



Delivery Settings

*A guide to setting up Delivery Methods and using them on Sales Orders,
Picking Slips and Job Cards*

Introduction

Delivery Settings is where you build the list of Delivery Methods your business uses — for example "Courier", "Own Vehicle" or "Customer Collects". Once set up, this list appears as a dropdown called "Delivery By" on Picking Slips and Job Cards, so whoever is preparing an order can record how it's going to reach the customer. That choice is then saved against the order and can be used to filter your Outstanding Sales Orders list, so you can quickly see, for example, everything going out by courier this week.

Before You Begin — Prerequisites

- You'll need access to Settings from the main menu.
- Decide on the list of delivery methods your business actually uses before you start — for example Courier, Own Vehicle, Customer Collect, Post.



Key Terms — Glossary

Term	What It Means
Delivery Method	A named way of getting goods to the customer (e.g. Courier, Own Vehicle). Set up once per company on this screen.
Delivery By	The dropdown on a Picking Slip or Job Card where you pick one of your Delivery Methods for that specific order.
Active	Whether a Delivery Method currently appears in the "Delivery By" dropdown. Untick it to retire a method without deleting it.

Where This Happens

Task	Data Fusion	Sage
Set up and manage Delivery Methods	✓	
Choose "Delivery By" on a Picking Slip	✓	
Choose "Delivery By" on a Job Card	✓	
Filter Outstanding Sales Orders by delivery method	✓	

The Full Workflow

1. Go to Settings, then Delivery Methods.
2. Click Add New Delivery Method.
3. Type the name of the method (e.g. "Courier") and click Save. It's automatically switched on (Active) and immediately available for use.
4. On a Picking Slip or Job Card, use the "Delivery By" dropdown to select the method for that specific order, then save the document as normal.
5. On the Outstanding Sales Orders list, use the delivery filter to show only orders using a particular method.

Understanding Active vs. Inactive

- **Untick Active to retire a method.** It disappears from the "Delivery By" dropdown for new selections, but any order that already used it keeps showing that value.
- **There is no delete option.** Methods are switched off (inactive), not removed, so your history of past orders is never affected.
- **There is no rename option.** Once a Delivery Method has been saved, its name is fixed. If you need a different name, add a new method and make the old one inactive.



Common Mistakes to Avoid

- **Confusing Delivery By with the Delivery Message.** Picking Slips and Job Cards also have a separate free-text "Delivery Message" field for notes to the driver or customer — that's independent of the Delivery Method dropdown set up here.
- **Creating near-duplicate methods.** Because names can't be edited afterwards, typos or duplicates ("Courier" and "Courrier") stay in the list forever unless you mark one inactive — get the name right before saving.
- **Expecting deleted history when a method is deactivated.** Making a method inactive only hides it from future selection; it does not change or clear it from orders already saved with that method.