

Dispatching Invoices - Counterpoint.

Basic Usage Notes

- The jDispatch mobile application and dashboard integrate directly with Counterpoint to allow you to dispatch invoices for delivery and collect electronic signatures for proof of delivery.
- This document will review the 3 main menu options in the Counterpoint delivery module..

Adding Drivers

- Before any work can be done with jDispatch, you must ensure that you have set up at least 1 driver in the Counterpoint
- Log into the Counterpoint
- Take following menu path.

4. Sales Desk > 7. Driver Dispatch > 2. Driver Maintenance

- Select option #1 - Add Driver
- Enter a code for the driver, such as their first name.
- Enter Their First & Last Name, as this will be how they are identified in the dashboard
- You can leave the contact number and vehicle blank if you wish.
- Once you have added a driver, or made any changes, you must then run option #4, extract driver info to update the information to the web.

Dispatching Invoices

- Dispatching invoices is done from the **Invoice Dispatch** menu option
- Sales Desk > 7. Driver Dispatch > 1. Invoice Dispatch
- To start, you can optionally display invoices for only a certain run by selecting the run number you want. Otherwise, press enter to view outstanding invoices for all runs.
- Then, select a driver who you want to assign the deliveries to

- Once the driver is selected, all invoices currently available for delivery are listed.
- Once the invoices are listed, you have numerous options to select which invoices to dispatch. You may:
 - Click the invoice you wish to dispatch
 - Key in the order number of the invoice to dispatch
 - Scan the barcode on the invoice you wish to dispatch
- All scheduled deliveries will have a time in the **Order Despatched**
- You can un-select an invoice by clicking the invoice number again.
- To accept all deliveries, click the 'close run' button.
- Once accepting, you will be asked if you wish to print a delivery sheet. A delivery sheet is a summary listing of all invoices dispatched in this session.
- After selecting Y or N for the delivery sheet, all invoices are pushed out to the phone assigned to the driver you just selected. For more info on the mobile jDispatch application, please refer to the jDispatch mobile documentation.

Manually Confirming Invoices

- Confirming invoices without the mobile application is done from the **Invoice Dispatch** menu option
- Sales Desk > 7. Driver Dispatch > 1. Invoice Dispatch
- Enter a Run number or press Enter
- Enter a Driver code to have the invoices displayed.
- Click on the **Action Mode** button at the top of the screen to go to
- Click on the invoice number to be confirmed or enter the invoice number followed by Enter.
- All confirmed deliveries will have a time in the **Received**
- You can un-select an invoice by scrolling to it and pressing enter again

Cancelling/Retiring Invoices

- Cancelling invoices is done from the **Invoice Dispatch** menu option
- Sales Desk > 7. Driver Dispatch > 1. Invoice Dispatch
- Enter a Run number or press Enter
- Enter a Driver code to have the invoices displayed.
- Click on the **Retire** button at the top of the screen
- Click on the invoice number to be confirmed or enter the invoice number followed by Enter.
- The various reason codes for retiring the invoice will be displayed on the right of the **Green** Click on the appropriate description
- Once you accept the selections, cancellation notices are sent to the jDispatch mobile app and Dashboard. If the customer had multiple deliveries, the driver will be able to show

them that the invoice was cancelled, and any signature they provide will not be assigned to the cancelled invoice.

Pulling Dispatched Invoices Back

- Recalling invoices for dispatch at a later time is done via the dispatch program
- Sales Desk > 7. Driver Dispatch > 1. Invoice Dispatch
- To start, you will need to select a run (or, enter for all runs), and a driver
- Once the run and driver are selected, Click the 'Action Mode' button until **Despatching**
- Click on the 'Display Mode' button until **Dispatched invoices** is displayed.
- Once the invoices are listed, clicking on any of the invoices and accepting will present the question "already sent; reverse send?" Answering yes will bring the invoice back to the dispatch screen and remove it from the driver's phone.

Revision #1

Created 2021-04-28 18:16:50 UTC by Jim

Updated 2021-09-15 23:56:01 UTC by Jim