# Using Warehouse and Dispatch

KBBConnect can help you track your projects from Quote to Completion. Part of this is tracking Goods In and Out of the warehouse, and then delivering them to your client's house or site.

In this quick guide we will cover:

- Recording supplier confirmation
- Recording Goods in
- Handling Short Deliveries
- Using Project Communication to note Supplier issues
- Using the Job Summary tab
- Creating and Printing Delivery Notes

## Warehouse View

The **Warehouse** view is where you will record when your ordered items are due to be delivered and when they arrive. It enables you to keep track of what has arrived and is ready for delivery and what has not for each individual project.
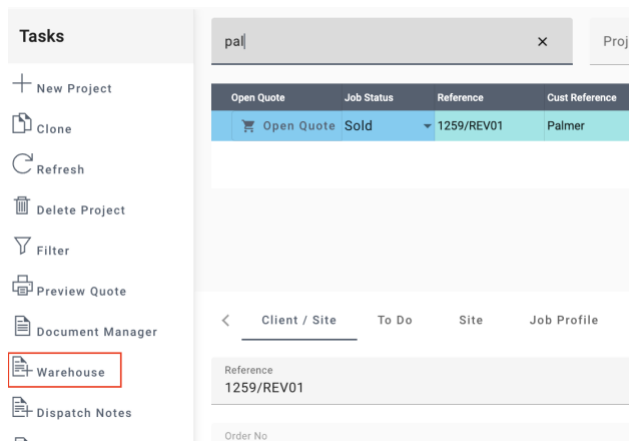


**To confirm and check your goods in:**

1. Select your job click on the Warehouse button on the Tasks menu as shown:
2. Select the supplier in the top pane.
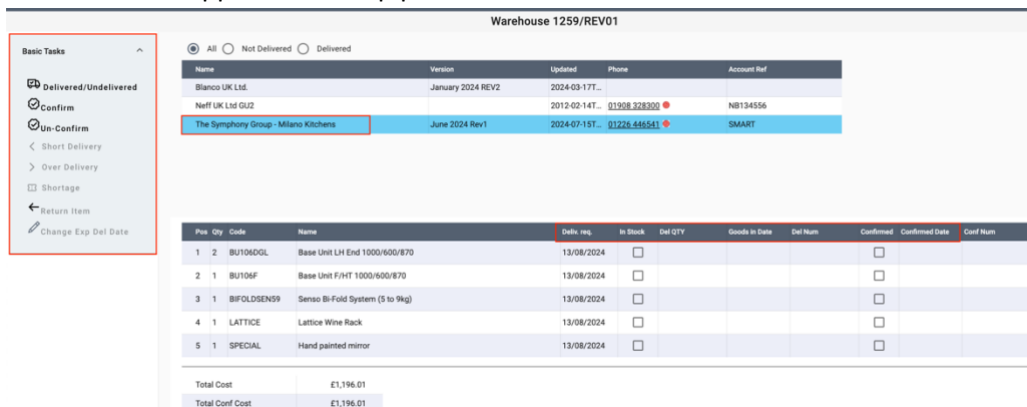
Displayed in the lower part of the pane are the components coming from highlighted supplier.

When a supplier confirms a delivery and date, select the **Confirmed** check box and enter a confirmed delivery date and number as required

When items are delivered select the **Goods in** check box to specify the items that have arrived and enter the delivery note number id applicable.

3.   Select OK.

### To Confirm and Book in ALL items for a Supplier

To either confirm or Book in all goods from a supplier, select the supplier from the list and use the **Delivered/Undelivered** or **Confirmed/Unconfirmed** buttons.  The system will automatically tick/un-tick all items and enter today's date for the highlighted supplier.

Follow the same procedure for each supplier in turn as the items are delivered.

If any items didn't get confirmed or delivered – just untic the box

| Pos | Qty | Code | Name | Deliv. req. | In Stock | Del QTY | Goods in Date | Del Num | Confirmed | Confirmed Date | Conf Num |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | 2 | BU106DGL | Base Unit LH End 1000/600/870 | 13/08/2024 | ☑ | | 14/08/2024 | 46546 | ☑ | 16/08/2024 | 4545 |
| 2 | 1 | BU106F | Base Unit F/HT 1000/600/870 | 13/08/2024 | ☐ | | | | ☑ | 16/08/2024 | 4545 |
| 3 | 1 | BIFOLDSEN59 | Senso Bi-Fold System (5 to 9kg) | 13/08/2024 | ☑ | | 14/08/2024 | 46546 | ☑ | 16/08/2024 | 4545 |
| 4 | 1 | LATTICE | Lattice Wine Rack | 13/08/2024 | ☑ | | 14/08/2024 | 46546 | ☐ | | |
| 5 | 1 | SPECIAL | Hand painted mirror | 13/08/2024 | ☑ | | 14/08/2024 | 46546 | ☑ | 16/08/2024 | 4545 |

# Short Deliveries

Sometimes when you will receive a delivery of good with too many or too few items.  In this case you can use the KBBConnect **Short Delivery** option.

In the example below, we ordered 2 Symphony Items

When the delivery arrives, there is only 1 item delivered



1. Select the item
2. Click on the Short Delivery button
3. Change the number of Items Delivered to 1
4. Click OK
5. Note that the delivery has now been split:  we have 1 sink
   booked in and there is now another line relating to the undelivered sink.

| Pos | Qty | Code | Name | Deliv. req. | In Stock | Del QTY | Goods in Date | Del Num |
|---|---|---|---|---|---|---|---|---|
| 1 | 1 | BU106DGL | Base Unit LH End 1000/600/870 | 13/08/2024 | ☑ | | 14/08/2024 | 46546 |
| 1 | 1 | BU106DGL | Base Unit LH End 1000/600/870 | 13/08/2024 | ☐ | | | |

When the missing sink arrives, this can be booked in as normal. A handy place to record information about the missing sink in the Project Communication tab.

# Project Communication

The Project Communication tab is where you can record important information and issues about a project. By putting information in here, including e-mails, everyone in your company with access to KBBConnect will be able to quickly see what's going on.

**To create a new Project Communication note:**

Select the **New** button, choose the *Action* and *Date* and enter information or paste in email text in the *Comments* section.

## Items Overview tab

This tab within your **projects screen** is a great way to see quickly where you are with all goods required for the job.

In Project View click on the **Items overview** tab at the base of your window, shown below:



# Reports

The system can analyse much of the information you have entered regarding your KBB projects and there are a number of reports enabling you to keep track of every aspect of your project, including Goods tracking

You can access your reports in the main **Projects** view in the **Basic Tasks** Menu. There are **Job Reports** which are specific to the individual project selected in **Projects** View and also **Group Reports,** which analyse data from all of your projects.



Purchase Invoices

Job Reports

Group Reports

Price Sums

## Job Reports

In KBBConnect you can access the reports specific to the job you have highlighted in the main **Projects** view by selecting the **Reports** menu on the left side of Projects View and selecting **Job Reports**.

There reports used to track goods are:

- Warehouse Missing Items, and
- Warehouse Missing Items by Tab



Documents

Project_Communication.frx ☐

Remedials.frx ☐

Statement.frx ☐

Warehouse_Missing_Items.frx ☑

Warehouse_Missing_Items_B... ☐

## Warehouse Missing Items

This report shows the items ordered but *not delivered* yet for the Project, by *Supplier*. It shows the suppliers information, items description, the date the items have been requested and the confirmation date.



## Warehouse Missing Items By Tab

This also shows the items ordered but *not delivered* yet for the Project, and it is organised by Tab. These are the section tabs you have set up in your KBBConnect Project view, e.g. Kitchen, Sinks & Taps, and Appliances.

## Group Reports

**Group Reports** will analyse the data from all your KBBConnect Jobs. It is possible to filter some of the Group Reports and for these reports a separate dialogue box will appear with filter options. There are many **Group Reports** available with KBBConnect, including operational and financial reporting for both internal and external use.

Purchase Invoices

Job Reports

Group Reports

Price Sums

### Deliveries to Warehouse (By Customer/By Supplier)

There are two group reports for warehouse management. They show all the items that have been ordered – through the **Purchase Orders** screen, and not yet received, and are available per customer, or per supplier.

The reports give details of the items ordered, including the project reference, client name, item codes and description. You will also see the delivery request date (that is the date the customer wants the goods in) and the confirmation date.

| Documents | |
|---|---|
| AChooseReport.frx | ☑ |
| Client Report.frx | ☐ |
| ConversionRate.frx | ☐ |
| Deliveries_To_Warehouse.frx | ☐ Del |
| Deliveries_To_Warehouse_By_ | ☐ |
| Job_Margin_Analysis.frx | ☐ |
| Marketing.frx | ☐ |
| Monthly_Lost_Jobs_By_Sales… | ☐ |
| Monthly_Sales_By_Salesman… | ☐ |
| Not_Completed_Remedials.frx | ☐ |
| Pipeline.frx | ☐ |
| Profit_Report.frx | ☐ |
| Sales_Invoices_Raised.frx | ☐ |
| Supplier_Spend.frx | ☐ |
| Who_Owes_Me_Money.frx | ☐ |

**NOTE**:  For a complete list of reports and what they do, please see: Business and Management Reporting in KBBConnect

### Top Notch Kitchens & Bathrooms Ltd

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Charters Road, Ascot, Berkshire, SL5 7ET
Phone:01344 621260

### Deliveries To Warehouse

| Reference | Client Name | Code | Description | Req Date | Conf Date |
|---|---|---|---|---|---|
| **Blanco** | | | | | |
| 1259/REV01 | Palmer | BL467616 | Blanco Modex M-60 | 13/08/2024 | |
| 1259/REV01 | Palmer | BL210223 | Blanco Drainer S/st | 13/08/2024 | |
| **Neff** | | | | | |
| 1259/REV01 | Palmer | G4655X7GB | Neff Fully Integrated | 13/08/2024 | |
| 1259/REV01 | Palmer | N24K30N0 | Neff Domino Hob With | 13/08/2024 | |
| 1259/REV01 | Palmer | B14M62W0GB | Neff Single Oven - Drop | 13/08/2024 | |
| **The Symphony Group - Milano Kitchens** | | | | | |
| 1259/REV01 | Palmer | BU106DGL | Base Unit LH | 13/08/2024 | 16/08/2024 |
| 1259/REV01 | Palmer | BU106F | Base Unit | 13/08/2024 | 16/08/2024 |

## Creating Dispatch/Delivery Notes

When you want to deliver some or all of your goods you can create a delivery note / checklist for the driver.

1. In the main projects **Task** Menu select the job you want to create the Dispatch note for.
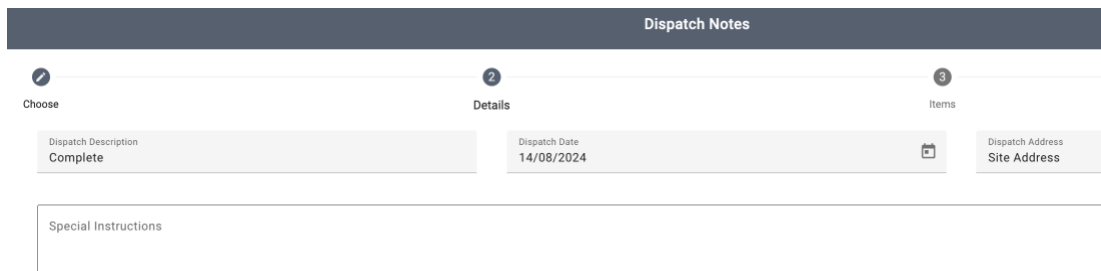2. Select the **Dispatch Note** command from the Tasks menu.

The following dialog will appear:

- ⦿ Create new Dispatch note
- ○ Edit, preview or print existing Dispatch note
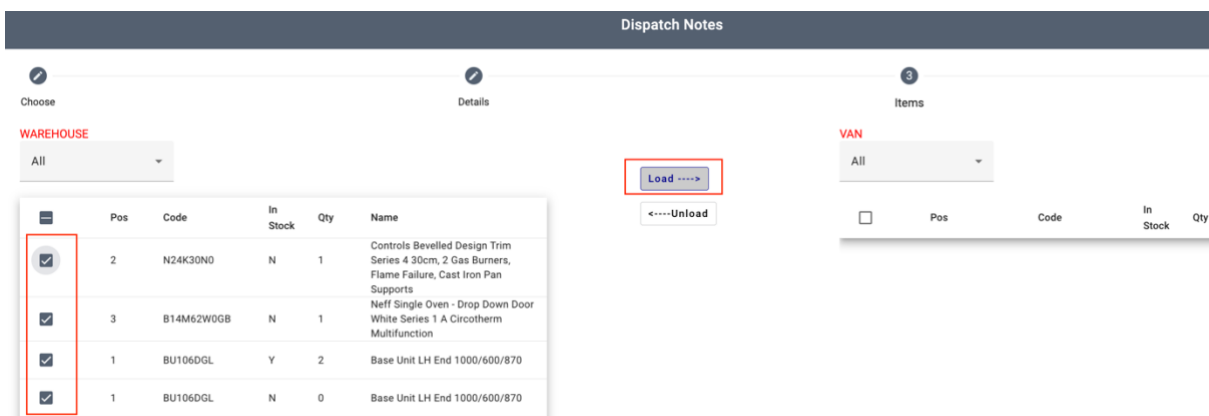- ○ Delete existing Dispatch note

3. Choose **Create New Dispatch note** and select **Next.**

In this dialog box, you can change the description of the delivery, for example if only the appliances are being delivered this can be stated.

You can also add any special instructions - these will appear in the bottom section of the delivery note.

| Dispatch Notes | | |
|---|---|---|
| ✎ Choose | ② Details | ③ Items |
| Dispatch Description: Complete | Dispatch Date: 14/08/2024 📅 | Dispatch Address: Site Address |
| Special Instructions | | |

4. Select the '**Next'** Button.
5. From WAREHOUSE choose which items you want to load onto the VAN for this delivery. You can either load the van based on the sections or you can choose individual items to deliver by checking the relevant items.

| Dispatch Notes | | | | | |
|---|---|---|---|---|---|
| ✎ Choose | | ✎ Details | | ③ Items | |

**WAREHOUSE**
All ▼

Load ---->
<----Unload

**VAN**
All ▼

| ☑ | Pos | Code | In Stock | Qty | Name |
|---|---|---|---|---|---|
| ☑ | 2 | N24K30N0 | N | 1 | Controls Bevelled Design Trim Series 4 30cm, 2 Gas Burners, Flame Failure, Cast Iron Pan Supports |
| ☑ | 3 | B14M62W0GB | N | 1 | Neff Single Oven - Drop Down Door White Series 1 A Circotherm Multifunction |
| ☑ | 1 | BU106DGL | Y | 2 | Base Unit LH End 1000/600/870 |
| ☑ | 1 | BU106DGL | N | 0 | Base Unit LH End 1000/600/870 |

| ☐ | Pos | Code | In Stock | Qty |
|---|---|---|---|---|

The example shows a whole section being moved. To move items across to the VAN, select the section and the items you want.

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6. Select on the **Load** button. All selected items will move to the VAN side of the window and will appear on the delivery note.



**Removing Items from the VAN**

If you have accidentally added something to the VAN and wish to remove the item simply click on the item's check box and press **Unload**.



7. Once you have finished adding the items to the **VAN** select **Next.**

    Your dispatch note is now displayed.



The dispatch note can be handy checklist for the person loading the goods.  To print your dispatch note, open in Word and print as normal.

You can also use this or another delivery note type as proof of delivery to site.  Like your KBBConnect quotation and invoice, you can have different version of this document for your business – more on this in the following section.

## Customising your Dispatch Notes using Microsoft Word

You can download the existing Word template of the Dispatch Note   **DispatchTemplate.doc**   and modify the look and feel of it.  For further details please see the Quick Guide;
Customising your Quotations Invoices and Dispatch Notes in KBBConnect

This will give you information on how to create your own templates and a list of fields available for you to choose from, to include in your templates.  If you would like to use our *Template Creation* Service, please contact us for a quotation.

We hope you found this document useful and we'd love to know what you think of KBBConnect.

To comment on this Quick Guide or anything else regarding KBBConnect, for support, or for information regarding training, please get in touch:

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>or

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