

Annapurna

Adding Weekly Postage Charges

Annapurna has a new feature to add a weekly postage charge. It has become evident that some labs offer a collection and delivery service. Due to the customer having the option to cancel or change this delivery it makes it difficult to automate this process. As a result a new feature has been added.

Updating the Customer Record

In order to use this feature the customer needs to be set to the correct postage type. From the 'Commercial' menu select the [Customer] option. Search for the customer you wish to apply this new postage option to using the 'Filter' box. Once the customer is selected click on the 'Accounts' tab and then select 'Postage Weekly' under the 'Postage Type' option.

The screenshot displays the 'Accounts' tab in the Annapurna software. The 'Postage Type' dropdown menu is open, showing the following options: 'Postage per Job', 'No Postage', 'Postage per Day', 'Postage per Box', 'Postage at Entry', 'Postage per Invoice', and 'Postage Weekly'. The 'Postage Weekly' option is currently selected. Other visible fields include 'Invoice Frequency' set to 'Daily', 'Delivery' set to 'D', 'VAT' set to 'Zero', 'Settlement %' at '0.00', 'Days' at '0', 'Credit Remaining' at '0.00', and 'Monthly Credit' at '0.00'. The 'Collection Days' section has checkboxes for Monday, Tuesday, Wednesday, Thursday, and Friday, all of which are checked. At the bottom of the form, there are buttons for 'Add', 'Update', 'Next', 'Previous', 'Delete', and 'Clear Form'. The 'Solenzara' logo is visible in the bottom left corner, and 'Import' and 'Export' buttons are in the bottom right corner.

Once this is selected then click on the [Update] button. No postage charges need to be applied in this area as this element of pricing is set manually. Repeat this processes for any other van/collection or weekly pricing customers.

Adding Weekly Pricing for Van/Collection Customers

Once all these customer have been set to the correct pricing option for weekly charging it is possible to use the new weekly pricing feature. These new charges must be applied prior to invoicing.

To add the weekly charge for Van Collection and Delivery, go to the 'Invoicing Menu'. Select on the [Weekly Postage] option. This feature is designed to be run on a weekly basis so there is an option to set a 'This Week' or 'Last Week' selection, however it is also possible to manually set a date range.

The screenshot shows the 'Weekly Postage' window with the 'This Week' radio button selected. The date range is set from 13/03/2023 to 19/03/2023. The table below is currently empty.

Account	Match	Name	Town	Postal	Goods	Goods Value	Sent Days	Weekly	To Charge
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Once the date range has been set, click on [Look] to display a list of orders processed during this time.

The screenshot shows the 'Weekly Postage' window with the 'Last Week' radio button selected. The date range is set from 06/03/2023 to 12/03/2023. The table displays a list of orders with columns for Account, Match, Name, Town, Postal, Goods, Goods Value, Sent Days, Weekly, and To Charge. A 'Postal Charger' box is visible at the bottom right.

Account	Match	Name	Town	Postal	Goods	Goods Value	Sent Days	Weekly	To Charge
100016	EYE SEE YOU	Eye See You Ltd	Manchester	0	14	206.00	3	0.00	
100017	EYECARE FOR	Eyecare for you	Bolton	0	11	176.20	1	0.00	
100021	IDEAL	Ideal Eyecare		0	18	189.45	3	0.00	
100022	IR OPTICAL	IR Opticals Ltd	Bolton	0	26	254.85	3	0.00	
100023	IRIS DO	IRIS Domiclary	Salford	0	103	858.45	3	0.00	
100024	JINKINSONS	Jinkinsons Opticians	Stockport	0	13	549.76	3	0.00	
100031	OPENSHAW OPT	Openshaw Optical	Manchester	0	5	85.80	1	0.00	
100034	PSM VS	PSM Vision Services	Higher Walton	0	13	150.45	2	0.00	
100040	EYE CL ROCH	The Eye Clinic Rochdale	Rochdale	0	22	168.85	2	0.00	
100042	UNIVI AUD	Univision Eye Centre (UNIVIS2A)	Blackburn	0	3	117.00	2	0.00	
100043	UNI BOL	Univision Eye Centre (UNIVISIB)	Bolton	0	1	16.00	1	0.00	
100044	UNI LIM	Univision Eye Centre (UNIVISIO)	Blackburn	0	2	69.00	2	0.00	
100045	UNI RISH	Univision Eye Centre (UNIVISRI)	Rishton	0	7	199.00	3	0.00	

Postal Charger: 100016 Eye See You Ltd [input field] [+]

This will display a list of orders sent and how many days items were despatched on. The number of delivery and collection days may differ from what is displayed, as Annapurna does not know if a driver went to collect items; only of orders were entered. What is important here is the amount the customer should be charged for this service. Click on a customer and then in the 'Postal Charger' box enter the amount to be charged. Click on the [+] button to apply this to the line. Repeat for other customers in the list. Once all the necessary charges have been entered click apply.

Once the postage charge has been applied for a specific week a wholesale order is automatically for that charge. This will be auto-completed on the last day of the search week. This is to ensure this charge is applied to the correct invoice run and the correct week as there may be multiple postage charges during a month.

Adding Additional Charges for a Week

If an additional charge needs to be added for a given week, this can be done by running the weekly postage report again and adding the additional amount. This needs to be processed prior to the invoices being created.

Cancelling a Postage Charge

If a charge is raised in error the way this needs to be handled is by cancelling the postage order that has been assigned to the account for the period in question. This can be located using the browse order function in Annapurna. It may be necessary to un-complete the order prior to cancelling.

If a charge appears as 'Invoiced' it will need to be credited in order to rectify any error.

Once all the postage charges have been raised the invoices can then be created in Annapurna as per the normal method used.

Any queries please email info@hawkstonedesign.co.uk or call 01608 670053.