Contents

Home Delivery Management of Medicines in Candela RMS

With Candela home delivery management feature you have the option of delivering prescription medication right to your customers' doorstep. The feature manages end-to-end processes involved in handling customer orders, route planning, medication delivery, proof of medicine delivery, and product returns during delivery

Candela home delivery feature increases efficiency and helps you improve customer service while giving you the flexibility to adapt to the changing business needs.

Let's learn how **'Home Delivery'** features works in Candela.

Group Rights (Admin or Head Office User)

All home delivery module screens are right based. The admin or HO user group should have all the rights for the module to work.

Shop Activities>Home Delivery

Go to: **Security>Group Rights**

From Form Categories, select **Shop Activities>Home Delivery**

Expand **Shop Activities>Home Delivery**

Expand **Book Order** and mark the check-boxes

Expand **Regular Customer Report** and mark the check-boxes

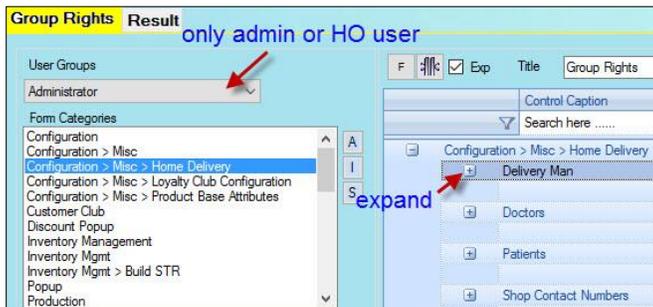Expand **Update Home Delivery Customers** and mark the check-boxes.

Configuration>Misc>Home Delivery

From Form Categories, select Configuration>Misc>Home Delivery

Expand **Delivery Man** and mark the check-boxes

Expand **Doctors** and mark the check-boxes

Expand **Patients** and mark the check-boxes

Configurations (Admin or HO User)

After all group rights for Home Delivery are checked, the admin or HO user has to make some configurations

Go to: **System Configuration>Home Delivery** tab and enter the following information:

Map Shop for Customer Definition: This field is used to select a *non-replicated* shop with which all home delivery customers can be mapped. All customers added during order booking will be added to the customer data base of the selected shop.

> **Note:** There is usually one non-replicated shop: Warehouse. You can select it or you can also define a dummy non-replicated shop for creating home delivery customers database.

Start Intimation Days: This field is used to set advance intimation about regular customers. For example, if a customer requires a certain medicine after every 15 days, you can set your intimation alert at 2 and the system will send an alert after 13 days i.e. two days in advance.

> **Note:** Intimation alert is meant to keep you updated about your regular customers, and it helps you improve your customer service. After receiving alerts you can call them to enquire if they need their regular medicine

This field is used for regular customers those who need to buy certain medicines at regular intervals.

Image Path: It should be a shared path on the server. This path is used to save image of prescriptions for controlled drugs.

CLI File Path: This is the path on the server where CLI exe file (to connect Candela with mobile phone) will be saved.

Show intimation: A list of computers connected to the main server will appear in the drop down. For computers where you want the intimation about regular customers to appear, enter 1. Zero means no alert will appear on the system.

> **Note: Select Computers for Intimation** list shows those systems (usually of the call centre) that are connected to the server.

Home Delivery Process

Booking Orders (Head Office, Call Centre)

> **Note:** Order booking screen is accessible to HO and Admin users. To create a call centre you can create a new group (call centre) and select the group type HO or Admin.
>
> Once the group is created, you can revoke all its rights (on the Group Rights screen) except the right to work on Home Delivery module.

Follow the steps below to book an order:

- When a call comes in, on **Shop Activities>Home Delivery>Book Order** screen the calling number appears in the **Phone No** field.

- If an order from the incoming call number has already been created before, patient's name and the branch name from where it was delivered will be displayed.

  In case of an old customer all previous orders of the customer will also be displayed in the grid.

  If a new order is being made against some previous prescription you can simply click **view and copy** button to select it instead of attaching a new one.

- If it is a new customer, when a call comes **'Add New Customer'** screen will automatically open up.

- Ask the required information and enter on the screen and click **Save**

- **Add New Customer** screen will close and you will be taken to the main screen.

- Click product help to select the product the customer wants.

- Products will load in the grid.

- Enter quantity in **Qty** column.

- In **Patient** field, select patient's name or define a new one by clicking the plus sign (it is not mandatory).

- If it is a controlled drug select name of the doctor in **Doctors** field or define a new by clicking the plus sign.

- For controlled drugs, doctor's prescription is needed, click Browse button to select the prescription.

- If there is any expiry date on the prescription from **Press. Expiry** calendar.

- In **Order Comments** field enter comments about the order if you want to.

- Click **Save.**

Booking Regular Orders

If the order being booked is for a medicine that the customer might need regularly, you can enter the interval after which the medicine will be needed. And the system will send you alert according to the number entered in **Start Intimation Days** on **System Configuration>Home Delivery** tab.

- Mark the checkbox **Regular Order**

- **Interval Days** field will become active. Enter the number of days after which the medicine will be required again.

- The system will automatically calculate the **Due Date**

- If you want to, you can add a few comments about the Regular order

- Click **Order Actual Value** button. This will show the actual price at which the ordered medicine is being sold at the store for which order is made.

  It is important to check the actual value because if there are some discounts, or price difference due to any other reason, you can inform the caller about the exact price they will be charged on delivery.

- Click **Check Stock** button. This will display stock of the ordered products at all shops and will inform you whether the required product exists at the branch for which order is made.

Delivering Orders (shop users)

When an order is booked and saved, the button **Home Delivery** starts blinking on POS of the store for which the order is made.

- Click Home delivery button.

- Home Delivery Orders screen will pop up.

- Select Delivery person.

  > **Note:** Delivery persons are defined by Admin or HO users on **Misc>Home Delivery>Delivery Man**
  >
  > Delivery man will get an SMS (on the number you entered while defining delivery man) will pick order and deliver

- Double click the order to load on the main screen.

- The sales person can also cancel the order by clicking the **Cancel** button. But if you try cancel it, you will be asked to enter reason in the **Reason** field. Enter reason and then click **Cancel** button. The order will be cancelled.

- When the order loads on the main screen, enter cash and click **Save**.

> **Note:** Even though the cash is not received yet, the order is as good as sold. If anything is returned or not received you can create a return later/
>
> **Note**: if the order is for drug items, the system will again ask you to enter Doctor's name in the comment section.

- Hand over the printed receipt to delivery person who can then deliver the order and receive cash.

When Delivery Person Reports back that the Order is Delivered

When delivery person comes back, reports that the complete order has been delivered, and hands over the received cash, you will carry out the following steps:

- Click **Home Delivery** button.

- On **Home Delivery Order**s screen, mark the checkbox **'Dispatched'.**

- All Dispatched orders will load in the grid.

(You can also select the date range to process orders delivered within a certain date range)
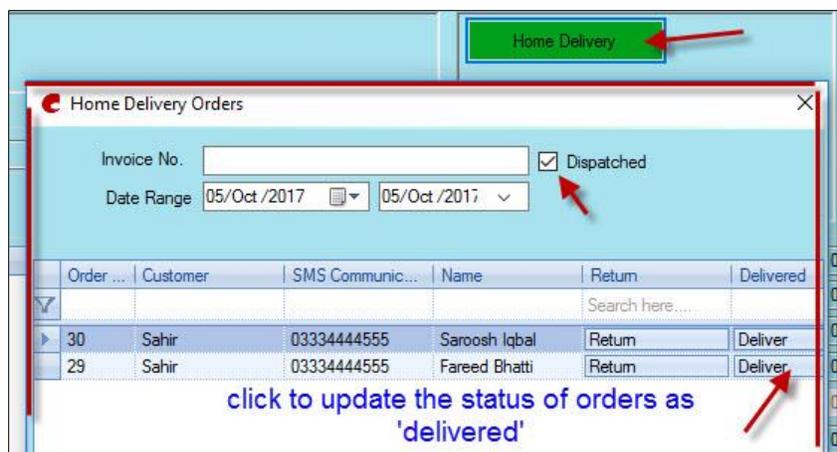
- You will get the message '**Do you want to deliver**?' Click **Yes**.

- The status of orders will be updated to 'delivered' in the system and the grid will clear.

What Happens when an Order is Returned during Delivery

When delivery person comes back, reports that the complete order has been returned (entire order or some of the products) you will carry out the following steps:

- Click return button on the main screen.

- Enter product and quantity that is being returned.

  (If it is a drug item the system will ask you to enter doctor and customer names)

- **Save**

- Click **Search Receipt** button to check **Receipt #** on the sales return just created.

- Click **Home delivery** button

- On the **Home Delivery Orders** screen mark the checkbox **'dispatched'**

- All dispatched orders will load in the grid

- In **Invoice No** field, enter receipt number of sales return

© LumenSoft Technologies (Pvt) Ltd

- Click **Return** button
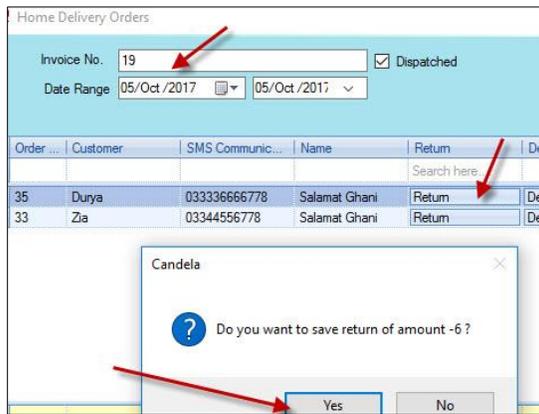
Home Delivery Report

Report C-20 Shop Sales Report (Home Delivery) helps you see details of all orders and their statuses.

- Go to **Reports>C-20 Shop Sales Report (Home Delivery)**

- Select line item and other criteria

- Select Shop

- From Order Status checkboxes mark the required checkbox.

- Click Generate report