

# ORBIS<sup>®</sup>



DSD ROUTE ACCOUNTING & PLANNING

Optimize delivery, increase sales,  
and strengthen customer loyalty.

Control your entire wholesale distribution and financial operations with Direct Store Delivery (DSD) route accounting and planning software built natively for Acumatica Cloud ERP.

# ORBIS

DSD ROUTE ACCOUNTING & PLANNING



## Improve sales, delivery planning, and route accounting for all your direct store distribution needs

Direct Store Delivery (DSD) is a B2B process that distributors and manufacturers use to market, sell, and deliver consumer goods directly from their own warehouses to outlet stores. Sustaining and growing a DSD business needs a fully integrated ERP solution which also addresses specific DSD requirements.

The key to growing and sustaining a DSD business is greater customer satisfaction through speedy and effective delivery and route management, without increasing costs. DSD companies need to optimize resources and improve their invoice-to-cash cycle while at the same time reduce operating costs per route. The ultimate solution is a fully integrated ERP solution which also specifically addresses DSD requirements.

Orbis DSD Route Accounting & Planning extends Acumatica Cloud ERP with functionality that is tailored for the DSD industry, helping DSD companies increase customer service while reducing errors, payment disputes, and administrative costs. Orbis DSD also integrates with many leading mobile Sales Force Automation applications to provide a full end-to-end DSD solution.

## Optimize your direct store distribution and maximize truck sales by using the latest technology built for Acumatica

Cut costs associated with distribution, merchandising, delivery, receiving and payment procedures, and unearth new opportunities for route sales staff. Increase revenue, take larger orders, execute faster and more accurate delivery, accelerate cash flow, manage inventory smarter, improve customer loyalty, increase performance of merchandisers, sales and delivery reps, and reduce administrative costs.

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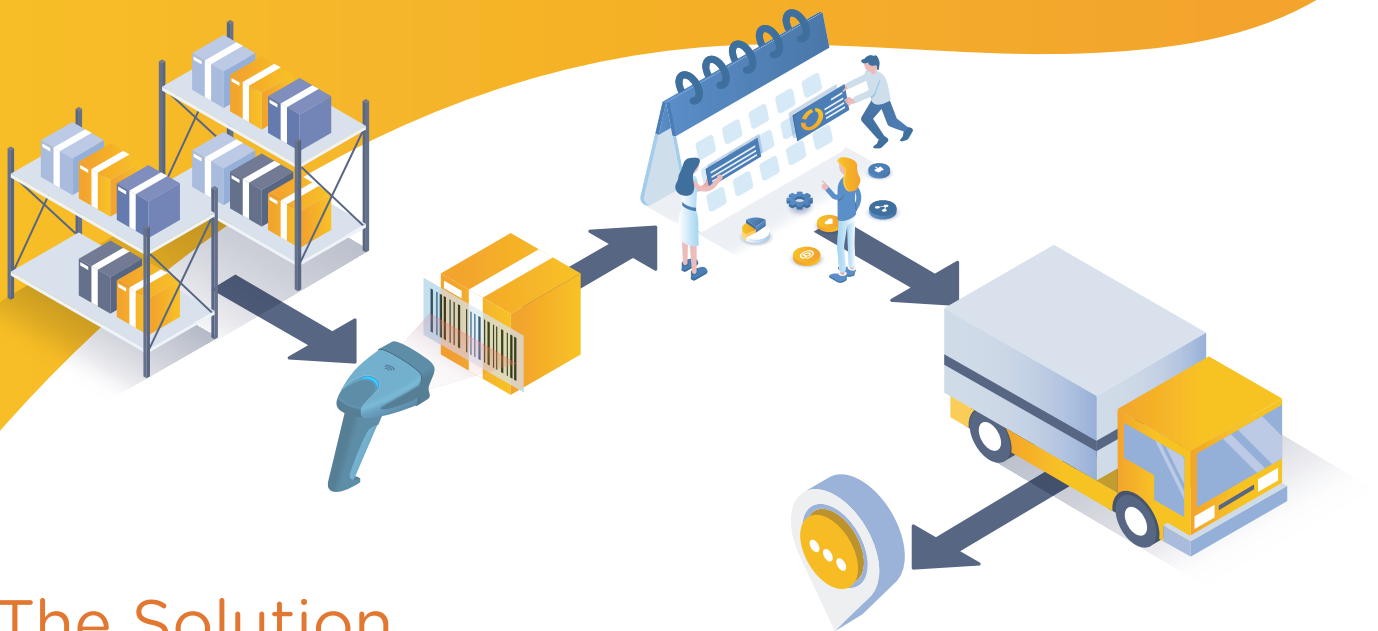
[info@computimesoftware.com](mailto:info@computimesoftware.com)

+356 2149 0700

# The Problem

In DSD operations, managing hundreds of daily orders which need to be delivered in a very short time, without the help of delivery and route planning software, is next to impossible. Operations where a high quantity of orders need to be sorted by hand, grouped in batches, picked from one or multiple warehouses and loaded / checked on the delivery vehicle order by order, require many resources and is a highly error prone process.

A similar challenge is faced by route settlers and cashiers when delivery vehicles are reconciled at the end of the day, especially in 'Cash on Delivery' environments. This latter process requires stock to be manually reconciled, return orders to be created one-by-one and processed manually, cash collected needs to be recorded and payments created one at a time and allocated to the originating invoices. Such processes, besides being time consuming, are prone to mistakes which result in unreliable information, disputes, risks of cash "going missing" and decreased customer satisfaction.



# The Solution

The Orbis DSD Route Accounting & Planning solution extends Acumatica to provide feature rich functionality for DSD operations. It streamlines complex distribution processes to reduce response times and costs – resulting in increased revenue and customer loyalty that ultimately keeps you one step ahead of the competition.

## Delivery Planning (Scheduling and Dispatching)

Standard Acumatica Distribution Edition functionality is enhanced to process sales orders, shipments, and related fiscal documents in a more streamlined and efficient manner. Orders can be automatically split by storage classification (such as ambient, chilled and frozen temperature regimes) and shipments are auto sorted and grouped for the dispatcher to create one or more loads which are assigned to one or more specific delivery vehicles. Pick lists can be generated by load and wave picking, individual picking and picking by weight are all supported picking methods. Orbis DSD continuously assists the dispatcher by providing warnings where assigned vehicles are overloaded or loaded with the incorrect SKUs, and it facilitates the bulk printing of delivery documents and related fiscal documents.

## Route Accounting

Orbis DSD extends standard Acumatica with tools to manage the reconciliation process for both stock and payments. Warehouse users can verify that delivery documents provided to drivers at the start of the day's delivery cycle are all returned, can create return documents for non-deliveries, and can fully reconcile stock – all from a single Acumatica screen.

Cashiers and accounts receivable personnel use the cash drawer screen to keep track of payments collected both by route drivers and non-route personnel, to generate and allocate payments for paid invoices, and to generate credit memos for non-deliveries also using quick processing. Additionally, accounts receivable personnel are provided with simplified tools to effect daily bank transfers of collected cash and checks.



## Customer Centric Functionality

Customer related functionality is enhanced with new features including annual rebate management, loan management, and additional central views for fast response when inquiring a customer's transactional history. Furthermore, the standard Fixed Assets Module has been extended so that the finance department, in collaboration with the logistics department, will be able to track fixed assets movement by customer location as well as expenses incurred on each fixed asset.

## BI & Data Analytics

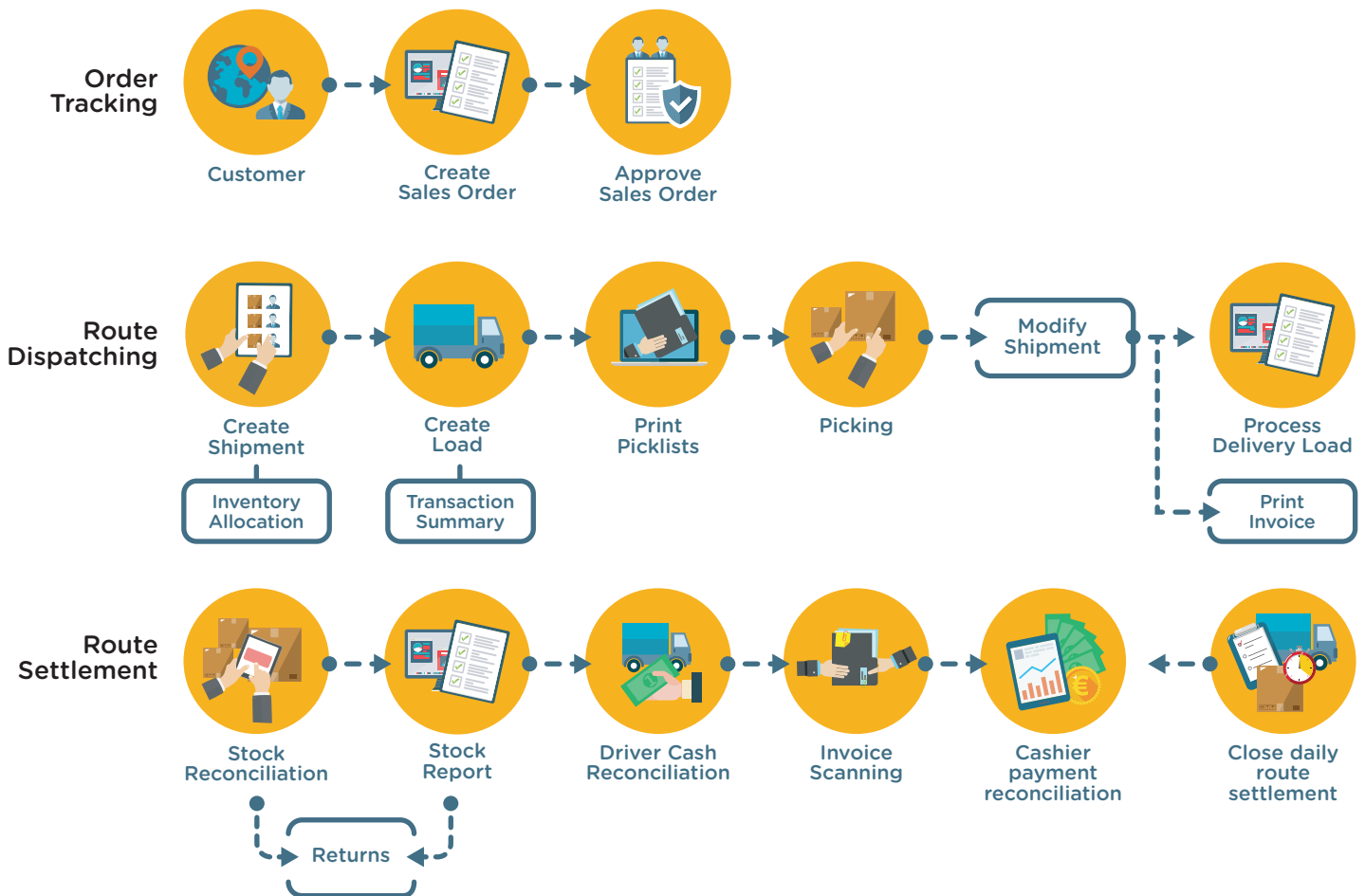
Executive users will be able to take better informed decisions making use of both new operational out-of-the-box Acumatica dashboards as well as our new sales data cube (based on MS SQL Server Business Intelligence Stack) which is provided as an extension to the Orbis DSD Route Accounting & Planning solution. Power users will be able to create new dashboards focusing on key performance indicators to ensure the business is running efficiently, customers are serviced on time and as promised, and profitability is exceeded. Users are also empowered to make use of this cube as a data source to easily create ad hoc reports directly on MS Excel.

# How it works

## Route Planning for Scheduling & Dispatching

Enhances and extends Acumatica standard distribution functionality.

- ✔ Plan shipments based on critical parameters such as warehouse, delivery type, delivery route, and SKU storage classification
- ✔ Check which SKU(s) planned to be delivered are out of stock and take necessary actions more efficiently
- ✔ Organize shipments by delivery loads and assign loads to drivers and delivery vehicles
- ✔ Use wave, individual and weighted picks of stock items organised by delivery loads to load delivery vehicles quicker and more efficiently
- ✔ Perform daily stock reconciliation by driver and delivery vehicle ensuring all non-deliveries and/or returns are captured on the system
- ✔ Re-ship orders not delivered by reassigning partial or full shipment to another day and/or driver without recreating all required documents from scratch
- ✔ Manage returns more efficiently by capturing reason codes for each return, auto generating necessary documents, and allocating resulting crmemos to the original invoices
- ✔ Track delivery vehicle inventory with start-of-day quantities and end-of-day reconciliation



# How it works

## Comprehensive Route Accounting

Enhances and extends Acumatica standard accounts receivable functionality.

- ✔ Manage driver payments more efficiently, capturing driver, cash register, cashier and payment collected details, auto generating necessary payment documents in bulk
- ✔ Manage returns more efficiently, capturing reason codes for each return, auto generating necessary documents, and allocating resulting credit memos to the original invoices
- ✔ Perform end-of-day payment reconciliation for route, vehicle sales, and non-route payments, organized by cashier, cash register and cash office
- ✔ Bulk email credit memos generated through the reconciliation process
- ✔ Manage daily bank deposits more efficiently, transferring both cash and checks collected from one central processing screen
- ✔ Leverage customer information through powerful central views combining customer's diverse documents generated through the different modules within the application
- ✔ Track fixed assets (goods) delivered and returned to/from customers
- ✔ Manage annual customer rebates and customer loans
- ✔ Keep track of sales by Salesperson at line level, which information is used to calculate Salesperson commission

## Management & Visibility

Enhances and extends Acumatica standard application functionality.

- ✔ Extend management of SKUs through enhanced stock item characteristics, additional attributes, additional UOMs and additional characteristics descriptions
- ✔ Configure all aspects of sales route schedules detailed by customer and day of the week
- ✔ Configure the delivery fleet considering temperature-controlled characteristics
- ✔ Configure delivery route schedules and link customers to one or more delivery schedules
- ✔ Make use of 50+ new generic inquiries used for DSD planning & route accounting
- ✔ Make use of 5 new dashboards to better manage DSD planning & route accounting
- ✔ Use ready built import scenarios addressing reference data upload required to configure DSD planning & route accounting
- ✔ Eliminate paper handling with automated document related functionality such as Invoice scanning/archiving and mass email of invoices/credit memos generated through the reconciliation process

## Data Analytics

Enrich standard Acumatica pre-configured analytics

- ✔ Visibility on all sales history, traceable by salesperson, delivery person and settlement cashier
- ✔ Monitor important KPIs in one glance with user defined dashboards
- ✔ Gain insight into route performance by viewing customer orders vs. customer deliveries
- ✔ Gain greater control over damage and credit management by easily identifying customer credits by reason code at the customer, product, and route level
- ✔ Evaluate sales and profitability by multiple business tiers including company-level, sales zones, sales routes, customer category or by the team/individual level including sales managers, sales personnel, routes, and delivery drivers
- ✔ Provide sales information at the product level, segmented by class, category & sub-category, brand & sub-brand, and SKU
- ✔ Receive notifications of business situations that have deviated from the norm and require immediate attention based on a defined management by exception criteria

# Competitive Advantage

Here are just a handful of the competitive advantages you will benefit from:

- ✔ Streamlined process flows and procedures to achieve faster and more accurate deliveries
- ✔ Increased sales and delivery productivity with integrated and automated processes
- ✔ Improved sales and order-to-cash cycle time
- ✔ Enhanced return collection management and reduced collection issues
- ✔ Elimination of reconciliation paperwork
- ✔ Improved payment allocation
- ✔ Decreased driver and customer disputes and related chargebacks through better document management
- ✔ Reduced inventory loss with process visibility, accountability, and control of all cash and inventory transactions
- ✔ Data captured can be transformed in field intelligence to take informed decisions to work smarter and boost customer loyalty.

## Technology

- ✔ Built on Acumatica xRP
- ✔ Fully integrated with Acumatica ERP
- ✔ Acumatica certified and customer validated
- ✔ Integration with leading Sales Force Automation applications



### Specialized Acumatica Extensions

Orbis is a range of fully integrated extensions for Acumatica - which optimize and accelerate various operational processes across a business. All Orbis extensions are developed by Computime Software and made available through the Acumatica global partner network.

## REQUEST A PERSONALIZED DEMO

Let us provide you with a customized product demo on simulated data to ensure you see the solution in action relative to your business requirements.



[www.orbiserp.com](http://www.orbiserp.com)



[info@computimesoftware.com](mailto:info@computimesoftware.com)



+356 2149 0700