



System Review Delstree Control Debuts



Delstree Control

Delstree

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Derek Hateley learned the ropes of the direct commerce systems world with one of the larger systems providers. A couple of years ago he set out on his own to develop a solution that would serve the under £20,000 order management systems market (with typically a half dozen users). Delstree Control is the result, currently with two users and another in the pipeline.

Written in MySQL for Windows XP, the system can be hosted externally, and incorporates SOAP technology for web services connectivity (which one of the users has already implemented).

The system includes an email parsing utility to identify orders embedded in email text, extract the order data and process it (with duplicate order error trapping). For the kind of low volume order environment Delstree is intended for, this actually works quite well.

The screenshot shows the Delstree Control Order Monitor window. It displays an order record with various details. On the left, there's a sidebar with 'Ordering Customer' and 'Delivery Customer' sections. The main area shows 'Other Details' (Status: Open, Date: 21/06/2007, User: dsh), 'Payment & Delivery' (Delivery Method: Next Day, Price: 0.00), and 'Order Line Details'. The 'Order Line Details' grid lists items like 'HP Laser Cartridge Black Q7551A', 'User-Easy Fax Machine', 'Centronics A4 Mono Printer', and 'Sony Miming Sheet Metal 1024 MB/1GHz'. At the bottom, there are buttons for 'Delete', 'Edit', 'Print', and 'Search'.

B2B/B2I

Unusually for a new system, thanks to the requirements of its initial users, Delstree is designed to handle trade sales (B2B) and government/institutional sales (B2I) that require a company or organisation name, with multiple divisions and, more importantly, multiple names and contact data (phone numbers, addresses) and job titles for each individual.

Accordingly, there is also an "ordered-by", "bill-to", "despatch-to" and "deliver to" names and addresses per order ("deliver to" is for cases where "despatch to" is a merchant or service which delivers the product to the end user, and may provide maintenance or service for it after the sale). Order records have a field for customer purchase order.

Each contact has a "preferred method" of communication (fax, email, post) to receive order confirmations, promotional material, etc. Communication documents have both an email and a print template (with PDF option).

The system handles bids and quotations, with reminders to chase the outcome. You can convert a quote to an order by simply changing the status code.

Tricky bits

Thanks again to the requirements of the first adopters, Delstree provides support for managing equipment rentals and repairs (for a customer requested number of weeks), with a scheduled return-date reminder option (or option to raise a renewal order).

Item serial numbers can be tracked upon despatch.

Sizes and colours or any other item options can be managed at up to four levels using a matrix interface, with each combination having a variant price, if required. The quantity of each is also displayed.

One quibble here: the system shows if an item or variant is in stock, with no free stock and a purchase order raised, or no free stock and no outstanding purchase order. It would be useful to see if the item is in-stock and available but below its reorder point, as well (which would require a field for reorder point, which the system does not yet have).

Stock quantities can be specified as eaches or "bulk", which represents the purchasing quantity.

There is a field for "expiry date" on perishables, however, and a "non-count" option for intangible stock such as insurance policies or maintenance agreements. Items can also be set up as "not for sale".

Kits can be specified with a Bill of Materials, which can include both mandatory and optional items.

Delstree offers support for direct despatch of goods on an order, producing either a despatch note or a work order to the supplier.

The system also has a workflow management utility to display a reminder to oneself or someone else to follow-up on a particular action at a designated interval. The reminders are displayed when the user logs on to the system.

Pricing, discounts

Pricing accommodates a standard price for an item with multiple pricing columns, as well as a "combination" price that is used when an item is sold along with other specified items. Discount Groups can also be set up.

The system can be set up to show price margins for trade sales, to guide ad hoc discounting during order entry. It also includes quantity price breaks.

There is support for customer-level discounts.

Pricing can be worked out and maintained on Excel spreadsheets, then readily imported into the system.

The screenshot shows the Delstree Control Customer Details window. It displays a customer record with various details. On the left, there's a sidebar with 'Customer ID' (C001), 'Copy To' (Acme Ltd), and 'Address' (22 Long Lane, Birmingham). The main area shows 'Customer Details' (Name: Acme Ltd, Address: 22 Long Lane, Birmingham, Postcode: CV1 4EH, Country: United Kingdom, Company Type: Private), 'Contact Details' (First Name: Mr, Last Name: Acme Ltd, Title: Director, Gender: Male, Salutation: Sir, Job Title: Buying Manager, Tax Type: personal-business.co.uk, Telephone: 02476 123456), and 'Billing Details' (Bill To: Acme Ltd, Address: 22 Long Lane, Birmingham, Postcode: CV1 4EH, Country: United Kingdom, Company Type: Private). At the bottom, there are buttons for 'Save', 'Print', and 'Close'.

Customers

Delstree maintains a database of customers, prospects, and "suspects" (suspects have not been contacted before, while prospects have been sent literature or contacted by email or phone). The customer file offers support for tax-exempt customers. You can specify company type, contact name gender, salutation name, contact suppressions, and default method of payment.

There is a country field, but it does not disable postcode formatting (which is supported by Hopeweiser for address look-up) for non-UK addresses.

You also get twenty user-definable demographic fields.

Oops!

You can send a customer an invoice or enter payment by cheque, but there is no support for automatic credit card processing at the moment (neither first adopter needs it) – you knew there had to be a catch! But Derek has no problem implementing it for the first user who needs it. For the moment, credit card payments must be done manually.

The system also does not do “allocations” of line-item entries on an order (i.e., it assumes “unlimited” stock).

All goods are maintained in a single warehouse, and there are no warehouse locations, as such. Receiving can be done in bulk or item-by-item, as well. You can also create a pro forma PO to receive something that you already bought and had delivered to the warehouse.

Source codes and promotional codes are at the order level, not the line-item level, but the system does capture and retain each customer’s original source code.

Sage Company Info Information Control					
Outstanding Invoices report generated on 27/04/2007					
Open Inv	Quote Date	Category	Contact	Telephone	Line Net
01	27/04/2007	Axure Mobility	John Riddler	0203 121 3369	£30.00
02	24/01/2007	B.B Mobility	John Riddler	0203 021 3366	£25.00
03	24/01/2007	C.A Mobility	John Riddler	0203 021 3368	£25.00
04	24/01/2007	Axure Mobility	John Riddler	0203 121 3368	£25.00
05	26/02/2007	B.B Mobility	John Riddler	0203 021 3366	£25.00
06	22/03/2007	Community Equipment F	Bob Mandier	0207 802 0146	£25.00
07	22/03/2007	Delstree	Bob Mandier	0207 802 0146	£25.00
08	22/03/2007	Delstree	Bob Mandier	0207 802 0146	£25.00
09	22/03/2007	Delstree	Bob Mandier	0207 802 0146	£25.00
10	22/03/2007	Delstree	Bob Mandier	0207 802 0146	£25.00
11	22/03/2007	Delstree	Bob Mandier	0207 802 0146	£25.00
12	22/03/2007	Delstree	Bob Mandier	0207 802 0146	£25.00
13	22/03/2007	Delstree	Bob Mandier	0207 802 0146	£25.00
14	22/03/2007	Delstree	Bob Mandier	0207 802 0146	£25.00
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