Guide for the delivery driver or field technician

Guides by job role

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Guides by job role

Guide for the delivery driver or field technician

Deliver goods, get signatures, record visits and handle payments away from the office.

Beginner · About 12 minutes · Version 1.0 · Updated 17 November 2026

Your role

You are the face of the business at the customer's door. What you record is the proof of delivery and of work done.

Before you leave

1. Open your **Delivery Notes** or **Maintenance Visits** for today, on your phone or tablet. They are in the browser.
2. Check the goods or tools against the document. Tell the store about differences before you go. See Guide for the storekeeper.

At the customer

Deliveries

1. Hand over the goods and check them with the customer.
2. Get the customer's **signature** and name on the delivery note, or take a photo of the signed copy and attach it. See Attachments and files.
3. Record any shortages or damage on the delivery note.

Service visits

1. Open the **Maintenance Visit** and record the work done, the parts used and the **Completion Status**. See Warranty claims and maintenance visits.
2. Take photos where useful, and get the customer's sign-off.

Taking payment

- **M-Pesa:** the customer pays to the business till or paybill. Check the confirmation, and note the transaction code. Never use your own number.
- **Cash:** count it in front of the customer, give a receipt and hand it to the office the same day.
- Tell the accountant, who records it in a **Payment Entry**. See Recording customer and supplier payments.

At the end of the day

- Return the signed copies and any goods not delivered.
- Hand over the cash and the list of payments.

Good habits

- Do not hand over goods before payment if the order is cash on delivery.
- Never promise discounts or refunds. Call the office.

Who to ask

Your supervisor or the sales team for customer issues, the storekeeper for stock.

Related documentation

- From quotation to payment
- Warranty claims and maintenance visits
- Recording customer and supplier payments
- Attachments and files