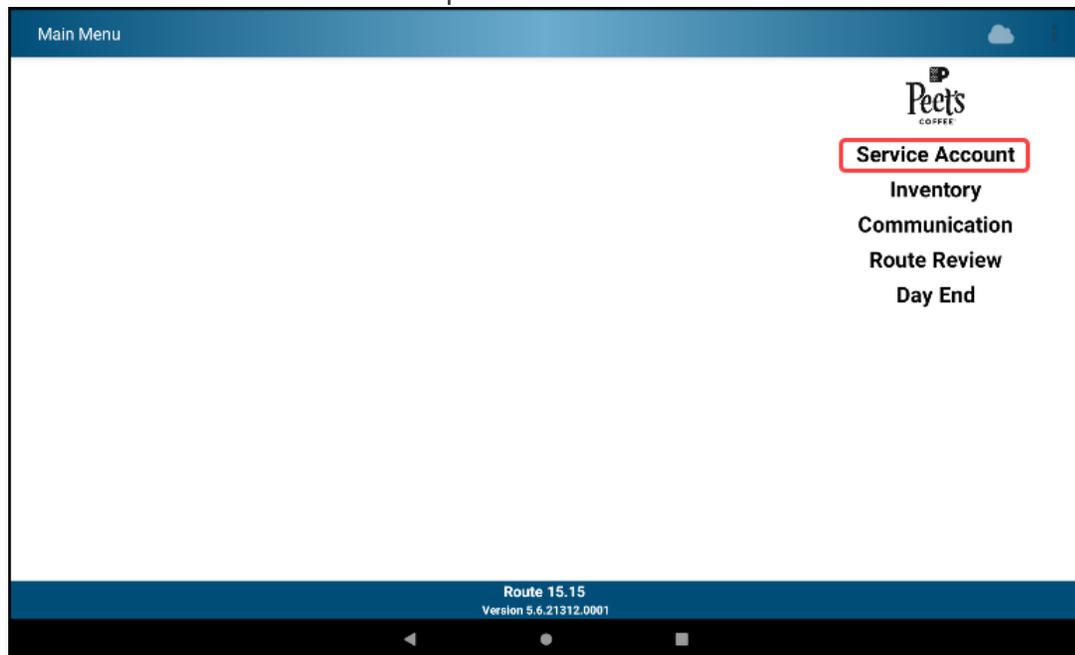


Overview- This SOP will provide Peet's business stakeholders a detailed view of what actions the RSR/ID's will need to take when capturing a photo(s) of their Proof of Delivery within the OmniTech Sales (OTS) application.

- A photo needs to be taken of any proof of delivery that is provided by a receiver of an account(DEX Copy, Store Stamp, or Signature for Delivery).
- Dex customers will need a copy of the DEX Document that was printed at the time of delivery to provide support for invoices disputed for payment.
- Non-DEX customers will need to capture an electronic signature from the receiver.
- For all Target stores a photo of the printed invoice with the store stamp on it (If the store stamps the back of your copy, you will need to take two images-front and back) which includes the PO# that is also entered on the invoice and the signature of the receiver
- All paperwork will be required to be retained for **13 Rolling Periods**.

To capture a photo of a required Proof of Delivery follow these steps:

1. Tap **Service Account**



2. A list of All Accounts (stores) is displayed.

- The list can be displayed in alphabetic order or by account number.
- Change views by tapping on the Menu Dots, selecting Account List Sort Order, and choosing the desired viewing method.



3. Choose an account by tapping the **Arrow** icon next to the customer.

Account Selection

Code, Name or Address | Number: MOLLIE STONE'S MKT #02
Name: MOLLIE STONE'S MKT #02
Address: 2435 California St.
City/State: San Francisco, CA, 94115

All Accounts

- BAYSIDE MARKET (120 Brannan St.)
- DO NOT USE DEFAULT (1400 PARK AVENUE)
- DSD Employee Take Home (1400 Park Ave.)
- MOLLIE STONE'S MKT #02** (2435 California St.)
- R J'S MARKET (1425 Sansome St.)
- RINCON MARKET (98 Howard St.)
- SAFEWAY #0995 (1335 Webster St.)
- SAFEWAY #1206 (350 Bay St.)
- SAFEWAY #1711 (15 Marina Blvd)
- SAFEWAY #2606 (298 King Street)

Transactions	Alerts	Notes	Surveys
Number Created	Status Delivery		Total Count
Invoices			
22001522303	Posted		\$17.12 0 / 2

4. Tap **Invoice** from the menu.

Service Menu

Peet's coffee

Invoice

Sales History
Payment
Map
Finish Stop

Number: BAYSIDE MARKET
Name: BAYSIDE MARKET
Address: 120 Brannan St.
City/State: San Francisco, CA, 94107

Transactions	Alerts	Notes	Surveys
Number Created	Status Delivery		Total Count



- Select product by **scanning** or **tapping** on the product name. Choose the desired quantity by case/each: tap **OK** or the **green checkmark**.

New Invoice FINALIZE INVOICE

506955 X ↺ ✓ 2

K10-BRAZIL MINAS Address **MOLLIE STONE'S MKT #02** Ref. Number
City/State **2435 California St.** San Francisco, CA, 94115

Sellable **7 / 5**

Case / Each **None**

		Sales		Returns	
	Item	Promo	Total	Quantity	
Promo	K10-CARAMEL BRULEE 514841	None	0	0	
Total	Case / Each		0	1	
Quantity	K10-BRAZIL MINAS 506955	None	0	0	
	Case / Each		0	1	

7 8 9 ABC
4 5 6 Bk
1 2 3 C
0 +/- . OK \$17.12

- Repeat for each additional product.

New Invoice FINALIZE INVOICE

Code or Description A-Z ≡ Number **MOLLIE STONE'S MKT #02** Ref. Number
Address **2435 California St.**
City/State **San Francisco, CA, 94115**

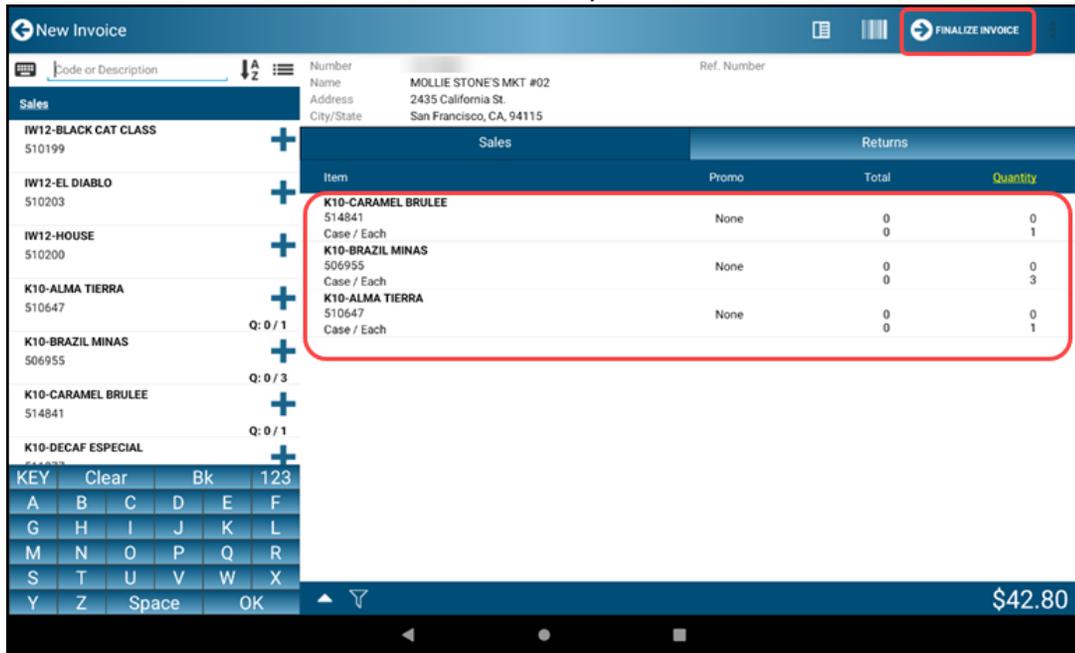
Sales

		Sales		Returns	
	Item	Promo	Total	Quantity	
+	IW12-BLACK CAT CLASS 510199				
+	IW12-EL DIABLO 510203				
+	IW12-HOUSE 510200				
+	K10-ALMA TIERRA 510647				
+	K10-BRAZIL MINAS 506955				
+	K10-CARAMEL BRULEE 514841	None	0	0	1
+	K10-DECAF ESPECIAL 506955	None	0	0	1

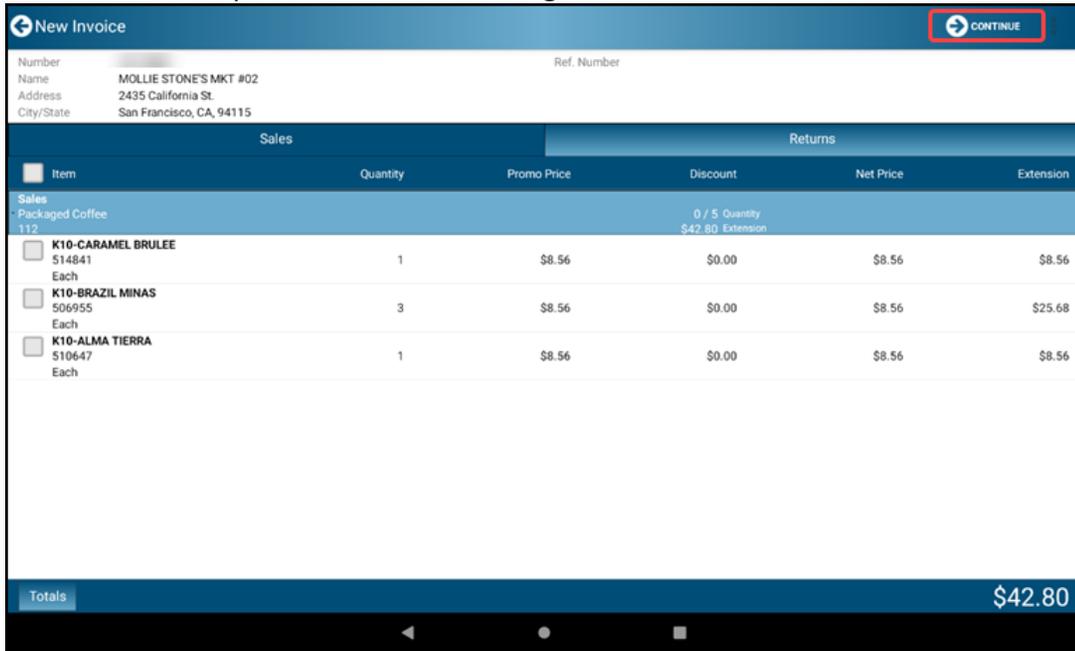
KEY Clear Bk 123
A B C D E F
G H I J K L
M N O P Q R
S T U V W X
Y Z Space OK \$17.12



7. When finished, tap the **Finalize Invoice-Arrow** at the top of the screen to view the summary.

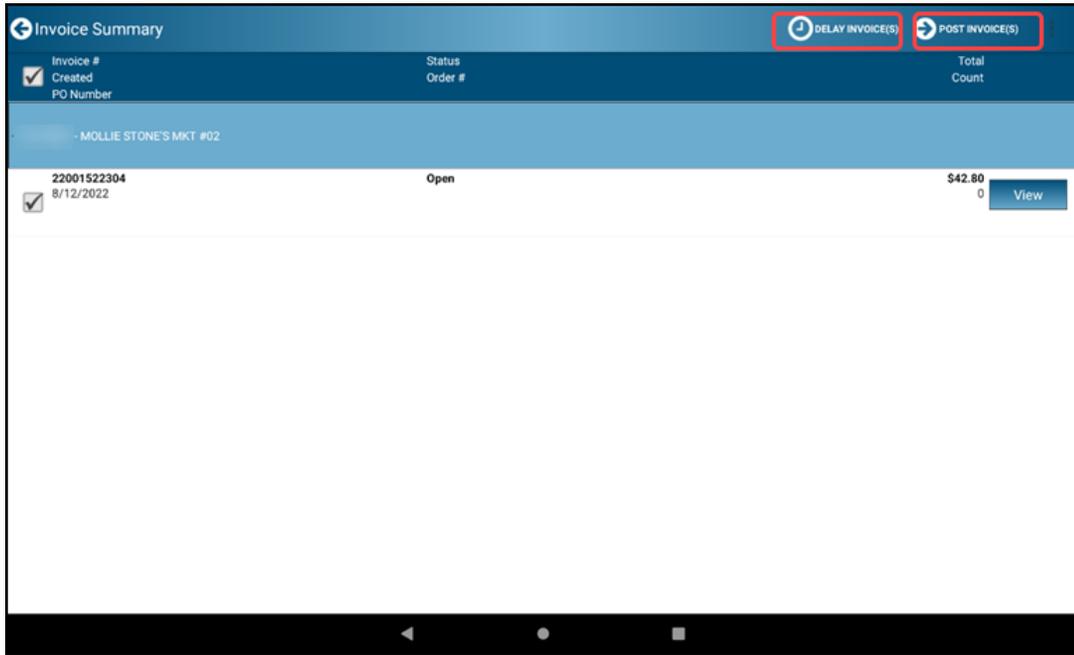


8. Tap the **Continue-Arrow** again to finalize the invoice.



9. When complete you can **Delay Invoice(s)** or **Post Invoice(s)**

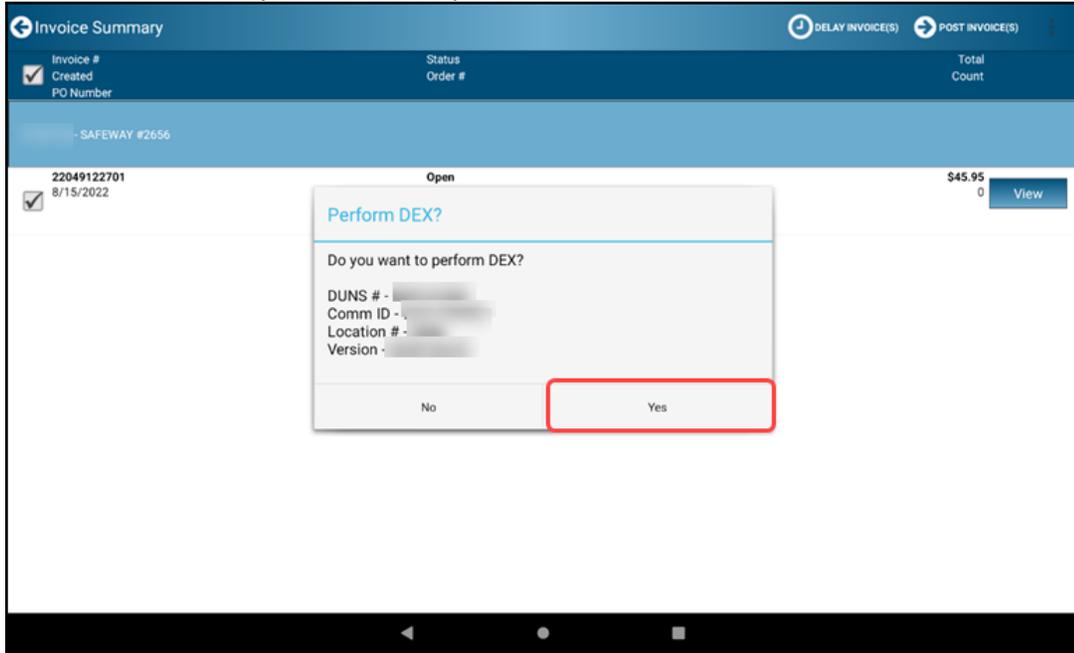
Note: If you are at a DEX location it will go to DEX screen, otherwise it will go to the next screen.



10. DEX Accounts:

If you are ready to proceed, tap the **YES** button to start DEXing.

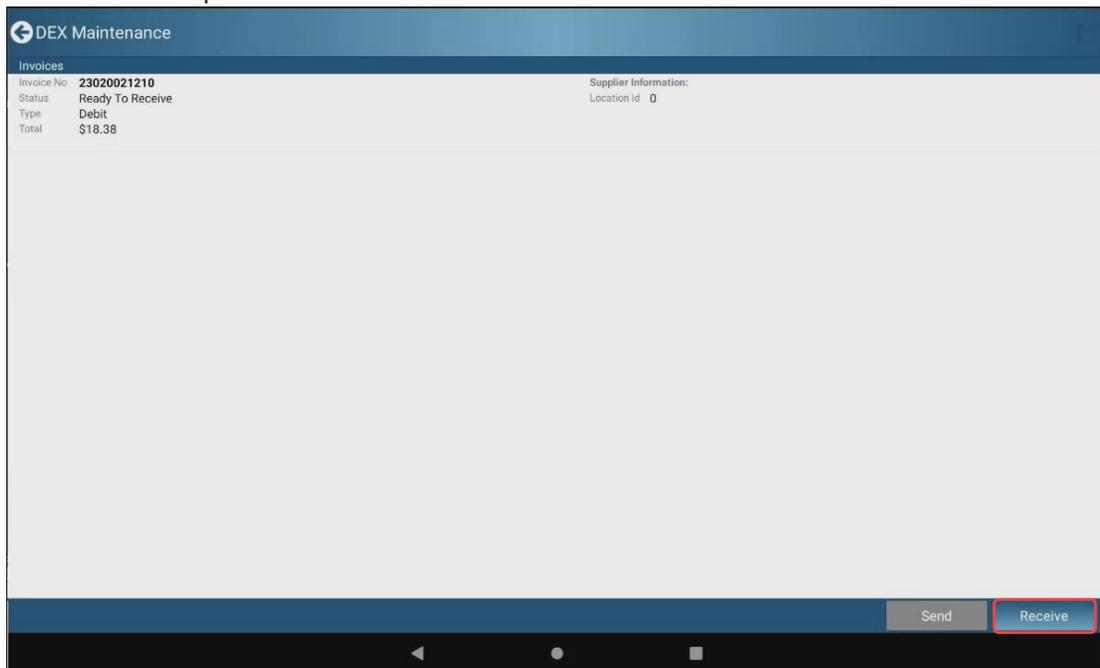
WARNING: If not ready, or unable, tap **NO** and it will finalize the invoice without DEXing.



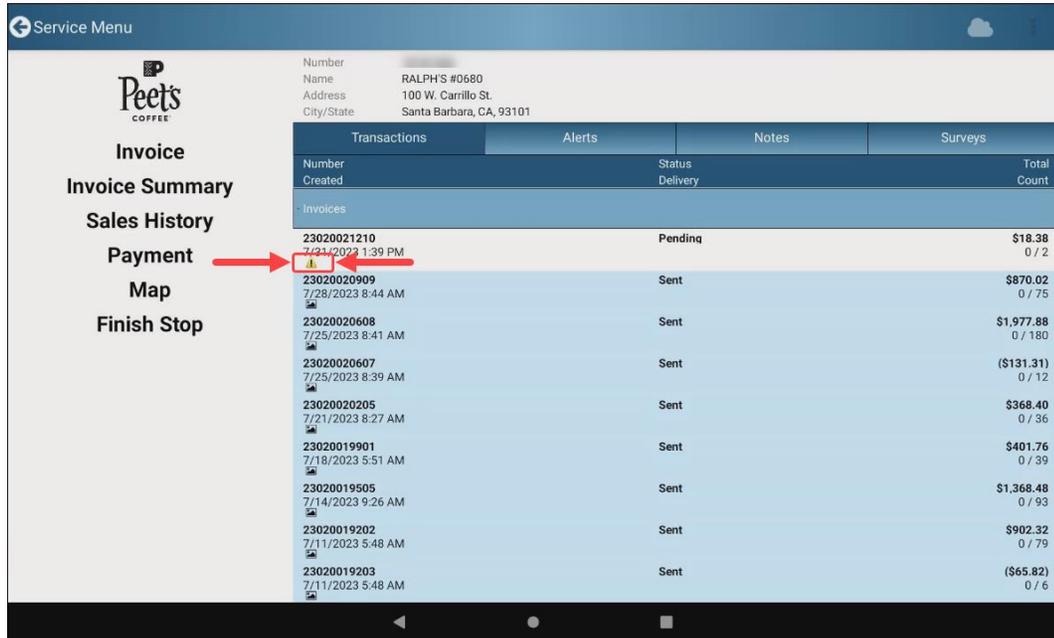
11. Tap the **SEND** button to transmit the DEX to the store.



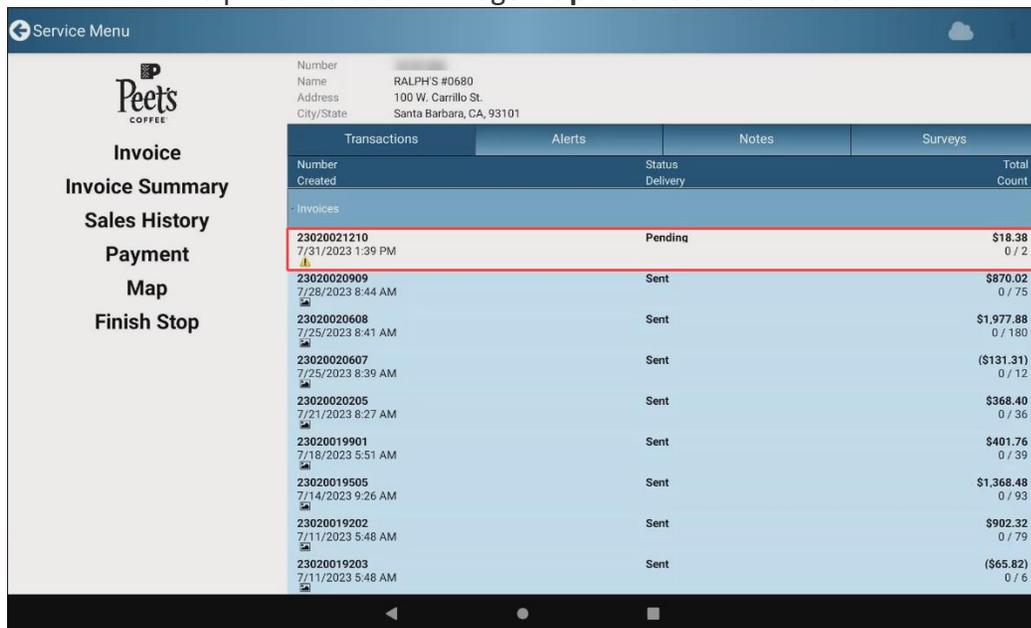
12. Tap the **RECEIVE** button to receive DEX data from the store.



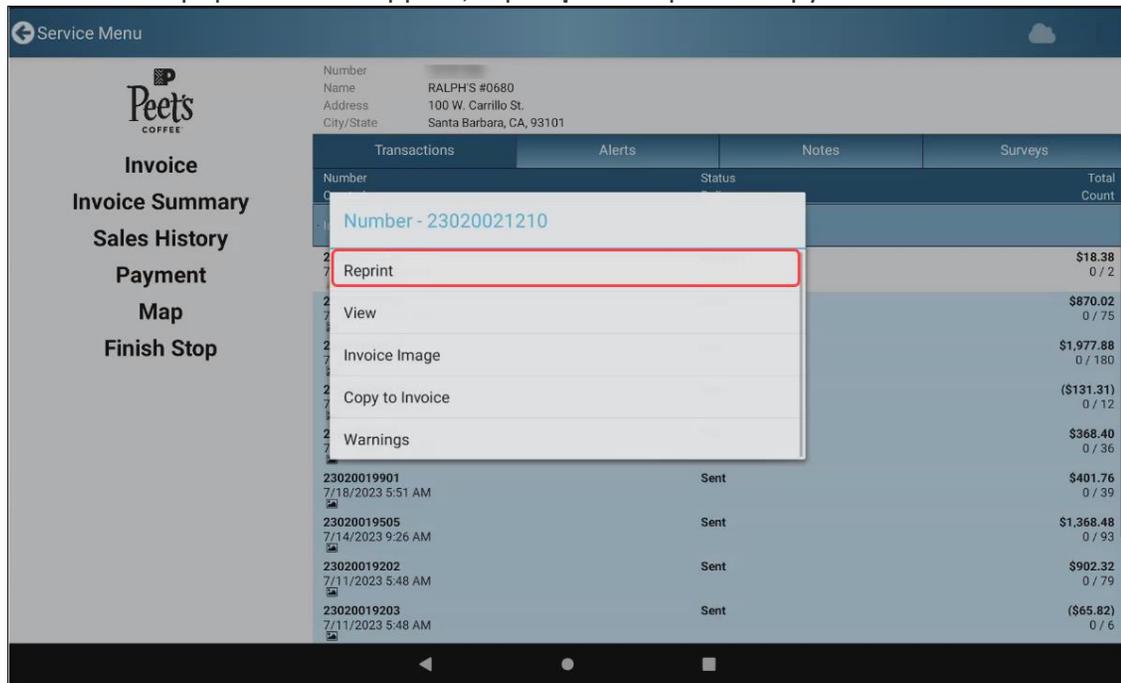
13. Once the DEX has been completed, OTS will bring the user back to the Customer Account Screen. There will be an indicator below the Invoice information that an Image was not attached to Invoice.



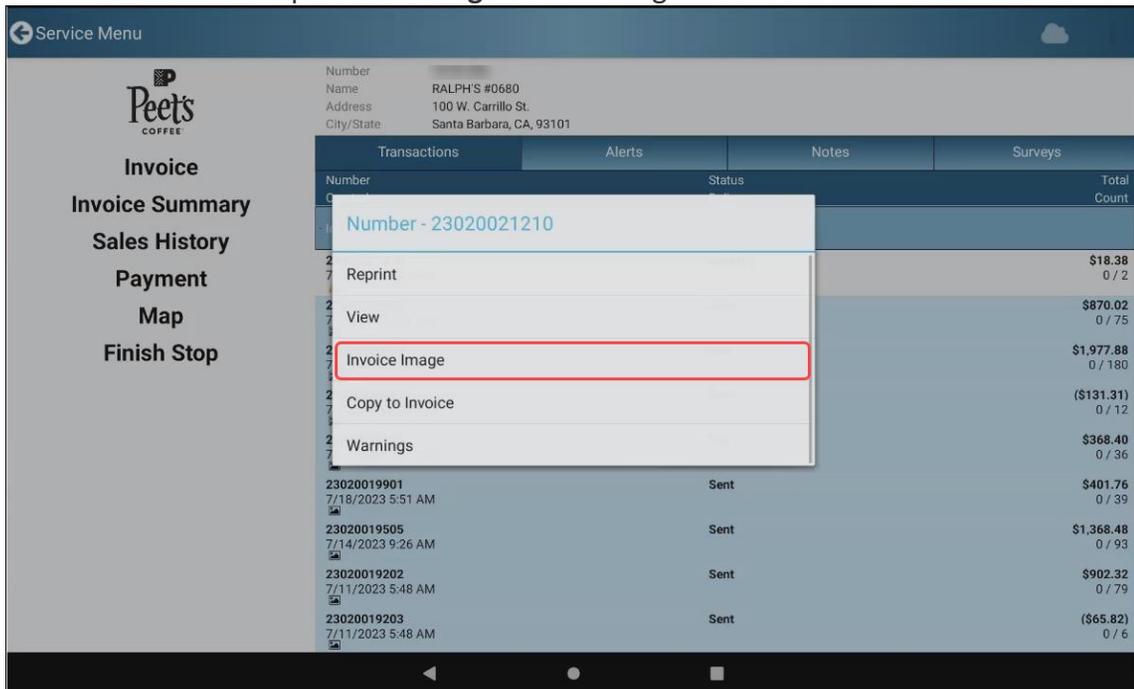
14. To print and add an image. Tap and hold the invoice.



15. A Popup menu will appear, tap **Reprint** to print a copy of the invoice.



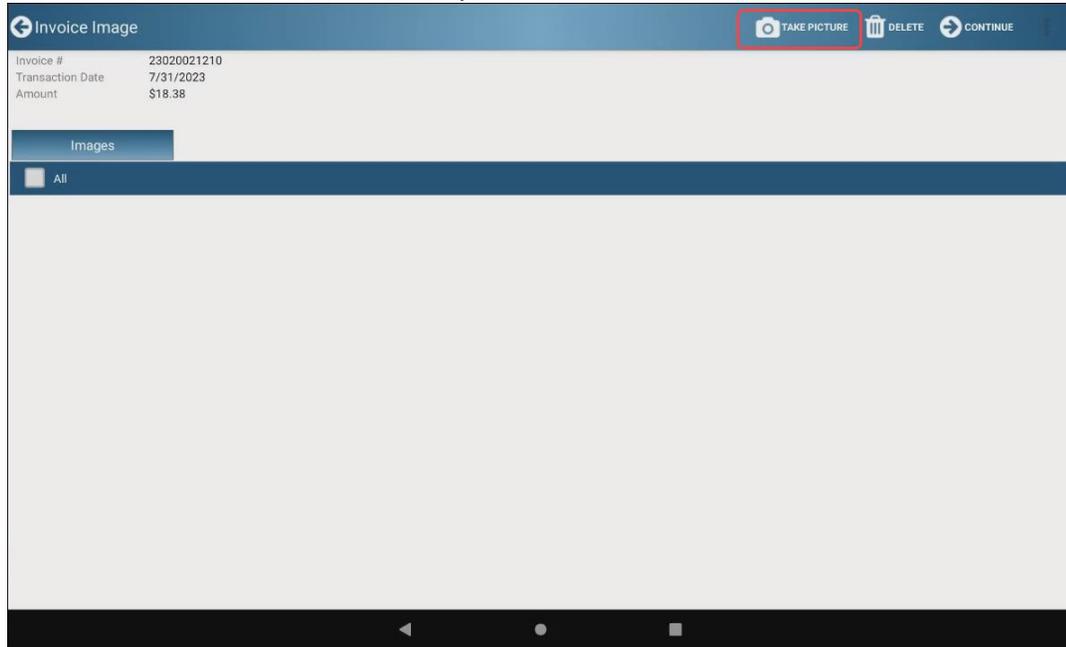
16. Tap **Invoice Image** to take images of the invoice.



17. When the invoice is completed and finalized you will not be able to move forward until you capture an image of the store's invoice copy.

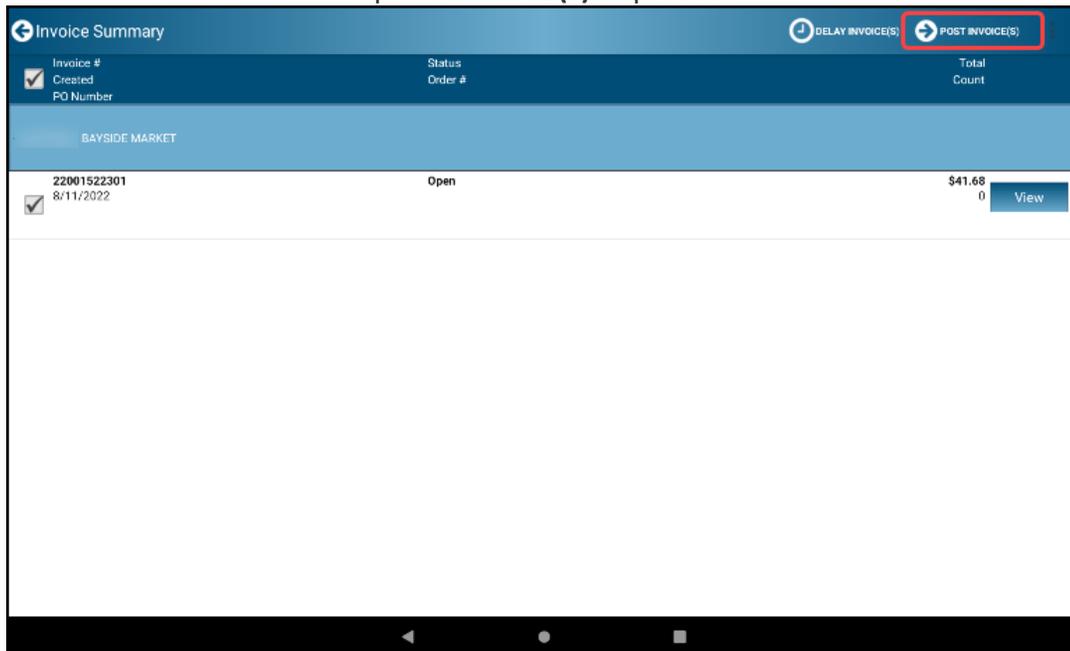
***Please note If you have multiple pages of Proof of Delivery documents, an image of each page will need to be taken.**

Tap Take Picture.

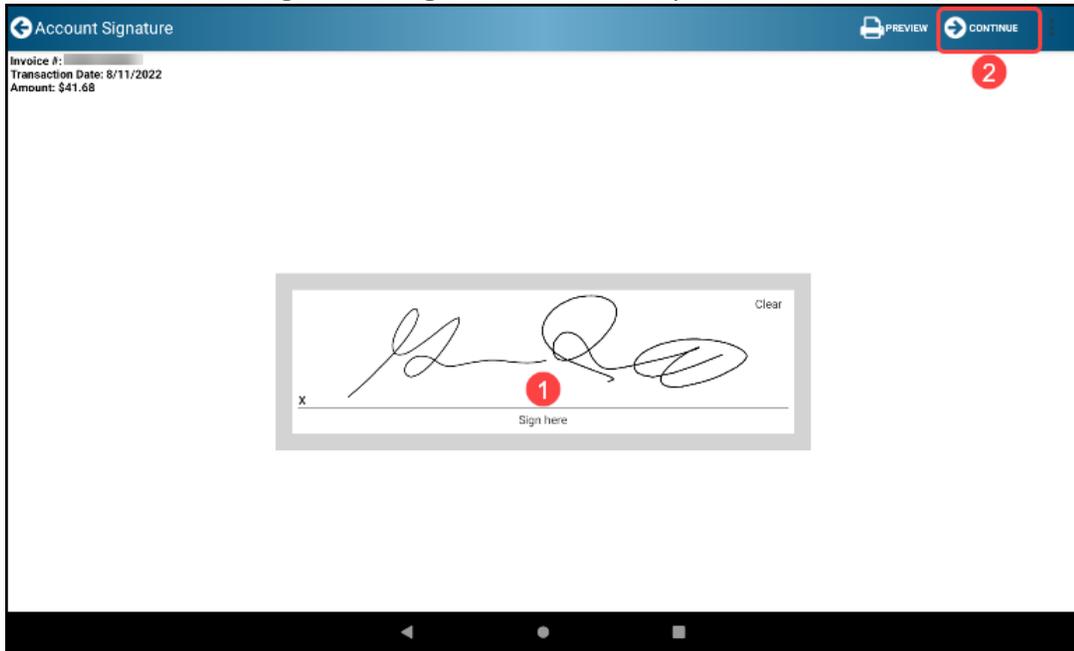


18. NON-DEX ACCOUNT

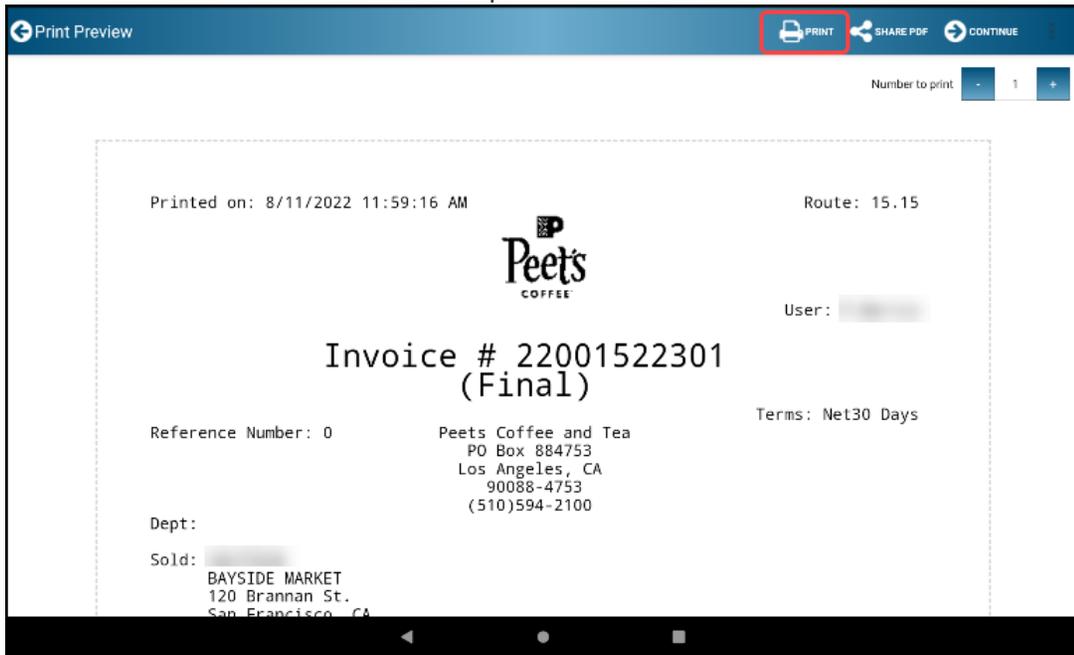
Tap Post Invoice(s) to proceed.



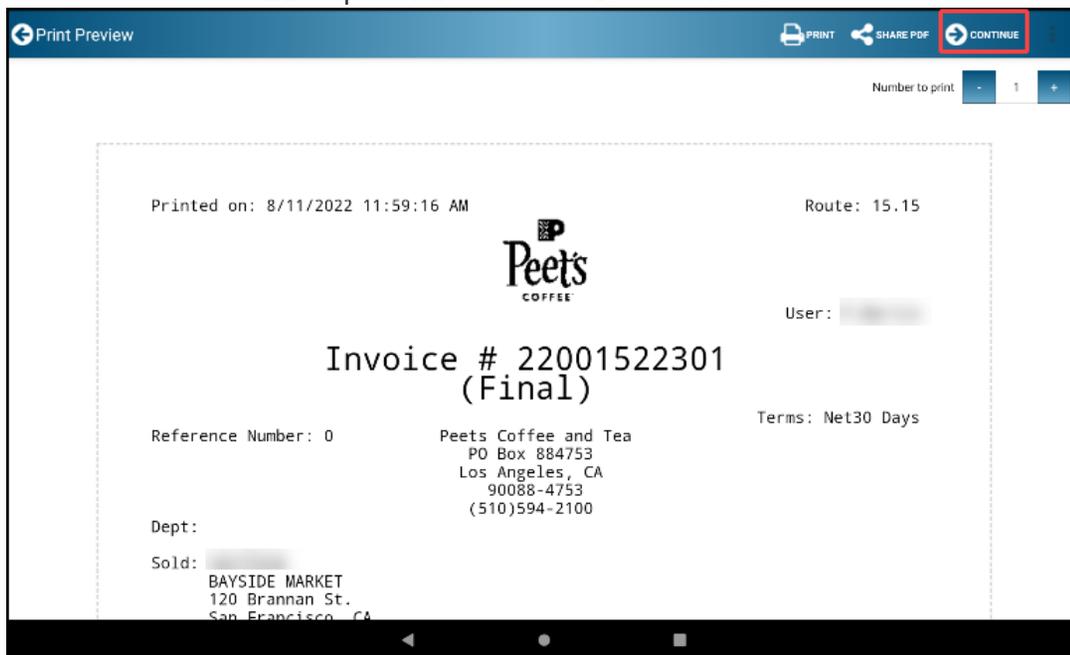
19. Sign in the **Signature Box** and tap **Continue**.



20. **Print** out copies of the invoice.



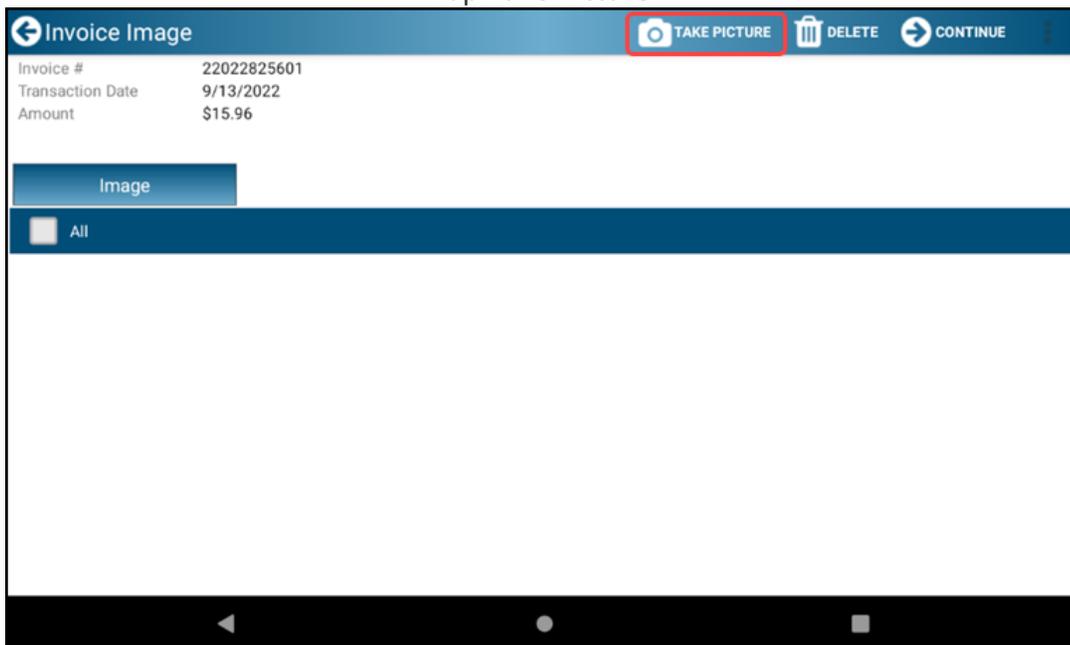
21. Tap **Continue** to finalize the invoice.



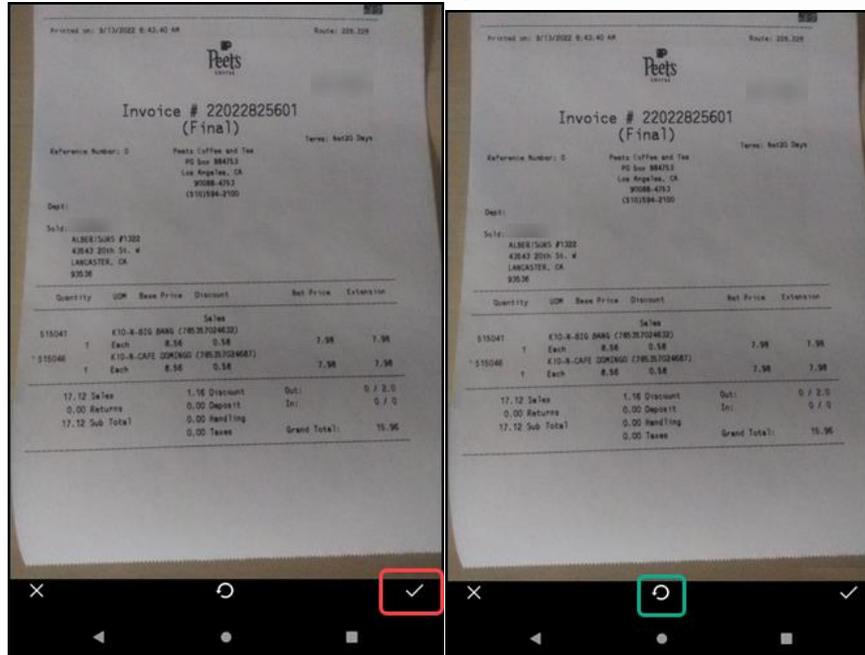
22. When the invoice is completed and finalized you will not be able to move forward until you capture an image of the store's invoice copy. This includes DEX and NON-DEX (Target Store stamps and receiver scan)

***Please note If you have multiple pages of Proof of Delivery documents, an image of each page will need to be taken.**

Tap **Take Picture**.



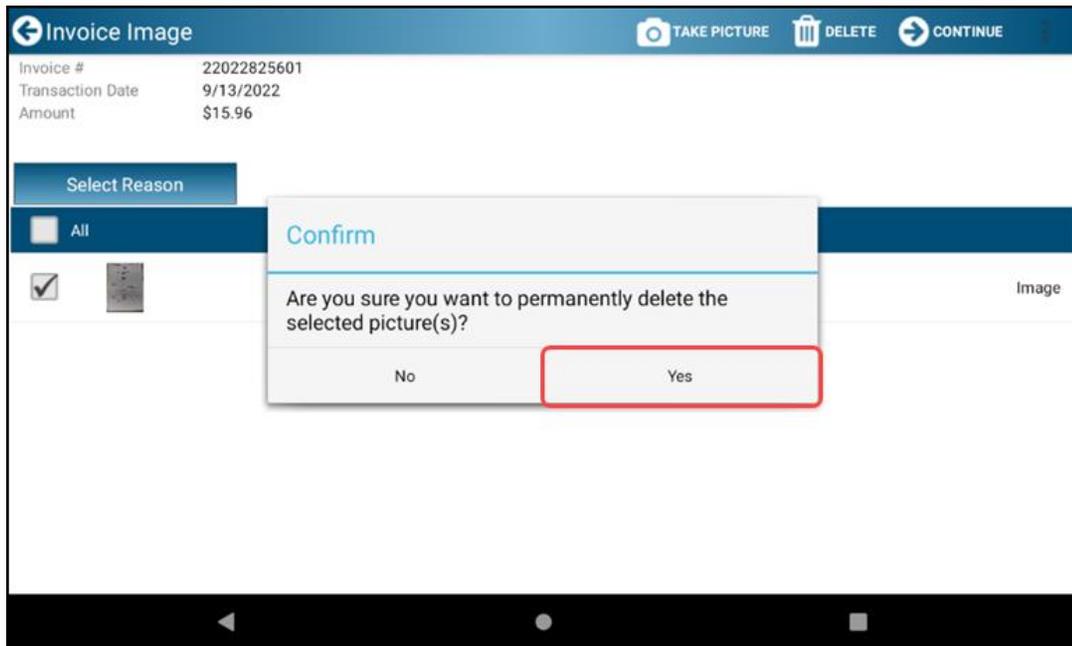
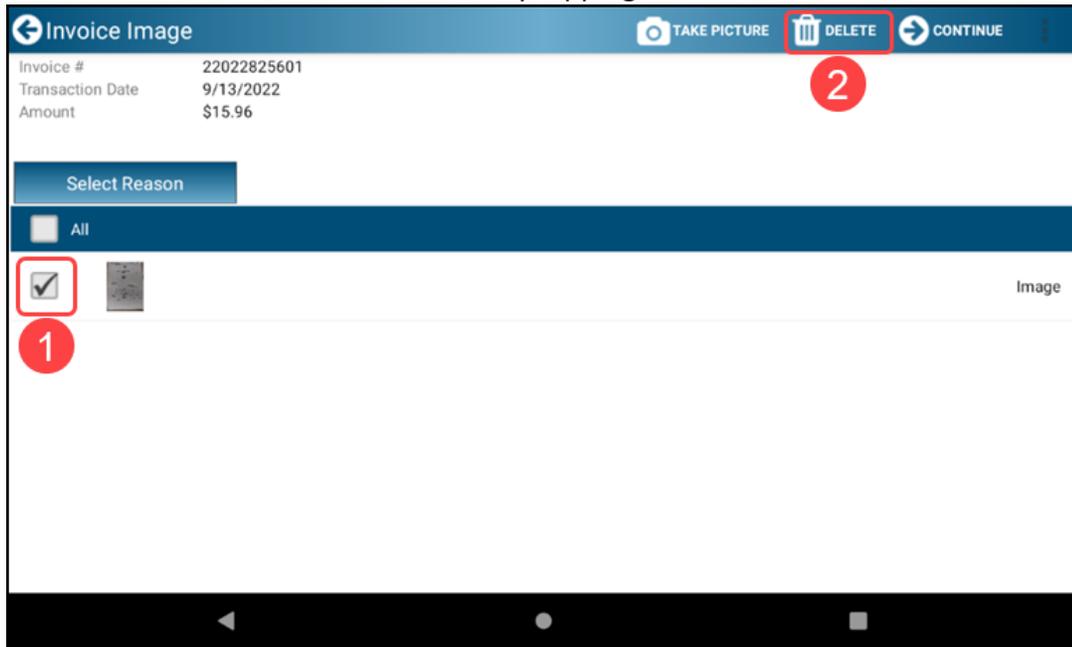
23. Once the Camera is opened, please align the Store Copy in the sights of the Camera and once a clear image is visible press the **Checkmark**.
If you are not satisfied with the image you can tap on the **Refresh** icon in the middle to take a more legible photo.



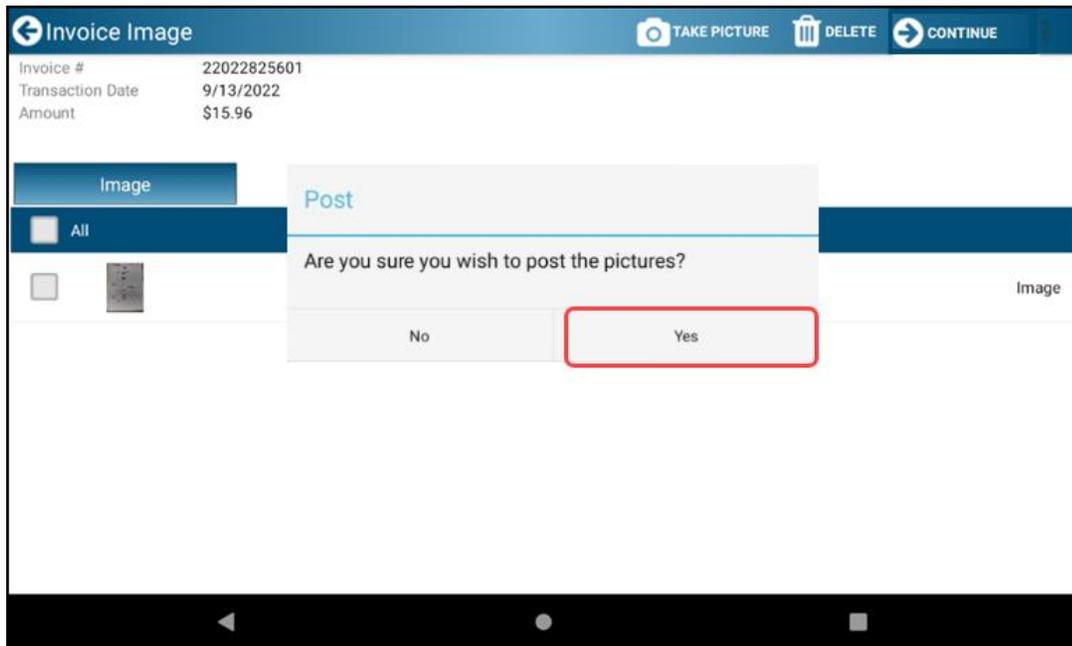
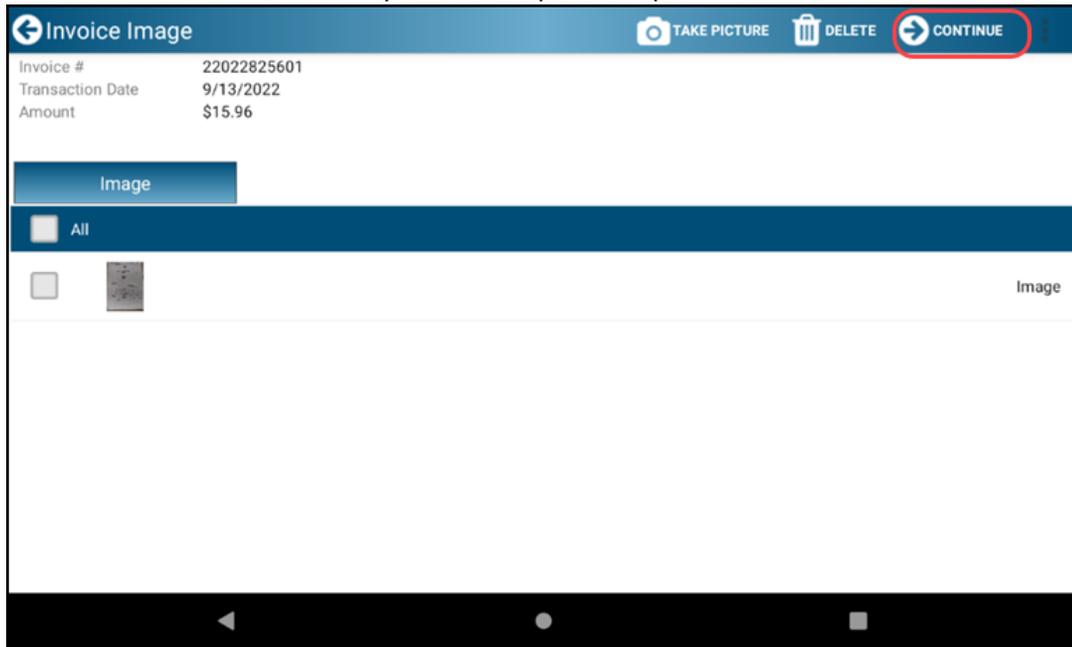
Example of an image that is not acceptable and will need to be retaken



24. To delete an image to retake, select the image and tap the **DELETE** option, confirm by tapping **Yes**.



25. Once you are satisfied with the image(s) press **Continue** and then tap **Yes** to are you sure you wish to post the pictures.



26. On the Service Account screen, an **image icon** appears indicating Proof of Delivery image was captured.

Service Menu

Peets COFFEE

Number: [Redacted]
 Name: ALBERTSONS #1322
 Address: 43543 20th St. W
 City/State: LANCASTER, CA, 93536

Invoice
 Sales History
 Payment
 Map
 Finish Stop

Transactions	Alerts	Notes	Surveys
Number	Status	Delivery	Total Count
Invoices			
22022825601	Posted		\$15.96
9/13/2022 8:43 AM			0 / 2
22022801103	Sent		\$761.54
1/11/2022 7:35 AM			0 / 86

27. When complete you will see a **green checkmark** indicating you have completed that customer.

Account Selection

Code, Name or Address [Filter] Number Name SAFEWAY #2656
 Address 2858 Vista Blvd.
 City/State Sparks, NV, 89434

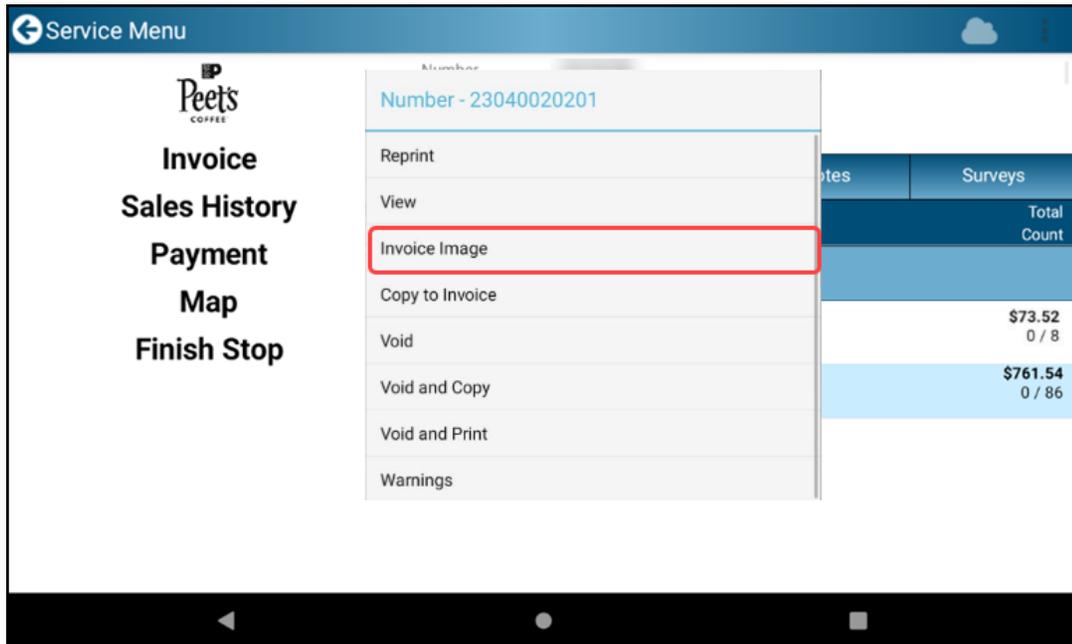
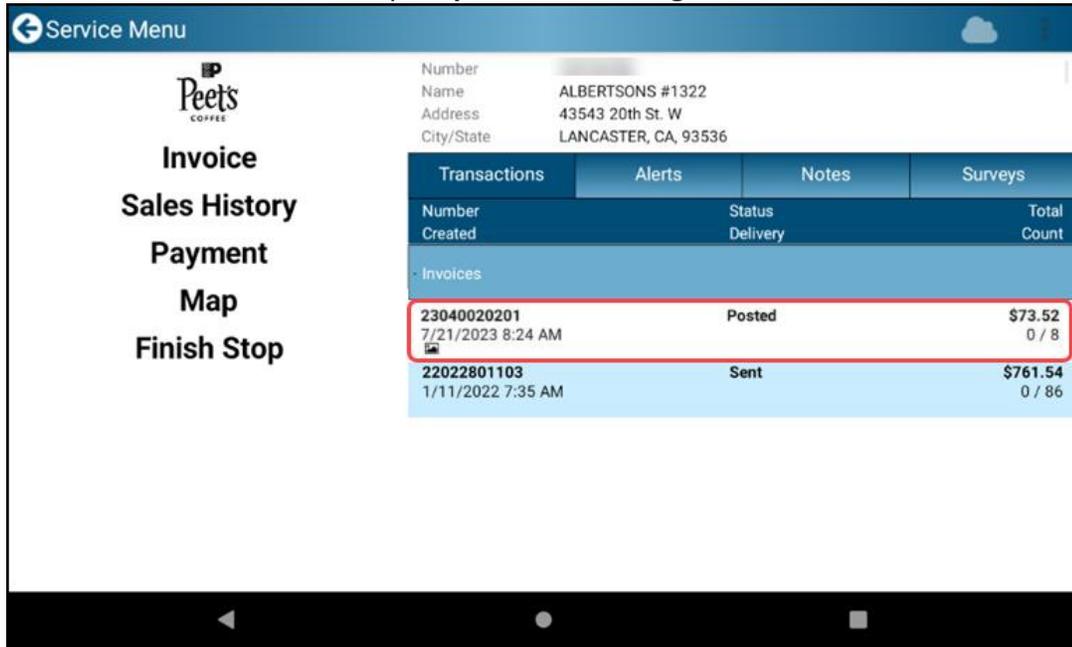
All Accounts

- DSD Employee Take Home →
- 1400 Park Ave →
- RALEY'S 102 →
- 2895 North Mccarran Blvd →
- RALEY'S 110 →
- 2389 Winfield Hills Rd. →
- RALEY'S 115 →
- 1075 No. Hills Blvd →
- SAVE MART #559 →
- 9750 State Route 445 →
- SAFEWAY #1517 →
- 890 W. Williams →
- SAFEWAY #2656** →
- 2858 Vista Blvd. →
- SAFEWAY #4160 →
- 400 Dartmouth A →
- WINCO #017 →
- 2855 Northtowne Lane →
- SMITHS #344 →
- 175 Lemmon Dr →

Transactions	Alerts	Notes	Surveys
Number	Status	Delivery	Total Count
Invoices			
22049122701	Posted		\$45.95
8/15/2022 11:40 AM			0 / 5
22049101304	Sent		\$551.79
1/13/2022 7:16 AM			0 / 66
22049101004	Sent		\$906.65
1/10/2022 7:36 AM			0 / 109

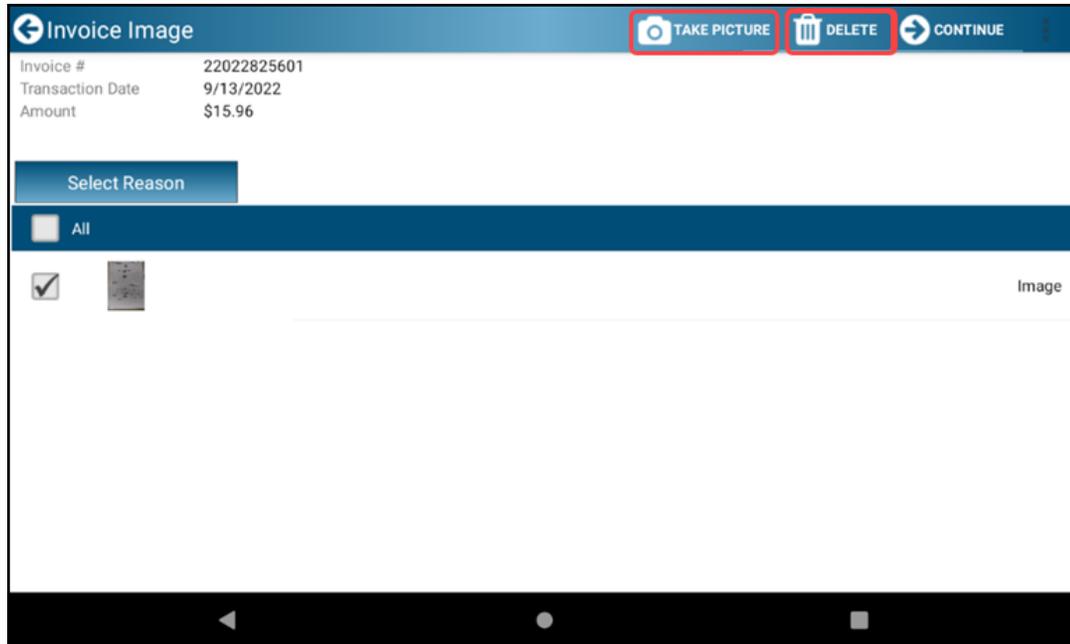


28. If an image needs to be Added or Removed, it can be done by accessing the account and **tapping** and **holding** the invoice number until a menu screen pops up. **Tap on Invoice Image.**



29. Once on the Proof of Delivery Image screen

- **Tap** on the **Take Picture** icon to add additional images.
- **Tap** the box to the left of the image, a checkmark will be indicated beside the image you want to remove can **Tap** the **Delete** icon.



Legible Photos Requirements

All photos need to be close and legible.

Good Examples:



Bad Examples:

