. Once sent, the user will automatically be brought back to the Routes screen
2. Complete the previous stop on a route.
 - a. This will automatically select the customer for the next stop on the route.
 - b. Once sent, the user will be directed back to the Orders screen.
3. Select the message icon from the toolbar on the stops page.
 - a. This will allow the used to select which customer(s) the message should go to.
 - b. Once sent, the user will automatically be brought back to the Stops screen.

Note: The message icon only appears on the toolbar of the stops page if Delivery Messages are configured in FeneVision CORE.

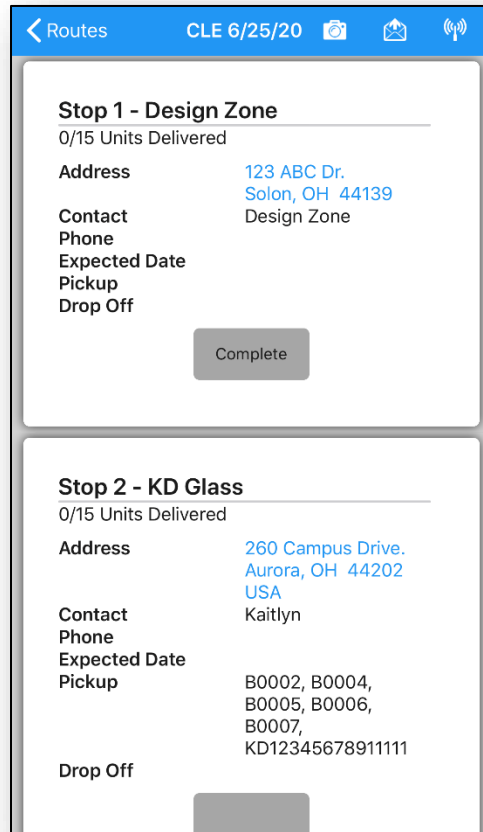
If the customer receiving the delivery is assigned a different language than the default language, the message will be automatically translated to the customer’s language when it is sent as long as a translation for the selected message has been configured in FeneVision Core.

To see which stops exist on a route, the user can tap on a route to enter the ‘Stops’ page.

Stops

On this page, the user can see information displayed about all stops on the route including address and contact information. Within each ‘Stop’ section, the user will see how many units have currently been delivered, and how many units have been picked up, as well as any containers that need to be picked up or dropped off at the stop. On this screen the user can manually mark stops ‘Complete’. Marking a Stop as ‘Complete’ will mark all of its orders, items, and units as ‘Delivered’. Alternatively, if all orders for a stop are marked ‘Delivered’, the stop will be marked as ‘Complete’ automatically.

Marking a stop ‘Complete’ does not cause the route to be uploaded - that is done through the signature page.



Tapping on the address will open the maps application for directions, and tapping on the phone number will open the device's dialer with the number input.

At this point, the user can tap on the camera icon (📷) in the top right to add, remove, or modify photos in a gallery for this route. This is explained more in the 'Toolbar' section below.

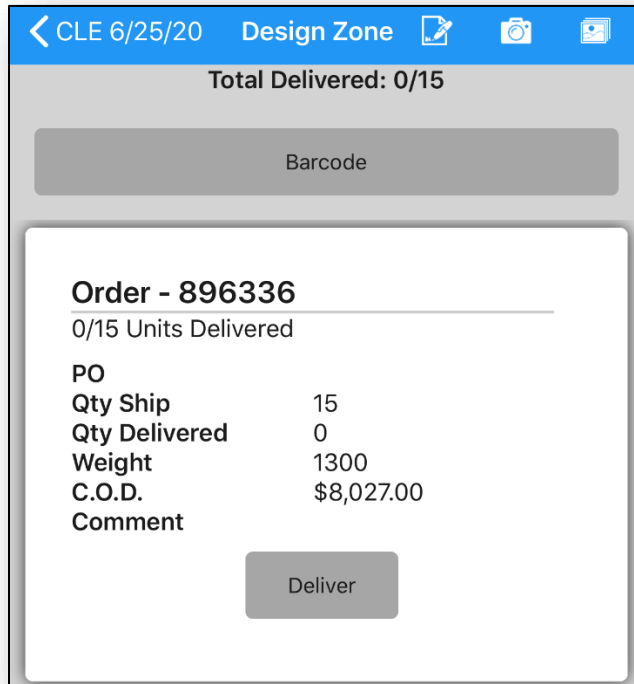
The following data will be retrieved from FeneVision Delivery API:

- **Stop ID** – Numeric identifier of the stop.
- **Company Name** – Name of the company as shown in 'Order Entry'.
- **Address of Stop** – Shipping address for order on packing slip.
- **Contact Name** – Personnel to contact regarding the shipment.
- **Phone Number** – Customer/Contact phone number.
- **Expected Arrival Date**
- **Pickup** – Lists all container IDs to be picked up
- **Drop Off** – Lists all container IDs to be dropped off

To see each order level of the stop, the user must tap on an individual stop from the 'Stops' page.

Orders

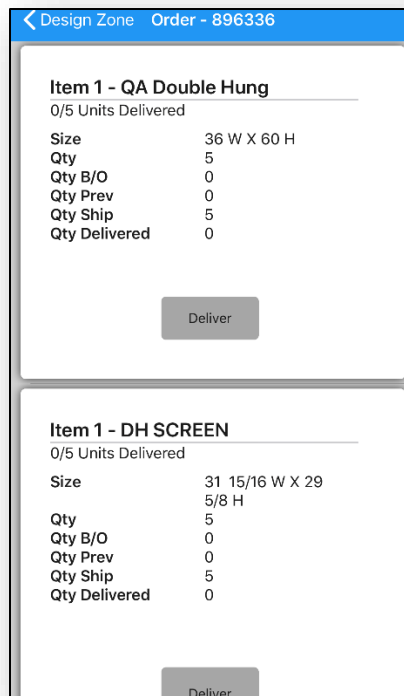
The 'Orders' page displays all orders, the number of units on each order, and other order information such as weight, order comments, and whether any orders are C.O.D.



The 'Orders' screen is the page from which the user begins to scan items that will be marked as delivered. This is also where units can be marked as picked up, if there are any 'Pickup' orders on the stop.

To enter the 'Item' level screen, tap an order on the 'Orders' screen

Items

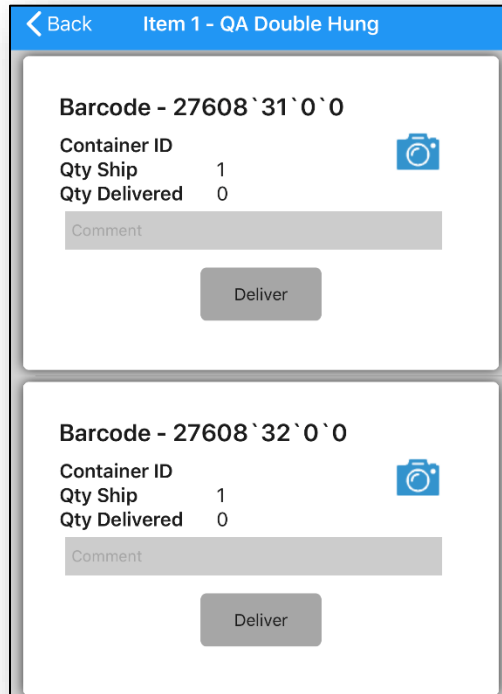


This screen displays a description of the item type, its size (if applicable), and the quantity of items. On this screen, the user can mark all units for a line item as 'Delivered' for that order and on that stop. Marking an item as 'Delivered' will mark all of its units as 'Delivered'. Also, if all units of an item are marked 'Delivered', the item will be marked as 'Delivered' automatically.

Tapping on the line item opens the 'Units' menu in the instance that the user wants to deliver individual units.

Units

The 'Units' screen displays each individual unit for the selected item type. At this point in the FeneTech Delivery process, the user has the option to select specific units. This can be done in the place of scanning each item using the barcode scanner.



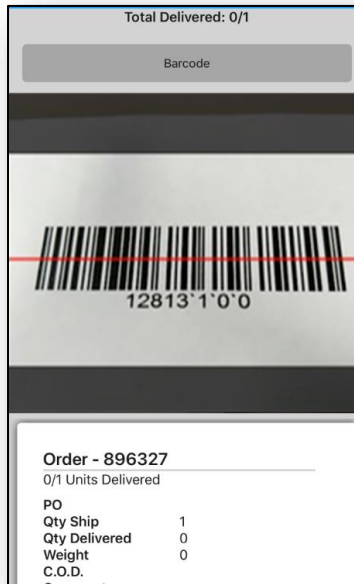
Delivering a Unit

To mark a unit 'delivered' there are two methods: through barcode scanning or by manually marking it delivered.


Scanning

To begin scanning, the user must tap the barcode button (**BARCODE**) found on the Orders page. This will open the selected Scanning Method, chosen from the Network screen. If the user has a barcode scanner, scanning can begin, and the information will go directly into the barcode box. Barcodes may also be scanned using the built-in camera on the device. Upon scanning a barcode, the order/item/unit will automatically be marked as delivered. Users should scan the ordered part's barcode. However, subpart barcodes may also be used in the event that the orders part's barcode becomes damaged.

If using a connected scanner rather than the devices camera, the scanner should not have a pre-amble configured. Additionally, configuring 'Enter' as the post-amble will allow Delivery to automatically accept the scan.




Manual

If the user would like to manually mark orders, items, and/or units as delivered, or stops as complete, they can simply tap the gray 'Deliver' box (). After marked, the box will say 'Undo' giving the user the opportunity to undo the choice. Marking an order as 'Delivered' will mark all of its items and units as 'Delivered'. Also, if all items of an order are marked 'Delivered', the order will be marked as 'Delivered' automatically.


Returning a Rejected Item

A unit may need to be returned if it has been damaged or is otherwise not fit for delivery. To return an item, complete the following on the unit screen:

1. Click the camera icon () to take a unit image of the item to be returned and include in the 'Comment' field any remarks associated with the reason that the item has been rejected. The photo and the comment are then uploaded to the FeneVision database once the rest of the route is delivered (optional).
2. Do not deliver the unit. It should be returned later using 'Return Mode' in FeneVision Trucking.
3. At this point, the unit will be available for rejection in FeneVision Tracking and can be reprocessed.

After these steps are completed, the unit will be available to be shipped on another route and delivered using FeneTech Delivery. If a unit is delivered using FeneTech Delivery and later identified as needing to be reproduced, the customer will need to follow the standard return procedure.

Completing a Stop

On the 'Orders' screen, the user taps the signature icon () to access the signature screen. Here the user will find a printed name box with a text field titled 'Print Name' and a signature area as shown below.

The top displays the Cash On Delivery (C.O.D), progress of units delivered, and units picked up. Comments about the delivery of the select stop may also be entered here. The person accepting the delivery will type their name in the 'Print Name' field; then use the 'Signature' area to sign by hand, if necessary. Once completed, the user can tap complete.

Note: A signature is not required to complete a stop. Only the printed name is required.

Once 'Complete' is tapped on this screen, edits can no longer be made to the stop. Make sure all information is correct before finishing.

During the next sync using internet connectivity, the information will be deployed up to the server to inform other users that a stop has been completed. The user can then move on to other stops.

If delivery messages are enabled, the 'Delivery Message' screen will automatically appear after completion if additional stops are required for the route.


Once all stops on a route are marked as complete, the route is also considered complete.

Delivery Confirmation Report

The 'Delivery Confirmation' report is sent to the customer automatically when a stop is marked complete through the Delivery application.

Delivery Confirmation						
Route: 9/5/2014 PIT (DT DATA)				DELIVER DATE: 9/5/2014		
Customer: Heplers Hardware						
ORDER: 2715						
ITEM	DESCRIPTION	SIZE	QTY	QTY B/O	QTY SHIP	QTY DELIVER
1	8220SL - TWO-LITE SLIDER	50 W X 50 H X 3 1/4 T	1	0	1	1
2	8510CS - CASEMENT	20 W X 32 H X 3 1/4 T	1	0	1	0
ORDER TOTALS:			2	0	2	1
ORDER: 2727						
ITEM	DESCRIPTION	SIZE	QTY	QTY B/O	QTY SHIP	QTY DELIVER
1	8220SL - TWO-LITE SLIDER	50 W X 50 H X 3 1/4 T	1	0	1	1
2	8510CS - CASEMENT	20 W X 32 H X 3 1/4 T	1	0	1	1
ORDER TOTALS:			2	0	2	2
SHIPMENT TOTALS:			4	0	4	3

SIGNATORY: Matt











The following information displays on the 'Delivery Confirmation' report:


- **Route** – Route name.
- **Deliver Date** – Date the stop was the delivered.
- **Customer** – Customer name.
- **Order** – Order number.
- **Item** – Line-item number.
- **Description** – Part number and description.
- **Size** – Ordered size of the item.
- **Qty** – Quantity ordered.
- **Qty B/O** – Quantity backordered or not shipped.
- **Qty Ship** – Quantity shipped.
- **Qty Deliver** – Quantity delivered.
- **Order Totals** – Total quantity ordered, backordered, shipped and delivered for the order.
- **Shipment Totals** – Total quantity ordered, backordered, shipped and delivered for the shipment.


Toolbars

Throughout the FeneTech Delivery application, several tools exist within toolbars on the top of the screen. The following tools are available:



- Logout () – Allows the user to logout of the application at the end of the workday.
- Network () – Opens the network page. See the network section below for more information.
- Refresh () – Allows the user to refresh the routes page to see any additional routes that may have been added. Refreshing the routes page also allows the user to view additional message options that may have been added.
- Images () – Allows the user to take and manage pictures for a route, stop, or unit. See Images/Gallery below for more information.
- Gallery () – Allows the user to see all images already taken for the route, stop, or unit.
- Messages () – Redirects the user to the message screen. See Messages for more information.
- Signature () – Opens the signature page for the selected stop in order to sign and more the stop complete.
- Back () – Allows the user to navigate to a previous page. Users can also use the device's 'Back' button to navigate, if available.

Images/Gallery

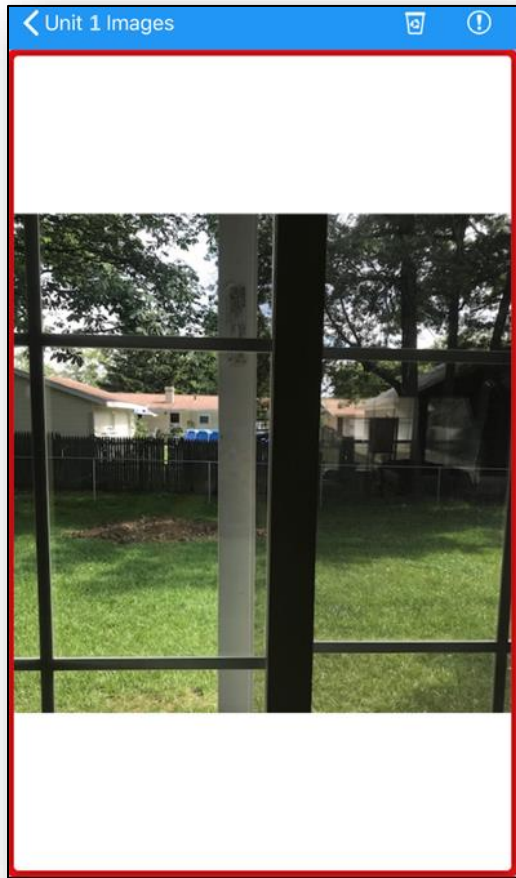
Aside from delivering units, the user has the option to take pictures on the various levels of the application by tapping the camera icon (). The user can send back 'Stop', 'Order', or 'Unit' images. On the 'Stop' and 'Order' pages, the icon is located in the toolbar. For units, there is a camera icon per unit. The images will be saved to a gallery where the photos can

be viewed. A gallery icon () will appear once the user has taken a photo for a 'Stop', 'Order', or 'Unit' for that specific screen. Tapping the gallery icon will bring the user to the gallery for the respective 'Stop', 'Order', or 'Unit'.



In the gallery, users can single tap a photo to enlarge it. The user may then delete the photo by tapping the recycle icon () or mark the photo as important by tapping the exclamation point icon (). Users can also double tap a picture to enter an edit mode where photos can be multi-selected before pressing the delete or important button. When an image is marked as important, the image will show on the edit page and the gallery page with a red outline around it.

Note: Marking an image as important may not be available depending on the FeneVision Core version being used.



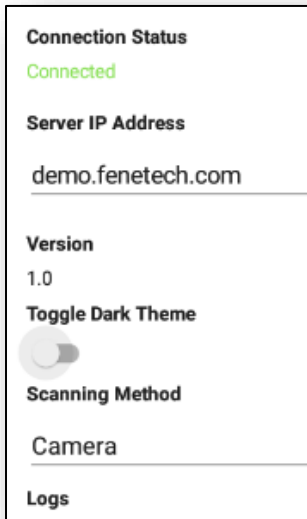
'Route' images are uploaded once the user leaves the image gallery after taking the pictures. Images for a 'Stop' or 'Unit' will be uploaded upon completion of the stop. Images marked as 'Important' will get emailed to any users configured via the notifications screen in FeneVision Core. All images are available in FeneVision BI via the route details report. Please see the Fenevision BI user manual for more information on the report.

Note: Images become locked once upload has begun. No changes to the images/gallery can be made after this point.

Network

Tap the network sign (📶) in the top right of the route or order screen. This will open the network page where the user can input a server IP address. Once this is set, the user should not have to modify the address unless the address itself changes.

The following screen will appear:



This screen shows the application information and settings. On this page, users can enter their server IP address to connect to a network, toggle Dark Mode to change the application to a darker color scheme, change the default scanning method of the device used for scanning barcodes, and access the device’s error log.


Error log

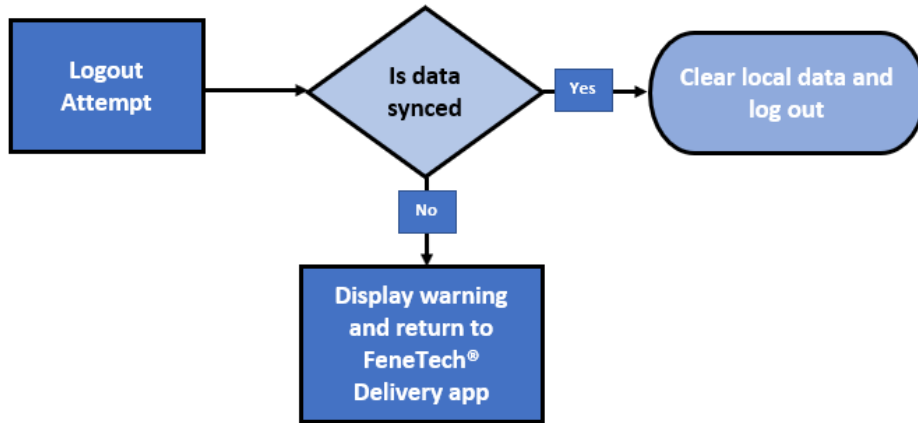
Tap the word ‘Logs’ to view the error log. The following screen will appear:



Users can use the ‘Copy’ button to copy the text or ‘Clear’ to empty the log. If the log gets to large, the app will automatically clear the log itself.

Logging Out

The user can log out of the application by tapping the 'Sign Out' button () on the 'Routes' page. Once the user has logged out, all data will be cleared from the device. When the user next logs in, new routes will be assigned. If the user closes the app without logging out or the app crashes, the route information is saved locally and restored when the user logs back in.



Setup

The 'Setup' section will explain essential information to operate the Delivery application.

Setup required within the FeneVision Core application consists of proper employee configuration. There are three necessary requirements for successful operation of the Delivery application:

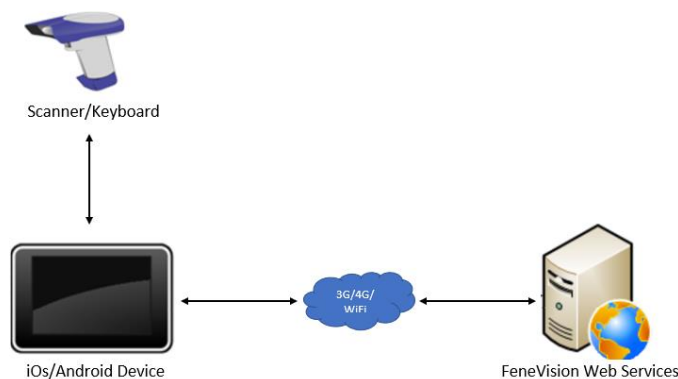
1. The employee logging into Delivery must be set up with a minimum login type of Delivery.
2. The employee must be assigned to the 'Truck Driver' employee group.
3. The employee must be assigned to shipped routes within Route Builder to populate information in the Delivery app.

See the FeneVision Core User Manual for additional information steps to successfully configure the necessary employees.

Logging for Delivery Tracking items can be added to track, and control items processed through the Delivery Tracking app. Contact FeneTech for additional information on enabling this logging.

System Requirements

To successfully run FeneTech Delivery, the user must have access to iOS 12.1 or Android 4.4 (KitKat) or later. Additionally, the user can use a barcode scanner that is compatible with the device or a built-in camera.



FeneVision Delivery API

Data is stored and retrieved from the FeneVision Delivery API. Information such as shipment data--including route, order, and order line item information--is retrievable from this service.

Installation

FeneTech Delivery should be installed on iOS 12.1 or Android 4.4 (KitKat) or later which can be found on the Apple App or Google Play Store. Once the app is installed, the correct IP should be entered and a FeneVision Core 'Truck Driver' employee (using FeneVision Authentication) should log into the application.

Translations

The FeneTech Delivery application will display translated part names and delivery messages as long as translations have been configured in FeneVision Core. The part names and delivery messages will be displayed in the default language of the device being used.

Help

Users can access the most up-to-date user manuals from the FeneVision Core, Tracking, or Trucking applications. See the FeneVision Core user manual for additional steps to access the full user manual directory.