**Take-On: Information Sheet - Mobility**

|  |  |  |
| --- | --- | --- |
| **Legal Entity:** |  | |
| **Trading As:** |  | |
| **VAT Number:** |  | |
| **Registration Number:** |  | |
| **Office Number:** |  | |
| **Physical Address:** |  | |
| **Postal Address:** |  | |
| **Office Number:** |  | |
| **Other VAT Numbers: Per Site or Branch (Should it not be the same as pervious information)** | | |
| **Site:** | | **VAT Number** |
|  | |  |
|  | |  |
|  | |  |
|  | |  |
|  | |  |

**Billing Information:**

|  |  |
| --- | --- |
| **Account Name:** |  |
| **Bank:** |  |
| **Branch Number:** |  |
| **Account Number:** |  |
| **Billing Contact Person:** |  |
| **Telephone number:** |  |
| **Email Address** |  |

**Main Contact Person/s (Project Lead)**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name & Surname** | **Position** | **Email Address** | **Direct Contact Number** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

**List of Emergency contacts (Contact person who needs to be contacted in the event of panic alert, high-risk area and battery disconnect):**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name & Surname** | **Position** | **Email Address** | **Direct Contact Number** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

**List of Branches or Sites:**

|  |  |  |
| --- | --- | --- |
| **Branch/Site** | **Address** | **Branch contact number** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

**System Access for all Staff – Drivers, Crew and Controllers:**

**(Please provide in Excel spreadsheet with following information)**

**\*Note: Grey cells are mandatory.**



**Vehicle Registration Details:**

**(Please provide in Excel spreadsheet with following information)**

**\*Note: Grey cells are mandatory.**



**Vehicle Operations Information**

|  |  |  |
| --- | --- | --- |
| **Questions:** | **Yes** | **No** |
| Do vehicles deliver on weekends? |  |  |
| Do vehicles deliver on Public Holidays? |  |  |
| Do vehicles do sleep out routes? |  |  |
| Do vehicles do more than one route per vehicle per day? |  |  |
| Vehicle license Disc Scanning? |  |  |
| Barcode scanning of Drivers licenses |  |  |

**Additional questions to field of business:**

|  |  |  |
| --- | --- | --- |
| **Questions:** | **Yes** | **No** |
| Are the Ship – to addresses adhoc or static? |  |  |
| Are the Start and End locations for the delivery vehicles the same? |  |  |
| Do you facilitate next day deliveries? |  |  |
| Do you facilitate for cash on deliveries? |  |  |
| Do you provide any of the following services: Inter-branch transfers, uplifts, customers to collect? |  |  |
| Do you have Geo- Coordinates for all the delivery points? |  |  |
| How many sites do you service (Isando, Kempton Park, East Rand etc? |  |  |
| Sample data from the client’s business. Documentation like as invoices, waybills, delivery notes, tripsheets (all paper work the driver requires) etc. This should be provided in excel (csv) format as well as the physical copies of the documentation. |  |  |

**Process Discussion for drivers:**

|  |  |  |
| --- | --- | --- |
| **Questions:** | **Yes** | **No** |
| Action Debrief:  This refers to the process of making an invoice or uplift as successful or Unsuccessful and if unsuccessful, is it to be cancelled or repeated at a later point in time (another route) |  |  |
| Sign of Glass (SOG):  This refers to the step where the driver hands the device to the recipient and asks them to sign on the handheld to confirm the transactions and update the dashboard |  |  |
| COD Debrief:  In the case where the delivery is COD, must we confirm that the cash of Proof of Payment was received. |  |  |

**Reasons for unsuccessful customer visit:**

This refers to the reason why the delivery could not commence and does not refer to issues with the stock being delivered.

|  |  |  |
| --- | --- | --- |
| **Reason** | **Mark: X** | **Other** |
| Incorrect/Incomplete delivery address |  |  |
| Access Denied |  |  |
| Operating hours |  |  |
| Customer Closedown |  |  |
| No Personnel on site to receive |  |  |

**Reason why the Invoice (action) was unsuccessful:**

This refer to issues relating specifically to the goods being delivered:

|  |  |  |
| --- | --- | --- |
| **Reason:** | **Mark: X** | **Other** |
| Duplicate Order |  |  |
| Duplicate Invoice |  |  |
| Stock Damaged |  |  |
| Incorrect Stock |  |  |
| Order Cancelled |  |  |
| No order received |  |  |
| Client Collection |  |  |

**Who needs to receive the Route Adherence Report (“RAR”)**

This refer to communication sent through on completion of each route when the driver returns.

|  |  |
| --- | --- |
| **Name & Surname** | **Email Address** |
|  |  |
|  |  |
|  |  |

**Integration Information:**

Main contact Person for Integration facilitation

|  |  |  |  |
| --- | --- | --- | --- |
| **Name & Surname** | **Position** | **Email Address** | **Contact Number** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

**Integration to external system:**

|  |  |
| --- | --- |
|  | **Details** |
| IP Addresses: |  |
| Port Numbers: |  |
| Log-on Credentials |  |
| Firewall Rules |  |
| Other: |  |

**Training:**

|  |  |  |
| --- | --- | --- |
| **Questions:** | **Yes** | **No** |
| Do you have a training facility? |  |  |
| Is there internet connectivity in the facility? |  |  |
| Is there sufficient signal strength? |  |  |
| How many people need the required training? \_\_\_\_\_\_\_\_\_\_\_\_ |  |  |
| When would you like training to be done? \_\_\_\_\_\_\_\_\_\_\_\_ |  |  |

**Reports to be emailed to selected personnel:**

|  |  |  |  |
| --- | --- | --- | --- |
| **Report** | **Daily** | **Weekly** | **Monthly** |
| License Expiry Vehicles |  |  |  |
| License Expiry Personnel (Drivers) |  |  |  |
| D & A |  |  |  |
| Speed Violations |  |  |  |
| Mobility Utilisations Report |  |  |  |
| Driver Scorecard |  |  |  |
| Action Failure |  |  |  |

**Notifications to be received by Client:**

|  |  |  |
| --- | --- | --- |
| Notification | SMS – Note there is a change to sms’e (Mark X) | Email  (Mark X) |
| All |  |  |
| DECO |  |  |
| Zone |  |  |
| Excess Idle |  |  |
| Excess Speed |  |  |
| Excess Stop |  |  |

**Notification to be received by \_\_\_\_**

|  |  |  |
| --- | --- | --- |
| Notification | SMS – Note there is a change to sms’e (Mark X) | Email  (Mark X) |
| Action debrief complete |  |  |
| Action debrief failed |  |  |
| Entity visit complete |  |  |
| Entity visit failed |  |  |
| Infinity Issued |  |  |
| Route Activated |  |  |
| Route Closed |  |  |