



## ***WhiteBoard On-Line Delivery Tracking***

**WhiteBoard On-Line Delivery Tracking** from ITG is a web-based service that displays the status of every order and every delivery currently in process. It is updated constantly by new information from the accounting server and from dispatch. Since it is a web-based service, it can be accessed by any authorized user with an Internet connection.

### **Overview**

The process starts with the accounting application sending invoices to a printer. The accounting server is configured to send one copy to the regular printer and a duplicate copy of the same print job to a logical printer. The logical printer can be either the document imaging server or a local Windows print server if imaging is not being used. The logical printer (either the imaging server or the print server) re-formats the data as needed and sends it on to the **WhiteBoard** web server.

The key technical requirement is that the accounting server must be able to send print jobs to a logical printer. If the accounting server is running Windows 2003 Server, SCO UNIX, or RedHat Linux, this is simple to set up. In some cases, particularly if the accounting server is an IBM AS/400, a third party printing module may be required.

**WhiteBoard** is a web-based service. The **WhiteBoard** web server is located in ITG's secure data center in Irvine, CA. Like any other web-based service, it does not really matter where the web server is located. The important thing is that it is immediately accessible, 24x7, by any authorized user who can connect to the Internet.

To access the **WhiteBoard** service, a user must provide a valid user ID and a password. Once authenticated as an authorized user, they will see the data for their company or for their location, depending upon what they have been given permission to view.

For each delivery, a number of fields will be displayed. Some of these include the Invoice or Order Number, the Customer Number, the Customer Name, the Driver Number, and the Status of the delivery. There are also columns that display the date and time the order passed through the various delivery check points.

The delivery check points are:

- Date and time the order was first printed

- Date and time the driver left to deliver the order
  - Date and time the customer signed for the delivery \*\*
  - Date and time the driver returned from the delivery
- \*\* this field is only captured automatically if some type of handheld electronic signature device is being used.

Number	Status	User	Unit #	Cust #	Customer	Printed	Left	Delivered	Returned
461865	Returned	RF6	105	100623	Les Schwab #335(hazel Dell)	12/07/2006 09:17	12/07/2006 09:36	12/07/2006 10:00	12/07/2006 10:46
461878	Printed	TH6	0	100726	Les Schwab #393 (117th&78th)	12/07/2006 09:36	00/00/0000 00:00	00/00/0000 00:00	00/00/0000 00:00
461876	Returned	RF6	106	100839	Les Schwab (122nd Division)	12/07/2006 09:33	12/07/2006 09:53	12/07/2006 10:25	12/07/2006 10:48
461886	Returned	RF6	119	100305	Les Schwab (29th & Sandy)	12/07/2006 09:53	12/07/2006 10:04	12/07/2006 10:17	12/07/2006 10:24
461879	Returned	RF6	108	100833	Les Schwab (alpha)	12/07/2006 09:38	12/07/2006 09:53	12/07/2006 10:35	12/07/2006 11:05
461492	Enroute	RF6	115	100294	Les Schwab (canyon)	12/07/2006 11:31	12/07/2006 11:46	00/00/0000 00:00	00/00/0000 00:00
461905	Enroute	MB6C	116	100298	Les Schwab (columbia)	12/07/2006 11:08	12/07/2006 11:14	00/00/0000 00:00	00/00/0000 00:00
461842	Returned	TH6	113	100728	Les Schwab (gratten's)	12/07/2006 08:24	12/07/2006 08:32	12/07/2006 09:26	12/07/2006 10:36
461919	Enroute	RF6	120	100290	Les Schwab (gresham)	12/07/2006 11:33	12/07/2006 11:50	00/00/0000 00:00	00/00/0000 00:00
461839	Returned	TH6	123	100303	Les Schwab (ombard)	12/07/2006 08:06	12/07/2006 08:10	12/07/2006 08:47	12/07/2006 09:08
461854	Returned	TH6	117	100303	Les Schwab (ombard)	12/07/2006 08:45	12/07/2006 08:56	12/07/2006 09:22	12/07/2006 09:48
461883	Printed	MB6C	0	100303	Les Schwab (ombard)	12/07/2006 09:48	00/00/0000 00:00	00/00/0000 00:00	00/00/0000 00:00
461893	Printed	MB6C	0	100303	Les Schwab (ombard)	12/07/2006 10:13	00/00/0000 00:00	00/00/0000 00:00	00/00/0000 00:00
461895	Returned	MB6C	113	100303	Les Schwab (ombard)	12/07/2006 10:18	12/07/2006 10:38	12/07/2006 11:02	12/07/2006 12:04
461916	Enroute	TH6	117	100299	Les Schwab (powell)	12/07/2006 11:21	12/07/2006 11:29	00/00/0000 00:00	00/00/0000 00:00
461841	Returned	TH6	108	100050	Les Schwab (sherwood)	12/07/2006 08:20	12/07/2006 08:26	12/07/2006 09:08	12/07/2006 09:40

sample **WhiteBoard** screen display

## Starting the Process

The process starts with the order being entered into the accounting system as usual. When the order is printed, one copy goes to the paper printer and one copy goes to the logical printer. The logical printer sends the appropriate data on to the **WhiteBoard** web server.

As soon as the **WhiteBoard** web server receives the data about the order, a new entry is created on the **WhiteBoard** display. All of the data on the **WhiteBoard** screen is taken directly from the electronic copy of the print job that was sent to the logical printer. There is no manual data entry required. **WhiteBoard** will display the information for the new order in RED. Each RED line is an order that has not yet left the store.

## Completing the Process with Handheld Signature Capture Devices

When the driver is ready to take the order out for delivery, the bar code on the invoice is scanned with a handheld bar code scanner. This data is sent back to the Windows PC that is running the local **WhiteBoard** application. The local PC packages the data and sends it to the **WhiteBoard** web server. The **WhiteBoard** web server updates the information, enters the date and time in the "Left" column, and changes the line to YELLOW. Each YELLOW line represents an order that is currently out for delivery.

When the order is delivered, the customer signs on the electronic signature pad. This signature becomes the legal proof of delivery and, if the document imaging software is installed, the signature can be sent directly to the imaging system and automatically attached to the original electronic copy of the invoice.

As the customer signs on the handheld electronic signature pad, the date and time are recorded as part of the signature information. When the driver returns to the store and re-enters the wireless network, the data from the handheld device

can be sent back to the Windows PC that is running the local **WhiteBoard** application. The local PC sends the data on to the **WhiteBoard** web server. The **WhiteBoard** web server updates the display, adds the date and time in the “Delivered” and “Returned” columns, and changes the line to WHITE. Every WHITE line represents an order that has been delivered.

### **Completing the Process with Fixed Mount Bar Code Scanners**

Because of the cost of the handheld signature capture devices, many companies prefer to use a fixed mount bar code scanner to scan the invoices, much like would be done at POS station. The fixed mount bar code scanners are often in the dispatch area and are connected to the Windows PC that is running the local **WhiteBoard** application.

When the driver is ready to take the order out for delivery, the bar code on the invoice is scanned with a fixed mount bar code scanner. This data is sent to the Windows PC that is running the local **WhiteBoard** application. The local PC packages the data and sends it to the **WhiteBoard** web server. The **WhiteBoard** web server updates the information, enters the date and time in the “Left” column, and changes the line to YELLOW. Each YELLOW line represents an order that is currently out for delivery.

When the order is delivered, the customer signs the paper copy of the delivery document. This signature is the legal proof of delivery and, if the document imaging software is installed, the signed copy can be scanned into the imaging system and automatically attached to the original electronic copy of the invoice.

With paper copies, the only way to record the time the delivery was made is for the driver to write the time on the office copy of the invoice. When the driver returns to the store, the invoice is scanned again with a fixed mount bar code scanner. During the scanning process, there is an option to enter the time of the delivery, if desired. The data is sent to the Windows PC that is running the local **WhiteBoard** application. The local PC sends the data on to the **WhiteBoard** web server. The **WhiteBoard** web server updates the information, enters the date and time in the “Delivered” and “Returned” columns, and changes the line to WHITE. Each WHITE line represents an order that has been delivered.

### **Benefits of WhiteBoard**

There are a many key benefits that come from **WhiteBoard**. Some of these are the ability to:

- measure ordering, picking, dispatching, and delivering time  
That which isn't being measured isn't being managed. **WhiteBoard** provides accurate and timely information to evaluate performance.
- identify bottlenecks in those processes

How long does it take an order to be picked? Is a slow delivery due to problems with picking, or did the order sit in dispatch all day? With the information from **WhiteBoard**, management will be able to identify where the bottlenecks are in the delivery process

- respond instantly to a customer's inquiry about the status of a delivery  
When a customer calls asking about a delivery, the information will be instantly available on the **WhiteBoard** display.
- measure driver performance  
How long does it take the average driver to make a given number of deliveries? Why do some drivers take longer than others to make a delivery to the same customer? Who are the "A" drivers, the "B" drivers, and the "C" drivers? How can you make the "B" drivers into "A" drivers and the "C" drivers into "B" drivers? **WhiteBoard** provides information about delivery times on a driver-by-driver basis.
- provide documentation showing the average delivery time per customer  
When a customer says deliveries are always late, do you have any data to prove the timeliness of your deliveries? **WhiteBoard** provides information about average delivery times on a customer-by-customer basis.
- **NEW!** allow customers to see their own deliveries on the **WhiteBoard**.  
This new **WhiteBoard** module allows your key customers to log on to the **WhiteBoard** web page. They are able to see only information for those deliveries associated with their own Customer Number. The goals of this new module are to reduce the number of telephone calls coming in asking about the status of deliveries, to provide a better, faster, and easier way for your customers to get information, and to help you differentiate your business from your competitors.
- **NEW!** search by Part Number, SKU, or Part Description  
This new **WhiteBoard** feature allows you to search for deliveries within **WhiteBoard** by using the part number, SKU, or the part description rather than the Invoice Number or Order Number.