



INTERNATIONAL
DECISION SYSTEMS

FleetWare Order Processing



This module is the starting point for a vehicle's journey through the Fleet Management system. Covering all the trading activities following receipt of an order through to delivery of the vehicle, when it interfaces with the rest of the Fleet Management system. The full notation and reporting functionality allows you to check on the order status. A variety of Contract, Order and Delivery documents are produced on demand.



From the point at which a quote is accepted by your customer, FleetWare Order Processing takes on the management of all of the processes, including the associated documentation and invoicing, until the vehicle is delivered and made 'live'.

Order Processing performs the following functions:

Seamlessly transferring vehicle, contract and financial information from the Quotation System once an order is confirmed.

Storing, updating and displaying information about vehicles and their associated contract(s) from the receipt of a customer's order through to the contract start date. The information collated for the original quotation will automatically complete a number of the fields within Order Processing, leaving you to add remaining details as they become available.

Creating an initial rental or instalment invoice and transferring financial information to the Accounts module.

Transferring vehicle, contract and financial information to the Contract Management module; the next step in the vehicle's journey through the system.

Monitoring vehicle acquisition events

The Monitor feature lets you track changes to vehicle records. For instance, if a delivery date changes on a particular vehicle a system generated record will be created noting that change, and this will show on the standard report when that vehicle record is selected.

Many events are monitored and reported for each vehicle, for example:

- Supplier Date Ordered changed
- Supplier Order Acknowledgement Date changed
- Order Acknowledgement created
- Dealer Stock selected
- Required Delivery Date changed
- Dealer Invoice produced
- Status changed in OP

Update Vehicles

At any stage before the order is transferred to Contract Management any of the original quotation details can be changed by using Update Vehicle.

The system will then update the original record with all the information from the new quotation and only those details modified, so anything previously entered will be retained and therefore re-keying is not required.



Processing Vehicle Records

Moves records through the system as their status changes. Vehicle records are assigned statuses which relate to the current state they are at whilst being processed through the Order Processing system.

Status Code	Description
Any live status	This displays any vehicles which have not been transferred to Contract Management
Any status	Displays all vehicles
New	Follows the creation of the quotation and its acceptance by the customer
Locate	The vehicle order normally remains at this status whilst colours and trims are chosen, the vehicle is located and the potential suppliers selected
Ordered	The vehicle has been ordered, but has not yet arrived at the supplying dealer
Pre-Delivery	The vehicle is now at the dealer and is in the process of being prepared for delivery to the customer
Delivered	Indicates that the vehicle has been delivered to the customer and is ready to be viewed by the Contract Management programme
Transferred	This status applies to vehicles that have been transferred to Contract Management
Cancelled	Relates to any vehicle order that has been cancelled
Stock	Vehicles that have been delivered to the leasing company, but have not yet been assigned

Vehicle Details

Displays the vehicle order from Quotes Browser through to Contract Management. During this process it is possible to post the Initial Invoice, Dealer Invoice, Supplementary Invoice and a Deposit Invoice, if required

The various tabs on the Vehicle Details are:
Order, Vehicle, Details, Supplier, Insurance, Vehicle Cost, Del/Col, Contract, Funding, Fleet Management, Finance, Payment, Key Dates.

Each Tab contains the information relevant to that area of the vehicle or contract, maintaining the links to the original quote at all stages for reference and comparison. Any changes of a financial nature are automatically balanced back to the rental quoted.



Features available for Order Processing are:

	Description
Outright Purchase	Enables FleetWare back office to manage vehicle acquisition and supply arrangements only. Usually in conjunction with a Fleet Management arrangement.
Stock Vehicles	Vehicles may be bought in for stock and "called off" for supply against Customer Orders as they are received.
Service Billing Spread Windows Quotes (Browser) Rental matrix	This feature allows for different service billing options. Link to Quotes Browser. This creates a schedule of rentals for multiple mileage and periods within the contract term.
Monitoring Fuel Card	Details above. Interface to Fuel Card providers; records and issues requests for new cards etc.
Ebbon Dacs	Interface to external procurement arrangements.
Enhanced Order Details	Allows for reasons for amendments to orders to be recorded.

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IDS Europe is a member of the IDS Group, world market leaders in the provision of software and services to the leasing and asset based finance sectors. We supply software systems, data management and Consultancy services to contract hire and leasing companies, fleet operators and manufacturers. Our FleetWare software and data provide a unique single-supplier solution for vehicle and contract management, with an interactive modular suite of programs that deliver the flexibility to meet your operational and accounting needs.