

Uber Eats Delivery vs. Pickup

Delivery vs. Pickup processes in Aura Point of Sale

v1.0

For stores that want to use the third party delivery service **Uber Eats** but are set up in such a way that their deliveries are typically handled by Yumbi, Online Ordering and Deliveroo, there is a particular way that the third-party delivery orders need to be handled so that they don't interfere with the other delivery systems.

Uber Eats has now released a collect option for customers where the order is still placed through Uber Eats but collected at the store by the customer.

This guide will detail the proper procedures for capturing these orders.

1. Contact the Aura Support Helpdesk to set up the Uber Eats customers using one of the following methods:
 - Phone on 0860 994 155
 - Email support@cosoft.co.za
 - Live Chat at www.cosoft.co.za
 2. Aura Support will set up the customer entries in the way detailed below.
 3. Refer to the '**Capturing Orders**' section of this guide for the correct method to capture orders from these services.
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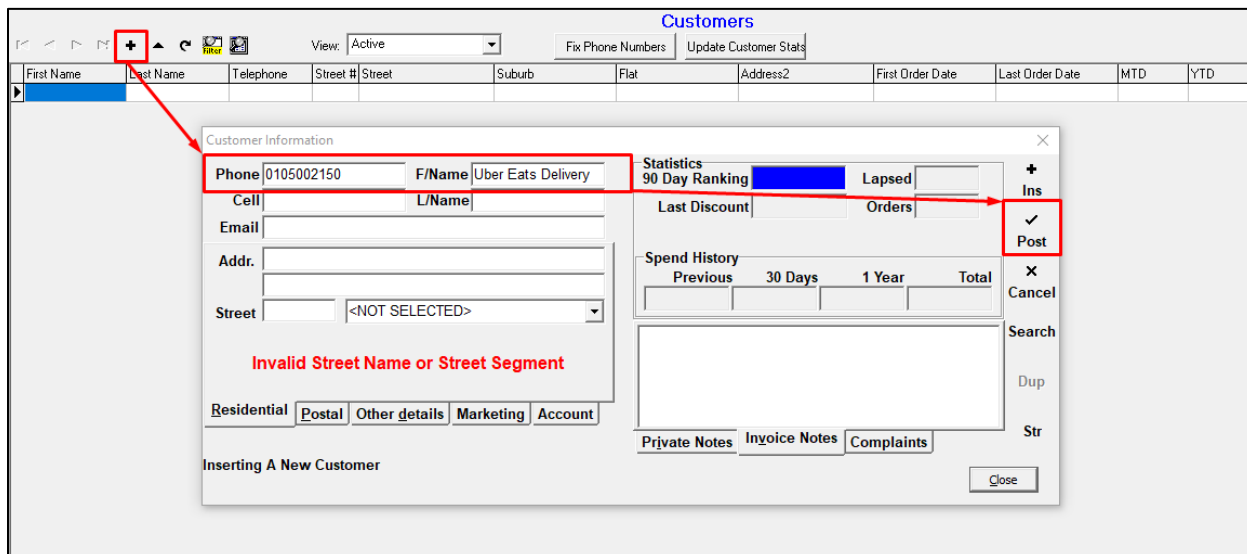
Initial Setup

Step 1: Create Customers

Each Third-Party Delivery company needs to be set up as a Customer in Aura, so that orders can be assigned to them. In **Backoffice**, click *Lists > Customers*, then click **[+]** to add a new entry.

Uber Eats Delivery

Uber Eats Delivery will be used for customers placing the order through Uber Eats and the Uber driver collecting on behalf of the customers. For these types of orders, there is no need to capture any of the customer’s details as the store will not be dealing with the customers at all.



Capture the company name as the **customers first name**. – “Uber Eats Delivery”

Note that no address details are required.

Note that only a first name and Phone number is required as the report extracts information using customer first name.

Click **Post** to save the changes.

Uber Eats Pickup

Uber Eats Pickup will be used for customers placing the order through Uber Eats and the customer collecting the orders directly from the store. For these types of orders, you will need to capture the customer's details as the store will be dealing with the customer directly.

When you ring up the order in Invoicing you can add an Invoice note with the Uber Eats order number and customer details.

The screenshot shows the 'Customers' window in the AURA software. A 'Customer Information' dialog box is open, displaying the following details:

- Phone:** +27105002150
- F/Name:** Uber Eats Pickup
- L/Name:** (empty)
- Statistics:** 90 Day Ranking: 0, Lapsed: (empty), Last Discount: (empty), Orders: (empty)
- Spend History:** Previous, 30 Days, 1 Year, Total: R0.00
- Address:** Street: <NOT SELECTED>
- Buttons:** Residential, Postal, Other details, Marketing, Account
- Viewing Customer:** Private Notes, Invoice Notes, Complaints
- Dialog Actions:** + Ins, Post, Cancel, Search, Dup, Str, Close

A red box highlights the 'Post' button, and a red arrow points from it to the 'Orders' field in the 'Statistics' section.

Capture the company name as the **customers first name**. – “Uber Eats Pickup”

Note that no address details are required.

Note that only a first name and Phone number is required as the report extracts information using customer first name.

Click **Post** to save the changes.

Capturing Orders

When orders are placed from a Third Party service, the order will come through via a Phone call to the store or a printer installed by the service.

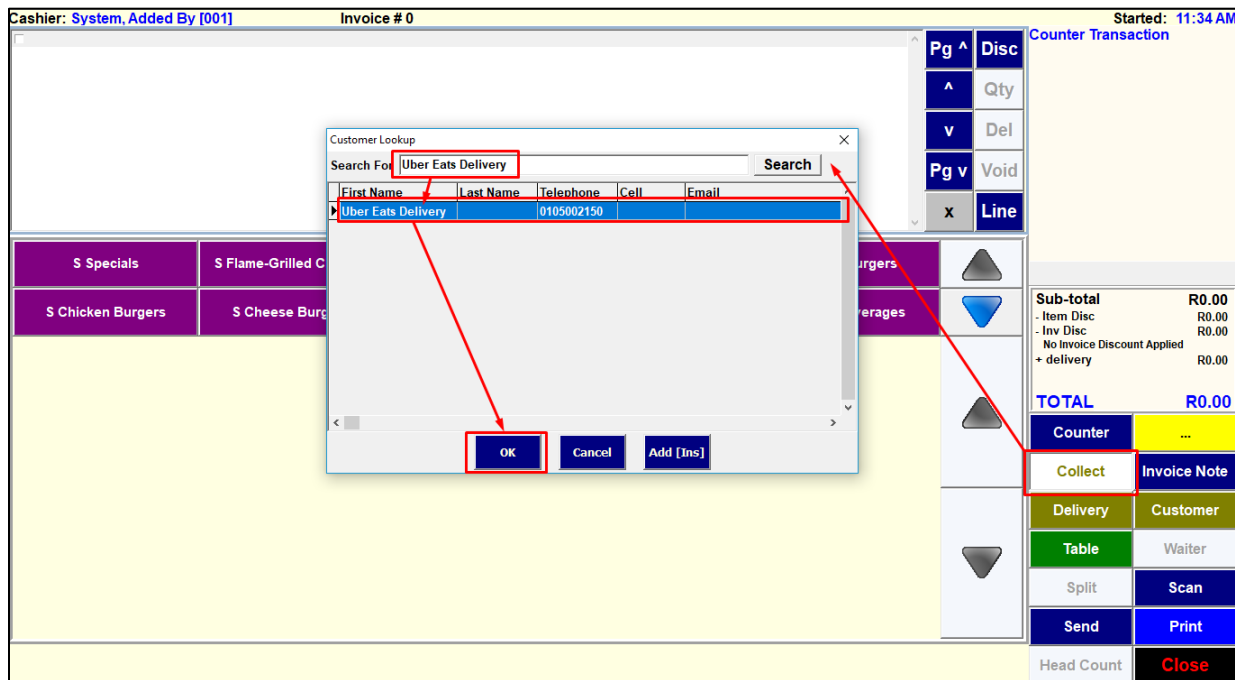
Uber Eats Delivery

Uber Eats Delivery orders must be captured in Invoicing as a Collect order!

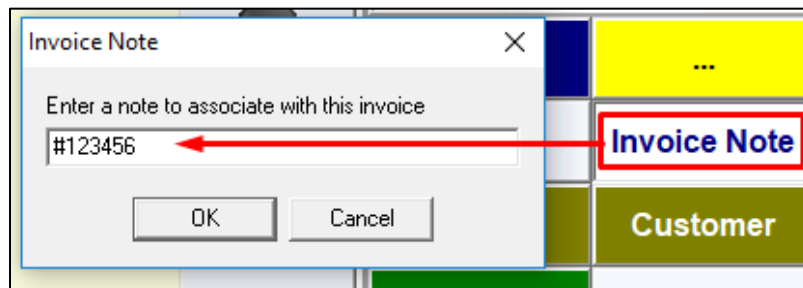
This is done for several reasons: first, it avoids problems with using Yumbi's call centre platform to send an order to Deliverree for the order to be delivered when it is not handled at all by the store.

Next, it allows the order to be held until it is collected by the Third-Party delivery company, as well as being linked to the Company's customer entry.

1. Click Collect
2. Search for customer name: **Uber Eats Delivery**
3. Select the Third-party service
4. Click OK



After the order has been placed, you will receive a reference number for the invoice from the third party service agent or printed slip. This reference number must be captured by pressing the **Note** button in invoicing so that the reference number will appear on the slip.

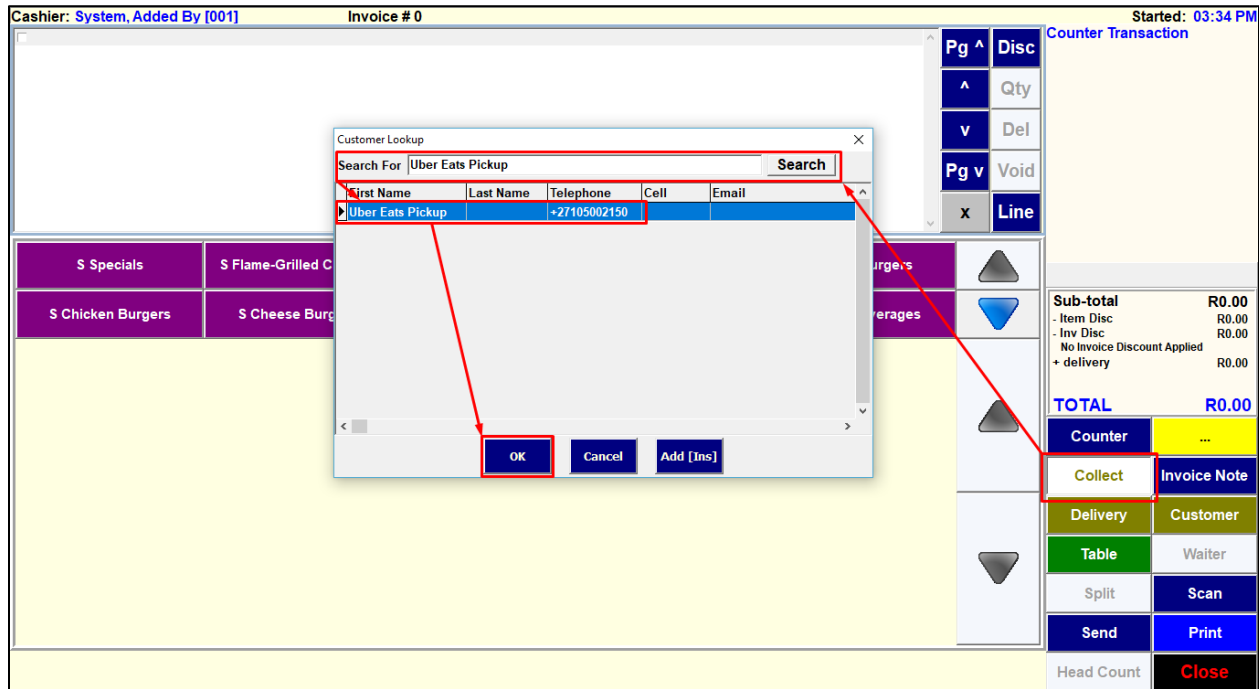


Uber Eats Pickup

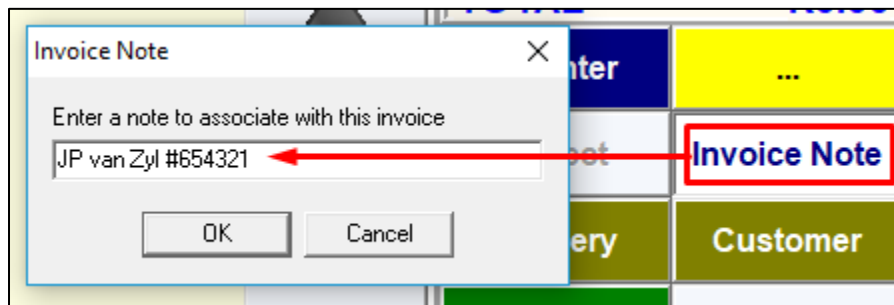
Uber Eats Pickup orders must be captured in Invoicing as a Collect order!

This is done for several reasons: first, it allows the order to be held until it is collected by the customer as well as being linked to the Company's customer entry.

1. Click Collect
2. Search for customer name: **Uber Eats Pickup**
3. Select the Third-party service
4. Click OK



After the order has been placed, you will receive a reference number and customer information for the invoice from the third party service agent or printed slip. This reference number and customer details must be captured by pressing the **Note** button in invoicing so that the reference number and customer details will appear on the slip.

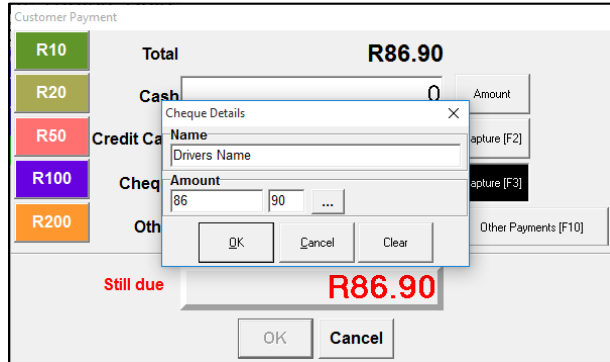


Completing the Order and Cashup

Uber Eats Delivery

When the Third Party Delivery Service driver comes in to collect the order, **the Cashier must Re-Print the invoice for the store's reference**, and make sure that the driver signs the slip, which will then be kept in the till drawer for proof.

The order should then be completed as a **Cheque transaction (F3)**.



The screenshot shows the 'Customer Payment' interface. On the left, there are buttons for different payment methods: R10, R20, R50, R100, and R200. The 'Total' is displayed as R86.90. A 'Cheque Details' dialog box is open, showing fields for 'Name', 'Drivers Name', and 'Amount'. The 'Amount' field contains '86.90'. Below the dialog, the text 'Still due R86.90' is visible. Buttons for 'OK', 'Cancel', and 'Clear' are present.

When cashing up the till, these values can be seen in the **Cheques** field (F3). All cheque (Uber Eats payments) should be captured under cheques to make cashup easier.

Employee	Till	Shop	Shift #	Shop#	Date	Till ID	Close Date	Op	Op2	Op3	Op4
			4	-1	26 Jul 2019	1		001			
			3	-1	25 Jul 2019	1	26 Jul 2019	001			
			2	-1	23 Jul 2019	1	25 Jul 2019	001			
			1	-1	22 Jul 2019	1	23 Jul 2019	001			

Till Totals:		OverRings:	R69.80
	Gross Sales (Ex O/R):		R56,786.10
	Less Discounts:		R263.50
	ADD Delivery Charges:		R0.00
	= Net Sales:		R56,522.60
Less:	Coupons (F1)		R0.00
	Credit Cards (F2)		R67.00
	Cheques (F3)		R86.90
	Cash On Hand (E4)		R0.00
	Debtors (F5)		R0.00
	Petty Cash (F6)		R0.00
	GRV's Paid		R0.00
	Employee Wages (F7)		R0.00
	Other Payments (Ctrl + F3)		R0.00
Add:	Addit. Banking (F8)		R0.00
	Driver Floats (F9)		R0.00
	Float Issues (F11)		R0.00
	Till Float (F10)		R500.00
	Gratuities (Ctrl + F9)		R0.00
	Under By		R56,867.80

Uber Eats Pickup

When the customer comes in to collect the order, the Cashier must Re-Print the invoice for the store's reference, and make sure that the customer gets a slip as well.

The order should then be completed as a Cheque transaction (F3).

The screenshot shows the 'Customer Payment' interface. On the left, there are buttons for payment methods: R10 (green), R20 (light green), R50 (red), R100 (purple), and R200 (orange). The main area displays a 'Total' of R86.90. Below this, there are fields for 'Cash' (86.90), 'Credit Card', 'Cheque', and 'Other Payments'. A 'Change' field shows R0.00. A 'Cheque Details' dialog box is open, showing fields for 'Name' (Customer Name) and 'Amount' (86.90). Buttons for 'OK', 'Cancel', and 'Clear' are visible in the dialog.

When cashing up the till, these values can be seen in the **Cheques field (F3)**. All cheque (Uber Eats payments) should be captured under cheques to make cashup easier.

Employee	Till	Shop							
Shift #	Shop#	Date	Till ID	Close Date	Op	Op2	Op3	Op4	
4	-1	26 Jul 2019	1		001				
3	-1	25 Jul 2019	1	26 Jul 2019	001				
2	-1	23 Jul 2019	1	25 Jul 2019	001				
1	-1	22 Jul 2019	1	23 Jul 2019	001				
Till Totals:									
		OverRings:							R69.80
		Gross Sales (Ex O/R):							R56,786.10
		Less Discounts:							R263.50
		ADD Delivery Charges:							R0.00
		= Net Sales:							R56,522.60
		Less: Coupons (F1)							R0.00
		Credit Cards (F2)							R67.00
		Cheques (F3)							R86.90
		Cash On Hand (E4)							R0.00
		Debtors (F5)							R0.00
		Petty Cash (F6)							R0.00
		GRV's Paid							R0.00
		Employee Wages (F7)							R0.00
		Other Payments (Ctrl + F3)							R0.00
		Add: Addit. Banking (F8)							R0.00
		Driver Floats (F9)							R0.00
		Float Issues (F11)							R0.00
		Till Float (F10)							R500.00
		Gratuities (Ctrl + F9)							R0.00
		Under By							R56,867.80

Office Contact Details

Aura Helpdesk

0860 994 155

support@cosoft.co.za

www.cosoft.co.za/support

Aura Helpdesk Hours

6:00am to 11:00pm, 7 days a week



In order to ensure that all calls taken have been logged and are treated with the importance and urgency each one rightfully deserves, please keep the following points in mind when consulting with our helpdesk:

- Ensure that the technician you are speaking to knows which store you are calling from, and that you get the name of the technician you speak to.
 - Be clear and concise with what the problem is and when it started appearing. The more information you can provide, the better.
 - If the technician does not offer you a reference number for your call, you should ask them for one. Not only does this makes it easier to follow up on the status of the issue later, but also ensures that your call is logged in our system and is being / has been attended to properly.
 - Most importantly, please keep in mind that Cosoft provide the Aura Point of Sales Suite; for any other problems such as your email, internet, anti-virus software and the like, please contact the software distributor or supporter related to that application. These contact details can generally be found under the application's Help > About or Help > Contact Us options.
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