Advantage QRoute™

User Guide

Advantage Route Systems, Inc.

We deliver, so you can!

Version 13
Windows 2000/XP/Vista/7/8

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Warning

Specifications are subject to change without notice.

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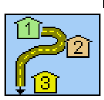
Table of Contents


1
2
3

Canadian QuickBooks Addendum 269

Appendix A – Sample Reports 273

Chapter 1 – Overview of QRoute

Introduction

QRoute is a unique product that uses portable handheld computers to capture data at the time of delivery. At the end of the day, this data can be directly imported into QuickBooks. This eliminates countless hours of data entry, and allows you to make better use of your time. It is easy to use and a powerful addition to any route delivery operation.

Who can use the QRoute software?

QRoute has been designed to work with any number of route delivery industries. Whether you have 50 customers or 5000, the ease of entering route sales information is amazing! In addition, you will be able to leave a professional looking receipt that includes the signature of the person who received the delivery.

Here are just a few examples of industries that use QRoute:

- Bottled Water Delivery to Homes and Offices
- Ice
- Wholesale Florists
- Route Vending
- Propane Exchange
- Specialty Bread Delivery
- Wholesale Bait Delivery

Building on the simple, flexible, yet powerful features of QuickBooks, you can now collect your sales information in the field with a handheld computer. Over the last few years, handheld computers have become affordable and there is no reason you should not be using these tools in your business — no matter how small you are!

What do I need to run the system?

There are a few requirements to use the QRoute system. While we provide you with the software needed, you will be required to provide the hardware. You also will need a copy of QuickBooks (2007 - 2011 Pro, Premier, or Enterprise).

Here is a complete list of all of components required to effectively run QRoute:

- Handheld Computer
- USB Cradle or Cable
- Storage Card
- USB Card Reader
- Desktop PC running Microsoft Windows XP or Vista
- Inkjet or LaserJet printer
- Portable Handheld Printer
- Carrying Case or Holster
- QuickBooks Pro, Premier, or Enterprise (2007 – 2013)
- Microsoft ActiveSync (for Cable/Cradle transfer)
- Various supplies: batteries, paper, stylus, car chargers, etc.

For detailed specifications on desktop PCs and other requirements, refer to *Appendix E* in this document.

How do I get started?

To get started with QRoute, *Chapter 2* will lead you through four basic steps:

1. Installing the QRoute software.
2. Adding supplemental information into QuickBooks.
3. Setting up parameters in QRoute.
4. Making your first route data card.

After you have completed the steps in *Chapter 2*, continue to *Chapter 3* to learn how to use all of the available features in QRoute. The time invested to properly set up your system will more than pay for itself through many years of productive use.

How the manual is organized

To help you get operational as quickly as possible, we've created this comprehensive manual for you. It has five basic sections:

- Getting Started (Chapters 1 and 2)
- Desktop Operations A-Z (Chapter 3)
- Hardware Overview (Chapter 4)
- Handheld Operations A-Z (Chapters 5)
- Appendices

It is best to read the manual carefully as you get started with QRoute.

What do I do if I need help?

Users at all computer skill levels should find the product easy to set up and use. We know that occasionally you may have a question or two, and require technical assistance when you are getting started with QRoute. With this in mind, feel free to give one of our professional support team members a call at 209-485-9395. We will be happy to assist you!

For your convenience, we also offer free alternatives to our live support. On our QRoute Web site: www.QRoute.com, you will find a wealth of information that may help answer your questions — often times this can be the fastest way to get you the answer you need. We even have forums available that allow you to share information with other QRoute users.

Our Web site is always changing, and new items are being added. Here are some of the materials you can find on the site:

- Handheld computer reference guides.
- Portable printer reference guides.
- Support reference sheets for common problems.

We are here to support you. Even though the product is very easy to install and use, we know it can be beneficial to have a helping hand. We are here to help.

Contact Us:

At ARS, it is our priority to provide you with the highest quality of service and support available. Our telephone support hours of operation are from 6am to 5pm Pacific Time, Monday-Friday (excluding holidays).

How to contact us:

- **Telephone Support:** 1-209-485-9395.
- **Fax:** 1-775-263-8426
- **Email:** Support@QRoute.com
- **Web:** www.QRoute.com

Support requests sent via email or fax will be responded to during the hours of 6am to 5pm US Pacific Time. For more information on ARS support policies, please refer to our Web site.

Chapter 2 – Installation and Quick Start

Introduction

In this chapter you will learn how to install, set up, and quickly configure some basic QRoute options to get started with the program. To make this process as simple and effective as possible, you should carefully read through the materials in this chapter before you start using the program. Once you have successfully set up the items discussed, you will be able to view your customers on the handheld.

Setting up your system

Here is a list of the steps outlined in this chapter:

- Install QRoute
- Basic Routing Tools
- Customer Setup
- Item List Setup
- Handheld Transfer
- Handheld Usage

Follow along carefully. Let's get started!

Installing QRoute

To install the software, insert the CD labeled QRoute into the CD-ROM player (or double-click on your downloaded installation file).

NOTE: To register your version of QRoute after the installation, you will need the *Serial Number* and *CI Code* found in your *Welcome Packet*.

Windows Vista Users: Refer to *Appendix G* to proceed with the QRoute installation.

QuickBooks 2011 Users: Refer to Appendix J to process with the QRoute installation.

Go to **Start**, then **Run**, and type in **(X):\SETUP**, where (X) is the drive letter of your CD-ROM drive.

This will bring up a screen similar to the following:

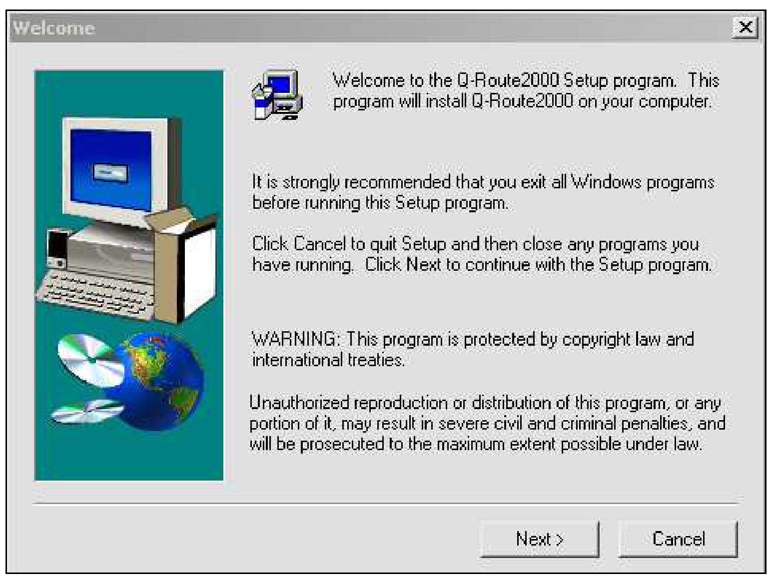


Figure 2.01

From this point on, select **Next** to continue with the installation process, or **Back** to view previous pages.

The QRoute *License Agreement* screen will be displayed.

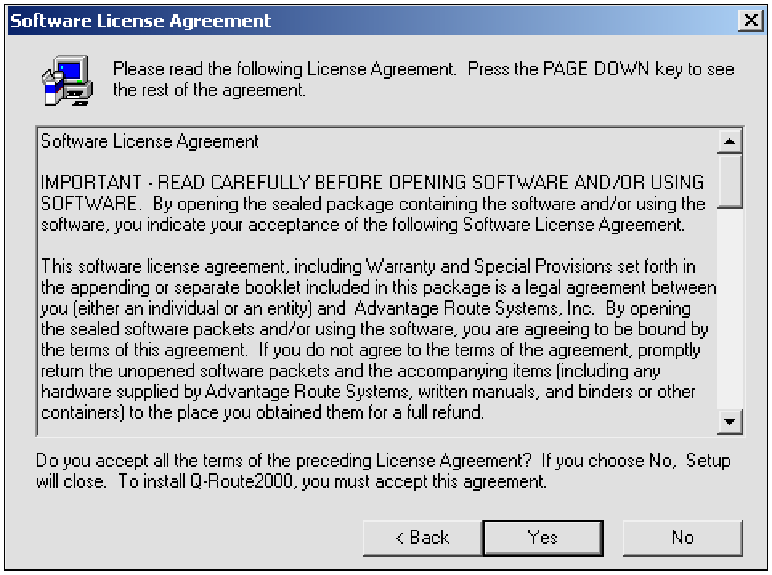


Figure 2.02

Carefully read the license agreement. If you agree to the terms displayed, select **Yes**.

NOTE: If you do not agree to the terms of the license agreement, select **No**. This will cancel the installation process.

You will now be prompted with the **Setup Type** menu:

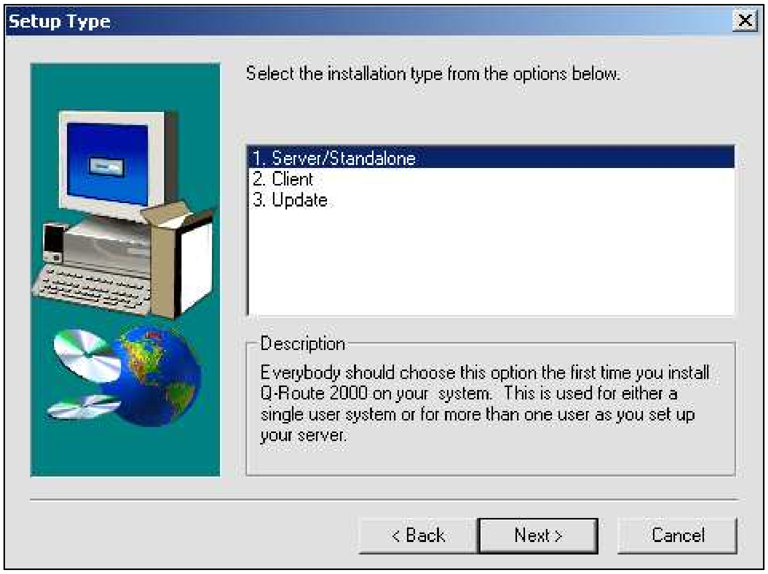


Figure 2.03

The three options are defined as follows:

- ***Server/Standalone:*** For installations on a file server, or single user environment.
- ***Client:*** If you have a network with more than one user, you should first install QRoute on the server, and then go to each workstation and run the *Client* install. This will give additional users access to the same data.
- ***Update:*** Use this option to update an existing version of QRoute.

Make your selection and click **Next**.

Choose the location to install the QRoute package. Unless you have a conflict with other programs, use the default location shown.

To install QRoute into a different directory, click **Browse** and select another directory.

NOTE: If you are installing QRoute on a file server, make sure you install the program in a network shared directory so that all other workstations may access the program.

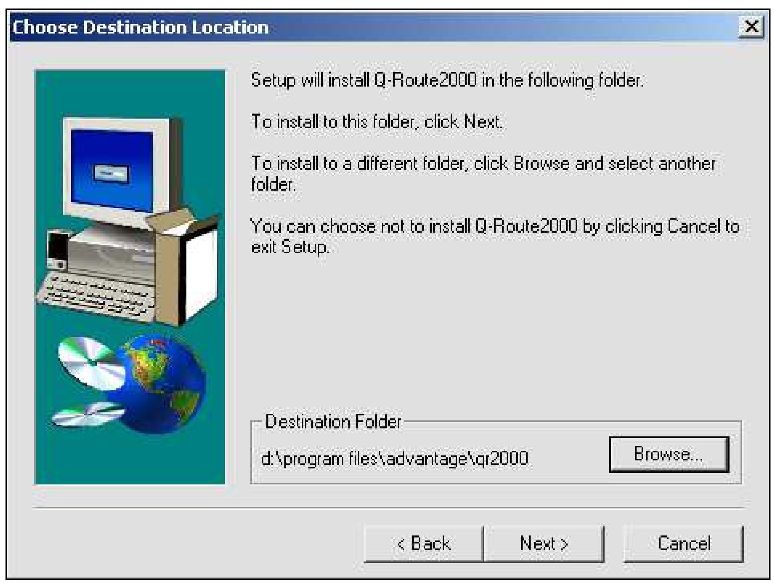


Figure 2.04

After clicking **Next**, the setup program will proceed to copy files, decompress data, and install the QRoute software package. This process may take several minutes, depending on the speed of your machine.

Refer to the progress bar on the screen to view the progression of the program installation. If you wish to quit the installation at any time, choose **Cancel** on the progress bar.

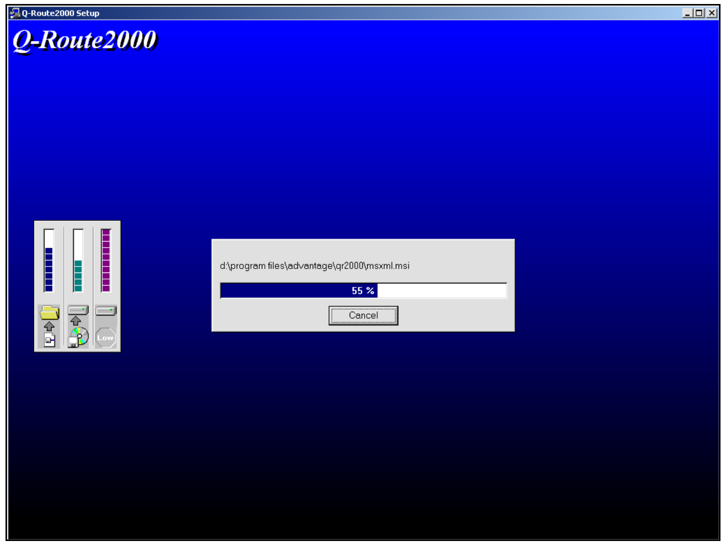


Figure 2.05

Once the file installation is complete, choose **Finish**.

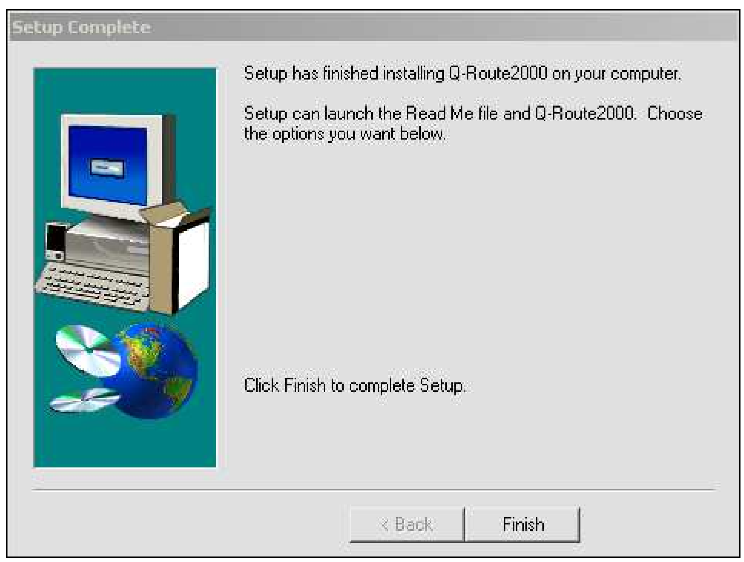


Figure 2.06

The following message will popup and stay on your screen, instructing you to open QuickBooks and your company file.

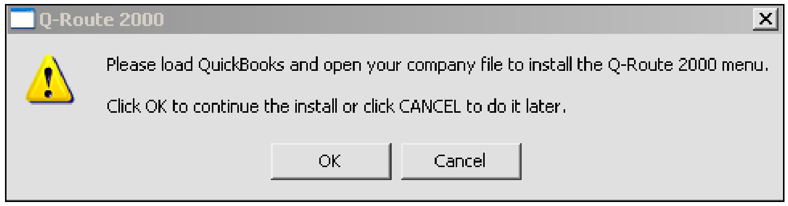


Figure 2.07

NOTE: Depending on the speed of your system, ***Figure 2.07*** above may popup prior to ***Figure 2.06***.

Leave this message on your computer screen and continue to the next page.

Installing the QRoute Menu

Follow these steps to ensure QRoute is installed properly.

1. Open *QuickBooks* and login to your company file.
2. Click **OK** to the message displayed in **Figure 2.07**.
3. A dialog screen similar to the following will appear:

Figure 2.08

   a. Under the question: 'Do you want to allow this application to read and modify the company file?' Choose the option: **Yes, whenever this QuickBooks company file is open.**

   b. Additionally, check the option: **Allow this application to access Social Security Numbers and customer credit card information.**

4. Select **Continue**.

5. You will now be prompted with a 'Confirm to Proceed' screen, click **Yes** to continue, or **No** to cancel.

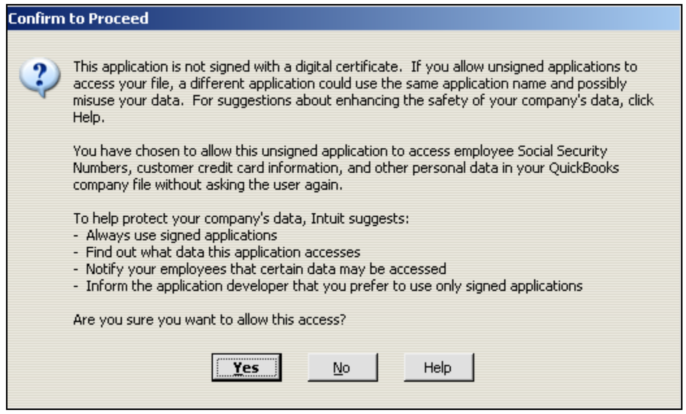


Figure 2.09

NOTE: If prompted, click **Done** when the *Program Access* confirmation window appears (not all versions).

6. Click **OK** to the message 'Successfully added to QuickBooks file menu'.

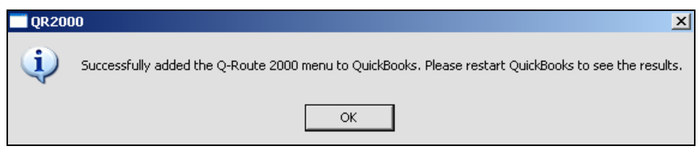


Figure 2.10

7. Restart QuickBooks.
8. Login to your company file, you will now have access to QRoute by going to *Customers > QRoute* on the QuickBooks menu.
9. To finalize the installation, choose *QRoute > About QRoute* on the QuickBooks menu.

NOTE: If QRoute is not available in your QuickBooks menu, refer to *Appendix F*.

10. A dialog box similar to **Figure 2.11** will be displayed on your screen. This screen will only be displayed once, and is required for QRoute to complete the integration with QuickBooks. Select **Yes** to create the required QRoute database.

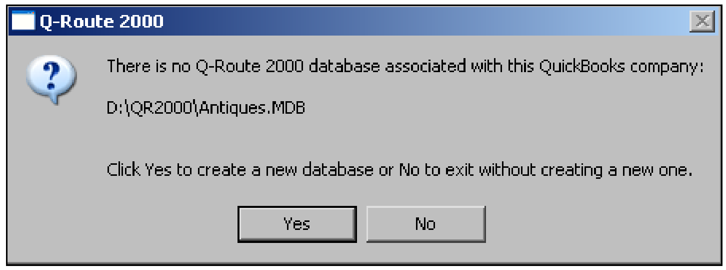


Figure 2.11

11. A warning message will be displayed, informing you that QRoute is currently in demo mode. Click **OK** to continue.

Figure 2.12

NOTE: If you would like to “demo” QRoute, skip the remaining steps and continue to the next section. If you do not have a serial number and would like to receive one, please contact Advantage Route Systems.

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12. To register your QRoute program, select the **Register** button on the *About QRoute* screen.

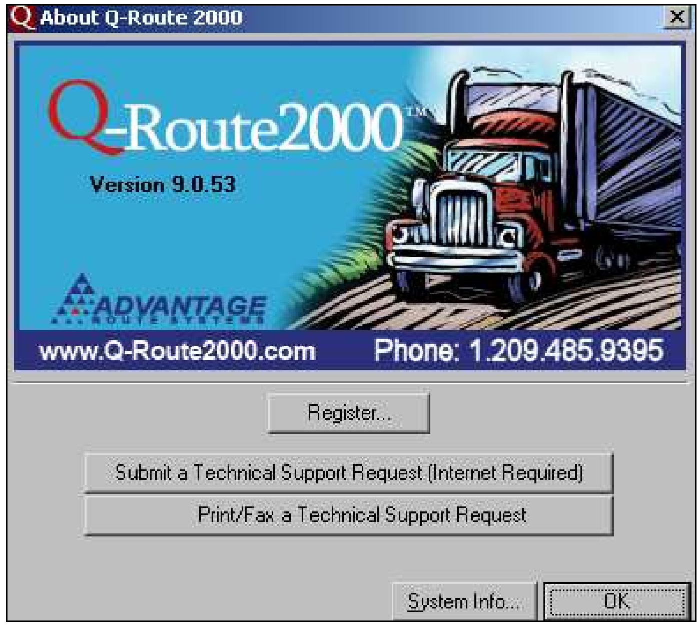


Figure 2.13

13. Enter the **CI Code** and **Serial Number** provided to you from Advantage Route Systems, and click **OK.**

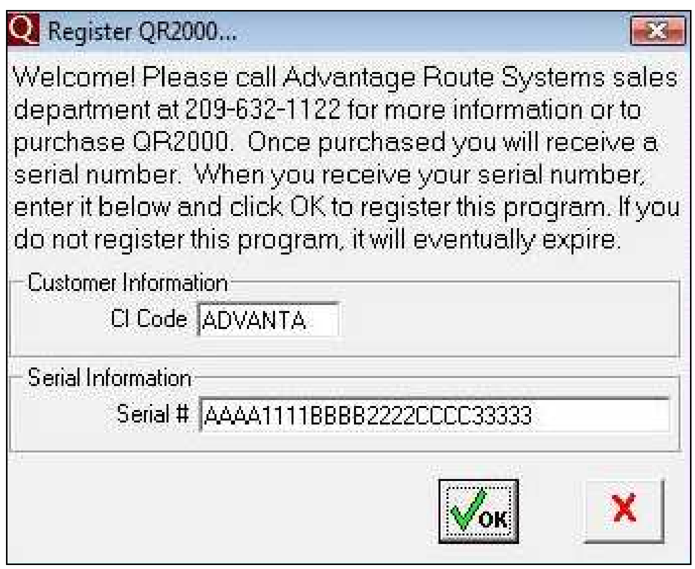


Figure 2.14

14. Once you have successfully registered QRoute, the *About QRoute* screen will display your *CI Code* and handheld licenses on the screen. Click **OK** to exit the screen.

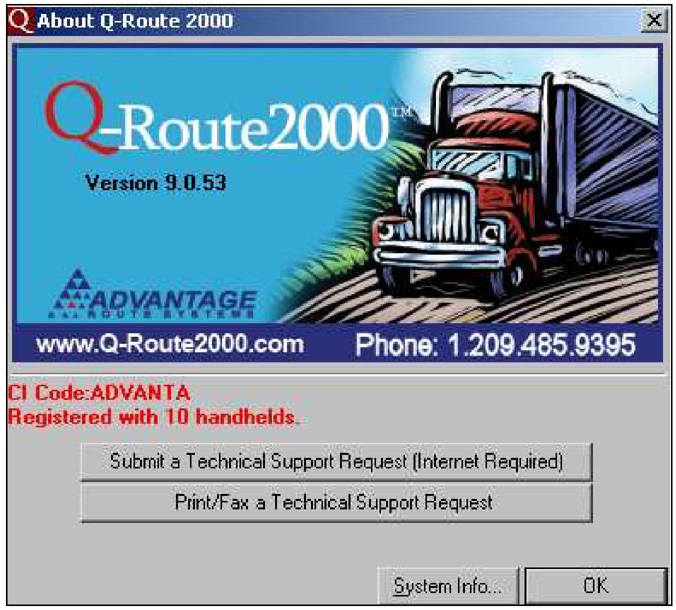


Figure 2.15

The installation is complete for this machine. Proceed to the next section to install QRoute on multiple workstations, or skip to 'Configuring QRoute - Routing' if your installation is complete.

Installing QRoute on a Workstation (Multi-User)

If you will be using QRoute in a multi-user environment, the first thing you will need to do is install the software on a *Server* in a network shared directory. Once this is complete, take the QRoute CD (or install file) with you to each workstation.

NOTE: An IT professional may be required for this type of install.

1. Create a mapped drive from the workstation to the shared QRoute directory on the server.
2. Insert the CD and Go to **Start**, then **Run**, and type in **(X):/SETUP**, where (X) is the drive letter of your CD-ROM drive (or double-click on your downloaded install file).
3. Click **Next** to the 'Welcome' screen.
4. Select **Yes** to the license agreement.
5. Select **Client** from the *Setup Type* screen, and click **Next**.

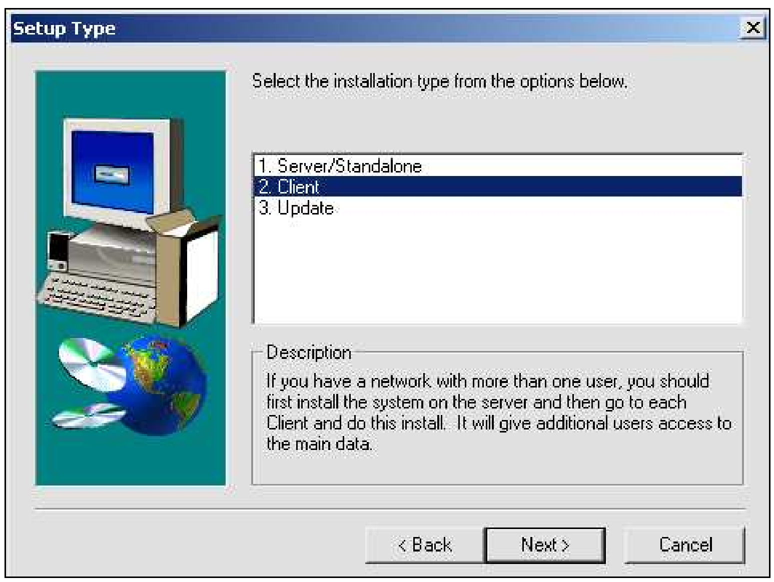


Figure 2.16

6. Choose the destination directory. The path should be a mapped drive pointing to QRoute on the *Server*.

EXAMPLE: Drive [R] mapped to the QRoute program folder on the server.

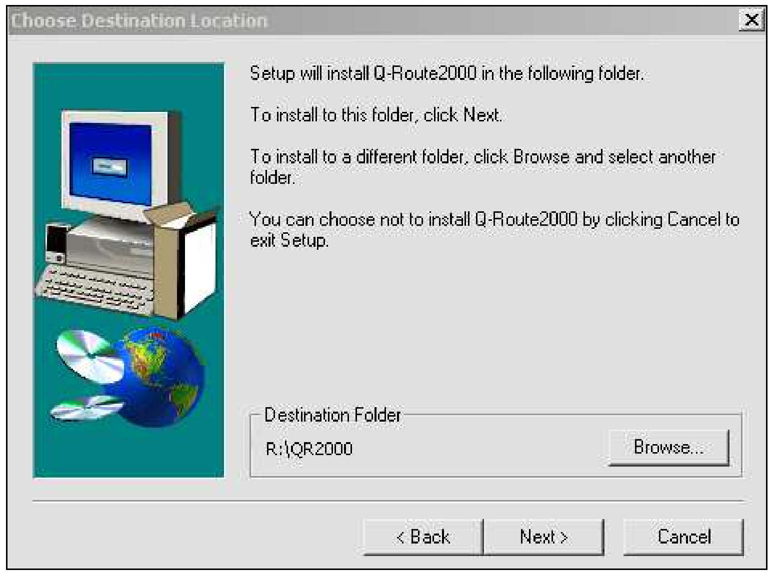


Figure 2.17

7. To continue with the installation, refer to ***Figure 2.05*** onward in the previous section — the procedure is exactly the same.

Learning QRoute - Routing

To get started with QRoute, you will need to assign at least one customer to a *Route* in QuickBooks. This section will help you determine a routing system, and explain the steps that are required to set it up.

Routing Background

Most likely, today you already have a system, or plan, that allows you to service your customers on a regular basis. In QRoute, routing consists of three distinct categories:

1. Routes
2. Delivery Areas / Frequency
3. Route Sequence Numbers

Here are some typical route labels that you might expect to see in QRoute: *R2/TUES/0410* or *7/WEST/1204* or *R2/MAPLE*.

For further explanation, each component will be addressed individually:

1. **Routes** – This typically refers to a driver, truck, or overall area that is serviced by a given person. It is generally the highest unit in the system. It is important that each customer be assigned to a route, as this will determine which handheld will receive the data for regular deliveries.

   NOTE: The *Route ID* is numeric value only, and up to two digits in length. You may insert an optional letter before the *Route ID* in the customer screen, such as 'R' (i.e., *Route 4* is entered as *R4 or R04*) if desired.

2. **Delivery Area / Frequency** – This option can be used multiple ways. If desired, you can label your delivery areas by name or area (i.e., Downtown, Airport Complex, Alpha Foods, etc.).

You can also use delivery frequencies, such as the following:

- W1 - This could indicate that a customer is serviced every Monday.
- BW02 - Every two weeks on Tuesday.
- M04 - On a monthly basis on the 4^{th} delivery day of the cycle.
- KCBW1 – A combination of an area and frequency, Kansas City (KC), every two-weeks (BW), Monday (1).

NOTE: Each *Delivery Area / Frequency* can be from 1 to 5 characters in length.

---

3. **Sequence** - The smallest unit in the routing hierarchy is optional. Based on the route and the day, you can put in a sequence number that indicates the order that the route will be run for this *Delivery Area/Frequency*. Each customer will appear in the order indicated by the sequence code. If the sequence number field is left blank, the order will be sorted alphabetically by customer name.

NOTE: Sequence numbers are four numeric characters in length, such as 0001. There may be gaps between numbers, and it will not cause a problem if two accounts are given the same sequence number.

Once the route pattern has been established, you will go to each customer's account and indicate the *Route* and *Route Area* that will be used. This will be done by setting up a custom field in QuickBooks, discussed in the next section.

Custom Fields

Now that you have a little routing background, let's see how quickly and easily you can get a handheld up and running!

1. The first step is to set up your drivers and define a few custom fields. Choose *Employees > Employee Navigator > Employees.*
2. Double-click on an employee (one of your drivers) that will be making deliveries. Once this is done, choose the *Additional Info* tab.
3. Click on the **Define Fields** button.

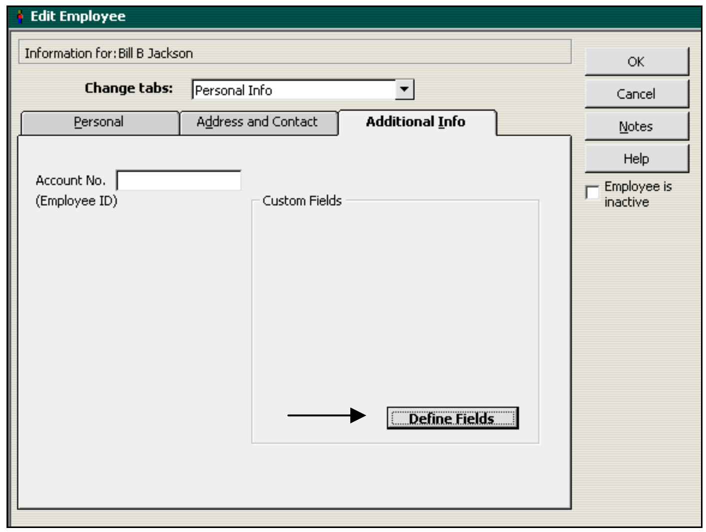


Figure 2.18

NOTE: If you have reached the maximum number of custom fields in QuickBooks, it may be necessary to make adjustments to accommodate the custom field requirements for QRoute.

In the first two available *Label* fields, enter:

1. ***Employee Type***
2. ***Route***

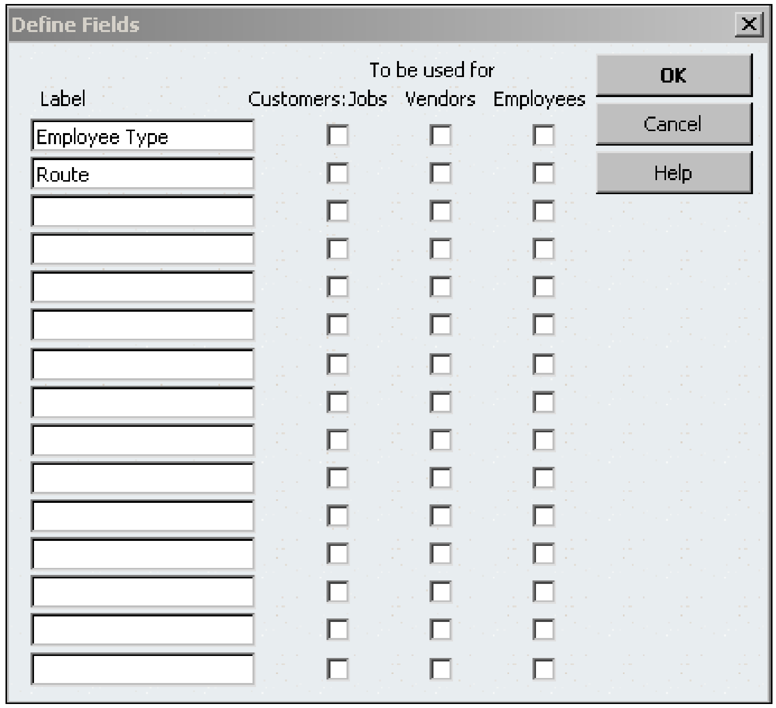


Figure 2.19

Next to each label, you must specify which modules will use these new fields. Select the following:

1. For *Employee Type*, check the **Employees** column.
2. For *Route*, check the **Customer:Jobs** column.

See the example shown in **Figure 2.20**.

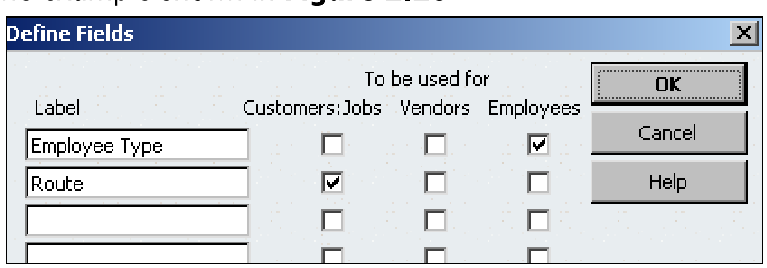


Figure 2.20

Click **OK** to save the information. The new *Employee Type* field will now be displayed on the *Edit Employee* screen.

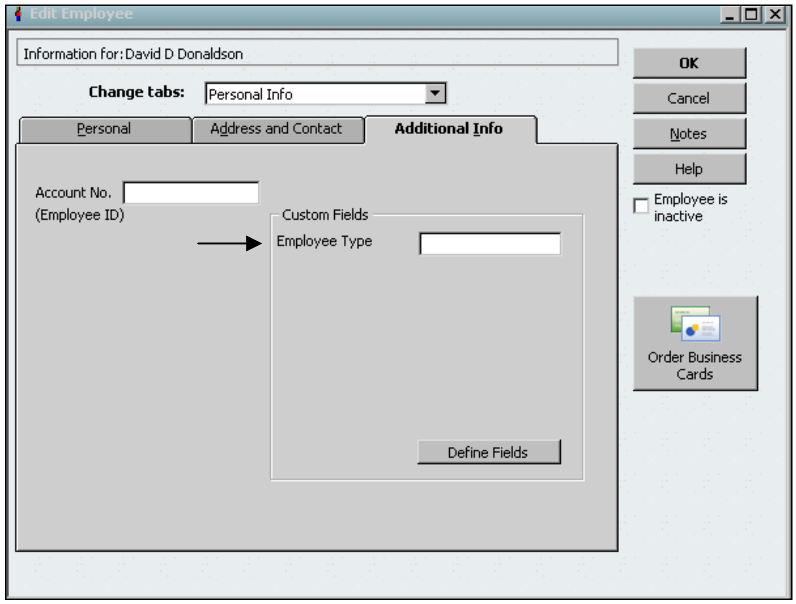


Figure 2.21

Next, you must enter an *Employee Type ID* in the *Custom Field*. You have three options:

1. **D** for Driver (A person who will use the handheld to deliver product.)
2. **C** for Checker (A person who will verify truck loads.)
3. **B** for Both (A person who performs both of the above functions.)

Place one of the corresponding letters into the *Employee Type* field. If an employee is not associated with route delivery, this field may be left blank.

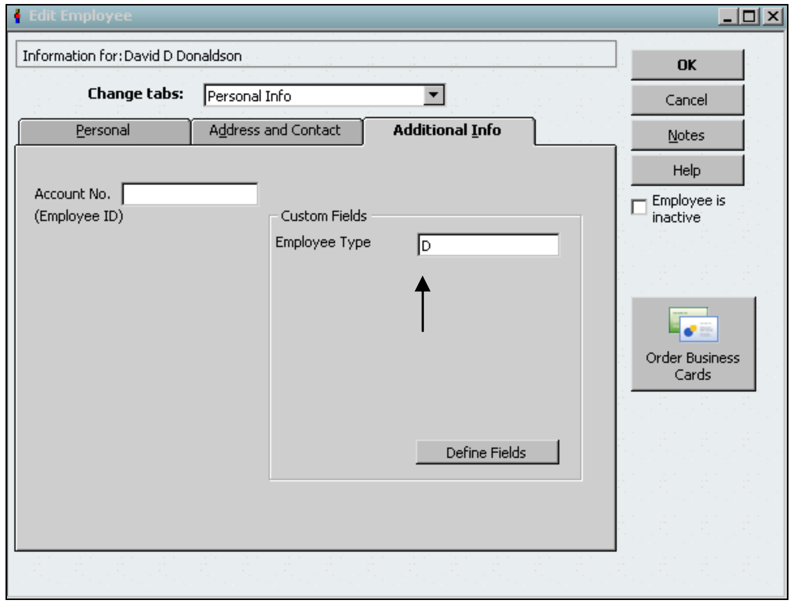


Figure 2.22

Click **OK** to continue.

Handheld Setup

The next step is to go to the *Handheld Setup* section of QRoute. Choose *Customers > QRoute > Setup Options > Handheld Setup* from your QuickBooks menu.

You will now establish the new QuickBooks *Custom Fields* in QRoute. Select the **General** tab.

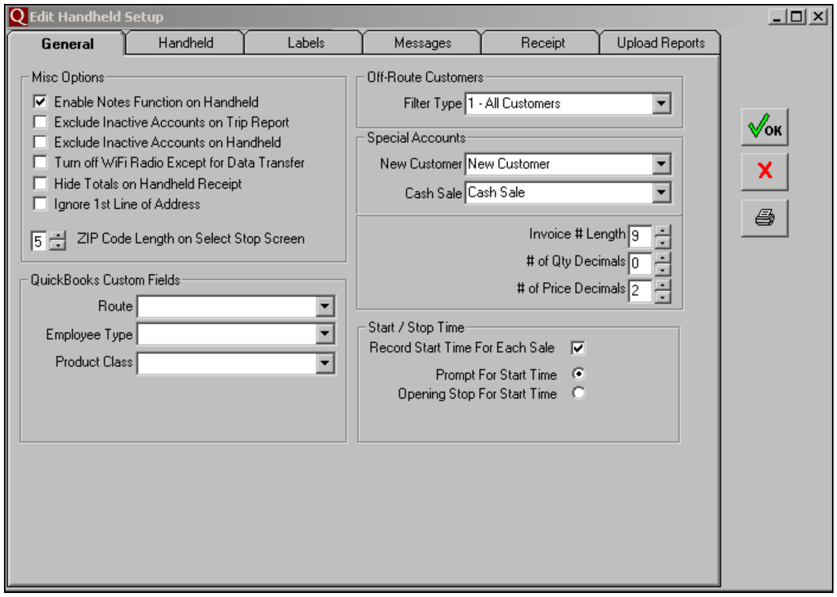


Figure 2.23

Under the section labeled: *QuickBooks Custom Fields*, choose the drop-down arrow next to the **Route** and **Employee Type** fields, and select the new fields created in the previous section (below).

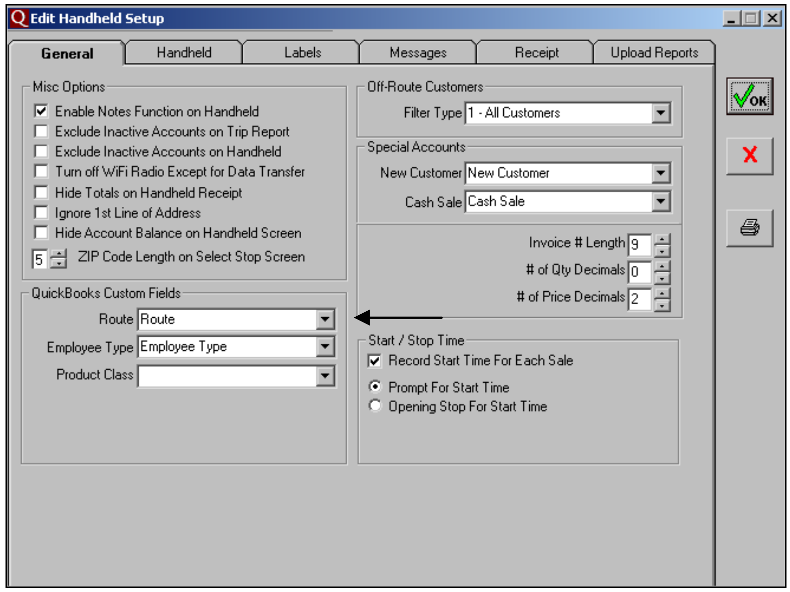


Figure 2.24

NOTE: *Handheld Setup* contains a majority of the QRoute configuration options; *Chapter 3* of this document covers each item in detail.

Click **OK** to save your changes. You can now move on to the next section.

Driver Setup

This section will guide you through establishing driver settings. Choose *Customers > QRoute > Setup Options > Driver Setup*.

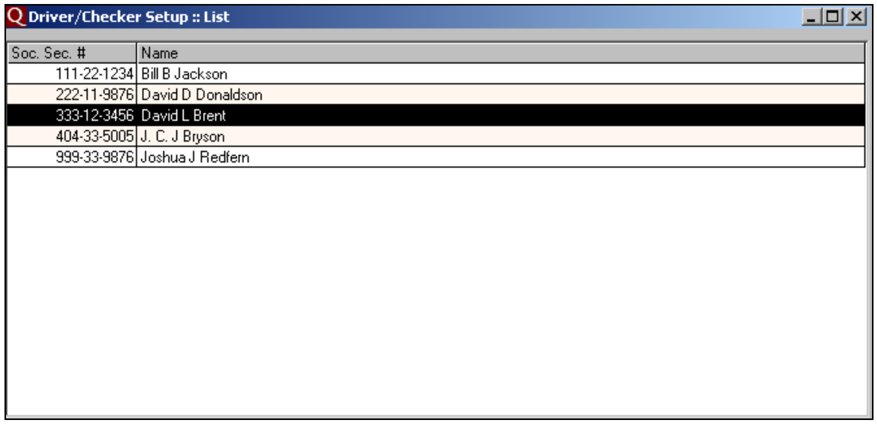


Figure 2.25

Double-Click on any driver to access the *Driver/Checker Setup* screen:

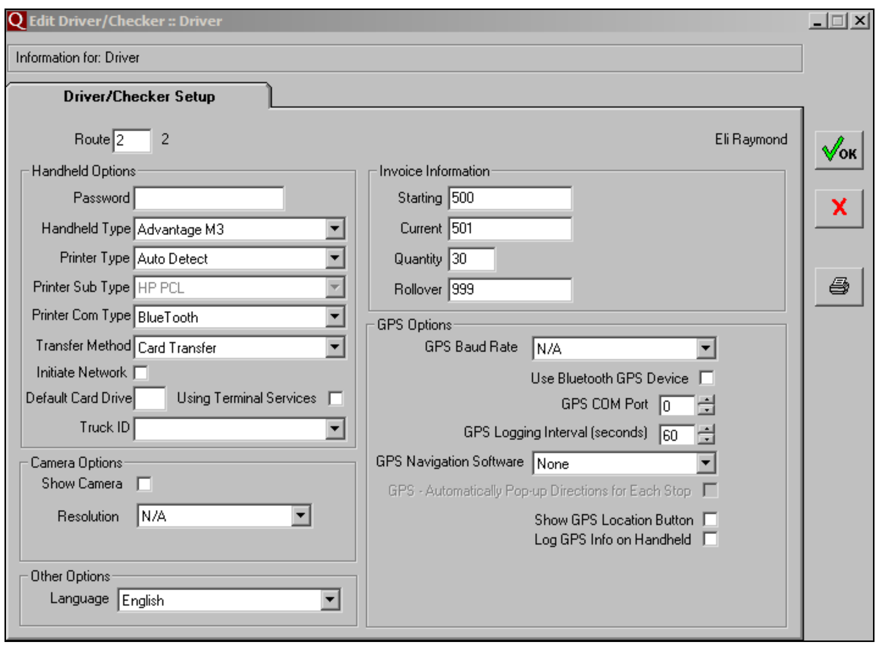


Figure 2.26

First, assign a **Route ID** to the driver. The *Route ID* is numeric, and up to two digits in length.

Next, you will assign the driver a handheld password, handheld type, and printer type:

- ***Password:*** The password field is numeric only, up to five digits in length.
- ***Handheld Type:*** Select your handheld type from the list.
- ***Printer Type:*** If the current driver will be using a portable printer, select the *Auto-Detect* option from the list.
- ***Printer Com Type:*** Choose the communication method that the portable printer will use (i.e., Bluetooth for Advantage BT-4).

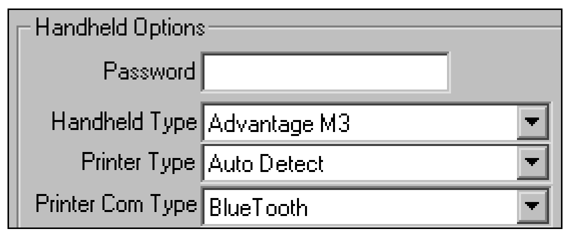


Figure 2.27

Establish the handheld *Transfer Method* from the drop-down list for this driver:

- ***USB Transfer:*** Select this option if you will be using a USB cable or cradle transfer.
- ***Card Transfer:*** Select this option if you will be using a USB card reader.

NOTE: Enter a drive letter in the *Default Card Drive* field when selecting *Card Transfer*. Additionally, select the 'Using Terminal Services' option if you will be processing cards on a PC using an RDP connection.

- ***Network Transfer:*** Select this option if you will be using a wireless transfer method (requires the *Advanced Communications Module*).

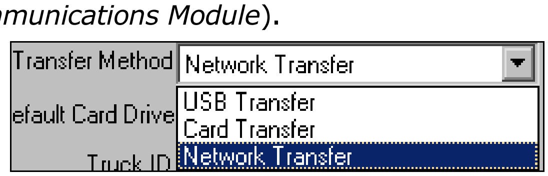


Figure 2.28

The *Truck ID* field will be established later. Skip this option for now.

The last option to configure is the **Invoice Pool**. Each route will generate unique invoice numbers from this area of the program.

The invoice length is nine digits by default — which can be adjusted within *Handheld Setup*, on the *General* tab — and accepts numeric values only.

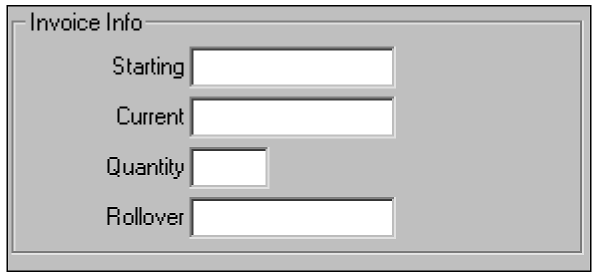


Figure 2.29

Populate the fields based on the definitions below:

Starting: Enter the starting (or lowest) invoice number that you would like this driver to begin with.

Current: The next available invoice number in the sequence. This field is updated automatically.

Quantity: Enter the quantity of invoices you would like this driver to have available each day on the handheld. This number should be ample enough to support an average amount of regular deliveries, plus extras for any special deliveries or call-ins.

Rollover: Enter the final (or highest) invoice number that you would like this driver to end with before reverting back to the *Starting* invoice number.

An example of a typical invoice pool:

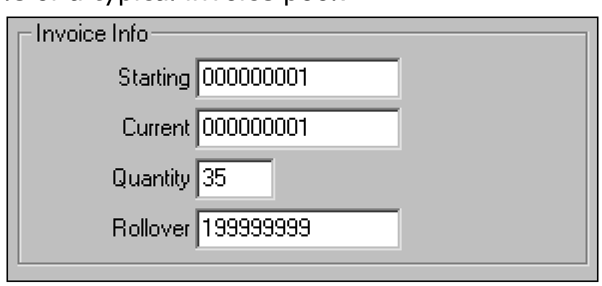


Figure 2.30

Click **OK** after you have defined the fields above.

Route Area Setup

In order to view your customers on the handheld, at least one *Route Area* needs to be established. *Route Areas* make it possible to group customers together based on location, area, and frequency of delivery.

Go to *Customers* > *QRoute* > *Setup Options* > *Route Area Setup,* and double-click on the **Add New** option.

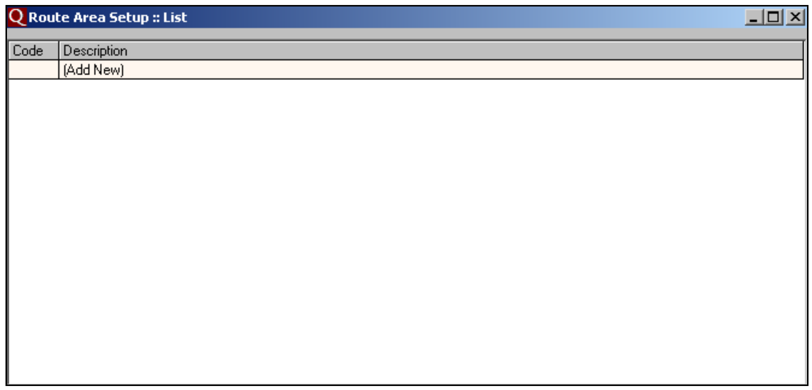


Figure 2.31

A few examples of *Route Area Codes* are:

- KCNOR = Kansas City North
- KCSOU = Kansas City South
- KCWM = Kansas City, Weekly, Monday
- W1BKC = Week 1, Bi-weekly, Kansas City

A maximum of five digits can be used when creating *Route Areas*. Create your own *Route Area* and click **OK** to continue.

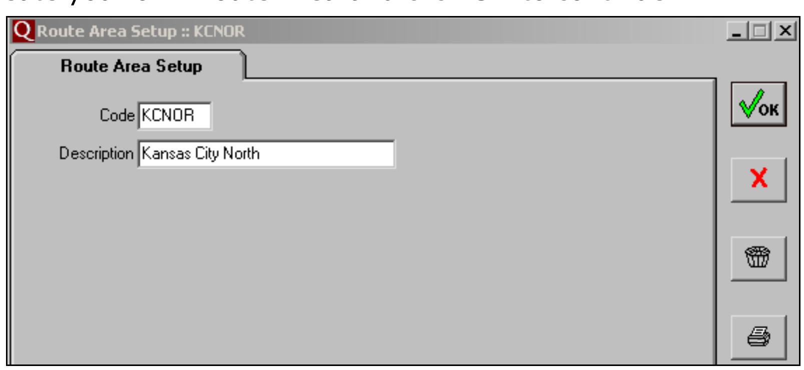


Figure 2.32

NOTE: You can repeat this process for all of the *Route Areas* needed.

This completes the minimal amount of QRoute related setup to get you up-and-running on the handheld. In the next section, we will guide you through a few required QuickBooks settings.

Customer Setup Items

Before a customer record can be displayed on the handheld, you must set up parameters for delivery addresses and routing in the QuickBooks *Edit Customer* screen.

Go to *Customers* > *Customer Navigator* > *Customers*. Double-click on a customer and the *Edit Customer* screen will be displayed.

The first thing to do is assign a delivery address to this customer. You can do this by filling in the **Ship To** location on the **Address Info** tab.

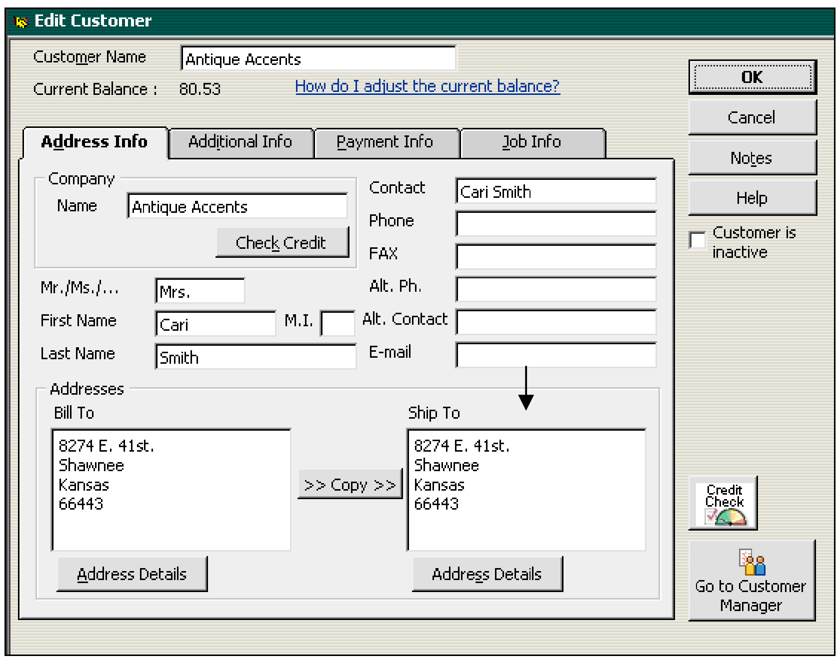


Figure 2.33

NOTE: Should you forget to do this and a customer has valid route information, QRoute will automatically use the **Bill To** address.

Next, choose the **Additional Info** tab. The new custom *Route* field is displayed on this screen: this is where you will assign the customer to a *Route ID*, *Route Area*, and *Sequence Number*.

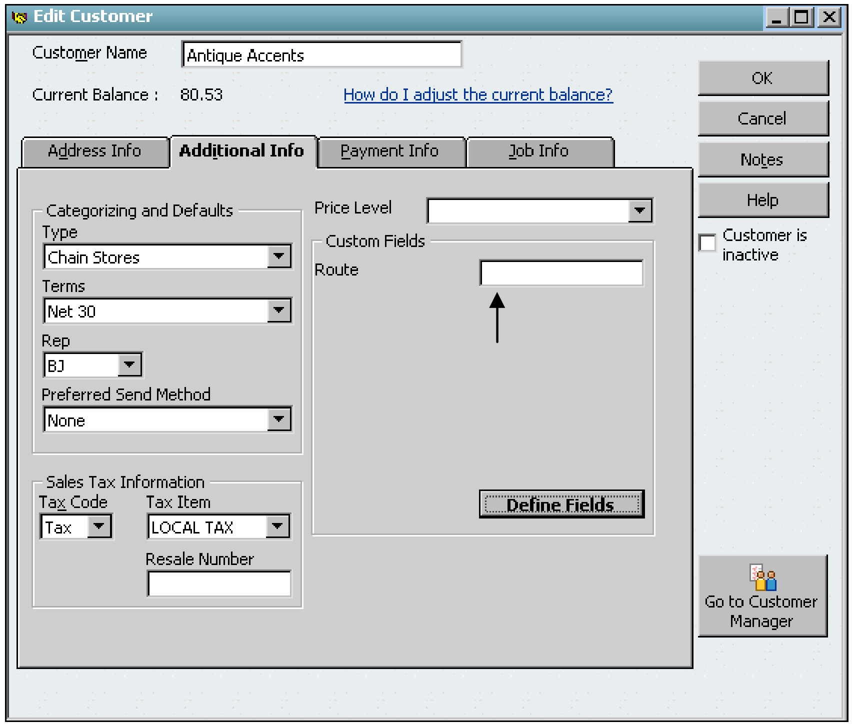


Figure 2.34

Using data entered during the course of this introduction, we have entered:

Route ID: R1

Route Area Code: KCNOR

Sequence Number: 0010

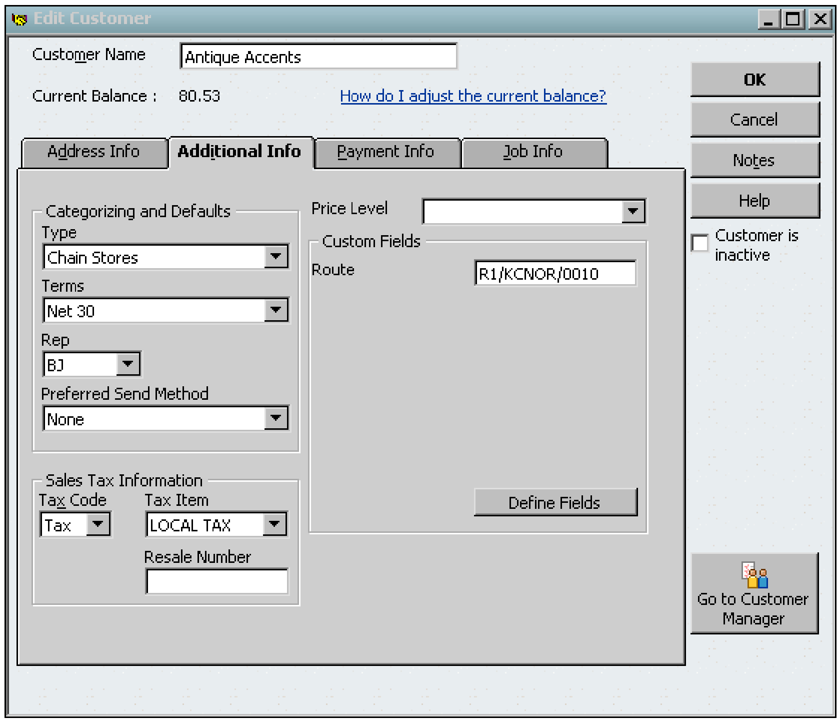


Figure 2.35

NOTE: A separator must be used in the *Route* field; the example above uses a forward slash (/). You may also use the symbols: \ - _ * , . #

Click **OK** to save any route changes.

Repeat the above steps until you have set up at least a handful, or all of your customers with *Routes*, *Route\ Areas*, and *Sequence Numbers*.

NOTE: If necessaery, turn to the *Route Area Setup* section of *Chapter 3* for more detailed information on setting up your *Route Areas*.

In the next section, we will guide you through entering products that will be sold on the handheld.

While you are still in the customer information area, you may find it helpful to add two new customers to your list. These would be:

- Cash Sale (If you do not already have one)
- New Customer

These would be used on your handheld for your drivers to use on route. If you allow your drivers to do Cash Sales from their vehicle, then they would use Cash Sale for that purpose. The new customer would be used if they are signing up new accounts that are not in QuickBooks before they start their route each day.

Item List

Another key part of the setup process is to update product information in the QuickBooks *Item List*.

On your *QuickBooks menu, select List > Item List*. This will access the current list of items that have been established in QuickBooks.

Double-click on an item, and a screen similar to **Figure 2.36** will appear.

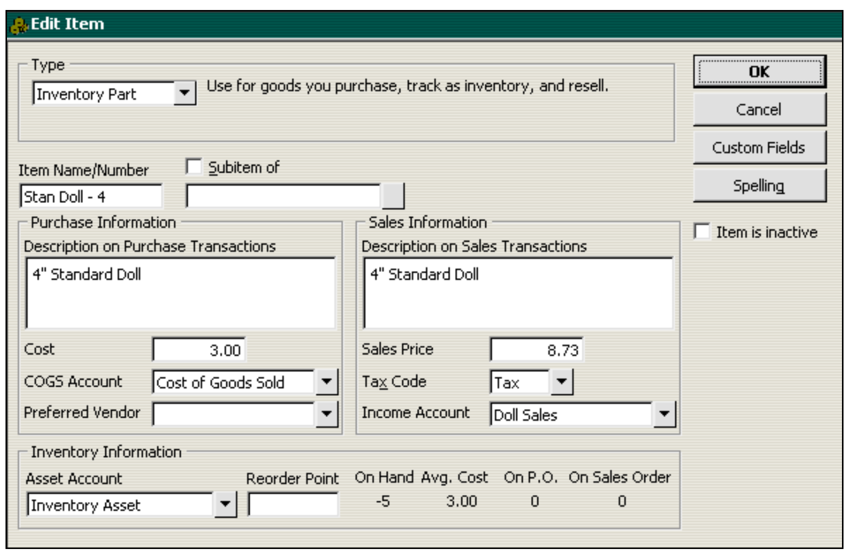


Figure 2.36

On the upper-left portion of the screen, the item *Type* will be displayed. In order for the product to show up in the QRoute handheld program, the item *Type* must be set to: **Inventory**

Part. If the product is not set up as such, it will need to be changed in order for the product to show up properly.

NOTE: QRoute also requires item type: *Service* to be available. This item type will be used with *Skip Reasons,* discussed in *Chapter 3*.

If *Inventory Part* is not an available option in the *Type* field drop-down, you will need to follow the steps below:

In QuickBooks, choose *Edit* > *Preferences* > *Items & Inventory* > *Company Preferences* and select: **Inventory and purchase orders are active** (as shown in **Figure 2.37**), and click **OK**.

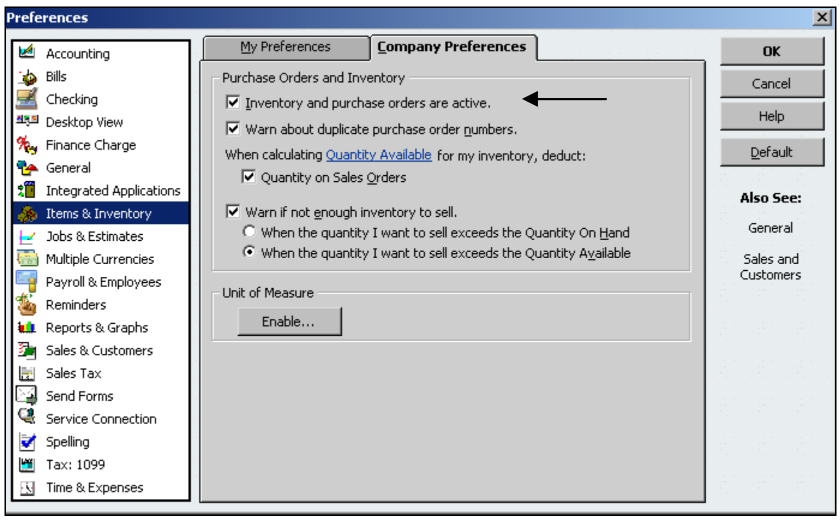


Figure 2.37

The *Inventory Part* option will now be available within the *Type* field.

NOTE: For further information on *Item Types*, refer to the tutorial on 'Item List Changes' in *Chapter 3,* if necessary.

In the next section, we will guide you through transferring customer data to the handheld. Do not continue unless you have established at least one customer on a *Route/Area/Sequence,* and one product has been created for the handheld.

Handheld Transfer – Morning Card (Card-Reader or USB Cradle/Cable)

To transfer customer data to the handheld, choose Custom*ers > QRoute > Morning Card,* and double-click on the route or driver name to process.

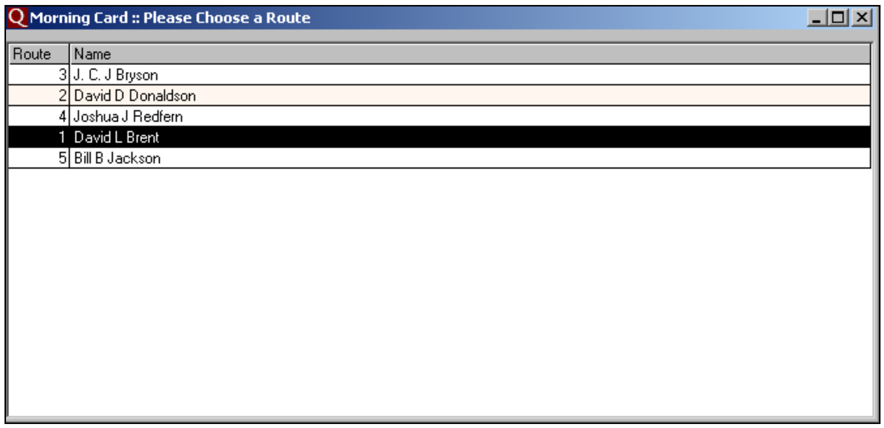


Figure 2.38

Depending on your method of transferring data, follow the steps outlined in either the *USB Card Reader* or *USB Cradle/Cable Transfer* sections below.

USB Card Reader

If you are using a USB card reader, make sure the *Drive Letter* listed is accurate, and choose at least one *Route Area* to process (select multiple areas by clicking **Select All** or manually selecting each).

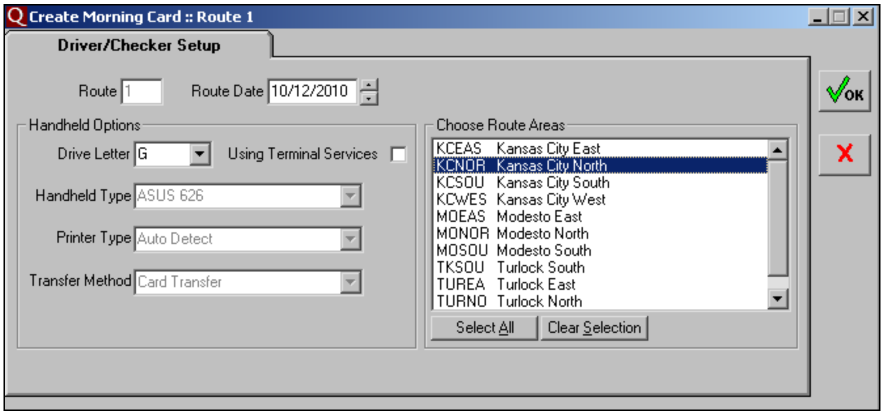


Figure 2.39

Click **OK** to process the *Morning Card*.

NOTE: Select the 'Using Terminal Services' option if you are downloading route data on a PC using an RDP connection.

A processing screen similar to the following will be displayed:

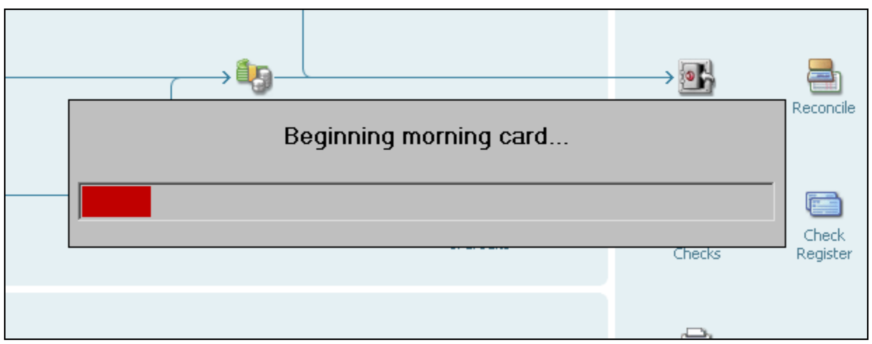


Figure 2.40

Finally, once all of the data has been transferred, a confirmation screen will be displayed.

Figure 2.41

Click **OK** to complete the process. The data is now ready to be viewed on the handheld.

In the next section, we will guide you through basic handheld activities.

NOTE: QRoute has many options available that allow you to tailor the handheld system to suit your company's needs. This is a general, quick-setup chapter that focuses on getting started. For more detailed information on this procedure, and alternative transfer methods, refer to *Chapter 3*.

USB Cradle/Cable Transfer

If you are using a direct USB transfer, place the handheld into the cradle (or plug into USB cable) and wait for *ActiveSync* to detect the handheld. Once the handheld is synced to the desktop, verify that **USB Transfer** is displayed in the **Transfer Method** field.

NOTE: In order to use the *USB Transfer* method, you must have *ActiveSync* installed on your desktop PC. This is standard for all USB cradle/cable connections in Windows. For information on downloading and installing *ActiveSync*, please refer to www.Microsoft.com/windowsmobile.

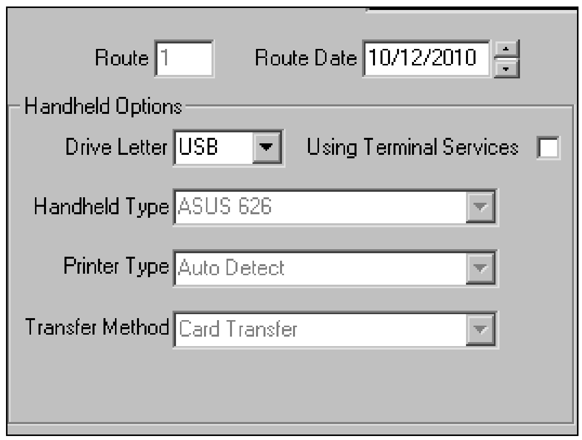


Figure 2.42

NOTE: The *Transfer Method* field is read only on this screen and can only be changed by going to *Customers > QRoute > Setup Options > Driver Setup*.

Click **OK** to process the *Morning Card*. A processing screen similar to the following will be displayed:

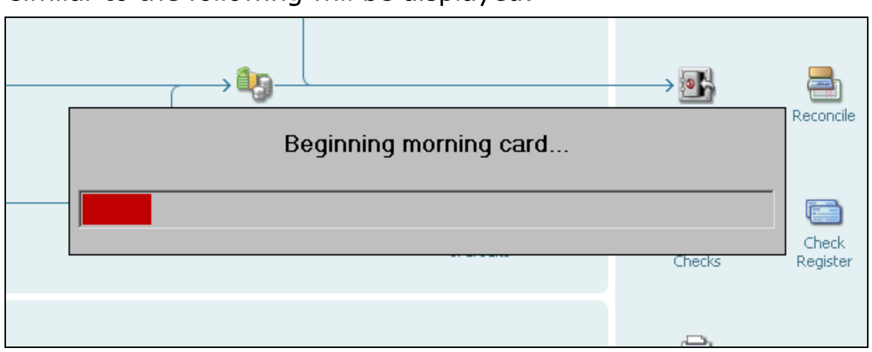


Figure 2.43

Finally, once all of the data has been transferred, a confirmation screen will be displayed:

Figure 2.44

Click **OK** to complete the process, the data is now ready to be viewed on the handheld.

In the next section, we will guide you through some basic handheld activities.

NOTE: QRoute has many options available that allow you to tailor the handheld system to adapt to your company's needs. This is a general, quick-setup chapter that focuses on getting started. For more detailed information on this procedure, and alternative transfer methods, refer to *Chapter 3*.

Using the Handheld

This section will introduce you to some commonly used options on the handheld.

Inserting the Card

Note the proper direction to insert the card, the card can only be loaded one way, do not force it into the slot. You may feel slight resistance as you insert it.

Figure 2.45 shows the use of an *SD Card*. Card types and sizes will vary.

Figure 2.45

Setting up the handheld with QRoute

To properly set up QRoute on the handheld, you will need to create a shortcut on the handheld *Start* menu.

With the card inserted into the handheld, choose *Start >Programs > File Explorer*. On most handhelds, you can choose the drop-down arrow next to **My Documents** or **My Device**.

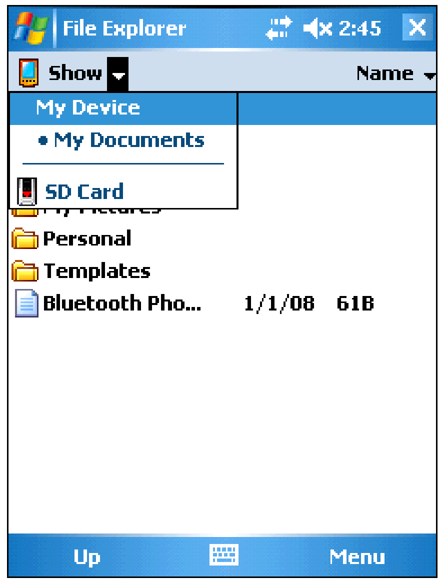


Figure 2.46

Select **SD Card** or **Storage Card**, followed by: **QRouteHH**.

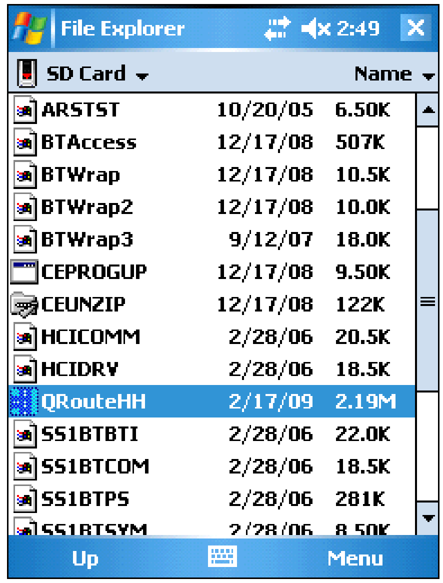


Figure 2.47

The first time QRoute is setup on the handheld, you will be prompted with a message informing you that the handheld will be reset in order to register new fonts. This is normal. Once the handheld is reset, you will be able to access QRoute directly from the *Start Menu*.

Choose the new **'QRoute HH'** shortcut on the handheld to launch the program. If you are prompted with a *System Diagnostics* screen first, simply key past it by selected the right-arrow on the screen.

Figure 2.48

NOTE: For more detailed information on setting up QRoute on a handheld device, refer to *Appendix B*.

To login to QRoute, enter the driver's password (if one has been established) and choose the green arrow to continue.

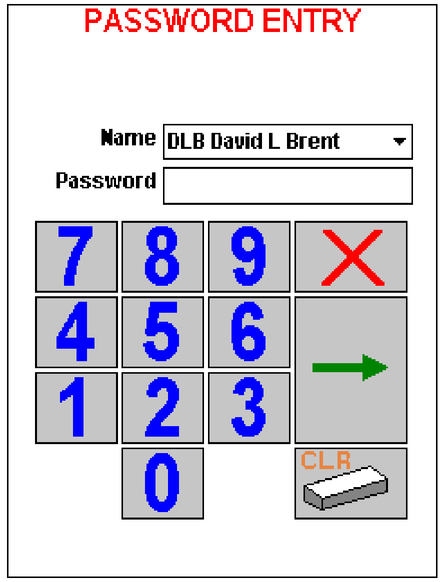


Figure 2.49

This will bring you to the 9-button, QRoute *Main Menu* screen.

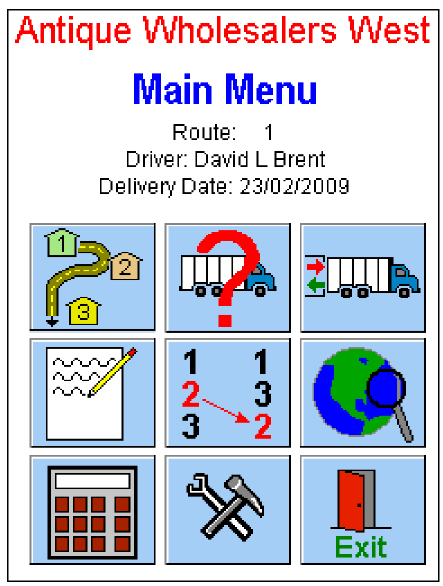


Figure 2.50

Now that you have successfully logged in to QRoute on the handheld, you can explore the various buttons available, as shown in **Figure 2.50**.

NOTE: *Chapter 5* explores all of the QRoute handheld features available; however, you should not skip chapters 3 and 4.

Conclusion

In conclusion, this chapter's focus is to quickly establish defaults in the QRoute program that will allow you to view data on your handheld. In the next few chapters, we will shift our focus to include all of the setup options and functions.

Where do I go from here?

Here is a list of the most important setup items that will be addressed in the remaining chapters of this manual, pay special attention to these areas:

- Drivers and Checkers.
- Trucks.
- Route Areas.
- Alert Messages.
- Setup all Items that will be used on the handheld.
- Skip Reasons and Gratis Codes.
- Container Deposits (if you are using them).
- Handheld Setup.
- Preview Trip Report to verify route data is correct.
- Run Data Integrity Check.
- Morning Card

If you need help along the way, let us know. Our support staff will help you with the startup process to quickly get you going!

Notes

Chapter 3 – QRoute Desktop (A to Z)

Introduction

As you get started with QRoute, you will need to set up several features so you can view your customer's information on the handheld. Many of these items were briefly covered in *Chapter 2*. In this chapter, all features of the desktop are explained in detail, in the order listed on the QRoute menu.

The QRoute Menu

All items relating to QRoute are located on a single menu that is displayed on the *Customers* tab of QuickBooks.

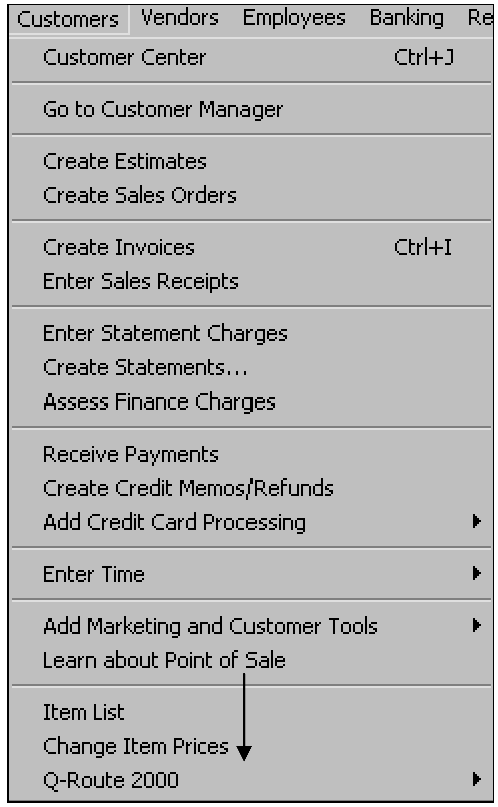


Figure 3.01

Within the QRoute menu, you will find six primary categories:

- ***Transfer***
- ***Reports***
- ***Customer Tools***
- ***Setup***
- ***Modules***
- ***Utilities***

The most frequently used items are located near the top of the menu.

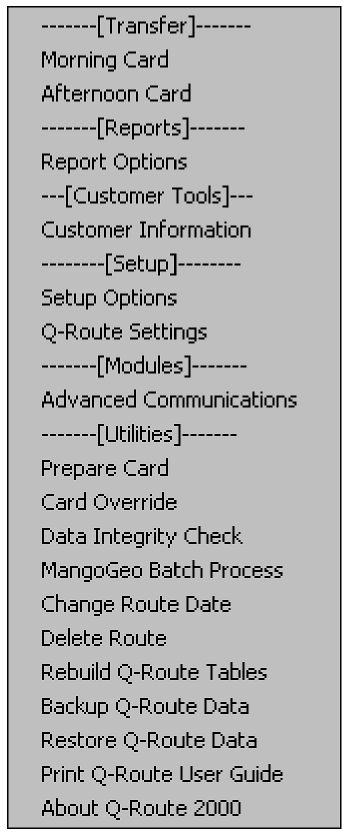


Figure 3.02

NOTE: If you are using the *QRoute Toolbar*, the layout is different, but the options are the same.

Transfer

This menu section contains the programs necessary to transfer data to and from the handheld(s).

Typical transfer methods are:

- USB connected cradle or cable
- USB Card Reader

More advanced, optional transfer methods are:

- Remote Transfer (Modem)
- Wireless Transfer (Wi-Fi/GPRS)

NOTE: Contact ARS for information on the *Advanced Communications Module*.

Most handheld computers come with a USB docking cradle that is used to charge the unit, as well as connect it to a PC via USB. If the handheld did not come with a cradle, then you should have received a USB cable that will connect the handheld to the PC directly.

You may also opt to use a USB card reader to transfer data between the desktop and handheld. This method of transfer is convenient, as you do not have to "sync" each handheld to the desktop prior to transferring information.

Each handheld requires a storage card to move data to/from the desktop. Storage cards come in a variety of different formats, such as: Compact Flash, MultiMedia, Secure Digital (SD), MiniSD and several others. Be sure to check compatibility with your handhelds prior to purchasing storage cards — having one or two extra storage cards can be helpful as well.

Morning Card

The *Morning Card* option allows you to transfer route data to the handheld(s) each delivery day.

A listing of available routes is displayed:

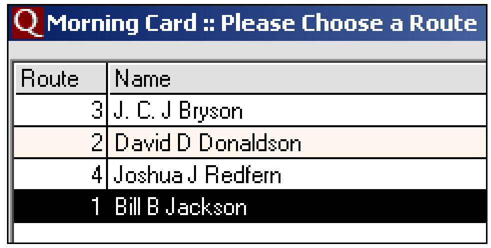


Figure 3.03

To get started, simply double-click on a route/name combination, and a screen similar to the following will be displayed:

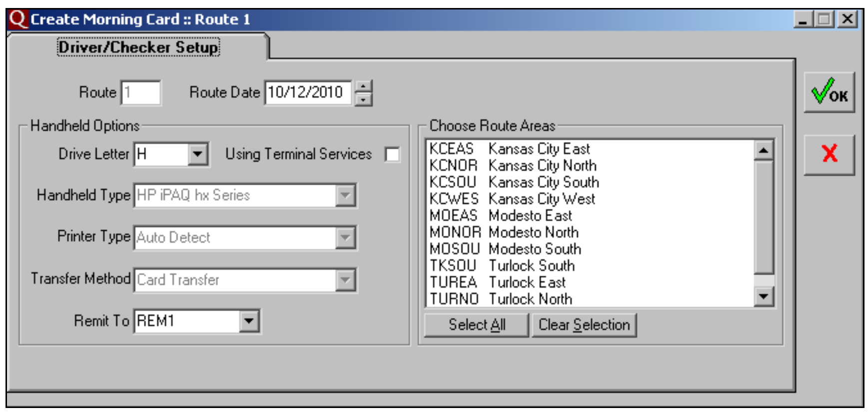


Figure 3.04

Fields:

Route: The route assigned to the current driver.

Route Date: The date of the route to download. This date will be used for all transactions on the handheld.

Handheld Options:

Drive Letter: The drive letter of the USB card reader (if applicable).

Using Terminal Services: Select this option of the driver will be transferring route data using an RDP connection.

Handheld Type: Displays the handheld type assigned to the current route driver.

Printer Type: Displays 'Auto-Detect' if the current route driver is configured to use a printer.

Transfer Method: Displays the method of transfer that will be used when processing route data.

NOTE: Four of the previous fields are 'display only' and cannot be changed on the current screen. To make changes, you must go to *Customers > QRoute > Setup Options > Driver Setup*.

Remit To (Optional): Select the 'Remit To' information to use on the current route.

NOTE: This option is only displayed if you have configured 'Remit To' codes within *QRoute > QRoute Settings*.

Choose Route Areas

Select all *Route Areas* that the current route driver will deliver to by clicking on one or more individually.

- ***Select All:*** Select this option to include all of the *Route Areas* on route.
- ***Clear Selection:*** Choosing this option will deselect all *Route Areas* that have been selected.

NOTE: To deselect an individual *Route Area*, simply click on it a second time.

The selected *Route Areas* are only valid for customers assigned to the *Route* being processed, in this case: *Route 1*.

Once you have made your selection, click **OK**.

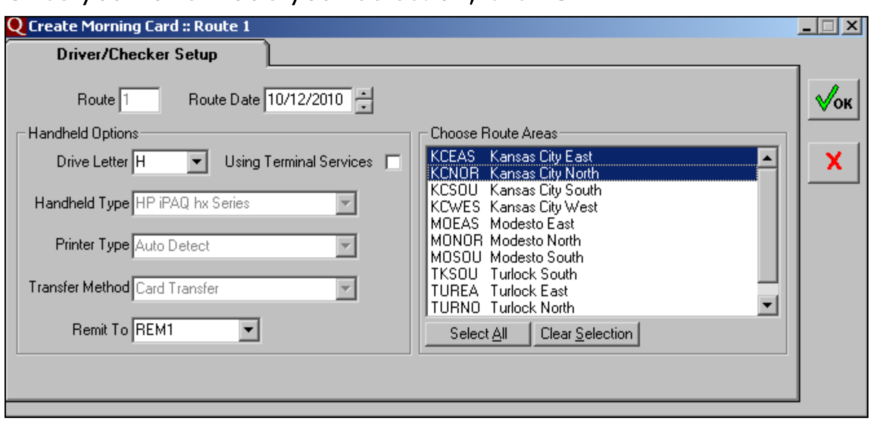


Figure 3.05

The program will begin to process data for the selected route.

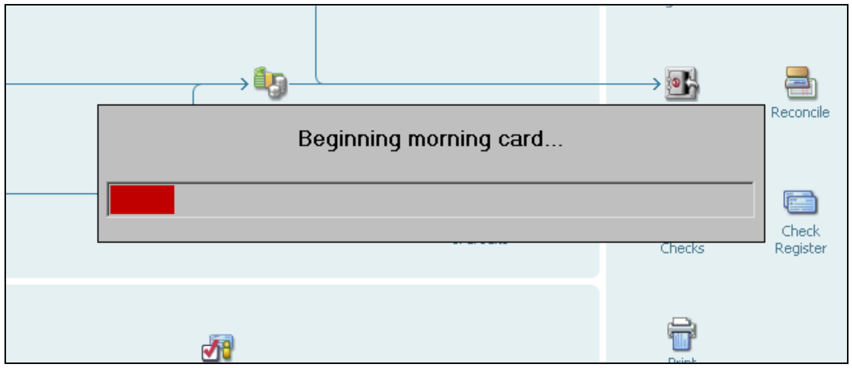


Figure 3.06

Depending on how many customers you have; the speed of your computer; and the size of other collected data, route processing time will vary.

Once the *Morning Card* process is complete, a message similar to the following will be displayed:

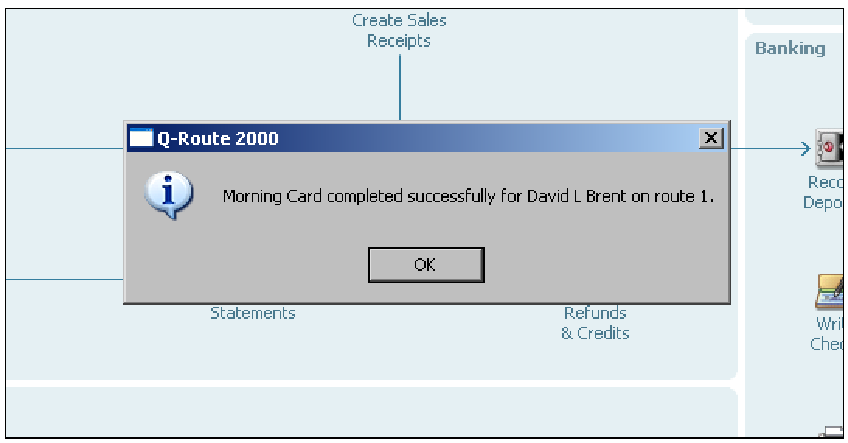


Figure 3.07

This completes the *Morning Card* process. Click **OK** to continue. You can now login to the route on the handheld.

NOTE: Detailed handheld operations are discussed in *Chapter 5*.

Afternoon Card

As each route is completed daily, the accumulated data must be transferred back to QuickBooks. As each route is uploaded, a series of reports will be printed on your desktop printer. Make sure your default printer is available prior to starting this process.

If you are using a *USB Card Reader*, insert a card into the reader and select **Afternoon Card**. A screen similar to the following will appear:

Figure 3.08

NOTE: If you are using the *USB Cradle/Cable* transfer method, select the **USB** option in the *Drive Letter* field after synchronizing the handheld to the desktop.

NOTE: For information on uploading data using one of our wireless data transfers, contact Advantage Route Systems.

The system will automatically identify your card. Make sure you verify this information is accurate. Simply follow the instructions on the screen to continue.

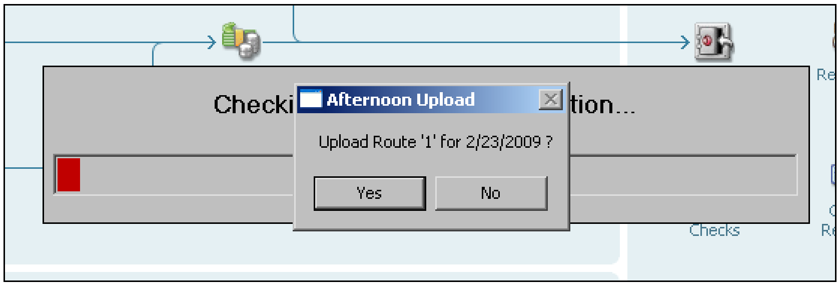


Figure 3.09

A confirmation message will be displayed once the process is complete.

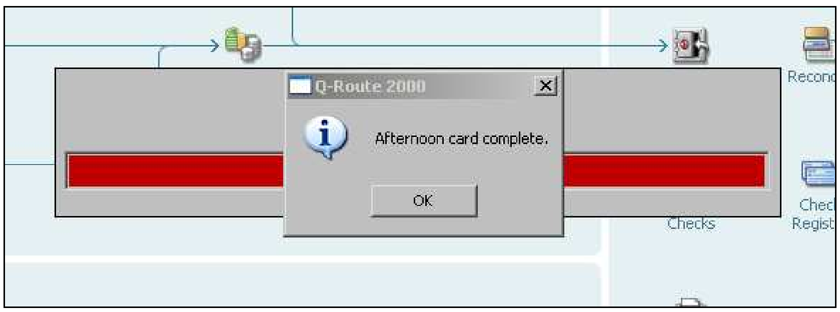


Figure 3.10

This completes the *Afternoon Card* process. Click **OK** to continue.

Depending on the settings established within *Handheld Setup* (on the *Upload Reports* tab) you can now review the *Afternoon Reports* printed for the current route.

Reports

QRoute has several built-in reports on the desktop. They are slightly different from the standard reports typically generated in QuickBooks, because of the nature of the interface for QRoute.

Each QRoute report follows a consistent format and has three main sections on each screen:

1. **Sort Order Selection** – You may choose the *Primary* and *Secondary Sort* order on most reports. The sort fields may vary based on the criteria in each report.
2. **Filters and Criteria** – To narrow the amount and range of information that you wish to view: you can enter date ranges, invoice numbers, etc.
3. **Output Destination** – You can print or preview each report.

Sample Report Screen:

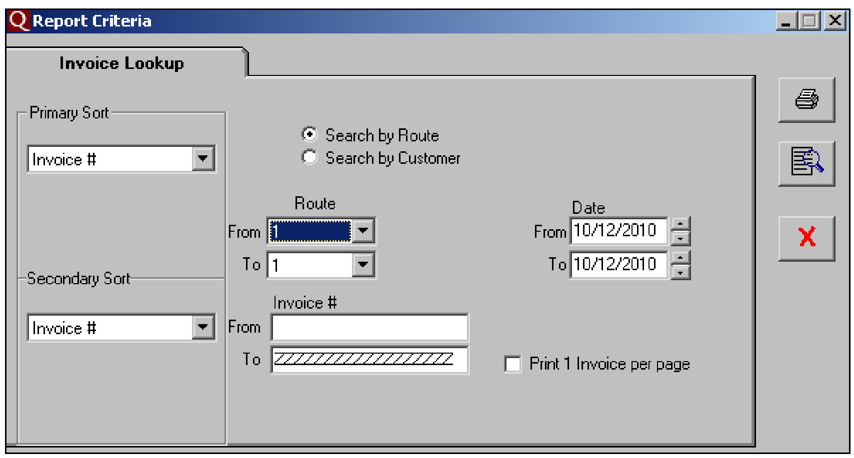


Figure 3.11

Route Trip Report

Before your drivers depart each day, it is a good idea to generate a list of all customers that each route will service. It can serve as a backup for the handheld, and also provide the driver with a good overview of the stops that need to be serviced that day. The driver can review the report before leaving on route.

Choose *Route Trip Report,* found under *Customers > QRoute > Report Options > Route Reports*.

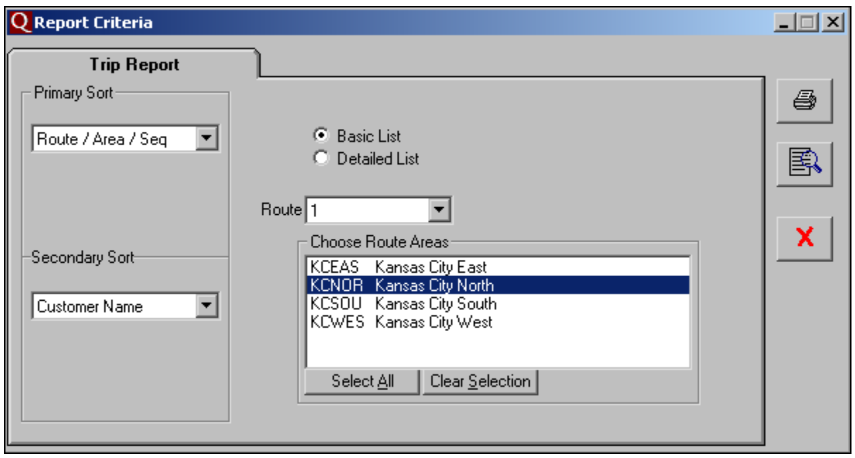


Figure 3.12

Fields:

Primary and Secondary Sort (Order):

- *Route/ Area /Seq.*
- *Customer name*
- *Delivery Address*
- *Delivery City*
- *Delivery ZIP*

Basic List: Report includes basic customer detail (e.g., *Name*, *Address*, *Phone Number*).

Detailed List: Select this option to include more detail on the report (e.g., *Sales Rep Info*, *Deposit Quantities*, and *Price Levels*).

Route: Select the *Route ID* to use on the report.

Choose Route Areas: Geographic areas/frequencies of route assignment.

Choose Destination: Select *Print* or *View Report* to continue.

Route Times Report

This report allows you to view the time of day each customer was serviced; the total time it took to deliver, and also includes invoice totals and mileage information.

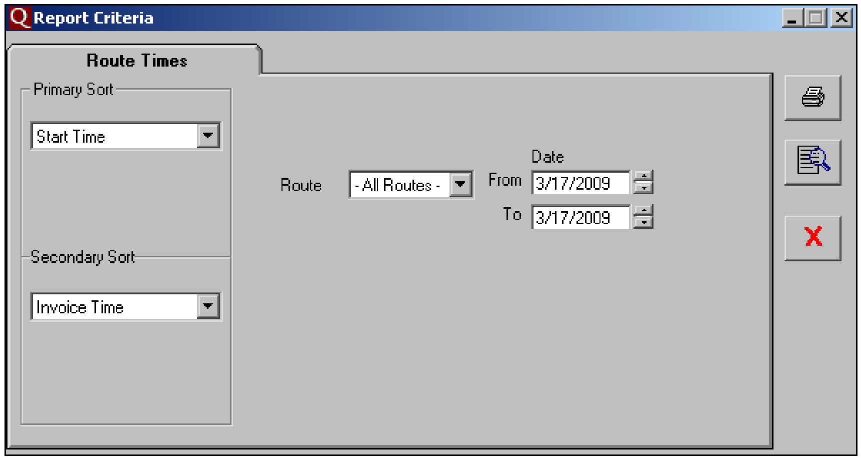


Figure 3:13

Fields:

Primary Sort and Secondary Sort (Order):

- *Start Time*
- *Invoice Time*
- *Duration*
- *Sequence*
- *Customer Name*
- *Invoice Amount*

Route: Select the *Route ID* to use on the report.

Date Range: Specify the beginning and ending dates to use on the report.

Choose Destination: Select *Print* or *View Report* to continue.

Site Inspection Report

This report allows you to reprint any *Site Inspections* that were completed on the handheld.

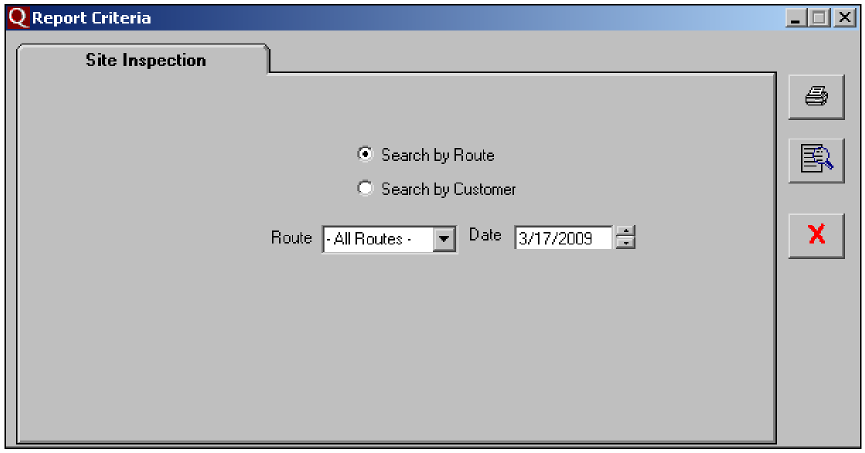


Figure 3.14

Fields:

Search by Route: Select this option to run the report by route.

Search by Customer: Select this option to run the report by customer.

Route/Customer: Depending on your selection above, choose the *Route* or *Customer* to include in the report.

Date: Enter the date to use on the report.

Choose Destination: Select *Print* or *View Report* to continue.

Driver Notes Report

This report allows you to reprint *Driver Notes* that were entered on the handheld.

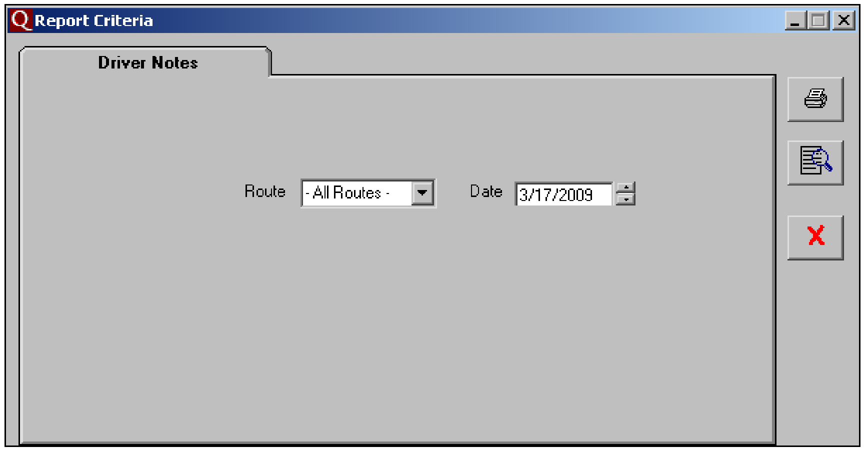


Figure 3.15

Fields:

Route: Select the *Route* to use on the report.

Date: Enter the date to use on the report.

Choose Destination: Select *Print* or *View Report* to continue.

Invoice Lookup

If you would like to reprint invoices in the QRoute format given to your customers (including signatures), select the *Invoice Lookup* option.

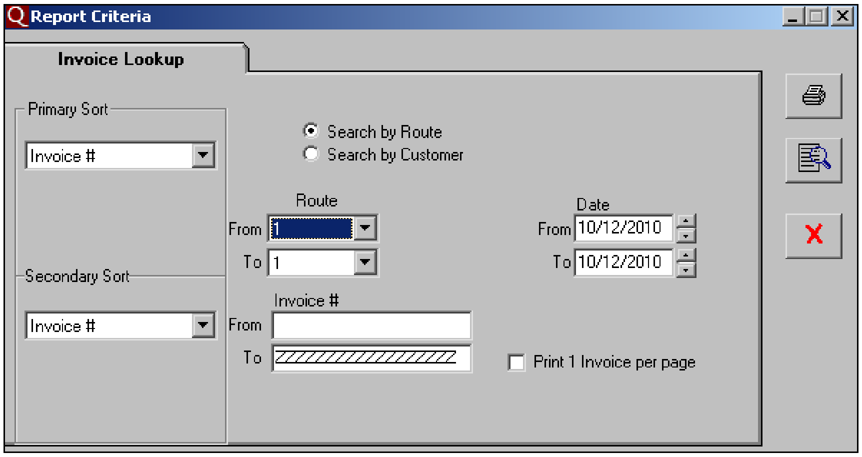


Figure 3.16

Fields:

Primary Sort (Order): The *Primary Sort* order may be sorted by:

- *Invoice number*
- *Customer name*

Secondary Sort (Order): The *Secondary Sort* order may be sorted by:

- *Invoice number*
- *Date*

Search by Route: Select this option to run the report by route.

Search by Customer: Select this option to run the report by customer.

Route/Customer: Depending on your selection above, choose the *Route ID* or *Customer* to include in the report.

***Invoice Number*:** Enter the range of invoice numbers, up to nine (9) characters per invoice number.

Date Range: Specify the invoice beginning and end dates you would like included on your report.

Print 1 Invoice per Page: Select this option to only include one invoice per page on the report.

Choose Destination: Select *Print* or *View Report* to continue.

Returned Products

The *Returned Products* report allows you to view damaged or returned items entered by the driver on the handheld.

NOTE: Refer to the *Setup* section of *Chapter 3* for further information on this topic.

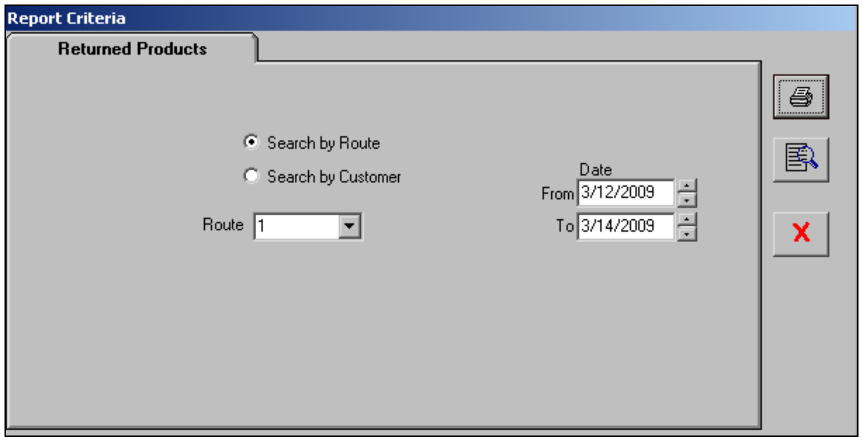


Figure 3.17

Fields:

Search by Route: Select this option to run the report by route.

Search by Customer: Select this option to run the report by customer.

Route/Customer: Depending on your selection above, choose the *Route* or *Customer* to include in the report.

Date Range: Specify the beginning and ending dates you would like included on your report.

Choose Destination: Select *Print* or *View Report* to continue.

Special Price Customers

Use the *Special Price Customers* report to view customers assigned to *Price Lists* or *Price Levels* in QuickBooks.

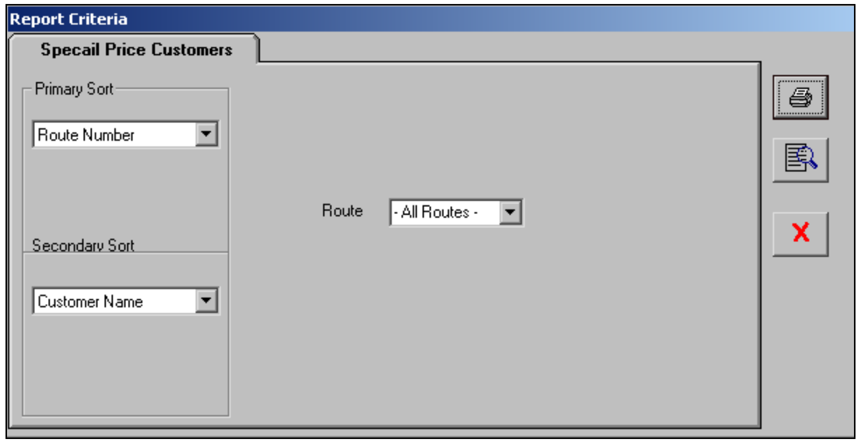


Figure 3.18

Fields:

Primary and Secondary Sort (Order): This report can be sorted by the following fields:

- *Route Number*
- *Customer Name*
- *Delivery Address*
- *Delivery City*
- *Delivery ZIP*

Route: Select the route that you would like to view on the report.

Choose Destination: Select *Print* or *View Report* to continue.

NOTE: *Price Lists* are only available in QuickBooks Premier or Enterprise versions.

Gratis Products

Use the *Gratis Products* report to view detailed product information for items that were assigned a *Gratis Reason*.

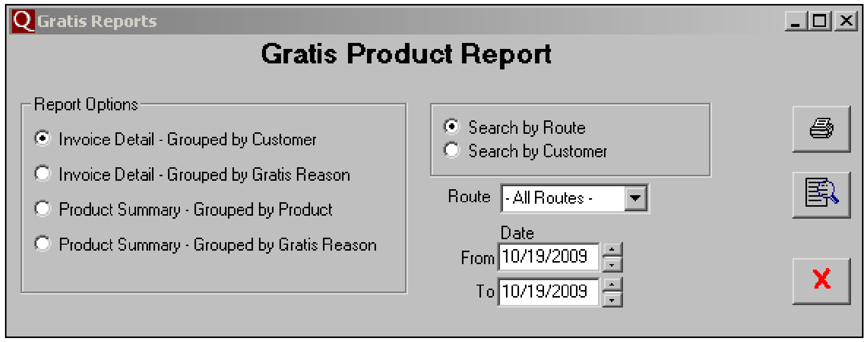


Figure 3.19

Fields:

Invoice Detail – Grouped by Customer: Select this option to include detailed invoice data on the report, sorted by customer name.

Invoice Detail – Grouped by Gratis Reason: Select this option to include detailed invoice data on the report, sorted by *Gratis Reason*.

Product Summary – Grouped by Product: Select this option to generate a summarized report, sorted by product.

Product Summary – Grouped by Gratis Reason: Select this option to generate a summarized report, sorted by *Gratis Reason*.

Search by Route: Select this option to run the report by route.

Search by Customer: Select this option to run the report by customer.

Route/Customer: Depending on your selection above, choose the *Route* or *Customer* to include in the report.

Date Range: Specify the beginning and ending dates you would like included on your report.

MangoGeo Address Correction

The *MangoGeo Address Correction Report* allows you to view detailed address results separated by route and *Result Code*.

NOTE: Visit www.Mango-Geo.com or contact Advantage Route Systems for further information on MangoGeo.

View Customer Photos

The *View Customer Photos* option allows you to view photos that were taken on a camera equipped handheld through QRoute.

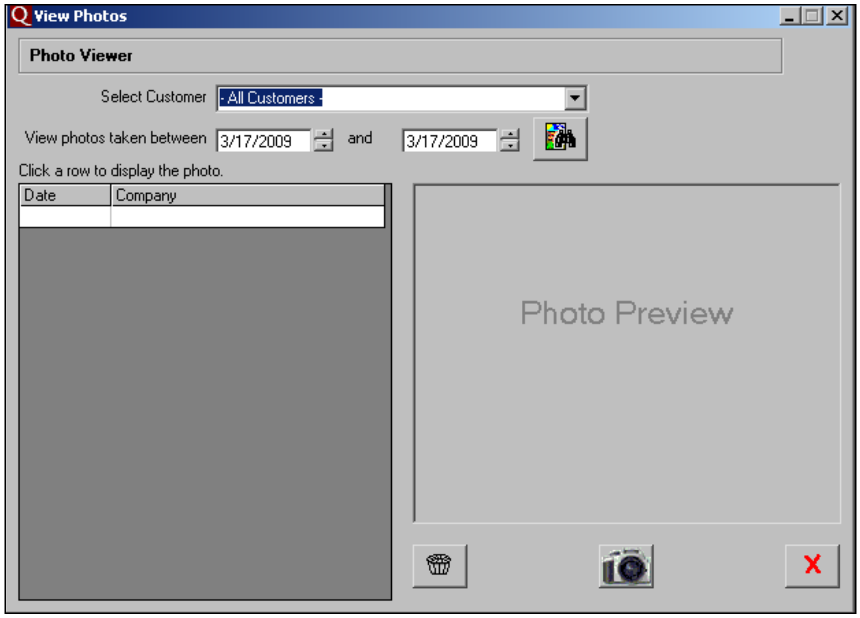


Figure 3.20

Fields:

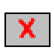
Select Customer: View photos for all customers or individual customers by selecting an option here.

View photos taken between [] and []: Enter the date range you would like to include for photo viewing.

 ***Search Photos:*** Select this button to search for photos after you have entered your criteria.

 ***Delete Photo:*** Select this button to delete the currently displayed photo.

 ***Open in Photo Software:*** Select this button to open the current photo using your default picture viewing program.

 ***Close*****:** Select this button to close the *View Customer Photos* window.

Invalid Route Numbers

Use the *Invalid Route Numbers* report to view customers assigned to *Routes* that are not available in the QRoute database.

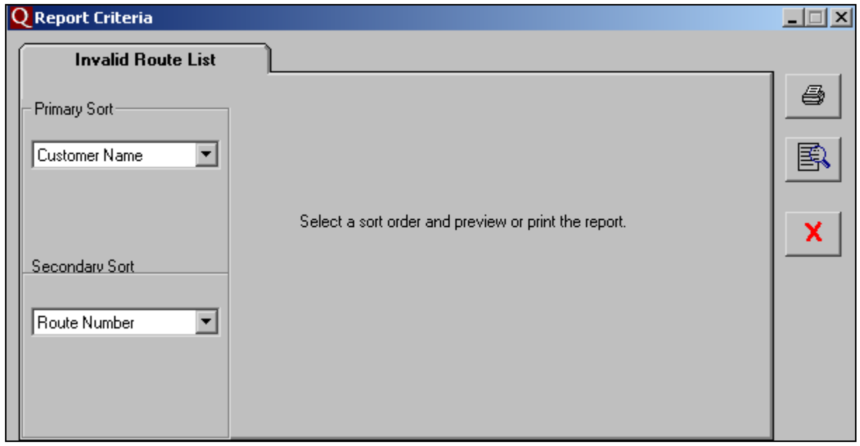


Figure 3.21

Fields:

Primary and Secondary Sort (Order): This report can be sorted by the following fields:

- *Customer Name*
- *Route Number*
- *Route Area*

Choose Destination: Select *Print* or *View Report* to continue.

Invalid Route Areas

Use the *Invalid Route Areas* report to view customers assigned to areas that are not added to the QRoute database.

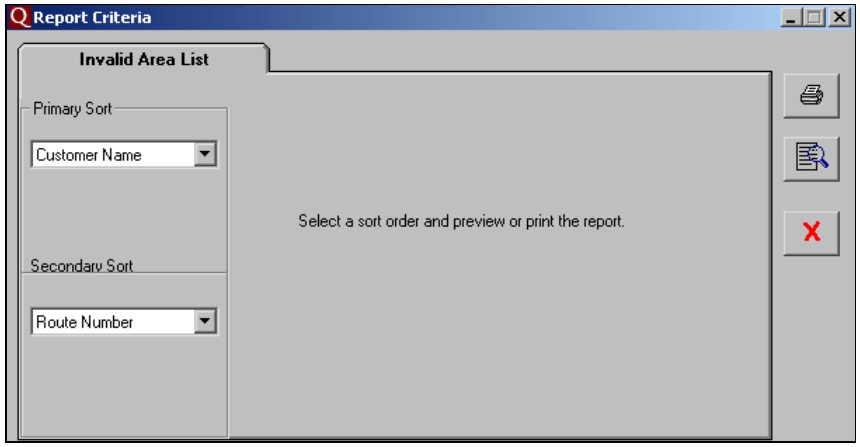


Figure 3.22

Fields:

Primary and Secondary Sort (Order): This report can be sorted by the following fields:

- *Customer Name*
- *Route Number*
- *Route Area*

Choose Destination: Select *Print* or *View Report* to continue.

Customer Tools

The *Customer Tools* menu items give you further flexibility with managing customers in QRoute. By selecting a customer you can control important handheld options, print or e-mail invoices, and view *Returned Product* information. Each option is discussed below.

Customer Information / Settings Tab

Choose a customer by using the drop-down menu on the top portion of the screen. As each customer is selected, various account details will be displayed on the screen, such as:

- ***Address Info***
- ***Route Information***
- ***Phone Number***
- ***Last Transaction***
- ***Price Level Info***

NOTE: This information is read-only. If changes need to be made, go directly to the account within QuickBooks.

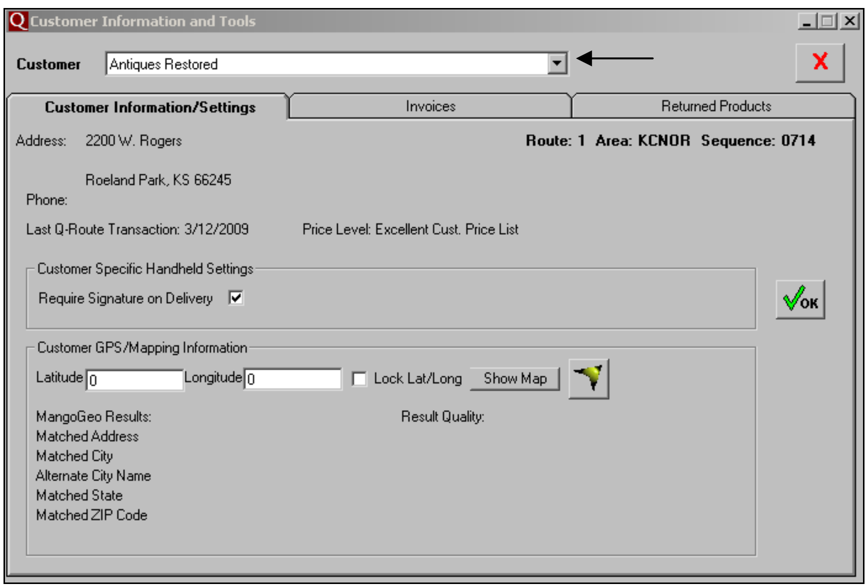


Figure 3.23

Require Signature on Delivery: Check this box to require a signature from the customer each time an invoice is created on the handheld.

OK: Click 'OK' to save any changes made on the screen.

Customer GPS and Mapping Information:

Latitude and **Longitude** settings can be stored here for the following programs to use for turn-by-turn and mapping functions on the handheld. You have a few choices:

- ***Mango Pilot*** – Turn-by-Turn Navigation system.
- ***MangoGeo –*** Address correction program.
- ***TomTom Navigator*** – Turn-by-Turn navigation system. (discontinued)
- ***QRoute Mapping Module*** – Route optimization system.

NOTE: Contact our sales department at 866.317.6883 for further information on any of these items.

Lock Lat/Long: Select this option to prevent the *MangoGeo* program from overwriting the current latitude and longitude coordinates listed (this can be helpful if valid coordinates are already displayed).

NOTE: Visit www.Mango-Geo.com or contact Advantage Route Systems for further information on MangoGeo.

Show Map: This option allows you to view or find the customer's *Latitude* and *Longitude* coordinates based on their delivery address in QRoute (requires internet connection).

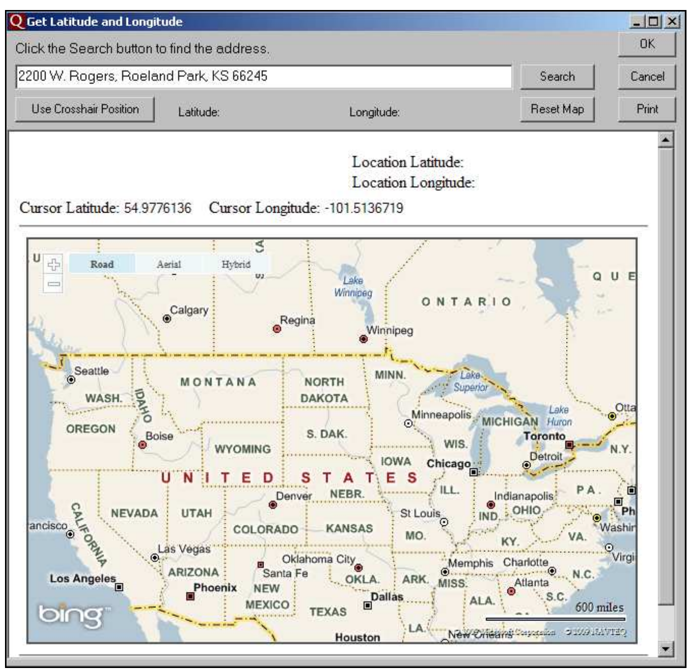


Figure 3.24

Use Crosshair Position: Right-click anywhere on the map to add a crosshair position. If you would like to use the selected location for the *Latitude* and *Longitude* coordinates, click on the *Use Crosshair Position* button.

Search: Select this option to search the map for the current address. If it is not found, similar addresses will be displayed.

NOTE: this tool is used for *Latitude* and *Longitude* coordinates only. The customer's stored address will not be affected.

Reset Map: Select this option to reset any coordinates currently on the map.

OK: Select this option to save the current *Latitude* and *Longitude* coordinates displayed.

Cancel: Select this option to cancel any changes and exit the screen.

Print: Select this option to print the map currently displayed.

 ***MangoGeo Address Correction:*** Select this option to correct the customer's address using the MangoGeo program.

NOTE: Visit www.Mango-Geo.com or contact Advantage Route Systems for further information on MangoGeo.

Invoices Tab

Choose a customer by using the drop-down menu on the top portion of the screen. As each customer is selected, recent invoice information will be displayed automatically.

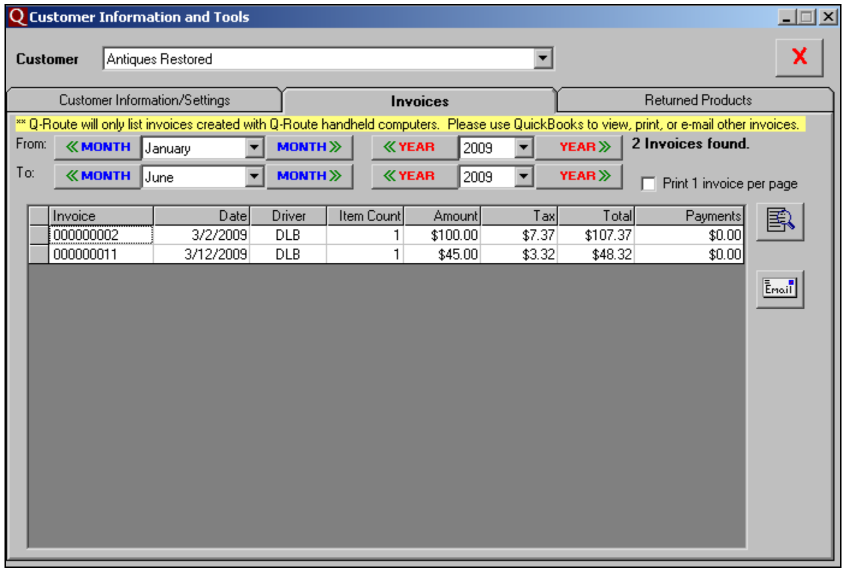
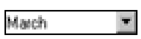


Figure 3.25

From and To:

Month (back): Select this button to view invoice information from the previous month.



Manual Selection: Choose the drop-down arrow to manually select a month.

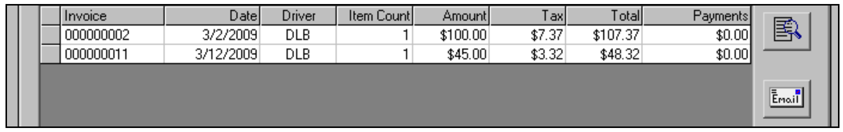
Month (forward): Select this button to view invoice information for the next month listed.

Year (back): Select this button to view invoice information from the previous year.

Manual Selection: Choose the drop-down arrow to manually select a year.

Year (forward): Select this button to view invoice information for the next year listed.

Print 1 invoice per page: Select this option to prevent the system from combining multiple invoices on each page when selecting the *Preview* and *Print* buttons.



Invoice	Date	Driver	Item Count	Amount	Tax	Total	Payments
000000002	3/2/2009	DLB	1	$100.00	$7.37	$107.37	$0.00
000000011	3/12/2009	DLB	1	$45.00	$3.32	$48.32	$0.00

Figure 3.26

Detail Lines:

Invoice: The assigned invoice number.

Date: The date the invoice was created.

Driver: The driver that created the invoice.

Item Count: The number of *Items* sold on the invoice.

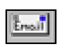
Amount: The subtotal of the invoice.

Tax: The taxes calculated on the invoice.

Total: The total amount sold on the invoice.

Payments: The payment total collected on the invoice.

 ***Preview:*** Click on an invoice and choose the *Preview* button to view the item.



Email: Click on an invoice and choose this button to E-mail a copy of the QRoute invoice to the customer.

NOTE: Configure E-mail settings within *QRoute > QRoute Settings* prior to using this option.

NOTE: QRoute uses the *E-mail* address listed within the *Edit Customer* screen, on the *Address Info* tab within QuickBooks.

Returned Products

Choose a customer by using the drop-down menu on the top portion of the screen. As each customer is selected, product return information for the current month entered will be displayed automatically.

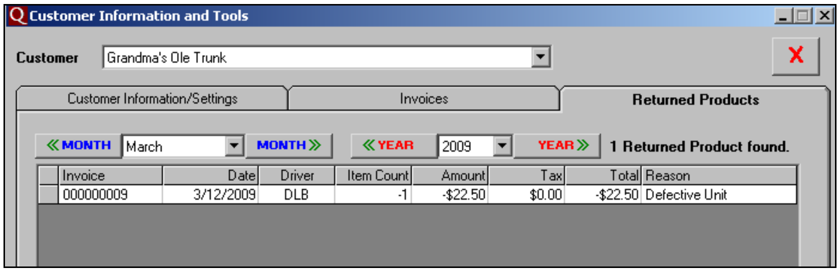
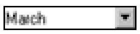


Figure 3.27

Fields:

Month (back): Select this button to view returned product information from the previous month.



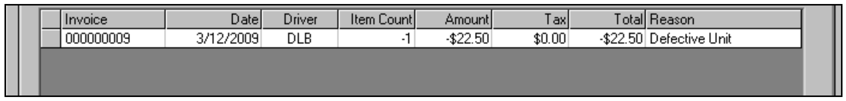
Manual Selection: Choose the drop-down arrow to manually select a month.

Month (forward): Select this button to view returned product information for the next month listed.

Year (back): Select this button to view invoice information from the previous year.

Manual Selection: Choose the drop-down arrow to manually select a year.

Year (forward): Select this button to view returned product information for the next year listed.



Invoice	Date	Driver	Item Count	Amount	Tax	Total	Reason
000000009	3/12/2009	DLB	-1	-$22.50	$0.00	-$22.50	Defective Unit

Figure 3.28

Detail Lines:

Invoice: The assigned invoice number.

Date: The date the invoice was created.

Driver: The driver that created the invoice.

Item Count: The number of returned *Items* entered on the invoice.

Amount: The subtotal credited on the customer's account.

Tax: The taxes credited on the customer's account.

Total: The total amount credited on the customer's account.

Setup

The *Setup* menu items are fundamental to the operation of the QRoute program. Here is a short overview of each:

Setup Options:

- **Route Area Setup** - This setup area allows you to create and maintain delivery cycles related to your routes.
- **Truck Setup** - QRoute includes data related to each delivery vehicle, which will be assigned to your drivers in the *Driver Setup* screen.
- **Handheld Setup** - A key area of QRoute that contains many items related to the operation of the program, on the desktop and handheld.
- **Driver Setup** - The *Driver Setup* screen allows you to establish basic route information for each driver.
- **Gratis Setup** - This option allows you to establish a series of reasons that can be entered on the handheld when items are given to a customer at no charge.
- **Vehicle Inspection -** This option guides drivers through a vehicle safety checklist on the handheld.
- **Site Inspection -** This option gives your drivers the ability to inspect the condition of equipment at a customer's location.
- **Returned Product –** This option allows you to establish a series of reasons that can be entered on the handheld when items are returned to the driver during delivery.

QRoute Settings

This screen contains various options related to backup location, E-mail settings, and more.

Route Area Setup

The *Route Area Setup* screen allows you to establish a list of all areas/frequencies/locations that will be assigned to your customers for routing purposes.

NOTE: *Chapter 2: 'Learning QRoute – Routing'* also includes information on *Route Area Setup*.

Double-click on an existing *Route Area* to make a modification, or select the **Add New** option to continue.

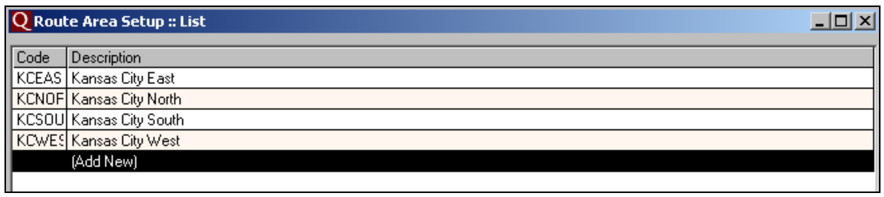


Figure 3.29

You can make changes to all of the displayed information. A definition of each field can be found after the screen.

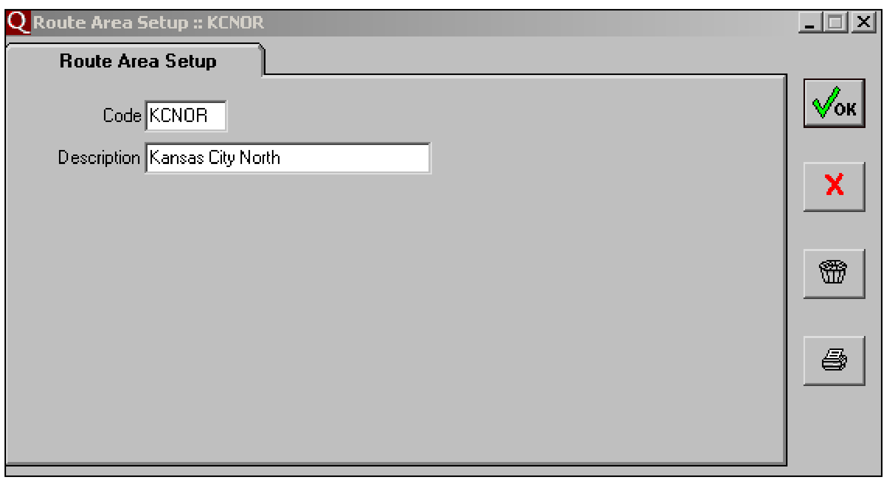


Figure 3.30

Fields:

Code: The *Code* represents the customer's delivery area, frequency, or location. In some cases, it may be necessary to combine multiple elements into one code.

Description: A description of the *Route Area.*

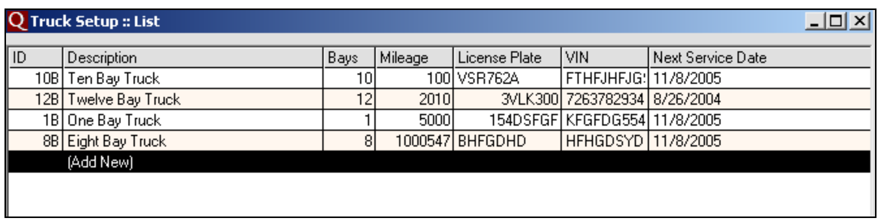
Exit Screen: After the fields have been edited, you have four choices:

- ***OK –*** Save the information and exit this screen.
- ***Cancel –*** Discard the changes and exit the screen.
- ***Delete –*** Delete an item that will no longer be used.
- ***Print –*** Generate a list report of the information shown for all entries.

Truck Setup

The *Truck Setup* screen allows you to establish a list of all delivery vehicles that will be assigned to your drivers (in the *Driver Setup* screen). Each vehicle will have unique bay settings and mileage information.

Double-click on an existing *Truck ID* or select the **Add New** option to continue.



ID	Description	Bays	Mileage	License Plate	VIN	Next Service Date
10B	Ten Bay Truck	10	100	VSR762A	FTHFJHFJG:	11/8/2005
12B	Twelve Bay Truck	12	2010	3VLK300	7263782934	8/26/2004
1B	One Bay Truck	1	5000	154DSFGF	KFGFDG554	11/8/2005
8B	Eight Bay Truck	8	1000547	BHFGDHD	HFHGDSYD	11/8/2005
	(Add New)					

Figure 3.31

You can make changes to all of the displayed information. A definition of each field can be found after the screen.

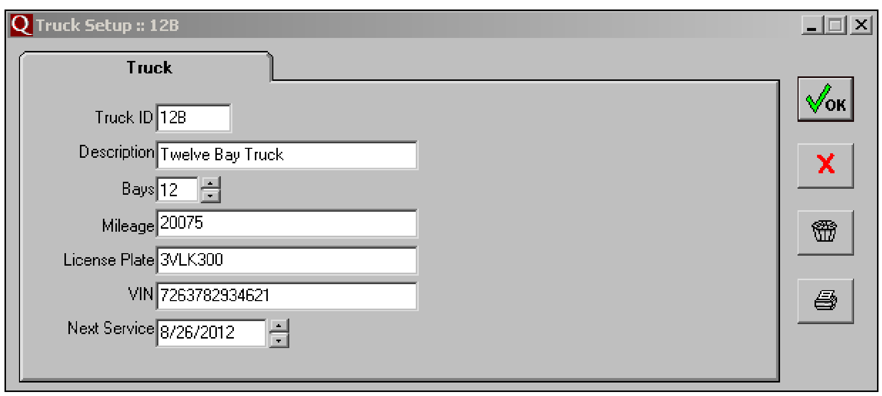


Figure 3.32

Fields:

Truck ID: A short reference number assigned to the truck, up to 5 letters and/or numbers.

Description: Make, model, or other description.

Bays: The number of bays (sections) for loading merchandise, packages, or equipment. This will aid in the check-out and check-in of the vehicle's contents. You will be able to identify which products are stored in each section.

Mileage: You can enter the vehicle's current mileage here. This figure can be updated daily by your drivers (handheld entry).

NOTE: Collected mileage information from the handheld can also be retrieved on the *Route Times Report*. Refer to *Chapter 5* for further information on handheld mileage entry.

License Plate (ID): Vehicle license tag number. This is simply used as another means of identification.

Vehicle Identification No. (VIN): Another form of identification for the delivery vehicle, the VIN number can usually be read through the vehicle's windshield.

Next Service: Place a service date reminder in this field. This is only used on this screen and has no other impact in the system.

Exit Screen: After the fields have been edited, you then have four choices:

- ***OK –*** Save screen information and exit this screen.
- ***Cancel –*** Discard the changes that were just made and exit the screen.
- ***Delete –*** Delete this truck record.
- ***Print –*** Generate a list report of the information shown for all entries.

Handheld Setup

The *Handheld Setup* section contains fundamental options that control QRoute settings on both the handheld and desktop level.

General Tab:

The *General* tab contains options for defining custom fields, misc. handheld options, and more. Each field is defined below.

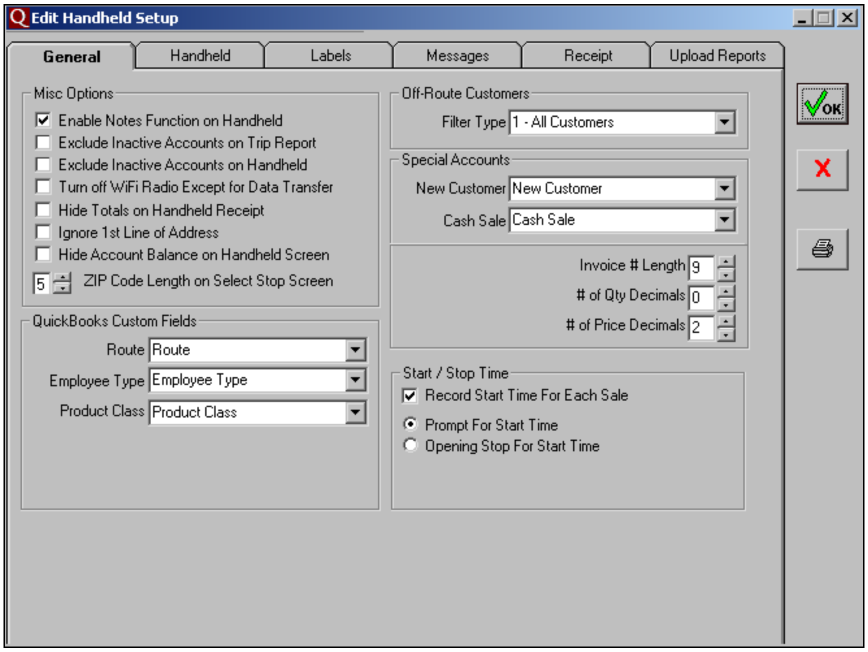


Figure 3.33

Fields:

Miscellaneous Options:

Enable Notes Function on Handheld: This option allows drivers to enter notes on the handheld, which will print during the *Afternoon Card* daily process. This is handy for communicating information from the customer to the office.

Exclude Inactive Accounts on Trip Report: Select this option to prevent customers that are flagged as 'inactive' from showing up on the *Trip Report*.

Exclude Inactive Accounts on Handheld: Select this option to prevent customers that are flagged as 'inactive' from showing up on the handheld.

Turn off Wi-Fi Radio Except for Data Transfer: If you are using a Wi-Fi radio (connection) on the handheld, you can check this option to disable wireless communications between data transfers.

Hide Totals on Handheld Receipt: Check this option if you would like to suppress invoice and account totals from printing on the handheld receipts.

Ignore 1st Line of Address: Select this option to suppress the first line of the 'Ship To' address field on the handheld.

NOTE: This can be helpful if the customer's name is duplicated on the handheld screen.

Hide Account Balance on Customer Screen: Select this option to suppress the customer's account balance on the handheld invoice screen.

NOTE: It is recommended that you select the option 'Block Account Balance on Invoice' on the *Receipt* tab (within *Handheld Setup*) when using the option above. This will suppress the *Account Balance* field on the printed receipt.

QuickBooks Custom Fields:

These fields are used to establish a relationship between *Custom Fields* in QuickBooks and QRoute:

- ***Route:*** This is a user-defined field that contains the *Route/Route Area/Sequence Number* information for each customer. Assign the appropriate *Route Custom Field* here. *Refer to page 20 for further information.*
- ***Employee Type:*** This field is used to define the *Custom Field* that is being used for the *Driver/Checker* designation. *Refer to page 20 for further information.*
- ***Product Class:*** This field is used to define unique item functions, such as *Skips* and *Deposits*. *Refer to page 138 for further information.*

Off-Route Customers:

You can specify which customers will be loaded into the driver's *Off-Route* List.

There are two menu choices:

- ***All customers:*** The driver will have access to every customer in the database, regardless of route.
- ***All customers on Route:*** The driver will only have access to customers assigned to the current *Route ID*.

Special Accounts:

New Customer: An account name assigned here will allow the driver to establish a new customer while on route. It may be helpful to set up a name such as: 'New Customer' in your customer list before using this feature.

NOTE: The driver can capture the name of the new account on the handheld and create an invoice. A special report will print out at the end of the day informing office staff that a new account should be created for this customer. After the new account is created, the existing invoice should be transferred to it — the *New Customer* account is only a holding account, and invoices should never actually end up on the account permanently.

Cash Sale: An account name assigned here will allow the driver to make a cash sale off of the delivery vehicle (i.e., a "walk-up" customer). It may be helpful to set up a name such as: 'Cash Sale' in your customer list before using this feature.

Invoice Number Length: Specify the invoice number length you would like to use (from 3-9 digits).

# of Qty Decimals: Specify the number of decimal places you would like to use in the *Quantity* field of the handheld (most companies will use '0' by default).

# of Price Decimals: Specify the number of decimal places you would like to use in the price field on the handheld (most companies will adjust this number to '2').

Start/Stop Time:

Record Start Time for Each Sale: This option will record the duration of time it takes to complete each invoice.

- ***Prompt for Start Time:*** Select this option to prompt the driver to begin recording.
- ***Opening Stop for Start Time:*** Select this option to automatically begin recording when the invoice screen is accessed.

Handheld Tab:

The *Handheld* tab contains options for products, delivery history, and more. Each field is defined below.

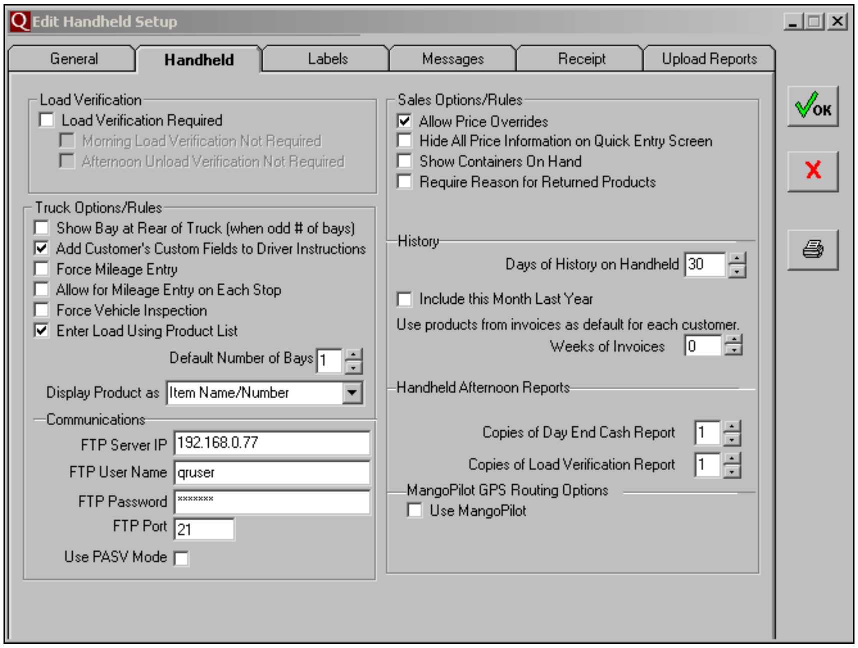


Figure 3.34

Fields:

Load Verification:

Load Verification Required: Check this option if you would like to force a load *Checker* to verify product totals loaded and unloaded on the truck daily.

- ***Morning Load Verification Not Required:*** Select this option to disable the *Morning Load* requirement.
- ***Afternoon Unload Verification Not Required:*** Select this option to disable the *Afternoon Unload* requirement.

Truck Options/Rules:

Show bay at Rear of Truck (when odd # of bays): If your trucks are equipped with a large back bay, this option will display the large bay on the handheld when loading and unloading products.

Add Customer's Custom Fields to Driver Instructions: Select this option to include *Custom Field* data in the *Driver Instructions* screen on the handheld (i.e., route and container details).

Force Mileage Entry: Choose this option to force your driver to enter beginning and ending mileage entries on the handheld as they leave and return at the end of the day.

Allow for Mileage Entry on Each Stop: Select this option to request mileage entries with each stop on the handheld (reported on the *Route Times* report).

Force Vehicle Inspection: Select this option to require that a *Vehicle Inspection* is completed prior to departing on route.

Enter Load using Product List: This option should always remain checked in the current version.

Default Number of Bays: The number of bays you would like to see on the handheld if you did not establish a different number in *Truck Setup* — this will also be used if no truck is assigned to a driver.

Display Product as: Choose from one of the following options for viewing products on the handheld:

- ***Item Name/Number:*** Select this option to use the *Item Name/Number* on the handheld and all printed invoices.
- ***Sales Description:*** Select this option to use the *Sales Description* on the handheld and all printed invoices.
- ***Name/Number or Description:*** Select this option to primarily use the *Item/Name Number* on the handheld and all printed invoices, unless the description is blank within QuickBooks. In such cases, the *Sales Description* will be used.
- ***Description or Name/Number:*** Select this option to primarily use the *Sales Description* on the handheld and all printed invoices, unless the description is blank within QuickBooks. In such cases, the *Item Name/Number* will be used.

NOTE: These fields are populated based on descriptions found within the QuickBooks *Item List*.

Communications (Adv. Comm. Module Required):

FTP Server IP: The IP address of the remote server.

FTP User Name: The user name for remote data transfer.

FTP Password: The password for remote data transfer.

FTP Port: The port to use for all FTP transfers.

Use PASV Mode: Select this option if *Passive Mode* is required for your FTP transfers.

Sales Options/Rules:

Allow Price Overrides: Select this option to allow your drivers to modify product prices on the handheld.

NOTE: Price changes, made by your drivers, will be noted on the afternoon *Exceptions Report* during upload.

Hide all Price Information on Quick Entry Screen: Checking this box prevents the driver from viewing product price information on the handheld screen.

Show Containers on Hand: Select this option to view the number of containers the customer has on-site. This information is displayed next to the 'Returns' spinner on the handheld and is generated from the 'Deposit Qty' fields within each customer's account.

Require Reason for Returned Products: Select this option to force the driver to select a *Returned Product Reason* on the handheld when a negative quantity is entered.

NOTE: To set up *Returned Product Reasons*, go to *QRoute > Setup Options > Optional Setup Items*.

History Option:

Days of History on Handheld: Enter the total number of days of history that the drivers need to view on the handheld. For example, to view 2 months of history, enter the number '60' in the box.

Include This Month Last Year: This field allows you to include history for the same month of the previous year. This is useful if you have seasonal, long-term customers.

Use products from invoices as default for each customer: *Enter a number from 1 to 120 (# of previous weeks to include) in this field to populate the Default Products field with products that were sold on previous deliveries per customer.* The price listed for each product will reflect the latest price the customer paid on a previous delivery.

NOTE: If you do not wish to use this feature, enter or leave the number at '0'. If you enable this option and a customer has not purchased any items during the number of weeks entered, the standard *Default Products* (within *Handheld Setup*) will be used. Additionally, if a customer is assigned to a *Price List* within QuickBooks, the *Price List* will always be used.

Handheld Afternoon Reports:

Copies of Day End Cash Report: The number entered here indicates how many copies of the *Day End Cash Report* should print from the handheld when selected. This report can be used by drivers for referencing their daily collected payment totals.

Copies of Load Verification Report: The number entered here indicates how many copies of the *Load Verification Report* should print from the handheld when selected. This report can be used by drivers for reconciling their daily product totals.

MangoPilot GPS Routing Options:

MangoPilot is a GPS solution that integrates with your existing route delivery handhelds using a Bluetooth connection. Address information is transmitted from the handheld to the GPS display unit mounted in the delivery vehicle.

Use MangoPilot: Select this option if you are using the MangoPilot program.

Labels Tab:

The *Labels* tab contains descriptive information for the handheld, including *Default Products* and *Container Tracking*. Each field is defined below.

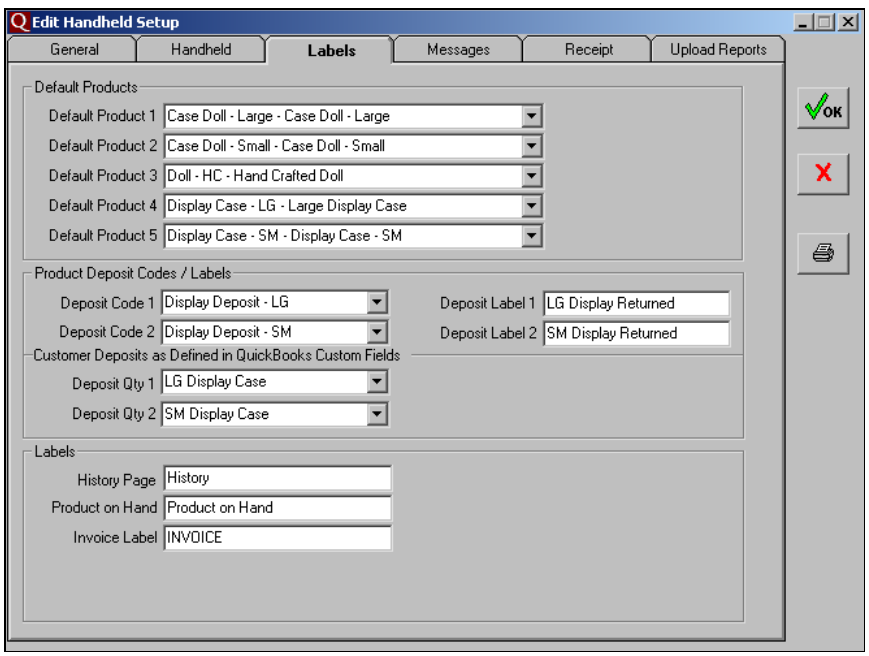


Figure 3.35

Default Products:

Default Products 1 - 5: The *Default Products* section of the handheld invoice screen allows your drivers "quick access" to a handful of products. This prevents your drivers from having to use the *Miscellaneous Items* screen to sell a product each time.

NOTE: Customers assigned to *Product Price Lists* or *Price Levels* in QuickBooks will have their own products listed in the *Default Products* section of the handheld.

Product Deposit Codes / Labels:

Deposit Code 1: This QuickBooks *Custom Field* is used for charging/tracking a container deposit.

- ***Deposit Label 1:*** This option allows you to enter a custom label (description) for *Deposit Code 1* on the handheld.

Deposit Code 2: This QuickBooks *Custom Field* is used for charging/tracking a secondary container deposit.

- ***Deposit Label 2:*** This option allows you to enter a custom label (description) for *Deposit Code 2* on the handheld.

Customer Deposits:

Deposit Qty 1: This QuickBooks *Custom Field* is used for displaying container/deposit quantities on the QuickBooks *Customer* screen.

Deposit Qty 2: This QuickBooks *Custom Field* is used for displaying container/deposit quantities on the QuickBooks *Customer* screen.

NOTE: for further information on deposits and container tracking, refer to the tutorial on *Container Tracking* found later in this chapter.

Labels:

History Page: This label (description) will be printed on the header of the history page if the customer requests a print-out from the handheld (i.e., Customer History, Statement of Account, etc.).

Product on Hand: This label (description) can be viewed on the handheld and printed on the invoice for inventory information related to container tracking (i.e., Cases, Crates, Pallets, Glass Bottles, etc.).

Invoice Label: This label (description) is printed on the top portion of the invoice (i.e., Invoice, Delivery Note, etc.).

Messages Tab:

The *Messages* tab allows you to set up messages for your printed receipts.

NOTE: In *Appendix C*, you will find information on styles of fonts, types, face sizes, and other helpful materials to help you set up your receipt to your requirements.

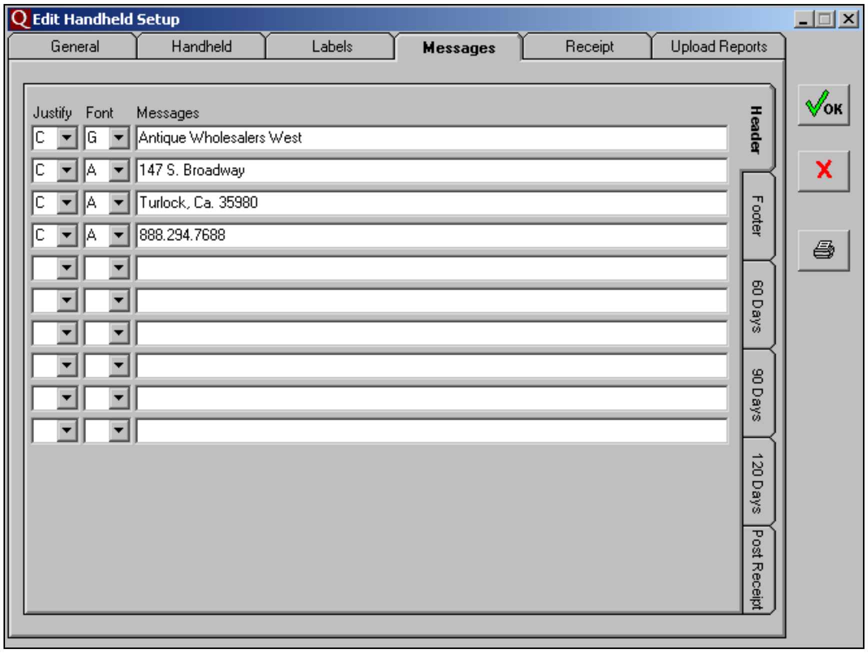


Figure 3.36

Fields:

Header/Footer:

Justify: Enter the corresponding letter that controls how you would like your messages aligned on your printed receipts; valid options are: L, R, or C (Left, Right, or Centered).

Font: Enter the letter corresponding to the font size you would like to use on your receipts.

NOTE: Refer to *Appendix C* for examples of available font sizes.

Messages: The message to display on all receipts; for example, your company's name or address.

60, 90, and 120 days:

These fields are used for manually printing dunning notices (past due messages) on the handheld. If the driver notices the customer is past due, he/she can select the appropriate past due message (60, 90 or 120) on the handheld, and print it with the customer's invoice.

Post Receipt (Paper Shredding Only):

This option is designed for the paper shredding industry. The information entered here is generally used for a 'Certificate of Destruction'.

Include Post Receipt Document: Select this option if you like to include the *Post Receipt* information with the invoice.

Require a Signature with Document: Select this option to include a signature from the driver with the *Post Receipt*.

NOTE: The driver will be prompted for a signature at the beginning of the route day, which will be included with each *Post Receipt*. It is not necessary that the driver sign each receipt.

Receipt Tab:

The *Receipt* tab contains items that can be printed or suppressed from your handheld receipts. Each item is defined below.

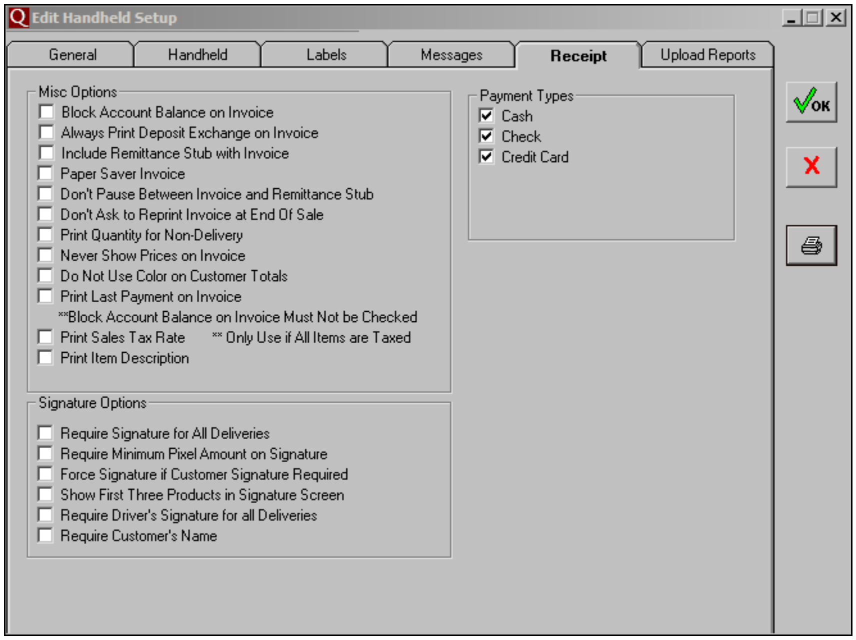


Figure 3.37

Fields:

Block Account Balance on Invoice: Select this option to prevent the customer's account balance from printing on the handheld receipt.

Always Print Deposit Exchange on Invoice: Select this option to include any container exchanges — the number of containers delivered, compared to the number of containers retrieved — on the receipt. If you do not select this option, the system will only print the information when there is an uneven exchange.

Include Remittance Stub with Invoice: Check this box to include a payment stub with each handheld invoice.

Paper Saver Invoice (Valid with 4-inch printers only): Select this option to print an invoice that condenses the amount of empty space on a receipt, consuming less paper.

Don't pause between Invoice and Remittance Stub: Check this box if you do not want the printer to pause between the invoice and remittance stub print-outs.

Don't ask to Reprint Invoice at End of Sale: Choose this option to suppress the reprint request after the initial invoice is printed.

Print Quantity for Non-Delivery: Check this box to print *Skip Reason* descriptions and quantity detail on the handheld invoice.

Never Show Prices on Invoice: This option will suppress all prices from printing on the handheld invoice.

Do not use color on Customer Totals: Select this option to disable color on customer totals displayed on the handheld screen.

Print Last Payment on Invoice (Block Account Balance option cannot be checked): Choose this option to print the last payment amount received on the handheld receipt.

Print Sales Tax Rate (Only if all items are taxed): Choose this option to print the tax percentage rate on the receipt.

Print Item Description: Select this option to print the 'Sales information' description within the item instead of the 'Item Name/Number' on the receipt.

Signature Options:

Require Signature for All Deliveries: Choose this option to require a signature on each customer's account on the handheld.

Require Minimum Pixel Amount on Signature: Choose this option to require a minimum number of pixels to be used when capturing a signature.

Force Signature if Customer Signature Required: Choose this option to force a signature entry on the handheld (cannot be toggled off).

Show First Three Products in Signature Screen: Select this option to display the first three products sold to the customer on the signature screen, for customer reference.

Require Driver's Signature for all Deliveries: Select this option to require that the driver enter a signature on the invoice screen to complete the sale.

Require Customer's Name: Select this option to require the driver to enter the customer's name on the signature screen prior to saving the invoice (using a keypad).

Payment Types:

Select the acceptable payments types that will be collected on route:

- ***Cash***

- ***Check***
- ***Credit Card***

Upload Reports Tab:

As you process your *Afternoon Cards*, each report listed below will print automatically, based on the number of copies entered in the quantity field.

NOTE: If you enter "0" as the quantity, the report will not print.

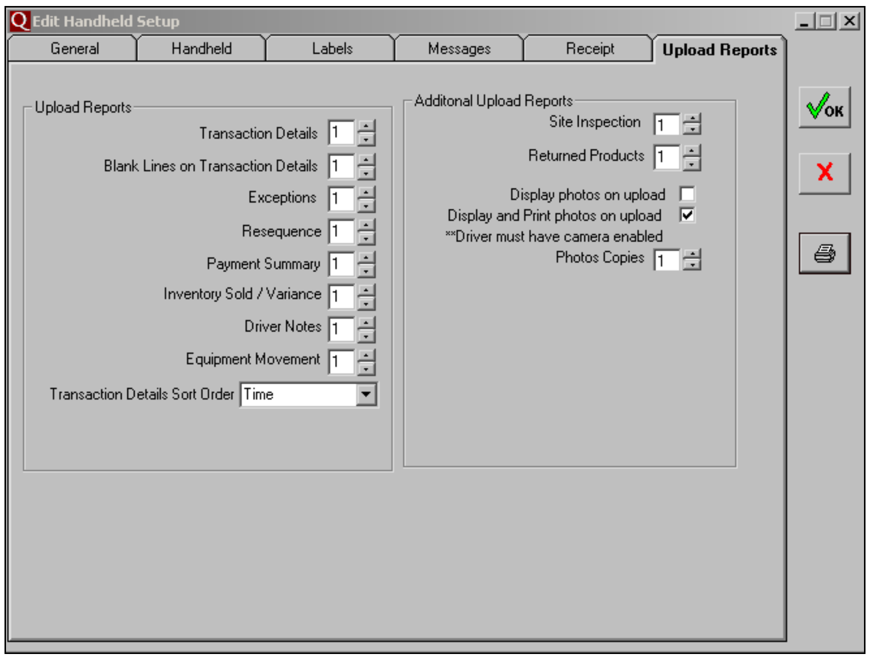


Figure 3.38

Fields:

Upload Reports:

Transaction Details: This report provides you with a detailed list of all transactions completed on route.

Blank Lines on Transaction Details: This option simply allows you to reserve extra space between transactions on the *Transaction Details* report (for entering notes, etc.), enter the number of lines desired.

Exceptions: This report contains various route related information, such as:

- ***Product Price Increase/Decreases***
- ***Skipped Stops***
- ***New Customers***
- ***Cash Customers***
- ***Gratis Reasons***

Resequence: This report provides you with a list of sequence numbers that were updated by your driver.

NOTE: QRoute cannot update sequence numbers in QuickBooks directly; each sequence number will need to be updated manually, using this report as a reference.

Payment Summary: This report provides you with a summary list of all payments collected on route.

Inventory Sold / Variance: A report summarizing all inventory activity on route for the day.

Driver Notes: Prints all of the notes taken by the driver while on route.

Equipment Movement: Shows any equipment activity completed on the handheld.

NOTE: QRoute includes basic equipment entry options on the handheld. The information is provided to you in report form only, and is not stored on the desktop.

Transaction Details Sort Order: Choose a sorting order from the drop-down list to be used on the *Transaction Details* report.

- ***Invoice No.***
- ***Name***
- ***Time***
- ***Sequence No.***

NOTE: 'Time' is the most commonly used sort order.

Additional Upload Reports

Site Inspection: Lists all of the *Site Inspections* completed on route.

Returned Products: This report lists all of the returned and damaged items entered on route for the day.

Display Photos on Upload: Select this option to automatically display all photos taken on the handheld during the *Afternoon Card* process — the photos will be displayed within your computer's web browser.

Display and Print Photos on Upload: Select this option to automatically display, and print, all photos taken on the handheld during the *Afternoon Card* process.

NOTE: If you would like to use the photo feature, make sure that the handheld is equipped with a camera, and you have enabled the 'Show Camera' option within *Driver Setup*.

Photos (displayed only with Print option above enabled): This report displays all of the photos taken on route.

Exit Screen: After the fields have been edited, you have three choices:

- ***OK –*** Save the screen information and exit.
- ***Cancel –*** Discard the changes that were just made and exit.
- ***Print –*** Allows you to print a copy of your current *Handheld Setup* configuration.

Driver Setup

The *Driver Setup* screen allows you to establish unique settings per driver that relate to the handheld. Double-click on an employee name to pull up the *Edit* screen.

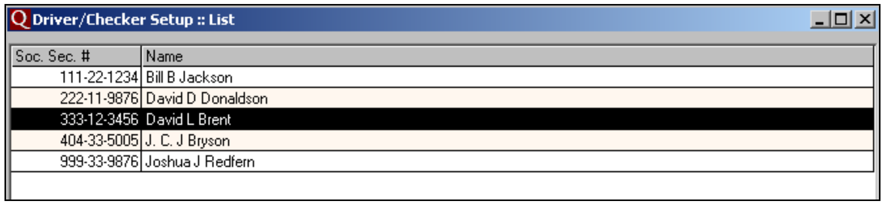


Figure 3.39

NOTE: For an employee to be displayed on this screen, you must first follow the steps discussed between pages 20-29 of this manual.

Driver/Checker Setup Tab

You can make changes to all of the displayed information. A definition of each field can be found after the screen.

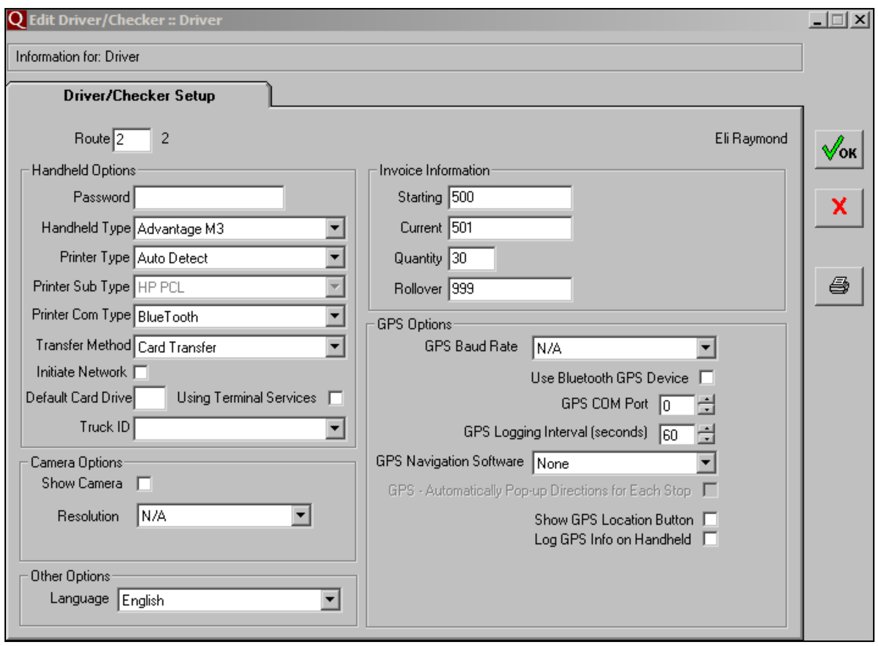


Figure 3.40

Fields:

Route: The *Route* assigned to this employee. The *Route ID* field is numeric, up to two digits in length.

Handheld Options:

***Password*:** The password used on the handheld. Enter a numeric value up to four digits. You may leave the field empty if desired (not recommended).

Handheld Type: Select the handheld computer type that this route driver will be using.

Printer Type: If the current driver will be using a portable printer, select the *Auto-Detect* option from the list.

Printer Com Type: Choose the communication method that the portable printer will use (i.e., Bluetooth for Advantage BT-4).

Transfer Method: Establish the handheld *Transfer Method* from the drop-down list for this driver:

- ***USB Transfer:*** Select this option if you will be using a USB cable or cradle transfer.
- ***Card Transfer:*** Select this option if you will be using a USB card reader.

> **NOTE:** Enter a drive letter in the *Default Card Drive* field when selecting *Card Transfer*.

- ***LAN/Wi-Fi/Bluetooth Transfer:*** Select one of these options if you will be using a wireless transfer method (may require the *Advanced Communications Module*).

Initiate Network (GPRS): Select this option to initialize your default GPRS connection prior to attempting to transfer data.

> **NOTE:** Typically you will not use this option if Wi-Fi is the default transfer method.

Default Card Drive: Specify the *Storage Card* drive letter (if applicable).

Using Terminal Services: Select this option if the route driver will be using an RDP connection to transfer route data from a remote location.

Truck ID: Assign a delivery vehicle to the driver.

Camera Options:

Show Camera: Select this option if you will be using a camera equipped handheld, and would like the driver to take photos onsite occasionally (i.e., photos of equipment problems, damages, etc.).

Resolution: Select the picture quality you would like to use.

Other Options:

Language: Select the language file that you would like to use on the handheld. This list is frequently updated to support new markets.

Invoice Info:

Starting: Enter the starting (or lowest) invoice number that you would like this driver to begin with.

Current: The next available invoice number in the sequence, this field is updated automatically.

Quantity: Enter the number of invoices you would like this driver to have available each day on the handheld. This number should be ample enough to support an average amount of regular deliveries, plus extras for any special deliveries or call-ins.

Rollover: Enter the final (or highest) invoice number that you would like this driver to end with before reverting back to the *Starting* invoice number.

NOTE: The maximum invoice length used in QRoute is nine digits, numeric format only (established in *Handheld Setup*).

TIP: Using a unique invoice "pool" per driver allows you to easily identify which driver delivered the product.

GPS Options:

GPS Baud Rate: The speed that the GPS device uses to receive information.

Use Bluetooth GPS Device: Select this option if you are using an external Bluetooth GPS receiver with your handheld.

GPS Com Port: The communications port that the GPS device uses to receive information.

GPS Logging Interval: The amount of time, in seconds, that each GPS coordinate will be logged on the handheld. Enter a number between 30 and 999 (i.e., 5 minutes is entered as 300 seconds).

GPS Navigation Software: The navigation program being used.

GPS – Automatically Pop-up Directions for Each Stop: Select this option to automatically navigate to the next stop after saving an invoice.

Show GPS Location Button: Select this option to capture *Latitude* and *Longitude* coordinates, per customer, on the *Confirm Sale* screen of the handheld. This information will be uploaded and stored within the customer's account under *QRoute > Customer Information*, on the *Customer Information/Settings* tab.

NOTE: The stored *Latitude/Longitude* coordinates are used with turn-by-turn navigation programs available within QRoute and the *QRoute Mapping Module*. Contact Advantage Route Systems at 866.317.6883 for further information on these products.

Log GPS info on Handheld (Route Track 2000 Module): Select this option to program QRoute to capture GPS coordinates on the handheld automatically. The data is stored on the handheld and can be retrieved on the desktop using the Route Track 2000 Module.

NOTE: The *GPS Logging Interval* field is used to configure the length of time that each coordinate is captured.

Gratis Setup

The *Gratis Setup* option allows you to create a series of *Gratis Reasons* that can be selected by your drivers on the handheld. If an item is to be given away at no charge, they will select one of the reasons entered here. This can be helpful for exchanges or promotions.

NOTE: Each *Gratis Reason* selected will be logged on the customer's invoice, and printed on the afternoon *Exceptions Report*.

Double-click on an existing *Gratis Reason* or select the **Add New** option to continue.

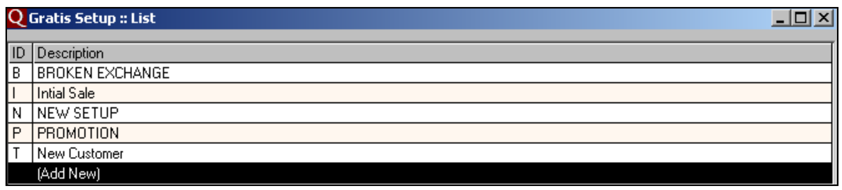


Figure 3.41

You can make changes to all of the displayed information. A definition of each field can be found below.

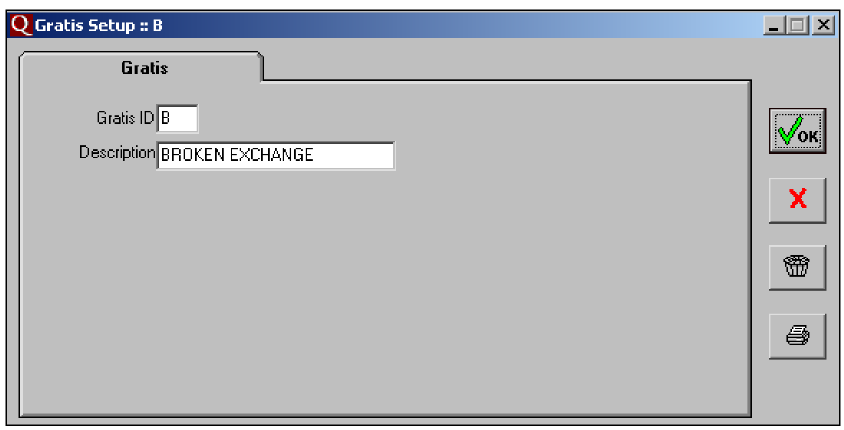


Figure 3.42

Fields:

Gratis ID: The single character code that represents the *Gratis Reason*.

Description: The description of the *Gratis Reason*.

Exit Screen: After the fields have been edited, you have four choices:

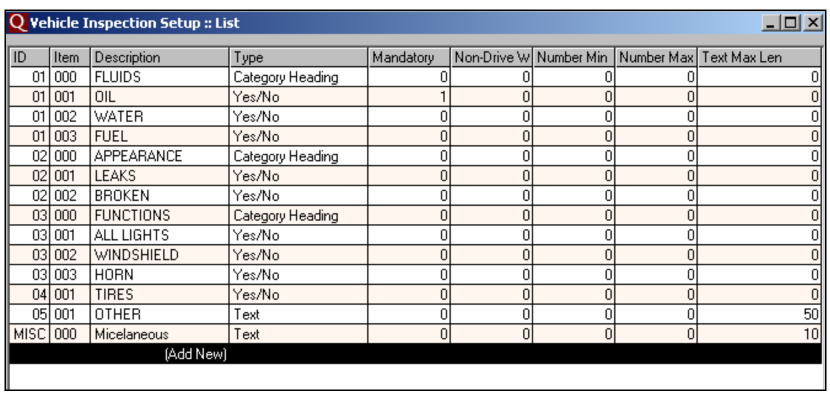
- ***OK –*** Save the information and exit.
- ***Cancel –*** Discard the changes and exit.
- ***Delete –*** Delete an item that will no longer be used.
- ***Print –*** Generate a list report of the information shown for all entries.

Vehicle Inspection

The *Vehicle Inspection* option guides drivers through a vehicle safety checklist on the handheld. Simply add all of the items that you would like drivers to inspect to the list. As each driver completes the inspection, the checklist can be printed from the handheld, prior to leaving the warehouse.

NOTE: *Vehicle Inspections* are not stored on the desktop — they can only be printed from the handheld.

Double-click on an existing *Vehicle Inspection Reason* or select the **Add New** option to continue.



ID	Item	Description	Type	Mandatory	Non-Drive W	Number Min	Number Max	Text Max Len
01	000	FLUIDS	Category Heading	0	0	0	0	0
01	001	OIL	Yes/No	1	0	0	0	0
01	002	WATER	Yes/No	0	0	0	0	0
01	003	FUEL	Yes/No	0	0	0	0	0
02	000	APPEARANCE	Category Heading	0	0	0	0	0
02	001	LEAKS	Yes/No	0	0	0	0	0
02	002	BROKEN	Yes/No	0	0	0	0	0
03	000	FUNCTIONS	Category Heading	0	0	0	0	0
03	001	ALL LIGHTS	Yes/No	0	0	0	0	0
03	002	WINDSHIELD	Yes/No	0	0	0	0	0
03	003	HORN	Yes/No	0	0	0	0	0
04	001	TIRES	Yes/No	0	0	0	0	0
05	001	OTHER	Text	0	0	0	0	50
MISC	000	Micelaneous	Text	0	0	0	0	10
		(Add New)						

Figure 3.43

You can make changes to all of the displayed information. A definition of each field can be found after the screen.

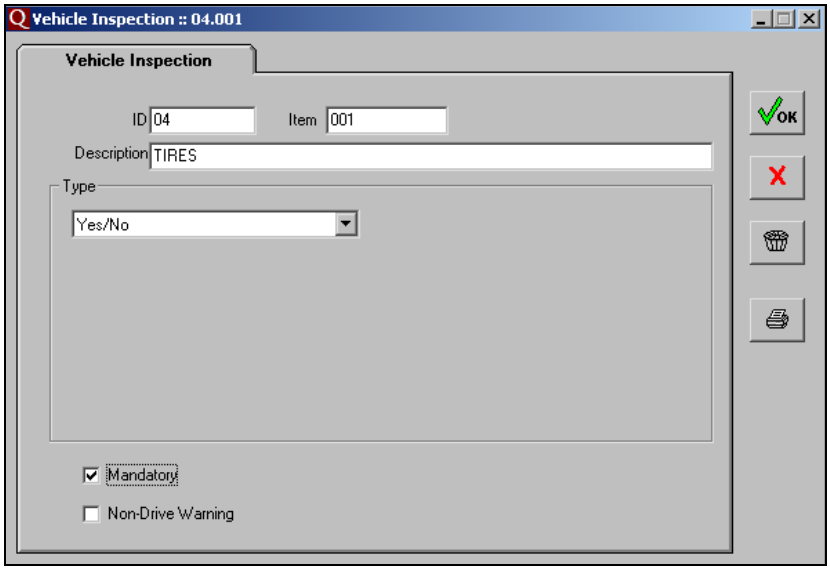


Figure 3.44

Fields:

ID: Up to four digits in length, the *ID* field functions as the category of the item (for grouping).

Item: Up to three digits, the *Item* field is used to control the order of the items per category (or ID).

NOTE: The format used in the *ID* and *Item* fields controls the order of the items (e.g., 01.001 – 01.002 – 02.001).

Description: A description of the item to be inspected.

Type: Select the type of item from the following list.

- ***Yes / No:*** Select this option if this item requires a 'Yes' or 'No' answer (e.g., "Does the engine run?").
- ***Numeric Value:*** Choose this option if the driver needs to input a numeric value. You can specify the minimum and maximum value ranges accepted (e.g., Tire Pressure).
- ***Text:*** Selecting this item will require the driver to enter a text response to satisfy this inspection item. You can specify the minimum number of digits accepted.
- ***List:*** When *List* is specified, the driver is required to select from a pre-defined list. Enter the items to be included in the list, manually.
- ***Category Heading:*** This option allows you to flag an item as a *Category Heading* (for display purposes only), which is helpful for separating categories.

Mandatory: Specify whether this item is required to be completed prior to printing the *Vehicle Inspection Report*.

Non-Drive Warning: Choose this option if you want a warning to appear if the entered value is not within an acceptable range (applies to *Numeric* and *Text Value* items only).

Exit Screen: After the fields have been edited, you have four choices:

- ***OK –*** Save the information and exit.
- ***Cancel –*** Discard the changes and exit.
- ***Delete –*** Delete an item that will no longer be used.
- ***Print –*** Generate a list report of the information shown for all entries.

Site Inspection Setup

The *Site Inspection* option gives your drivers the ability to inspect the condition (or cleanliness) of equipment or store fixtures at a customer's location. The information entered will be printed on the *Site Inspection Report* during the *Afternoon Card* process, and can be reprinted on the desktop.

Double-click on an existing *Site Inspection Reason* or select the **Add New** option to continue.

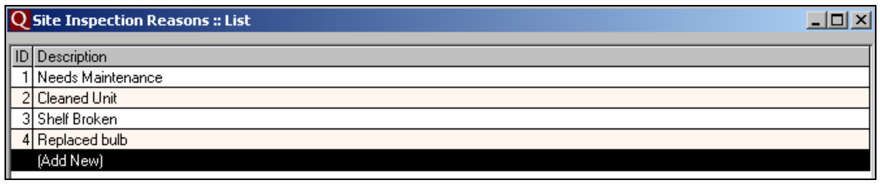


Figure 3.45

You can make changes to all of the displayed information. A definition of each field can be found after the screen.

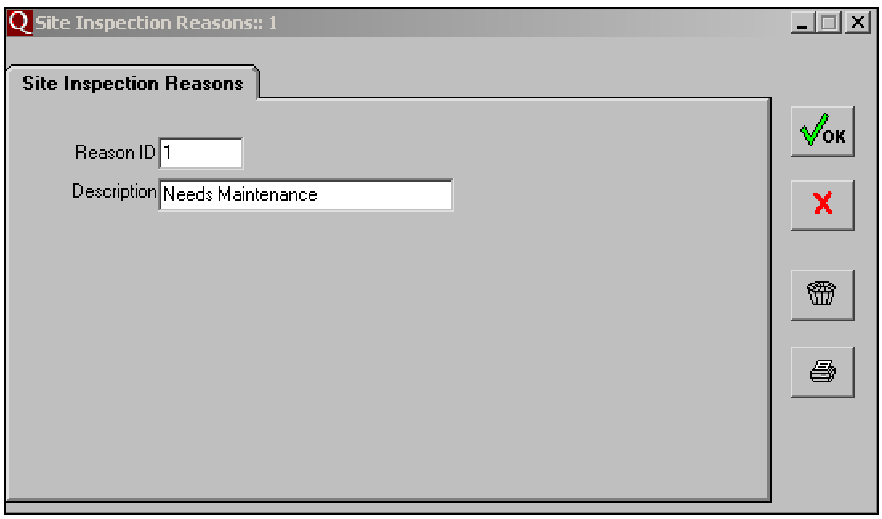


Figure 3.46

Fields:

Reason ID: The identification code for this *Site Inspection Reason* (up to two digits).

Description: The description for this *Site Inspection Reason*.

NOTE: Along with the description selected, the driver will have the ability to key in further details on the handheld, if necessary.

Exit Screen: After the fields have been edited, you have four choices:

- ***OK –*** Save the information and exit.
- ***Cancel –*** Discard the changes and exit.
- ***Delete –*** Delete an item that will no longer be used.
- ***Print –*** Generate a list report of the information shown for all entries.

Returned Product

The *Returned Product* option allows you to monitor products that are being returned from your customers at the time of delivery. The driver will be able to enter the reason a product was returned directly on the handheld screen. This information will be printed on the 'Returned Products' *Afternoon Report*, and stored within QRoute for future reference.

Double-click on an existing *Returned Product Reason* or select the **Add New** option to continue.

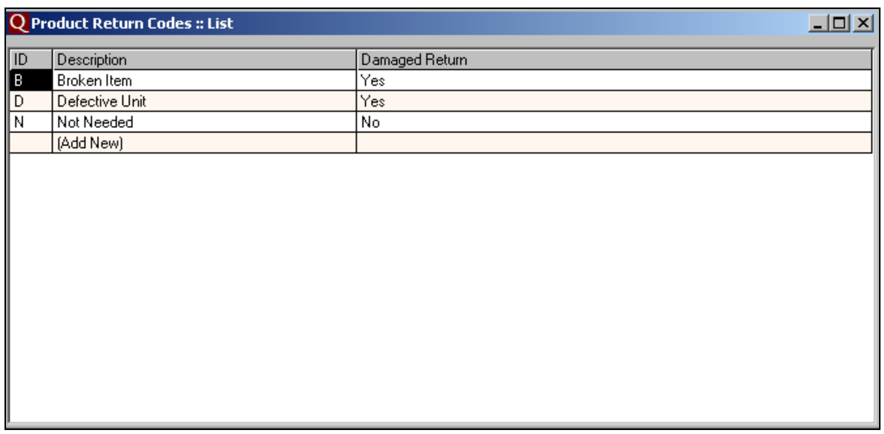


Figure 3.47

You can make changes to all of the displayed information. A definition of each field can be found after the screen.

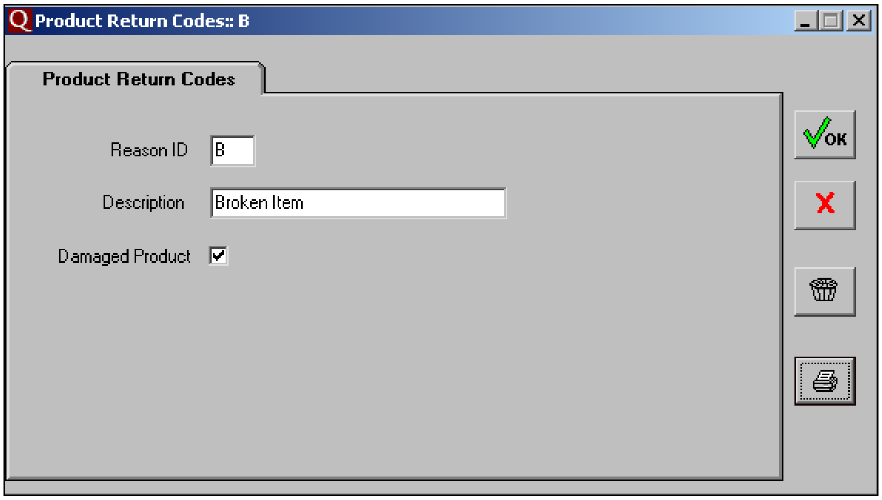


Figure 3.48

Fields:

Reason ID: The identification code of this *Returned Reason Code* (up to two characters).

Description: The description of this *Returned Reason Code*.

Damaged Product: Select this option if the current reason will be selected for items that are damaged and will not be returned to inventory (e.g., *Broken Item*, *Damaged*).

NOTE: Do <u>not</u> select the *Damaged Product* option if the item returned will be returned to inventory (e.g., *Wrong Product*, *Not Needed*).

Exit Screen: After the fields have been edited, you have four choices:

- ***OK –*** Save the information and exit.
- ***Cancel –*** Discard the changes and exit.
- ***Delete –*** Delete an item that will no longer be used.
- ***Print –*** Generate a list report of the information shown for all entries.

QRoute Settings

The *QRoute Settings* screen contains the backup location for QRoute, 'Remit To' information, and E-mail configuration options.

General Tab:

Enter the location that you would like to use for storing QRoute backup files when they are generated. You can create a backup by going to *Customers > QRoute > Backup QRoute Data*.

NOTE: It is recommended that you establish a regular backup routine to help avoid any unforeseen problems.

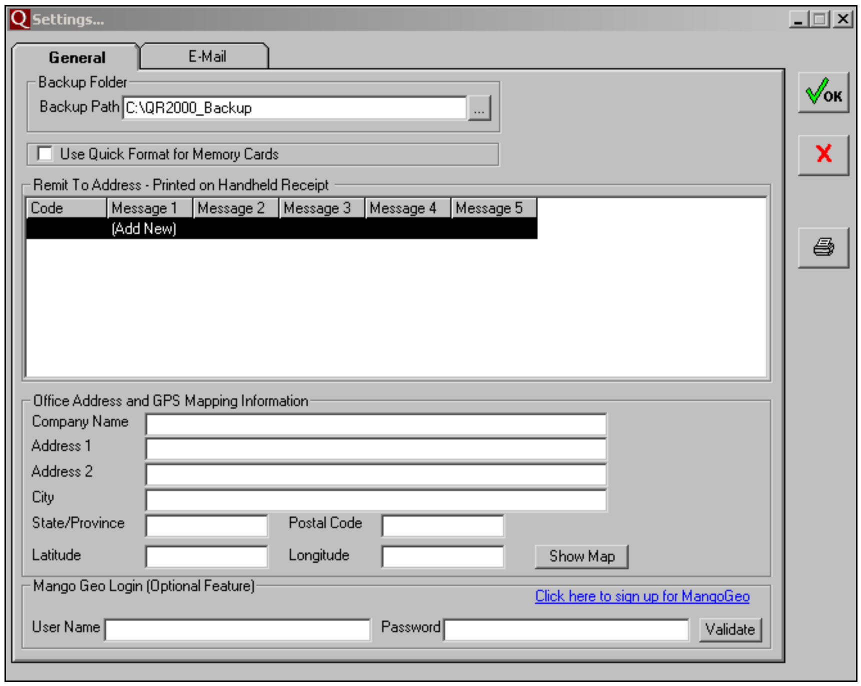


Figure 3.49

Fields:

Backup Path: Enter the target location for QRoute backups, or choose the ... *Browse* button and navigate to the proper directory.

Use Quick Format for Memory Cards (Recommended): Select this option to perform a 'Quick Format' when running the *Prepare Card* function — designed to speed up the format process.

Remit To Address – Printed on Handheld Receipt:

This option can be used if you have enabled the 'Include Remittance Stub with Invoice' option under *Handheld Setup*, on the *Receipt tab*. The printed remittance stub can be tailored to include your company's address information. Additionally, multiple remittance stubs can be configured if you would like to configure more than one remittance address for your customers. Up to five lines of text in a variety of styles can be established per stub.

Simply double-click on the 'Add New' option to establish a remittance stub.

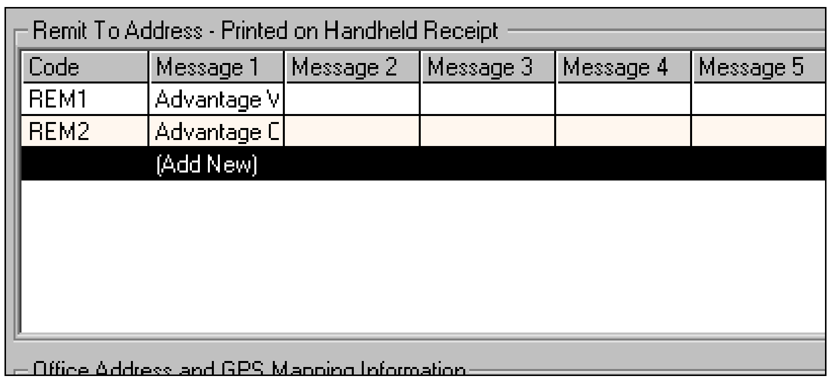


Figure 3.50

Enter a unique *Code* for each remittance stub, up to five characters in length. Each message line will begin with a *Justify* and *Font* option, followed by up to 72 bytes of text.

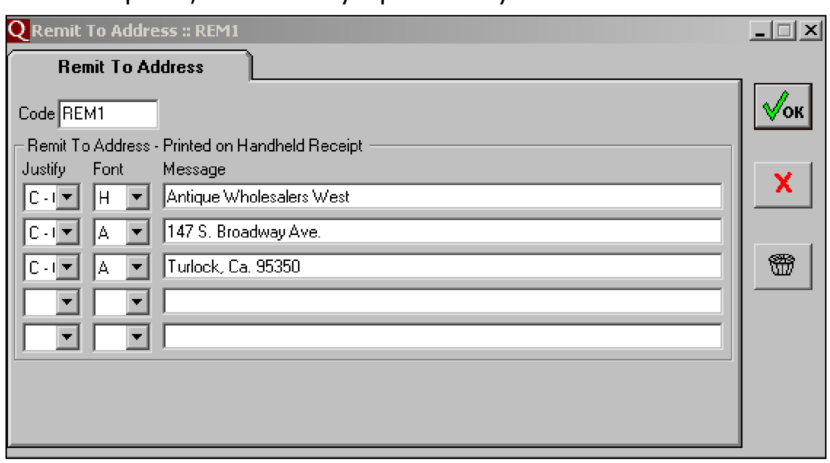


Figure 3.51

The *Justify* field controls the location of the text on the stub, select one of the choices below:

C – Centers the text on the stub (commonly used).

L – Prints the text in the left-column of the stub.

R – Prints the text in the right-column of the stub.

The *Font* field controls the size and style of the text on the stub; refer to *Appendix C* for examples of each option available.

Office GPS and Mapping Information:

The office address information entered here is used with optional mapping and navigation programs available with QRoute. Contact Advantage Route Systems for further information.

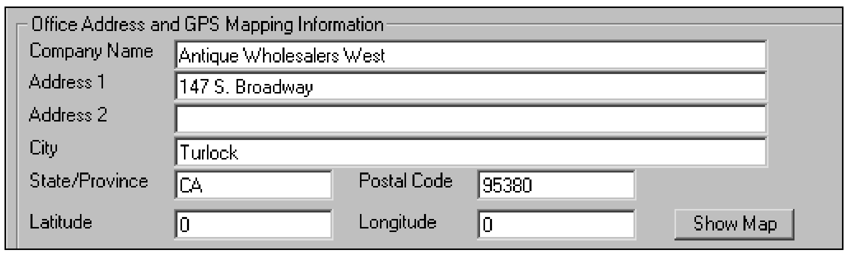


Figure 3.52

Latitude/Longitude: Enter the *Latitude* and *Longitude* coordinates for the office or warehouse location.

Show Map: This option is used to view the Latitude/Longitude coordinates on a map, or capture new coordinates. Refer to page 72 for details.

MangoGeo Login (Optional Feature):

MangoGeo is a web-based address correction tool that can help you correct your delivery and mailing addresses in QuickBooks, as well as provide latitude and longitude coordinates.

NOTE: Contact Advantage Route Systems or visit www.Mango-Geo.com for further information.

User Name: Enter your MangoGeo user name.

Password: Enter your MangoGeo password.

Exit Screen: After you have made changes, you have two choices:

- ***OK –*** Save the information and exit.
- ***Cancel –*** Discard the changes and exit.
- ***Print –*** Generate a list report of the information shown for all entries.

E-Mail Tab:

QRoute will allow you to E-mail your customers copies of their delivery invoices from within the *QRoute* > *Customer Information* > *Invoices* tab.

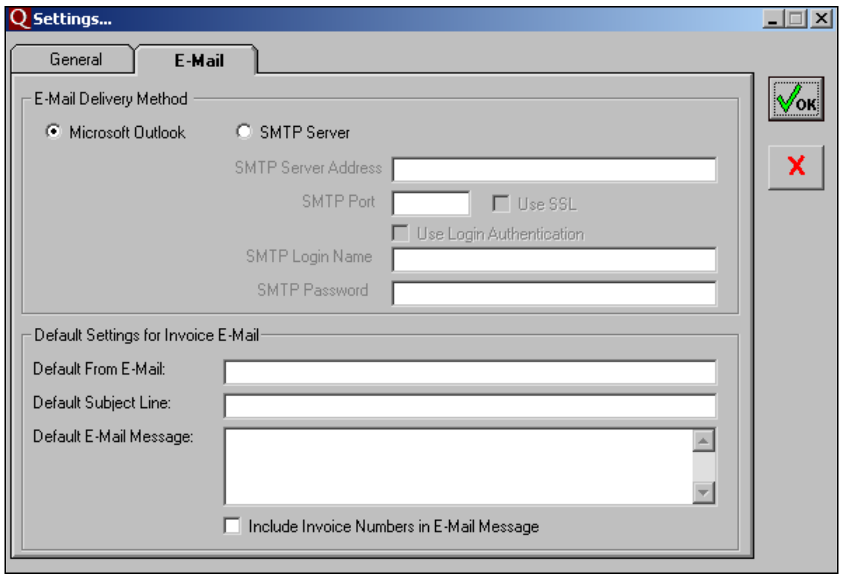


Figure 3.53

E-Mail Delivery Method:

Microsoft Outlook: Choose this option if Microsoft Outlook is used to send E-mail.

SMTP Server: Choose this option if Outlook is not used and you will send E-mail directly through an SMTP server.

- ***SMTP Server Address:*** The IP address or host name of the SMTP server.
- ***SMTP Port:*** Select the port that should be used for transfer.
- ***Use SSL (Secure Sockets Layer):*** Generally used for added security when transmitting data over the Web.
- ***Use Login Authentication:*** The login password used with SMTP.
- ***SMTP Login Name:*** The login name used to access the SMTP server.
- ***SMTP Password:*** The password for the SMTP login name.

Default Settings for Invoice E-Mail

Default 'From' E-mail: Enter the default E-mail address that you would like to use in the 'From' field when sending invoices to customers.

Default Subject Line: Enter the information you would like your customers to see in the 'Subject' line of each E-mail.

Default E-Mail Message: Enter any information you would like to include in the body of each E-mail sent to your customers.

Include Invoice Numbers in E-mail Messages: Select this option to list the invoice numbers in the body of the E-mail (reflects what is currently attached to the E-mail).

Modules

Advanced Communications (Optional Module)

This module enables wireless transfer methods within QRoute. For more information, contact your reseller or Advantage Route Systems.

Utilities

The *Utilities* section of the QRoute menu contains a collection of options that will assist you with effectively managing the QRoute program. Here is a quick synopsis of each item:

- **Prepare Card** – As you set up your handheld computer(s), you must prepare each storage card before placing a route on it. This routine prepares the card for use.
- **Card Override –** Built in safeguards prohibit you from accidentally deleting data on the handheld that has not been uploaded. Performing a *Card Override* bypasses this requirement (performed when you do not need to upload the data).
- **Data Integrity Check** – This report lists any inconsistencies found with your QRoute program, and should be performed periodically for maintenance.
- **MangoGeo Batch Process** – MangoGeo is an optional address correction tool that can help you correct your delivery and mailing addresses. Contact Advantage Route Systems for further information.
- **Change Route Sequence** – This utility allows you to update and manage all of your customer's route, area, and sequence assignments.
- **Change Route Date** – If a route is uploaded with the wrong date on the invoices, this utility allows you to easily change the dates globally.
- **Delete Route** – Should you upload data and then decide you do not need it, you can use this utility to delete the unneeded route.
- **Rebuild QRoute Tables –** This maintenance utility is available should you experience any problems with recent updates or changes in the program.
- **Backup QRoute Data –** This utility allows you to quickly and easily backup your important QRoute data.
- **Restore QRoute Data –** This utility allows you to restore QRoute data from a backup file.
- **Print QRoute User guide** – Use this option to print a copy of the *QRoute User Guide*.
- **About QRoute** – The *About* screen provides useful version and system information.

Each item is covered in this section.

Prepare Card

The *Prepare Card* function allows you to prepare a *Storage Card* for QRoute usage.

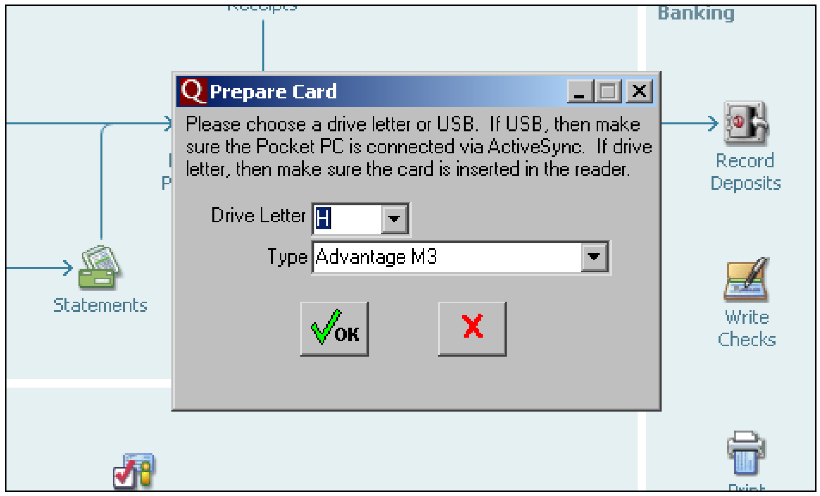


Figure 3.54

There are two standard methods defined below for preparing a card in QRoute.

Prepare Card - Using a Card Reader

1. Insert a card into your *Card Reader*.
2. Select the correct *Drive Letter* of the storage card.
3. In the *Type* field, select the handheld type that will be used with this card.
4. Click **OK** to being processing the card.
5. Follow the prompts on the screen.

NOTE: You will be prompted to format the card during this process — any information already on the card will be lost.

Prepare Card – USB Cradle/Cable

1. Insert the card into the handheld.
2. Place the handheld on the cradle (or plug cable into the device).
3. Wait for the handheld to sync with the desktop (*ActiveSync* required).
4. In the *Drive Letter* field, choose **USB**.
5. In the *Type* field, select the correct handheld type.
6. Click **OK** to begin processing.
7. Follow the prompts on the screen.

NOTE: You will be prompted to format the card during this process — any information already on the card will be lost.

Refer to *Appendix B* for more information on the *Prepare Card* function.

Card Override

The *Card Override* function allows you to bypass the *Afternoon Card* process.

The following message is displayed when a *Morning Card* is attempted and QRoute does not detect that the card has been uploaded:

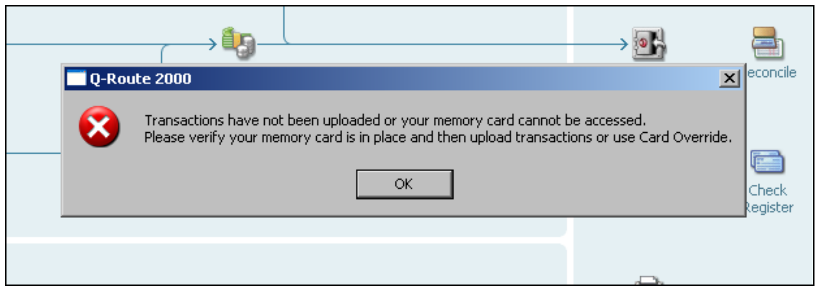


Figure 3.55

This is a safety feature of the software that will not allow you to create a new route until the current route has been transferred back to QuickBooks. If you are sure the card contains no useful data, you can proceed with the *Card Override*.

Choose the appropriate drive letter (or USB) and click **OK**.

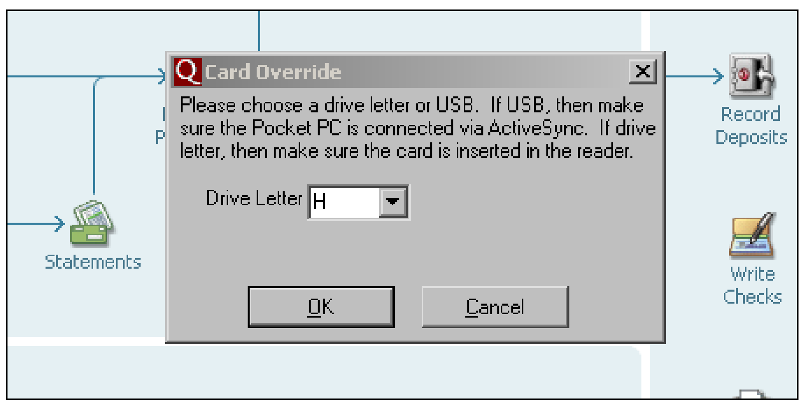


Figure 3.56

After clicking **OK** to the confirmation message, you may now proceed with the *Morning Card* process.

Figure 3.57

Data Integrity Check

This report lists any inconsistencies found within your QRoute program, and will help you determine if something has changed in QuickBooks that could affect the stability of the software.

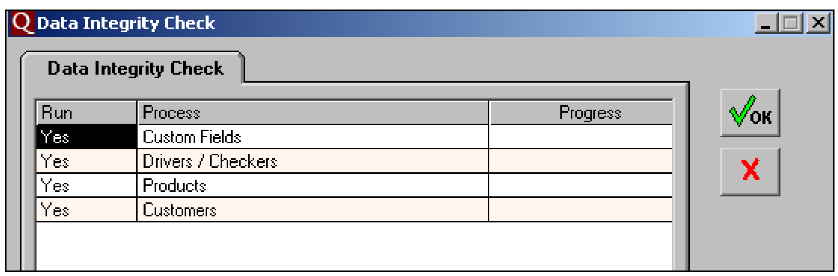


Figure 3.58

You have the option of checking all areas or individual categories listed on the screen (by double-clicking on them).

Click **OK** to receive a listing of any problems found.

NOTE: You should run this report once every few months.

MangoGeo Batch Process

MangoGeo is a web-based address correction tool that can help you correct your delivery and mailing addresses in QuickBooks, as well as provide latitude and longitude coordinates.

NOTE: Refer to the *MangoGeo User Guide* available at www.Mango-Geo.com or contact Advantage Route Systems for further information.

Change Route Sequence

The *Change Route Sequence* utility allows you to globally update routing information assigned to each customer's account within QuickBooks.

NOTE: Refer to the tutorial on page 160 for further information on using the *Update Route Sequence* screen.

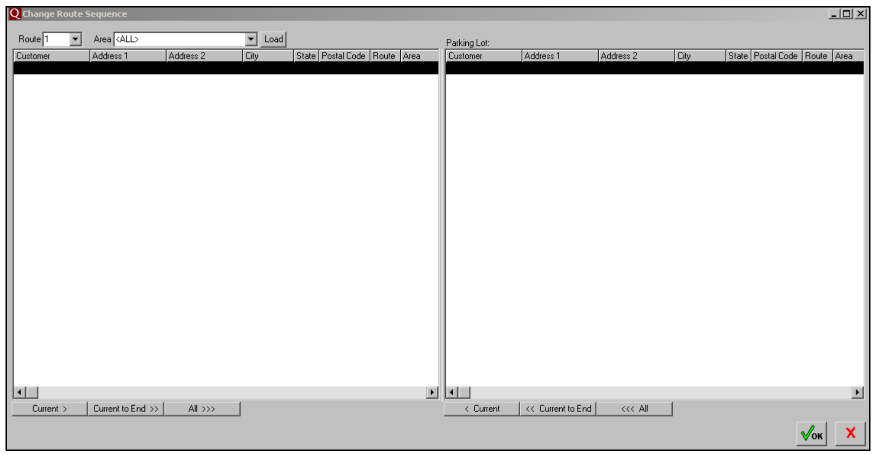


Figure 3.59

Fields:

Route: Displays all available routes in the program.

Area: Displays all available *Route Area Codes* in the program.

Load: Select this option to load the *Route* and *Route Area Code* selected.

Route Listing Panel:

The left panel of the *Change Route Sequence* screen displays all of the routed customers based on the criteria loaded.

Customer: Displays the customer's name.

Address 1: Displays the first line of the customer's address.

Address2: Displays the second line of the customer's address.

City: Displays the city assigned to the customer.

State: Displays the state assigned to the customer.

Postal Code: Displays the ZIP or postal code assigned to the customer.

Route: Displays the route assigned to the customer.

Area: Displays the *Route Area Code* assigned to the customer.

Current: Select this button to add the highlighted customer to the *Parking Lot*.

Current to End: Select this button to add all customers from the highlighted account onward to the *Parking Lot*.

All: Select this button to add all of the customers listed to the *Parking Lot*.

Parking Lot Panel:

The right panel of the *Change Route Sequence* screen displays all customers added to the temporary staging area used for route changes.

NOTE: Refer to the tutorial on page 160 for further information on using the *Parking Lot*.

Customer: Displays the customer's name.

Address 1: Displays the first line of the customer's address.

Address2: Displays the second line of the customer's address.

City: Displays the city assigned to the customer.

State: Displays the state assigned to the customer.

Postal Code: Displays the ZIP or postal code assigned to the customer.

Route: Displays the route assigned to the customer.

Area: Displays the *Route Area Code* assigned to the customer.

Current: Select this button to add the highlighted customer to the *Route Listing Panel*.

Current to End: Select this button to add all customers from the highlighted account onward to the *Route Listing Panel*.

All: Select this button to add all of the customers listed to the *Route Listing Panel*.

Other:

OK: Select this button to save all changes made.

Exit: Select this button to exit the screen.

Change Route Date

The *Change Route Date* utility allows you to change dates on individual routes globally. If you notice a route day was run using the wrong date, this utility can globally replace the date of each invoice, saving you time with manual changes.

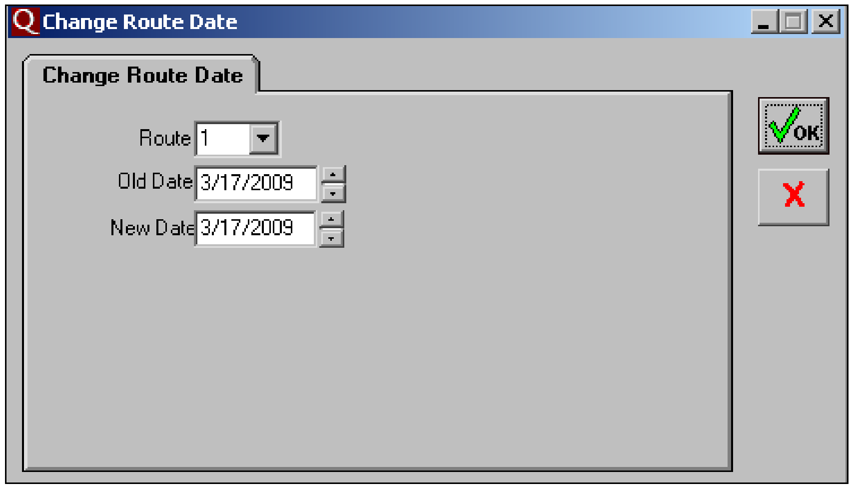


Figure 3.60

Fields:

Route: Select the *Route* that you will be changing the date for.

Old Date: The date currently assigned to the route (the incorrect date).

New Date: The new date that needs to be assigned to the route.

Click **OK** to complete the operation, or **Cancel** to exit the screen.

Delete Route

The *Delete Route* utility allows you to completely delete an uploaded route from QRoute and QuickBooks — this can be helpful if your printer jams and you want to upload a card again.

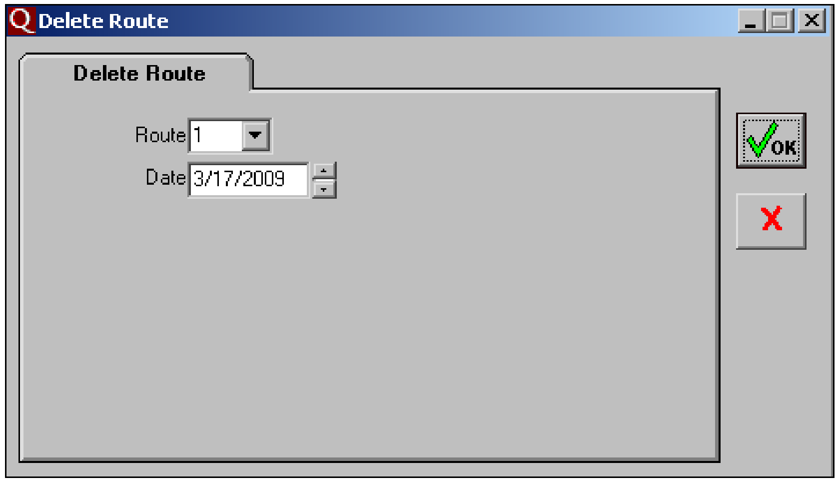


Figure 3.61

Fields:

Route: Select the *Route* that you would like to delete from the drop-down list.

Date: Enter the date of the *Route* you would like to delete.

NOTE: Once the information has been deleted, it cannot be retrieved. Use caution!

Rebuild QRoute Tables

The Rebuild *QRoute Tables* option is available to you if you experience any problems with QRoute. Often times our technicians will ask you to perform a rebuild if you are experiencing errors after a recent update or change in the program.

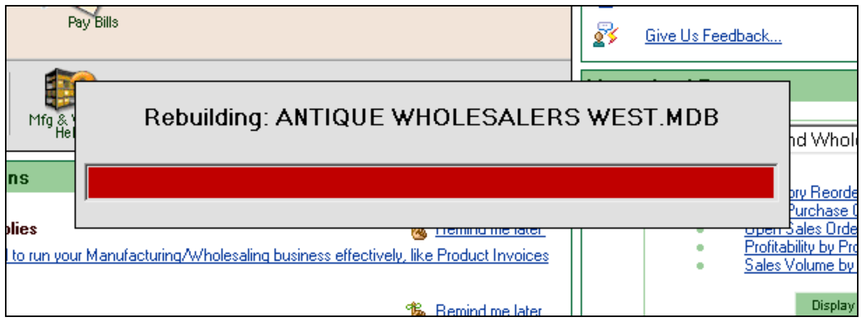


Figure 3.62

A confirmation message will be displayed on the screen after the process is complete. Simply click **OK** to continue.

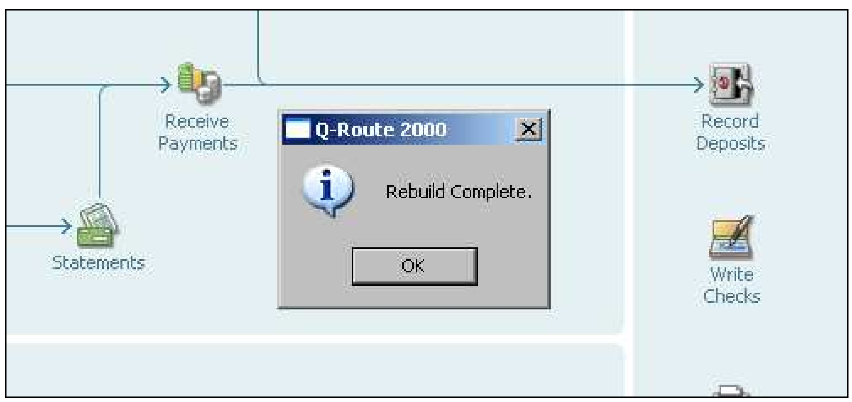


Figure 3.63

Backup QRoute Data

The *Backup QRoute Data* utility allows you to quickly and easily backup your important QRoute data. The *Backup Path* listed will match the established directory entered under *Customers > QRoute > QRoute Settings*. You may also enter a directory manually, if desired.

Each field on the screen is defined below.

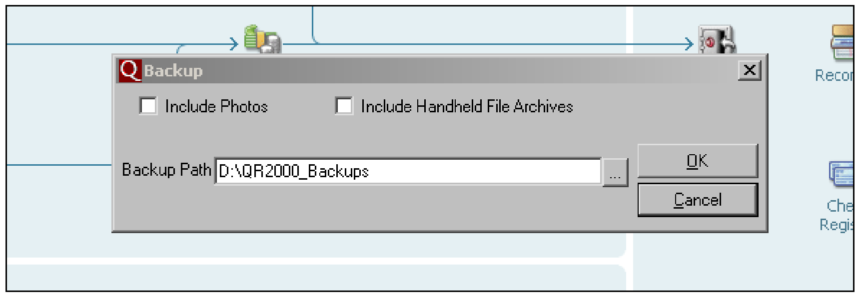


Figure 3.64

Fields:

Include Photos: Select this option if you are using the photo capture utility on the handheld and want them included in the backup file.

Include Handheld File Archives: Select this option to include all of the archived route data in the backup file.

NOTE: The handheld files contain all of the route information that has previously been uploaded using QRoute.

Backup Path: The path to the location where all of the backup files will be stored. You may also type in a location manually, or choose the ☐ *Browse* option.

Click **OK** to back up the data.

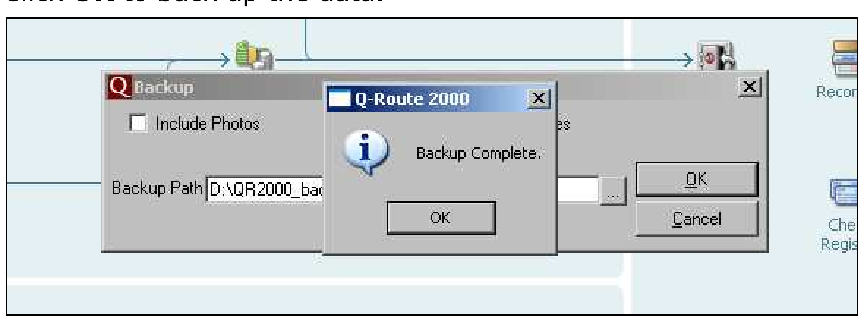


Figure 3.65

After the confirmation screen appears, click **OK** to complete the process.

The backup file will be stored in the backup location; the backup file will resemble the following:

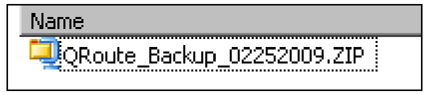


Figure 3.66

Restore QRoute Data

The *Restore QRoute Data* utility allows you to quickly and easily restore important QRoute data from a backup file. The backup files listed are stored in the established directory entered under *Customers* > *QRoute* > *QRoute Settings*. You may also manually change the directory to restore from an alternate backup file, if desired.

WARNING: Restoring data can have serious implications on your data! Proceed with caution.

Each field on the screen is defined below.

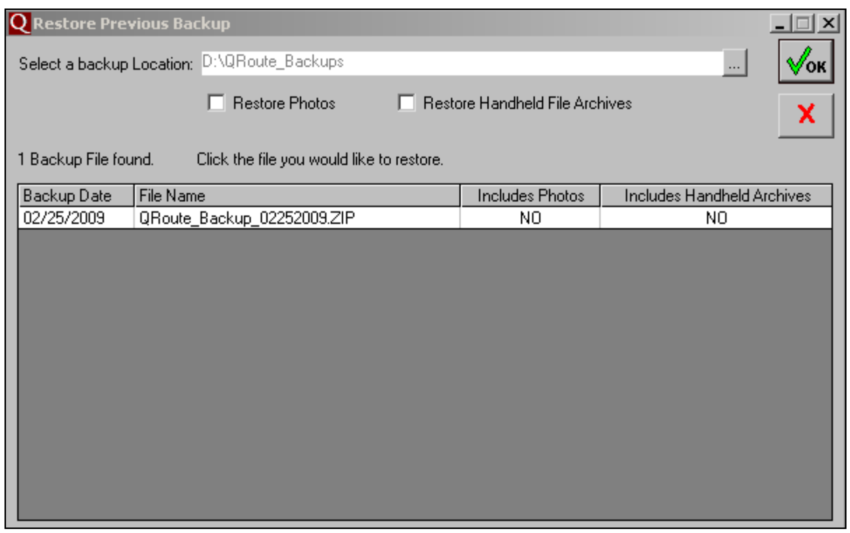


Figure 3.67

Fields:

Select a backup location: This field displays the current backup directory; any current backup files in this directory will be displayed on the screen automatically.

NOTE: Choose the button to temporarily change the target location, if desired.

Restore Photos: Select this option if you would like to restore photos included in the selected backup.

Restore Handheld File Archives: Select this option of you would like to restore handheld archive files included in the selected backup.

NOTE: Photo and archive information can only be restored if the current backup file includes them. This information is clearly displayed per file.

Backup Date	File Name	Includes Photos	Includes Handheld Archives
02/25/2009	QRoute_Backup_02252009.ZIP	NO	NO

Figure 3.68

Detail Lines:

Backup Date: The date the backup file was created.

File Name: The name of the backup file (the naming convention used includes the date).

Include Photos: Specifies whether or not the backup file contains photos.

Include Handheld File Archives: Specifies whether or not the backup file contains handheld archives.

To restore a backup file, select the file and choose **OK**.

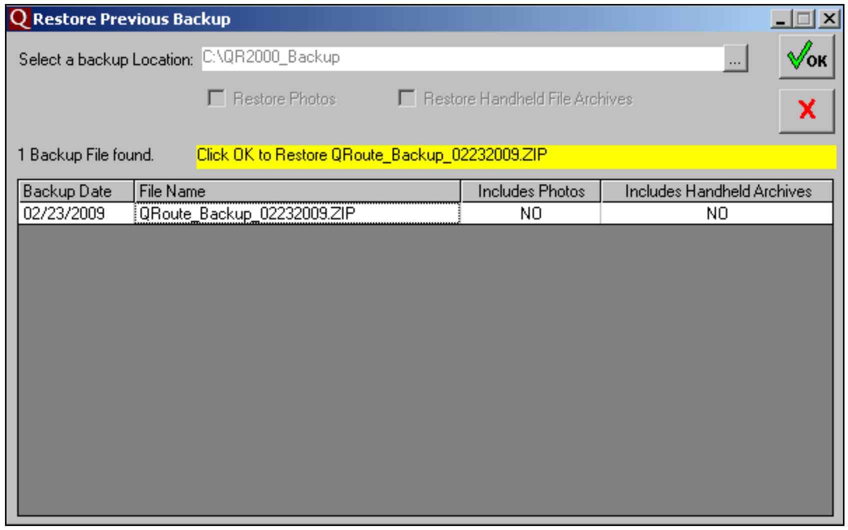


Figure 3.69

A confirmation screen will be displayed, click **Yes** to proceed or **No** to cancel.

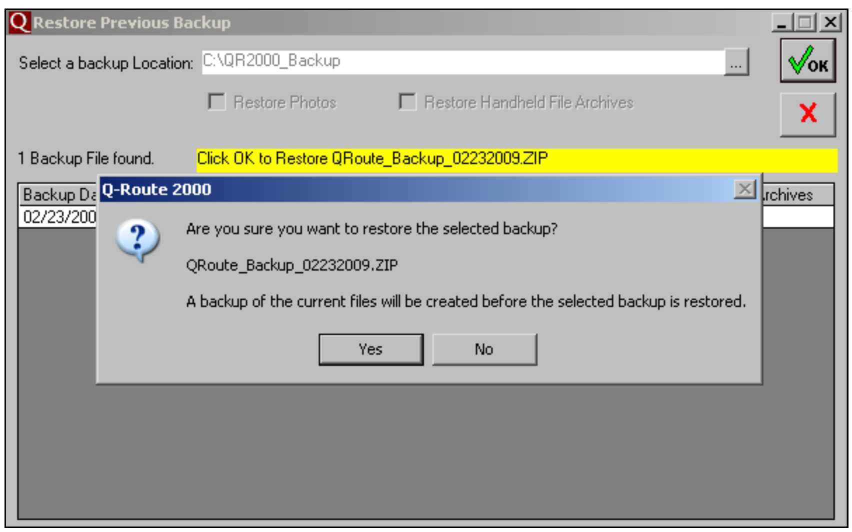


Figure 3.70

NOTE: A backup of your current QRoute data will be created during this process, in case you make a mistake.

The restore process will only take a few moments, once complete, click **OK**. You have now successfully restored the data.

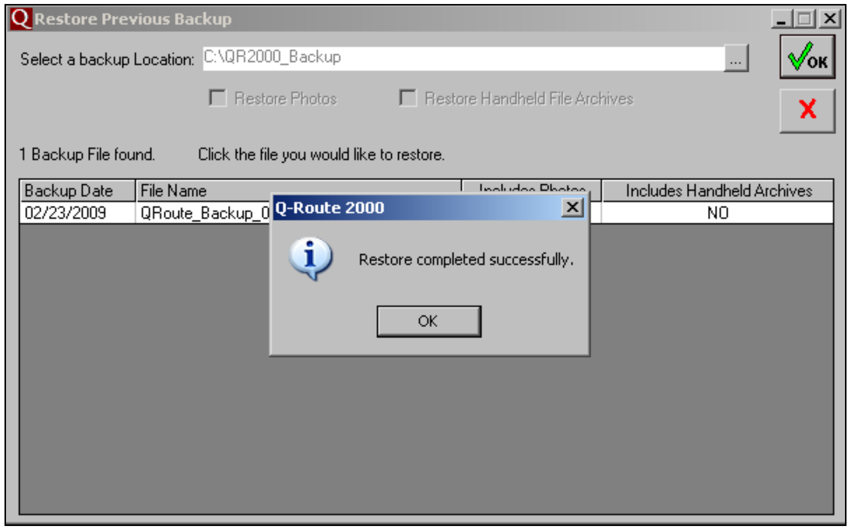


Figure 3.71

Print QRoute User Guide

Use this option to print a copy of the *QRoute User Guide*. You can print the manual in-house, or use the *FedEx Office* option to have Kinko's prepare a three-ring binder copy for you.

In-House Manual

To print a copy in-house, simply choose the preview button and a copy of the manual will be generated in your default PDF program, which you can choose to print if desired.

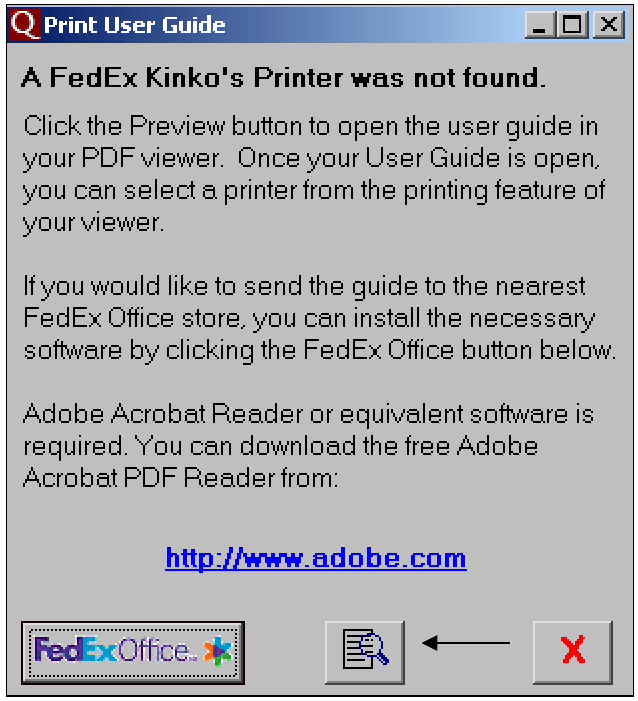


Figure 3.72

FedEx (Kinko's) Office Manual

To have a copy of this manual prepared by Kinko's for you, follow the steps below:

1. Choose the **FedEx Office** button located on the bottom of the screen (requires an active internet connection).

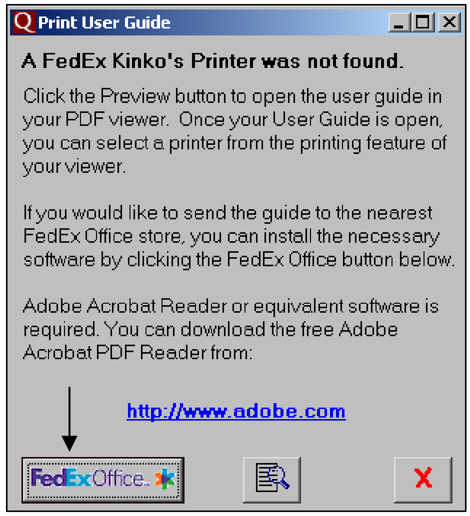


Figure 3.73

2. You will be directed to the *FedEx Office* Web site, simply follow the instructions on the screen to install their print driver.

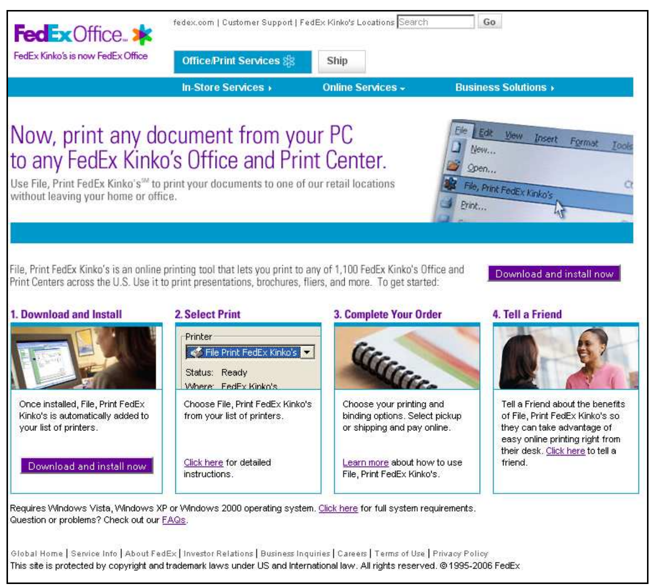


Figure 3.74

3. Once you have downloaded and installed the *FedEx Kinko's* software, the screen will inform you that the **FedEx Kinko's Printer was found.**

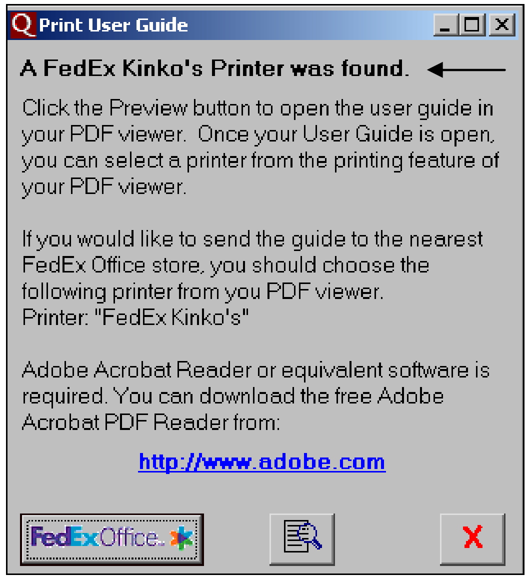


Figure 3.75

4. Click the *Preview* icon to generate a copy of the manual using your default PDF program.

5. After the manual has been displayed, select *File* > *Print*.

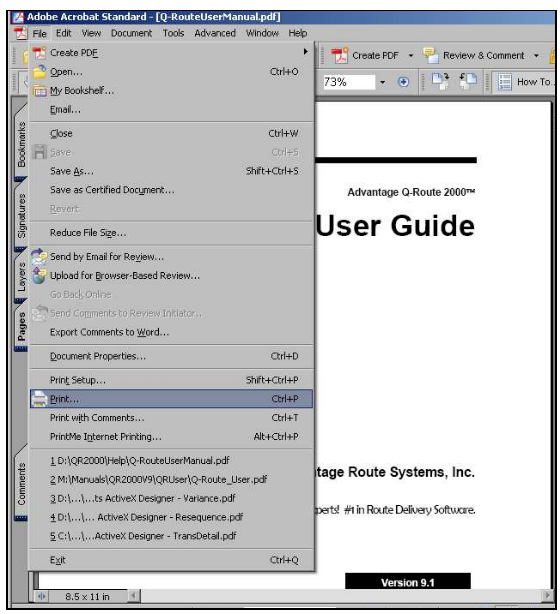


Figure 3.76

6. Choose the FedEx Kinko's printer from the list and click **OK**.

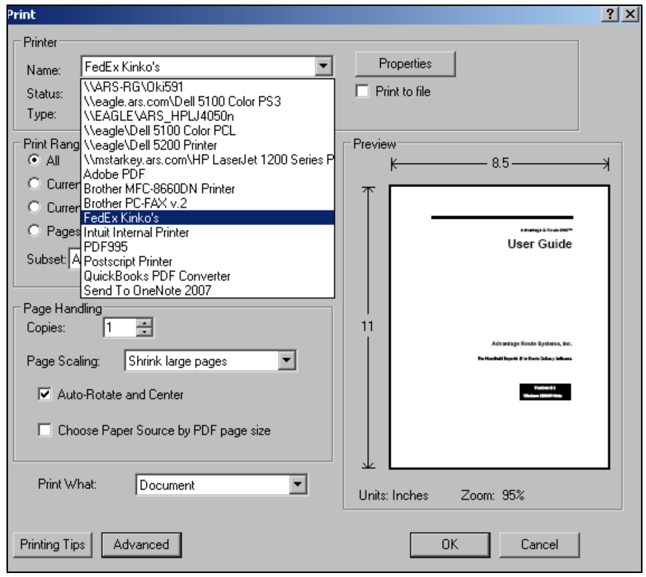


Figure 3.77

7. The manual will be processed and you will be redirected to Kinko's Web site to complete your order.

NOTE: There will be a charge for each manual printed using *Kinko's FedEx*.

About Screen

The *About QRoute* screen displays various information related to version, support, and licensing.

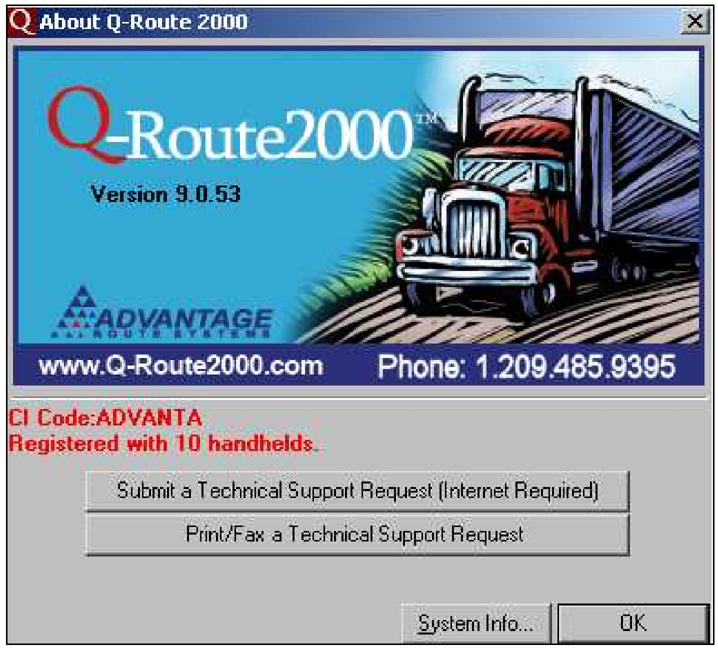


Figure 3.78

Tutorial - Item List changes for QRoute

In order for products to be sold on the handheld computer, you may need to update the *Item Type* in QuickBooks. This tutorial will guide you through the process.

Modify Existing Items

The *Item Type* is displayed on the *Edit Item* screen on existing items (see arrow below).

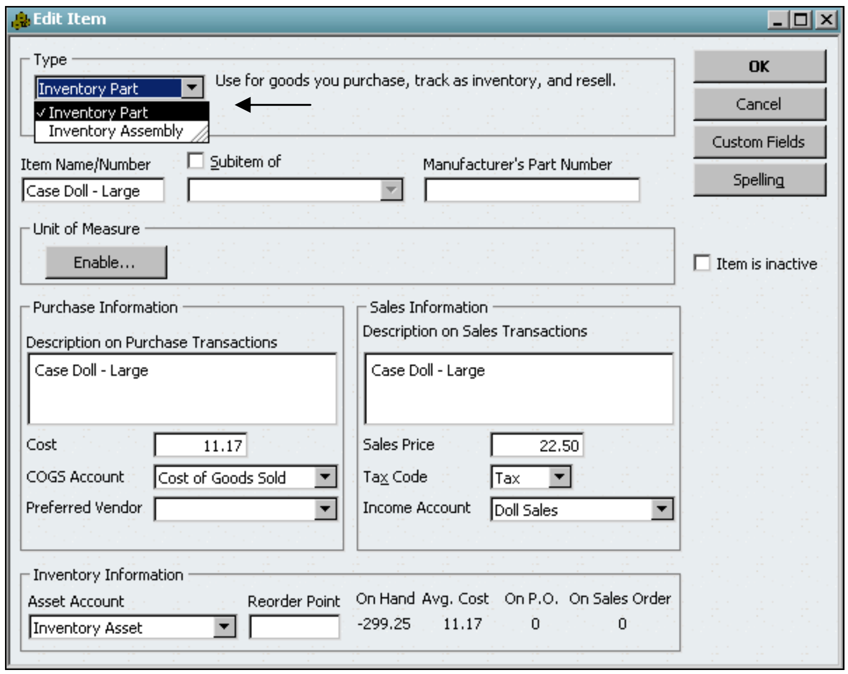


Figure 3.79

In order for items to show up on the QRoute handheld, they must be assigned to one of the following *Item Types*:

- ***Inventory Part:*** These items represent any product you will be selling to your customers.
- ***Service:*** These items represent "Skip Reasons," which will be addressed later in this chapter.

If your existing products are not set up as *Inventory Part* items, simply change them to the required type by choosing the drop-down arrow and selecting the new type (in the *Type* field).

NOTE: If *Inventory Part* is not an available option in the *Type* field drop-down list: go to *Edit > Preferences > Items & Inventory > Company Preferences* and select: **Inventory and purchase orders are active**.

Click **OK** and repeat the same steps for all of the items that need to be sold on the handheld.

Create a New Item

You may also create a new item by choosing *Lists > Item List*. Right-click on the screen and choose the 'New' option.

Assign the item to **Type: Inventory Part***,* and fill in the remaining item details.

Click **OK** and repeat the same steps for all of the items that need to be sold on the handheld.

Tutorial - Skip Reasons

A *Skip Reason* is defined as any reason the driver was not able to complete a delivery to a customer. This information is transferred back to the desktop and noted in the customer's sales history record.

There are a few setup items that need to be addressed within QuickBooks before *Skip Reasons* can be used, they are covered below.

New Custom Field – Product Class

In this section, you will create a new *Custom Field* in QuickBooks that will be used by the QRoute program.

NOTE: If you have already created the *Product Class* custom field, you can skip this step.

1. Browse to *Lists* > *Item List* and double-click on any existing item to bring up the *Edit Item* screen.
2. From within the *Edit Item* screen, select the **Custom Fields** button.

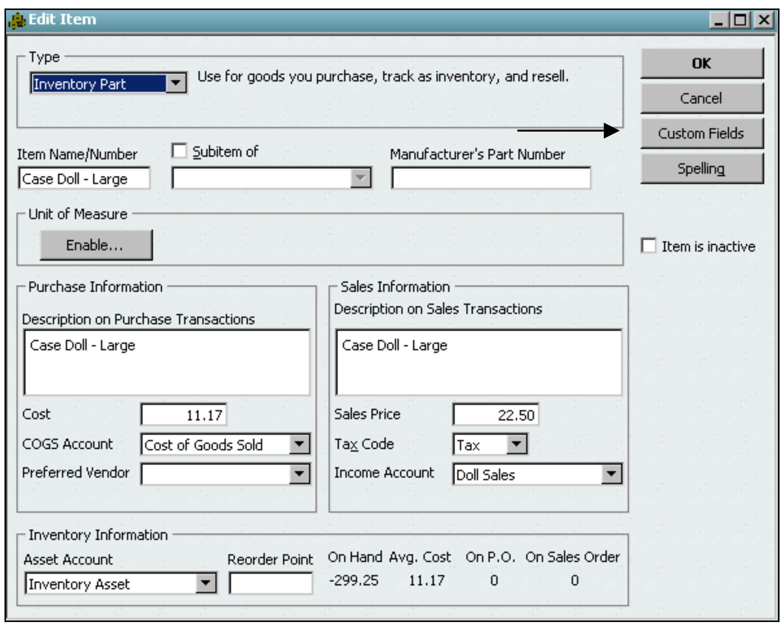


Figure 3.80

3. Choose the **Define Fields** button.

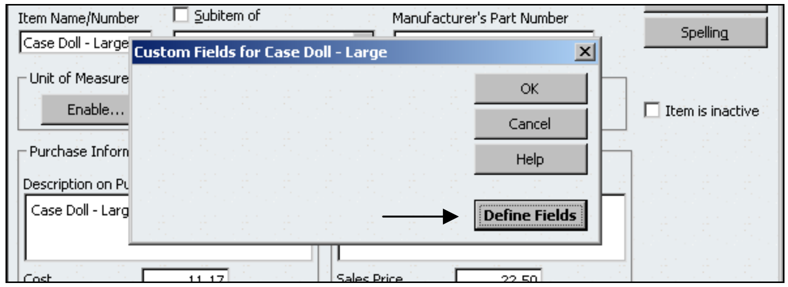


Figure 3.81

4. In the first line available, enter: **'Product Class'**, and make sure to <u>check</u> the box next to it.

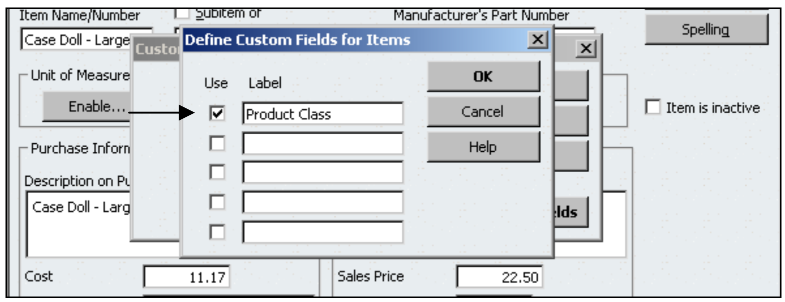


Figure 3.82

5. Click **OK** and you should now see the new field: *Product Class*. Click **OK** again to exit the screen.

6. Browse to *Customers > QRoute > Setup Options > Handheld Setup*.

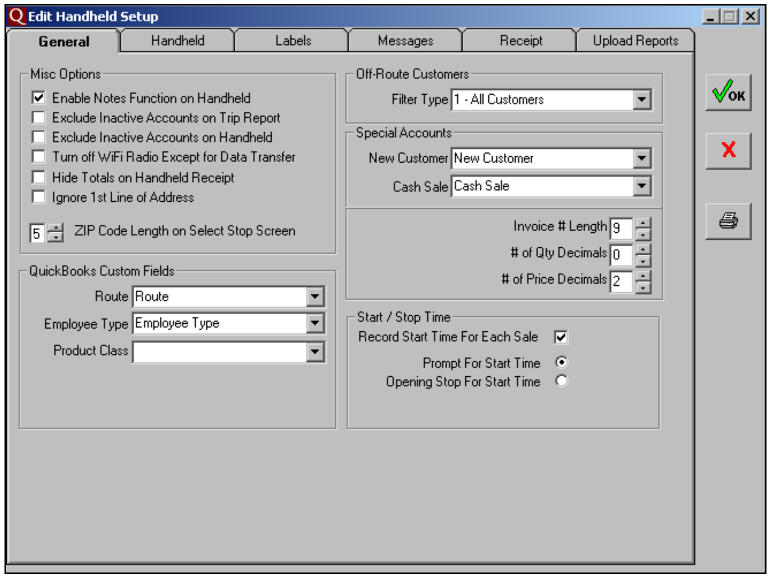


Figure 3.83

7. On the *General* tab, select the **Product Class** option from the drop-down list, next to the *Product Class* field (below).

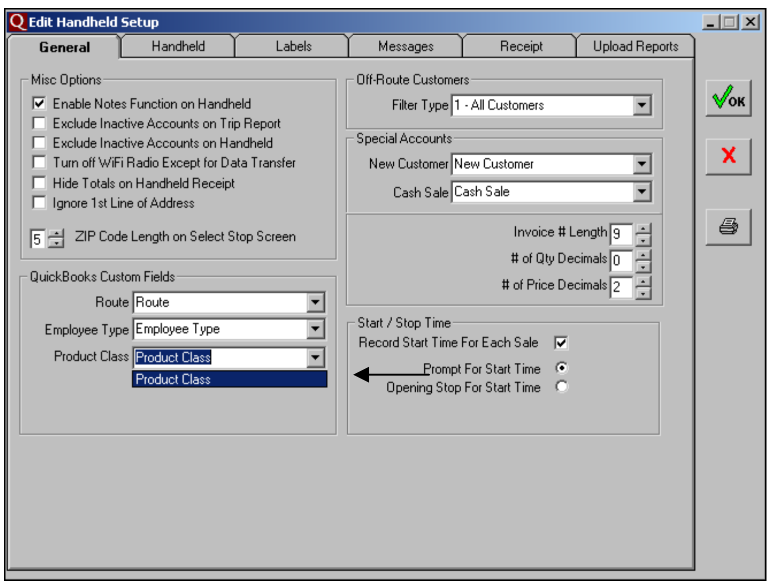


Figure 3.84

8. Click **OK** to save your changes and exit the screen.

Now that the *Product Class* custom field has been established, continue to the next section to create a *Skip Reason*.

Create a Skip Reason

Follow the steps below to create a *Skip Reason* in QuickBooks that will be used by the QRoute program.

1. Create a new item that will be used as a *Skip Reason* by right-clicking in the *Item List* and selecting **New**:

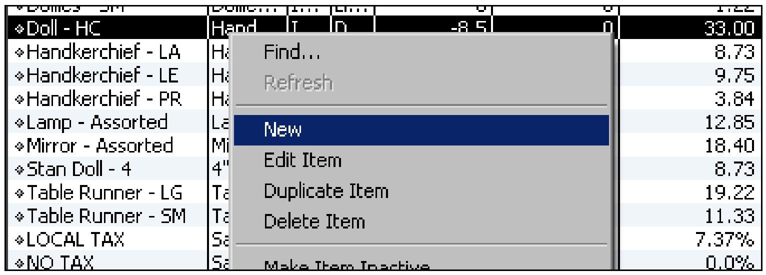


Figure 3.85

2. Select **Service** as the item *Type*:

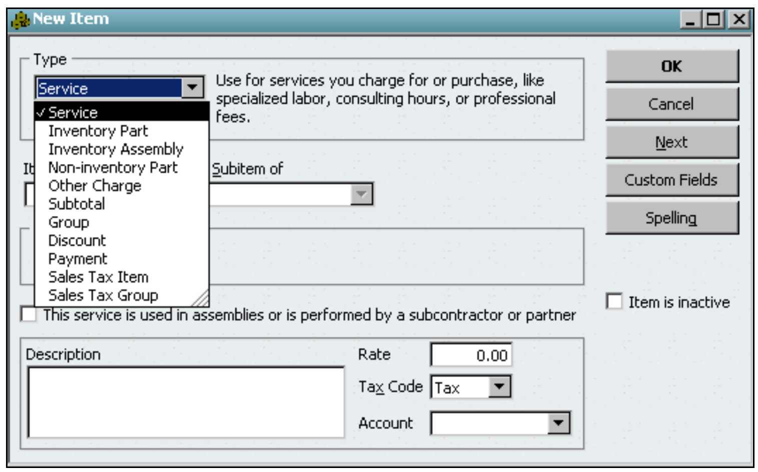


Figure 3.86

3. Enter a *Skip Reason* description (i.e., Customer not Home, Business Closed, Refused Service, etc.).

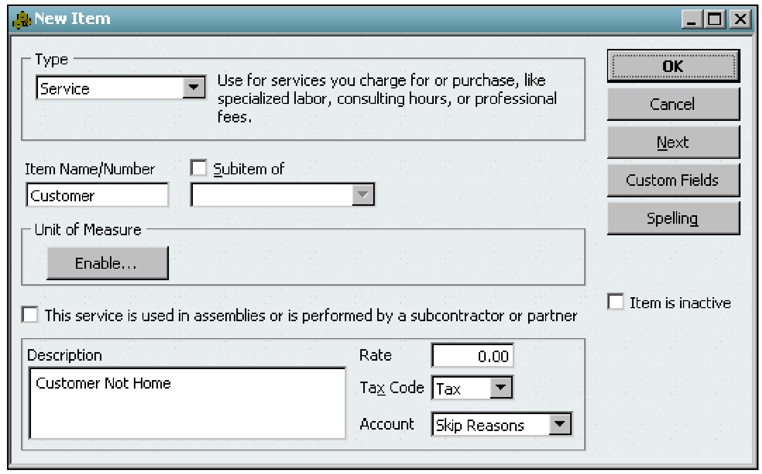


Figure 3.87

NOTE: Prices on *Skip Reasons* will always be 0.00, and the assigned *G/L Account* number is entirely your choice. To remain organized, it may be helpful to create a new *Skip Reasons* account.

---

4. Select the **Custom Fields** button on the screen.

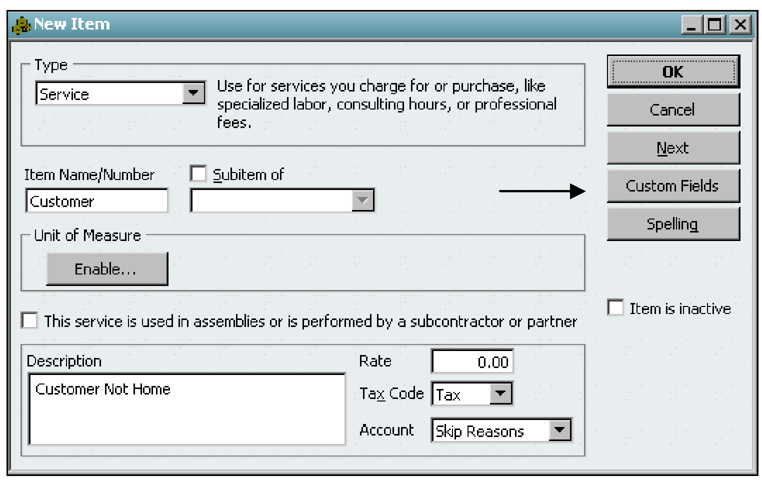


Figure 3.88

5. In the *Product Class* field, enter the word **SKIP** and click **OK**.

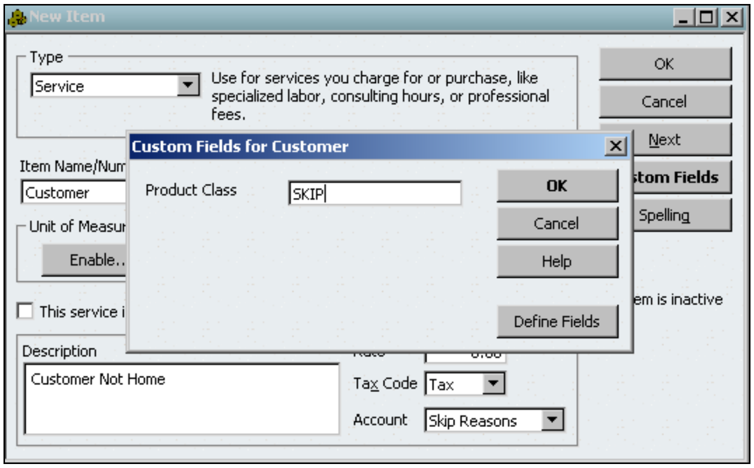


Figure 3.89

Repeat this process for each *Skip Reason* needed.

Tutorial - Alert Messages (Notes for the Handheld)

Occasionally, you may need to convey important information to your route drivers regarding a customer's account. For example, perhaps the account has special handling instructions, driving directions, or an access code. Each message will be clearly displayed on the handheld screen as the driver selects the customer.

To add an *Alert Message* to a customer's account:

1. Browse to *Customers* > *Customer Manager,* and double-click on a customer's account.
2. Choose the **Notes** button on the screen.

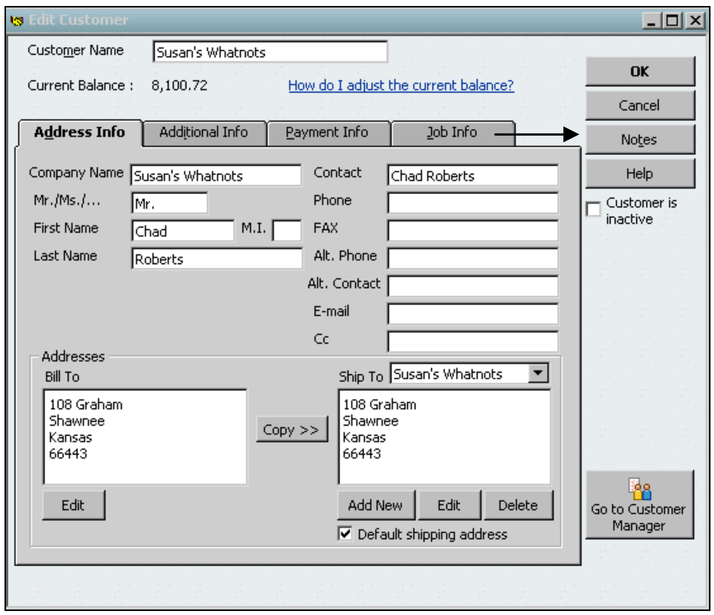


Figure 3.90

3. In the notes section, anything that begins with: '***ALERT:' and ends with '***', will automatically popup on the handheld when the driver accesses the account on the handheld (example below).

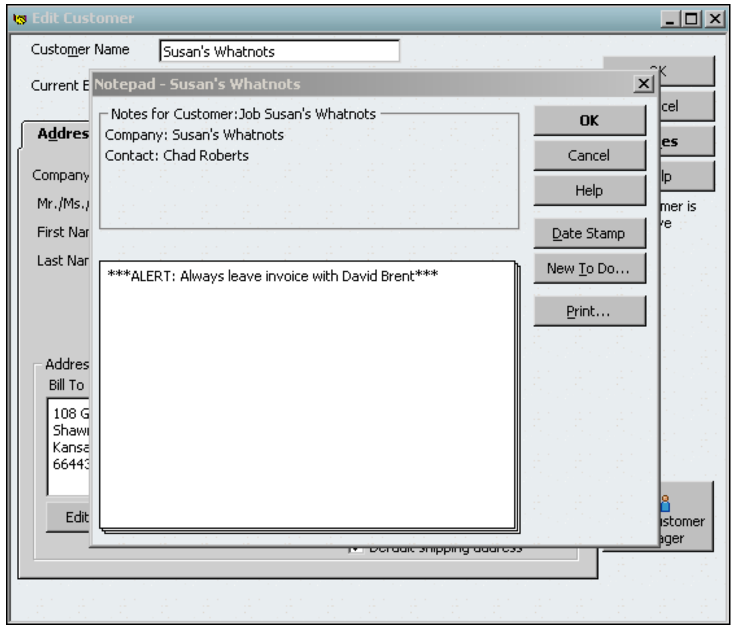


Figure 3.91

NOTE: Using this format allows you to keep your desktop and handheld notes separate.

Alternatively, if you would like to send a message to the handheld but do not need it to popup each time the account is accessed, enter the note in the following format: ***DELIV: Your Delivery message***. This message can be found on the handheld invoice screen, within the 'I' (Instructions) button.

Tutorial - Container Tracking

QRoute allows you to track returnable items such as crates, pallets, bottles, racks, etc. If you charge deposits for these items, the program will be able to automatically determine the deposit charge per customer.

NOTE: If you have containers that you would like to track but do not charge for deposits, this feature will work for you as well.

Follow the steps below to setup container tracking within QRoute.

New Custom Fields

In this section, you will create new *Custom Fields* in QuickBooks that will be used by the QRoute Program for container tracking.

Product Class (Custom Field)

The *Product Class* custom field will be used internally by QRoute to identify containers for tracking.

NOTE: If you have already created the *Product Class* custom field*,* skip to the section on creating the *Customer Deposit Detail* field*.*

1. Browse to *Lists* > *Item List,* and double-click on any existing *Item* to bring up the *Edit Item* screen.

2. From within the *Edit Item* screen, select the **Custom Fields** button.

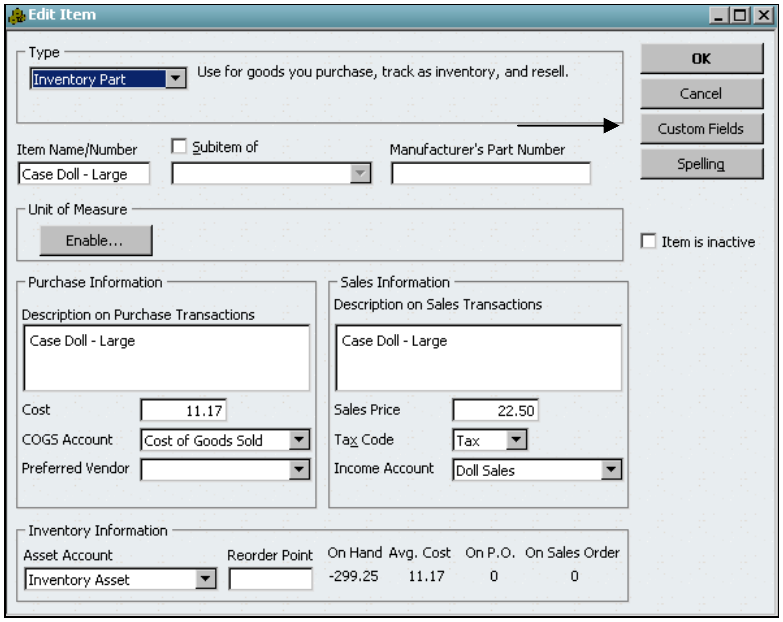


Figure 3.92

3. Choose the **Define Fields** button.

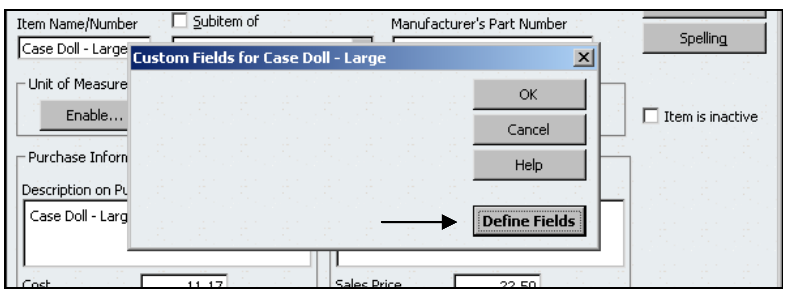


Figure 3.93

4. In the first line available, enter: **Product Class** and make sure to check the box next to it.

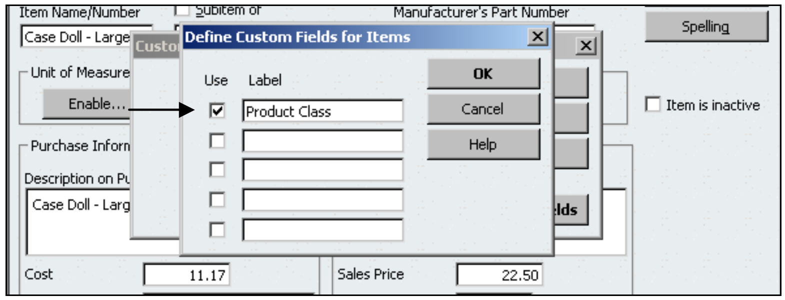


Figure 3.94

5. Click **OK** and you should now see the new field displayed. Click **OK** again to exit the screen.

6. Browse to *Customers > QRoute > Setup Options > Handheld Setup*.

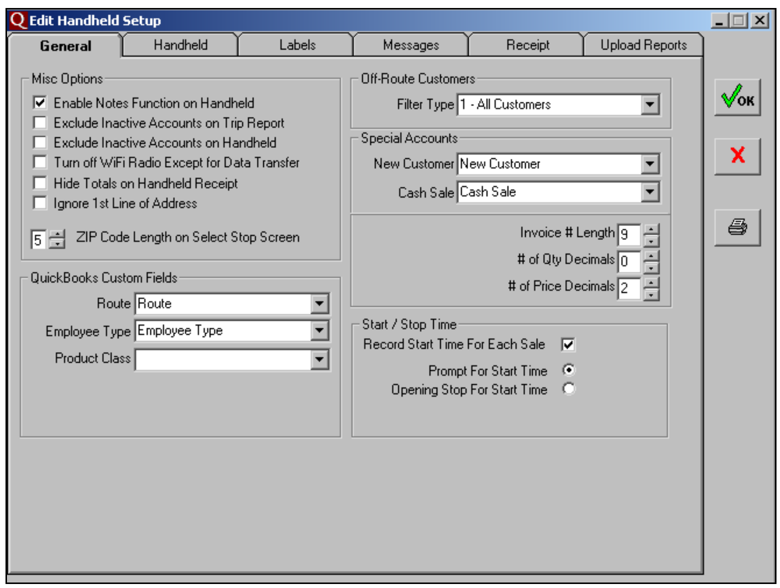


Figure 3.95

7. On the *General* tab, select the **Product Class** option from the drop-down list, next to the *Product Class* field (below).

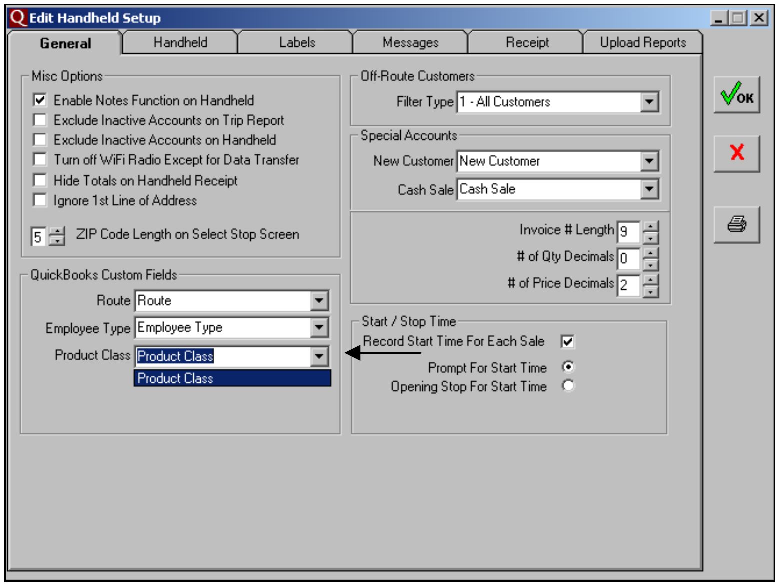


Figure 3.96

8. Click **OK** to save your changes and exit the screen.

Customer Deposit Detail (Custom Fields)

These *Custom Fields* allow you to view the total count of each container at a customer's location.

1. Browse to *Customers* > *Customer Manager* and double-click on any account to bring up the *Edit Customer* screen.
2. From within the *Edit Customer* screen, select the *Additional Info* tab and choose the **Define Fields** button.

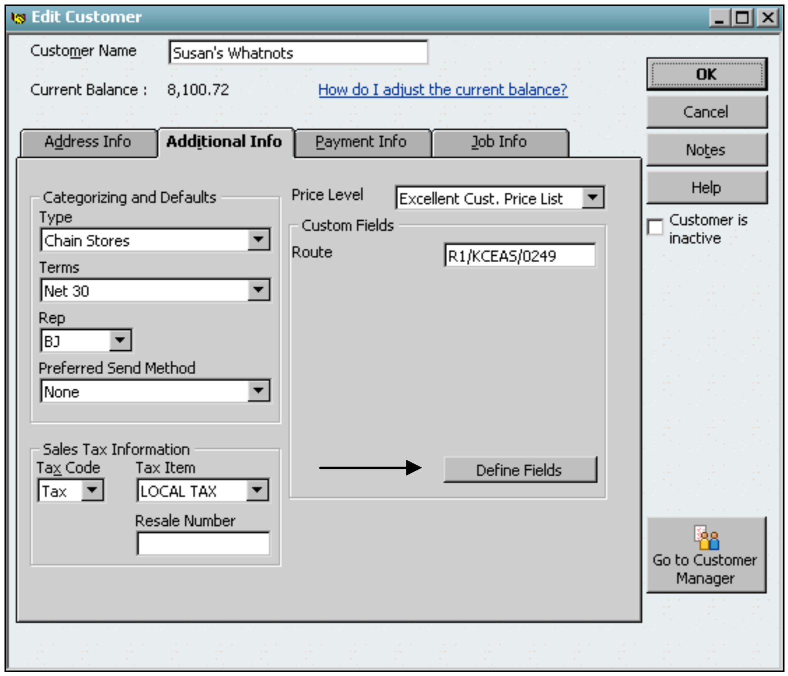


Figure 3.97

3. In the first and second lines available, enter your container descriptions and make sure to check the box next to each line. Click **OK** to confirm your changes.

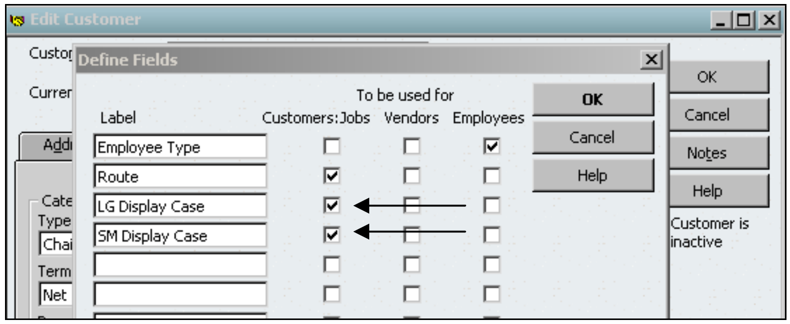


Figure 3.98

NOTE: You can track up to two types of containers within QRoute. In this example, an antiques company is tracking two of their display cases.

---

4. You should now see the new fields displayed on the *Additional Info* tab. Click **OK** to exit the screen.

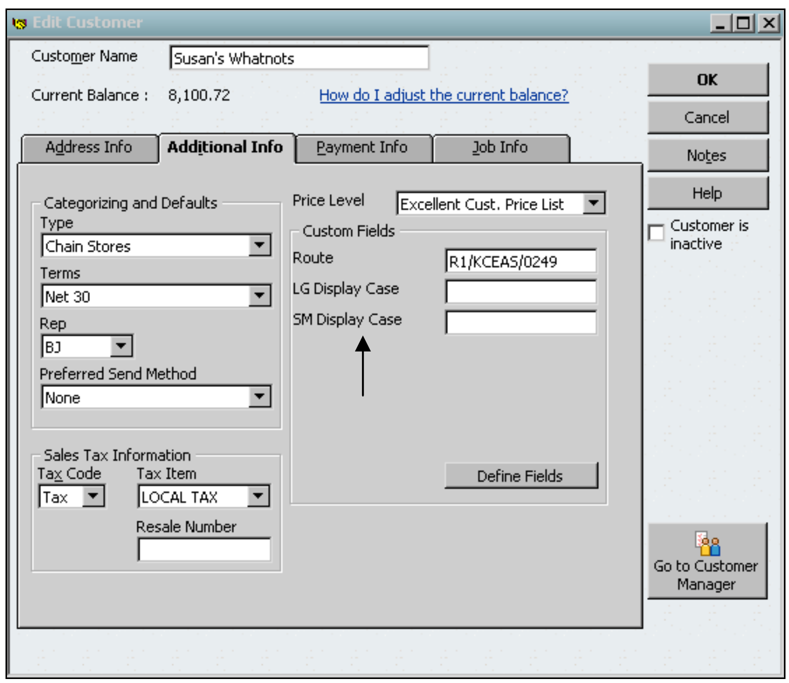


Figure 3.99

5. Browse to *Customers > QRoute > Setup Options > Handheld Setup,* and select the **Labels** tab.

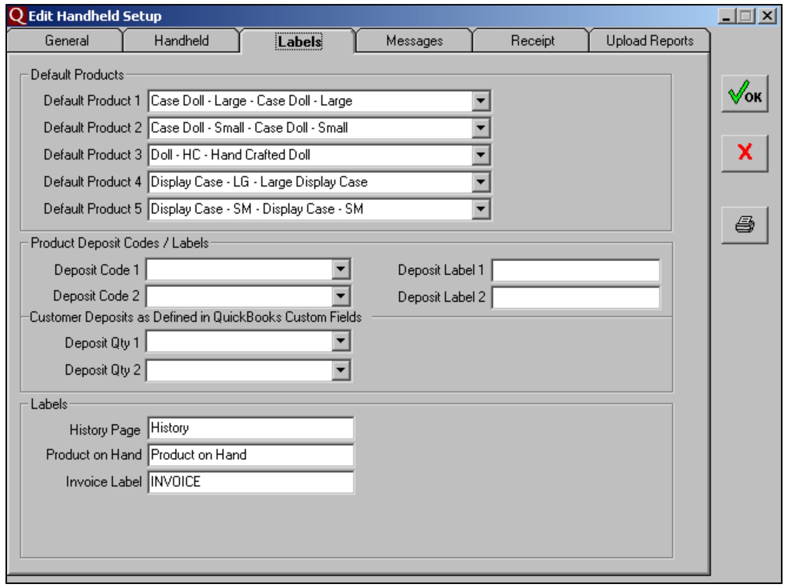


Figure 3.100

6. On the *Labels* tab, select your new *Custom Fields* from the drop-down lists available in the section: **Customer Deposits as Defined in QuickBooks Custom Fields**.

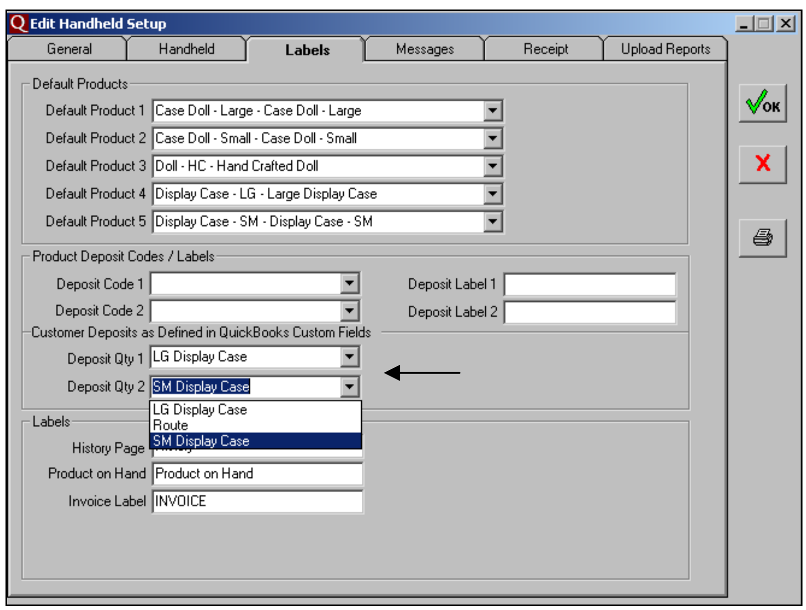


Figure 3.101

7. Click **OK** to save your changes and exit the screen.

Container Item Setup

This section will guide you through establishing your containers for tracking.

Identifying Containers

A container can be a bottle, case, crate, pallet, etc. It is the object that is used to hold the product for the customer. If the product is sold to the customer with a container that is being temporarily leased to them, you may charge a deposit for this item.

NOTE: If you do not charge a deposit, it is still a good idea to keep track of the number of containers the customer may have.

The data used in this section is set up for an antiques company that keeps track of their large and small display cases. The customer pays a refundable deposit each time a display case is used. As the delivery is made, any empty cases are picked up by the driver, and returned to the warehouse for a credit.

In order for QRoute to properly track and/or charge deposits for their display cases, two *Item* codes are used within QRoute: one for adding the item to the invoice at the time of delivery, and one for tracking (or charging a deposit).

The *Items* used for their first container are:

- *Item 1: Large Display Case*
- *Item 2: Large Display Deposit*

The *Items* used for their second container are:

- *Item 3: Small Display Case*
- *Item 4: Small Display Deposit*

If the container actually holds the product at the time of delivery, as in a large bottle of water, the *Items* resemble the following:

- *Item 1: 5 Gallon Water*
- *Item 2: 5 Gallon Deposit (or Empty)*

NOTE: Applying the logic from above, it may be necessary for you to create new *Items* for container tracking.

Assigning Product Class

Each container being tracked needs to be assigned to a special *Product Class* in order for QRoute to handle the item properly. Follow the steps below.

1. Browse to *Lists* > *Item List,* and double-click on your first container to bring up the *Edit Item* screen.
2. From within the *Edit Item* screen, select the **Custom Fields** button.

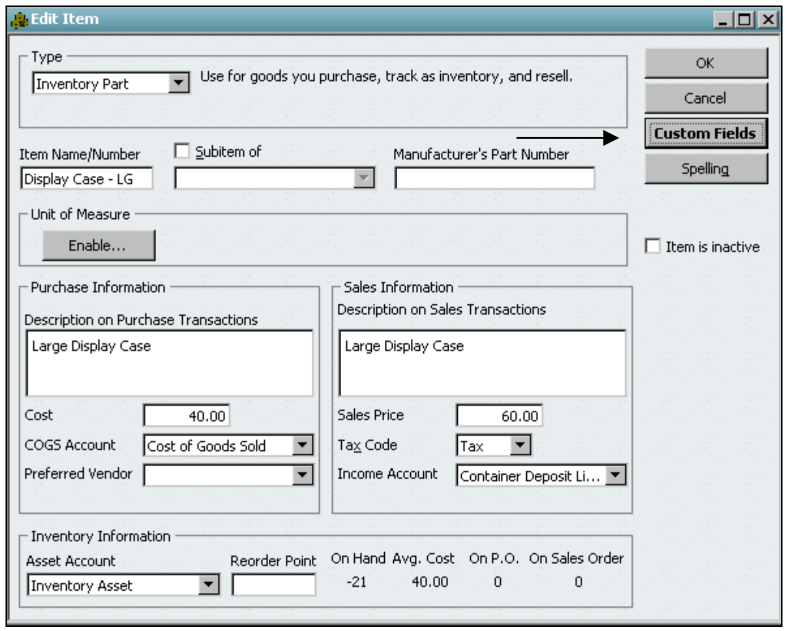


Figure 3.102

3. In the Product Class field, enter **DEP1** and click **OK**.

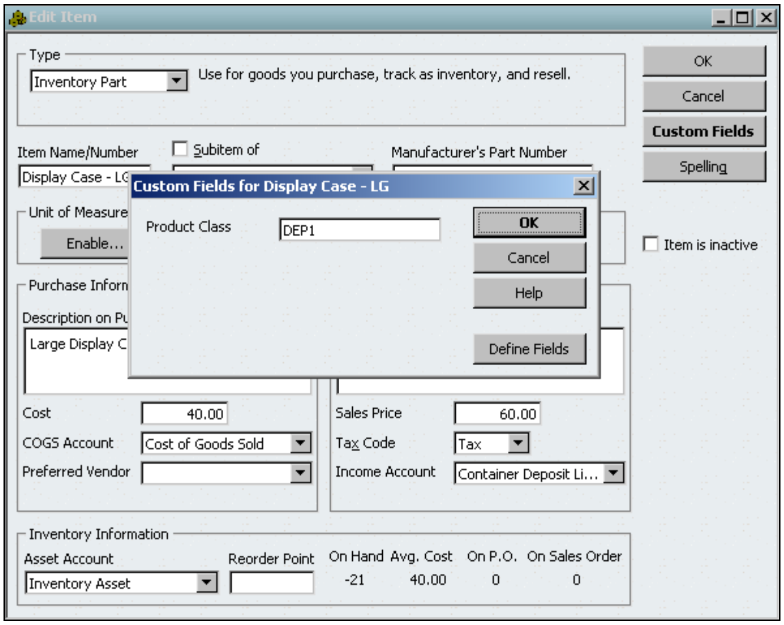


Figure 3.103

4. Click **OK** to exit the *Edit Item* screen.

5. Next, double-click on the deposit or tracking item that will be associated with your first container, and choose the **Custom Fields** option.

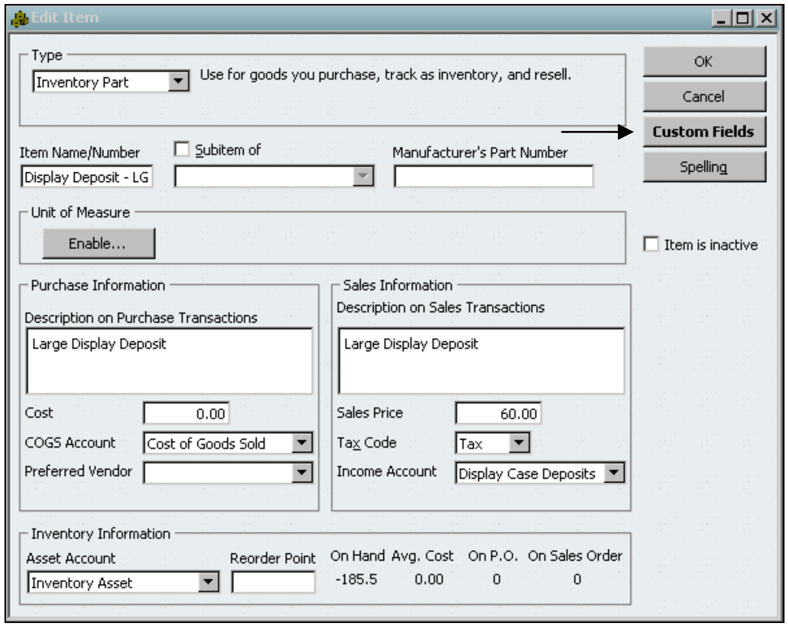


Figure 3.104

6. In the *Product Class* field, enter **DEP** and click **OK**.

NOTE: If you will be charging a deposit for your container, enter the deposit amount in the *Sales Price* field.

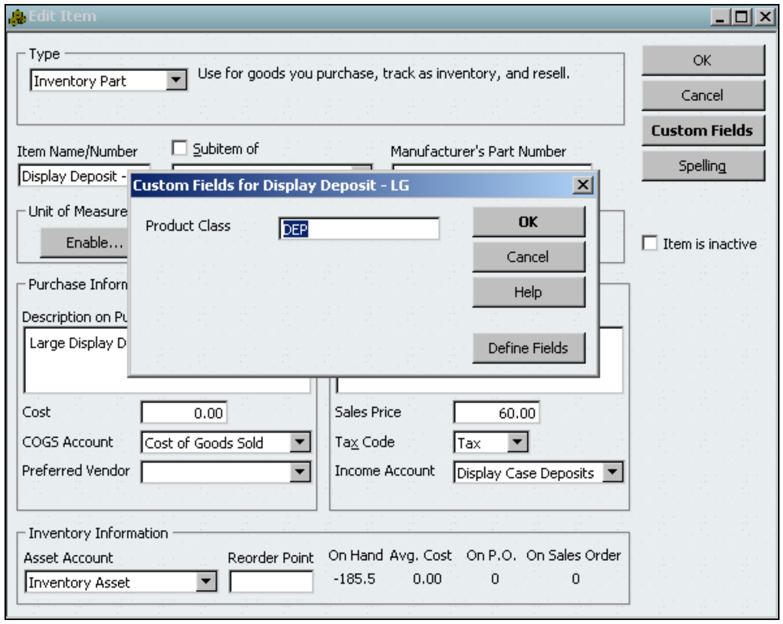


Figure 3.105

7. Click **OK** to exit the *Edit Item* screen.
8. Repeat the same steps above for your second container, but substitute: **DEP2** in step 3.

NOTE: Use **DEP** again on the second deposit/tracking item.

An example of items used in a standard water delivery company may look like this:

- 5 Gallon Water = DEP1
- 5 Gallon Deposit (or Empty) = DEP
- 3 Gallon Water = DEP2
- 3 Gallon Deposit (or Empty) = DEP

Container Tracking Labels

The final step in the process is to establish *Deposit (Tracking) Labels* for the handheld.

1. Browse to *Customers > QRoute > Setup Options > Handheld Setup*, and choose the *Labels* tab.

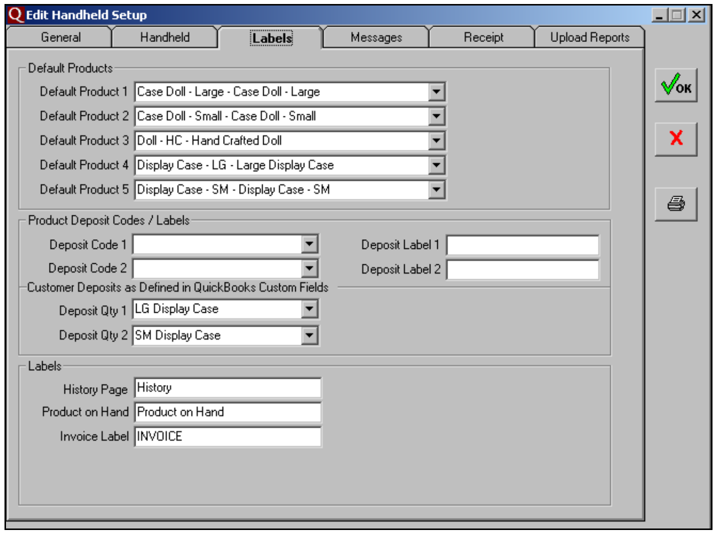


Figure 3.106

2. Assign each deposit (tracking) item to the *Deposit Code* fields available in the *Product Deposit Codes / Labels* section of the screen.

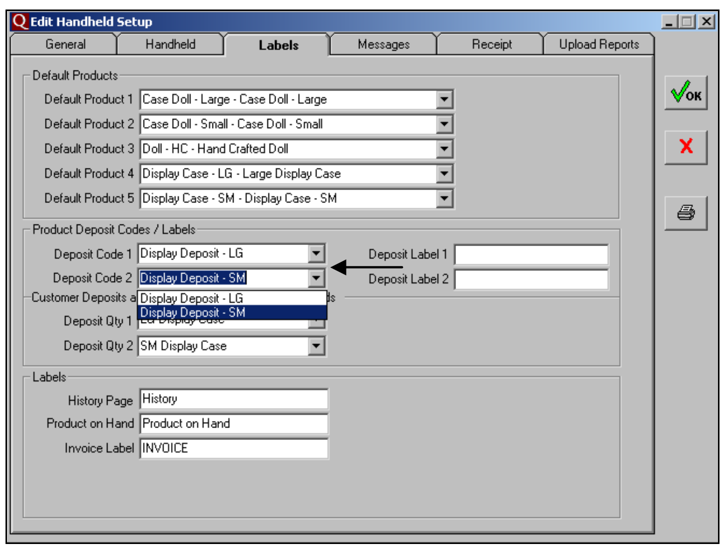


Figure 3.107

3. Enter a *Deposit Label* for each deposit (tracking) item.

NOTE: The label is displayed on the invoice screen and it is best to use descriptions such as: Cases Returned, Bottles Returned, Pallets Returned, etc.

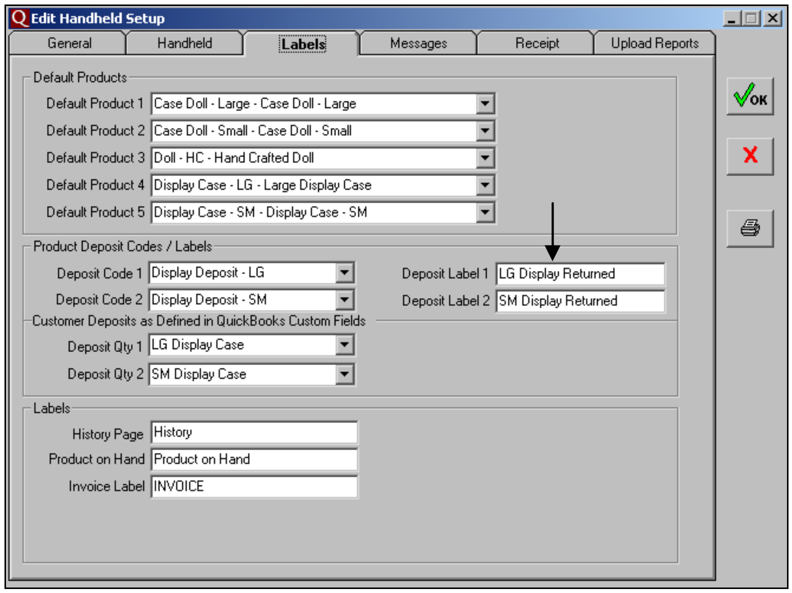


Figure 3.108

4. Click **OK** to save your changes and exit the screen.

Additional Info

There are many industries that utilize the deposit feature in QRoute. It is easy to setup and will help you keep track of items that should be returned to you. Even if you do not charge the customer each time you deliver or remove the items, it is helpful to keep track of your containers at all times.

Here are just a few examples of industries that can use this feature:

Bottled Water: Keep track of empty bottles by setting up container tracking for your 5 Gallon and 3 Gallon bottles.

Propane: If you are doing tank exchanges, then you could charge the customer for each tank, and credit them when they are returned.

Chemical or Petroleum Distribution: Set up a deposit for each drum. Charge for them when they are delivered, and issue a refund when empties are picked up.

Tutorial – Change Route Sequence

The *Change Route Sequence* feature allows you to manage all of your customer's route settings on a single screen. This utility can be used to update the following information on each account within QuickBooks:

- Route Sequence Numbers
- Route ID's and Route Area Codes on routed accounts
- Route ID's and Route Area Codes on empty accounts
- Additional Features

This tutorial will guide you through each option listed.

NOTE: Prior to using this utility, you must establish the 'Route' custom field in QuickBooks and *Handheld Setup* (covered in *Chapter 2*).

Update Route Sequence

The *Change Route Sequence* screen allows you to easily update the sequence order of each route.

Navigate to *Customers > QRoute > Change Route Sequence* (or use the QRoute toolbar), and follow the steps below:

1. Select the 'Route' and desired 'Area' (or *All*), and click the **Load** key.

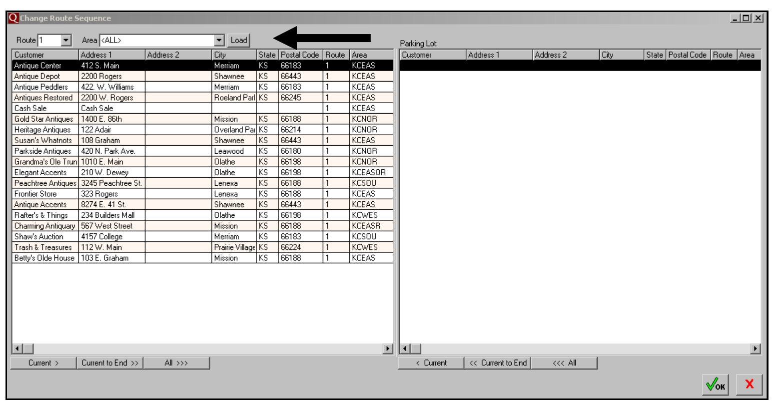


Figure 3.109

2. Drag and drop each account to the desired location on the route:

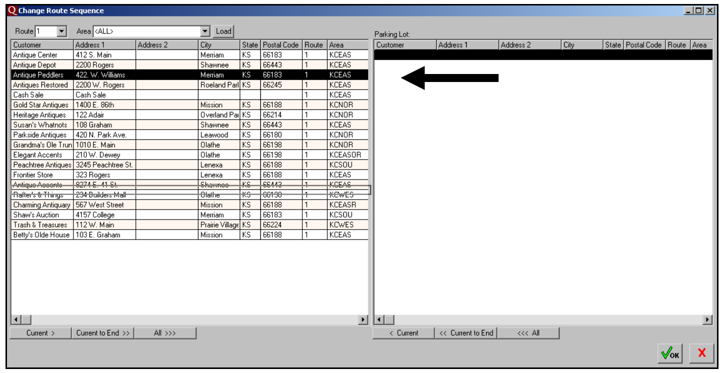


Figure 3.110

In this example, *Antique Peddlers* is moved from the third stop on route to the fourteenth:

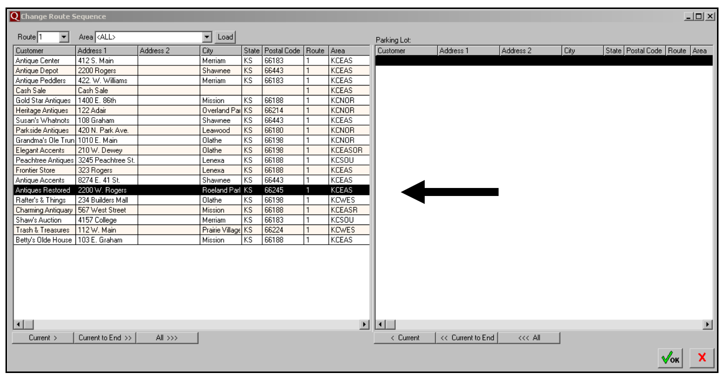


Figure 3.111

3. Repeat this process until the route is in the desired delivery order, and click **OK** to update the assigned sequence numbers.

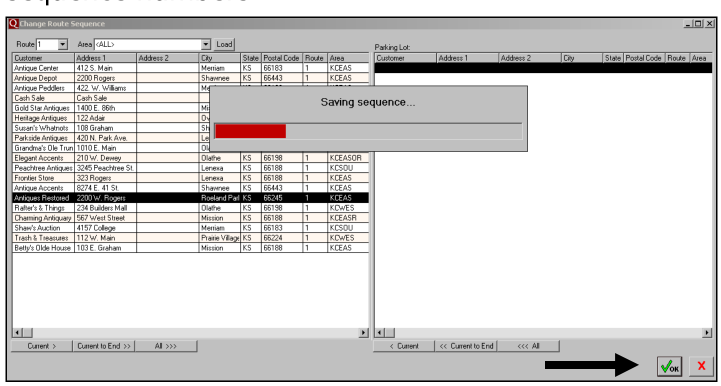


Figure 3.112

NOTE: The sequence numbers are automatically updated on each account in increments of '10' (e.g., 0010, 0020, and 0030).

Here is an example of an updated sequence number within the 'Route' field in QuickBooks:

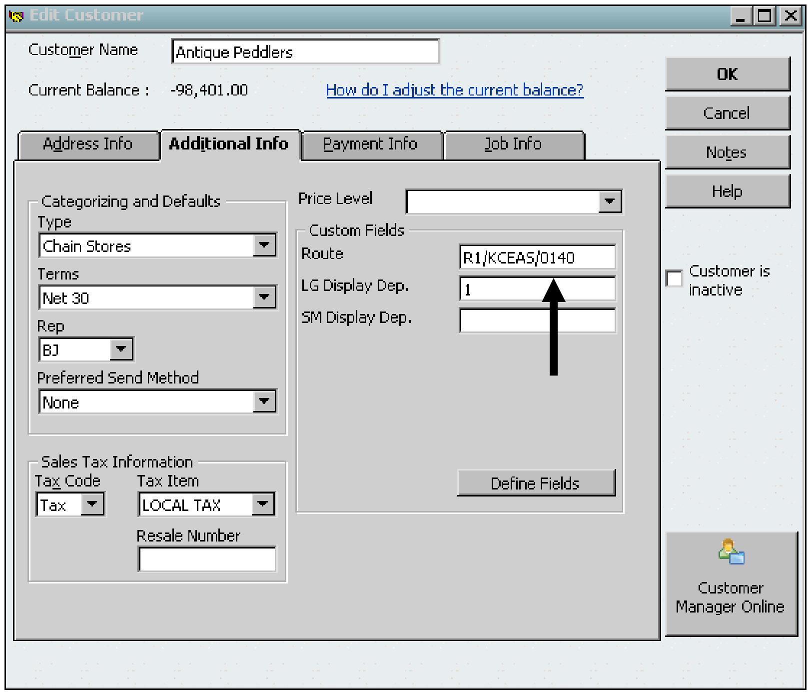


Figure 3.113

Continue to the next section to learn how to update assigned Route ID's.

Update Route ID's and Route Areas

The *Change Route Sequence* screen allows you to easily update each customer's assigned *Route* and *Route Area*.

Navigate to *Customers > QRoute > Change Route Sequence* (or use the QRoute toolbar), and follow the steps below:

1. Select the 'Route' and desired 'Area' (or *All*), and click the **Load** key.

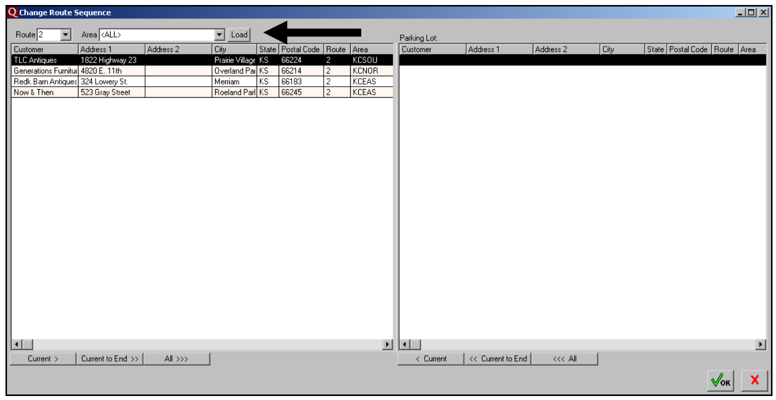


Figure 3.114

2. Drag and drop each account that will be assigned a new route to the *Parking Lot* (right panel):

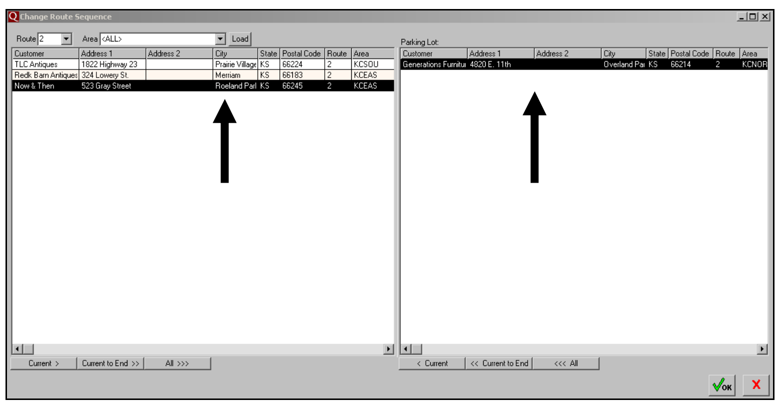


Figure 3.115

In this example, *Generations Furniture and Now & Then* have been moved to the *Parking Lot:*

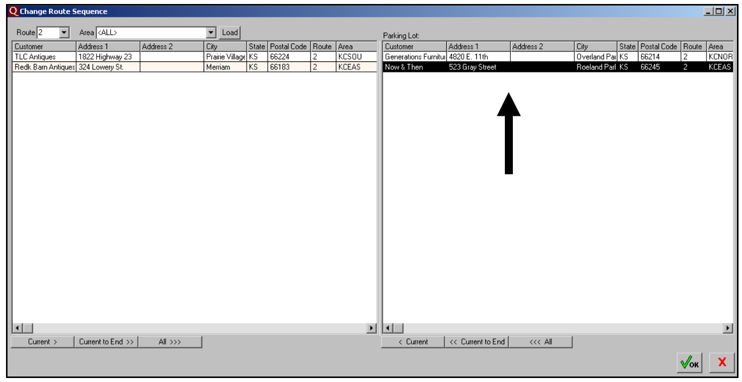


Figure 3.116

3. Load the *Route* that the accounts will be assigned to:

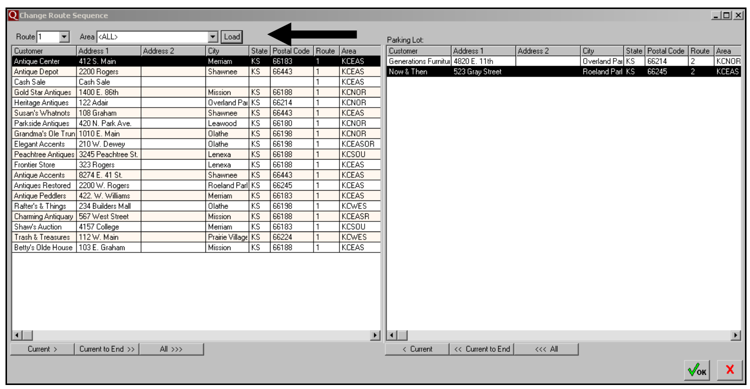


Figure 3.117

NOTE: A warning message will be displayed as you load the new route; informing you that any unsaved changes will be lost, click 'Yes' to continue.

---

4. Drag and drop each account in the *Parking Lot* to the desired location on the new route:

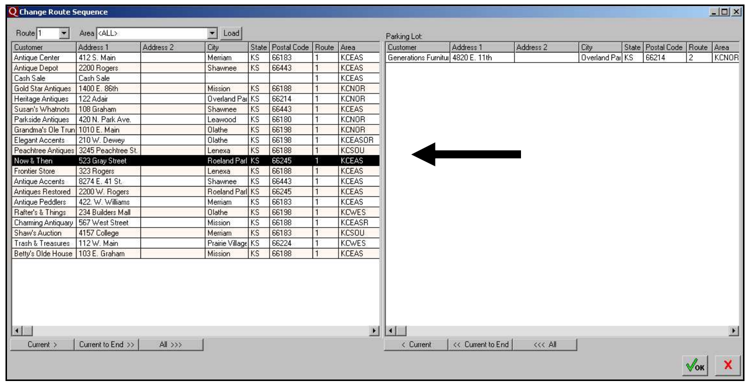


Figure 3.118

5. If necessary, you can update the customer's assigned *Route Area Code* by right-clicking on the account and selecting 'Change Area':

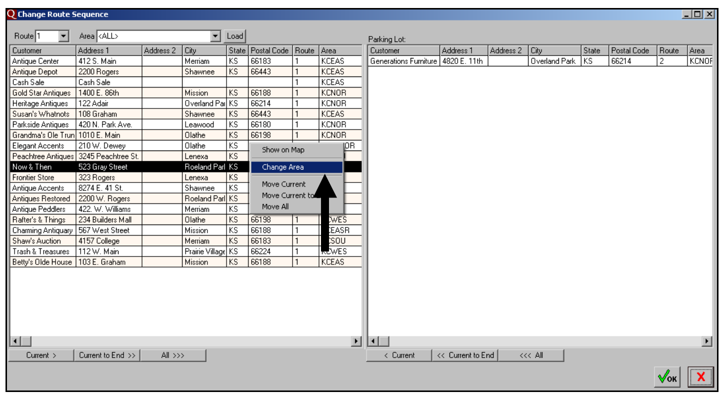


Figure 3.119

Choose the new *Route Area Code* from the drop-down list and click **OK**:

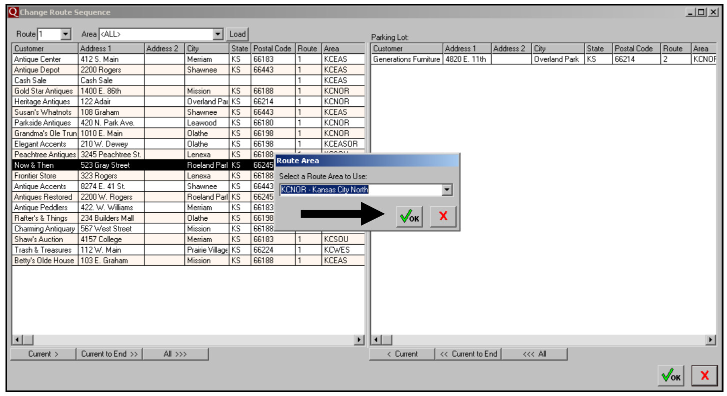


Figure 3.120

6. Repeat this process until all of the accounts in the *Parking Lot* have been routed and click **OK** to update the accounts in QuickBooks.

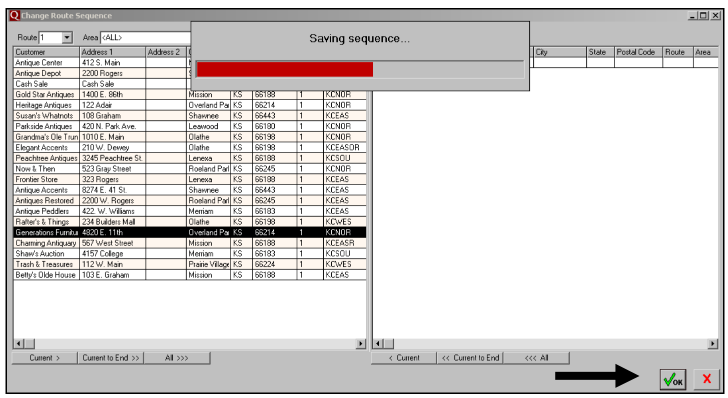


Figure 3.121

Here is an example of the 'Route' field in QuickBooks that has been updated with a new route ID:

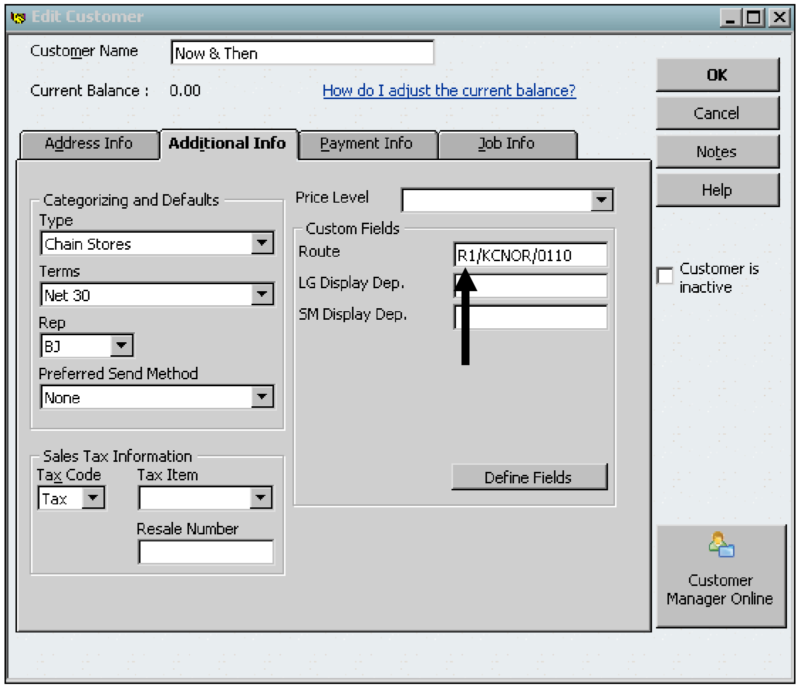


Figure 3.122

Continue to the next section to learn how to assign *Routes* and *Route Areas* to un-routed accounts.

Assign Routes and Route Areas

The *Change Route Sequence* screen allows you to easily add *Route ID's* and *Route Area Codes* to un-routed customers in QuickBooks. This option is especially helpful when you are getting started with QRoute, and can save you hours of time spent manually keying in route information.

Navigate to *Customers* > *QRoute* > *Change Route Sequence* (or use the QRoute toolbar), and follow the steps below:

1. Right-click in the *Parking Lot* screen and select the 'Load Off Routes' option.

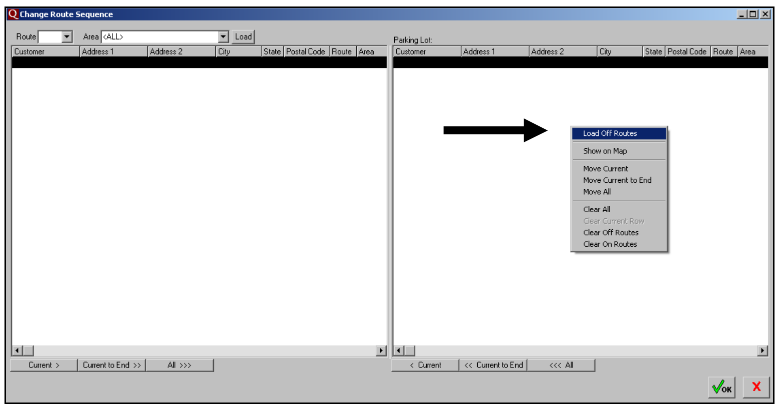


Figure 3.123

This will load all un-routed accounts in the *Parking Lot*:

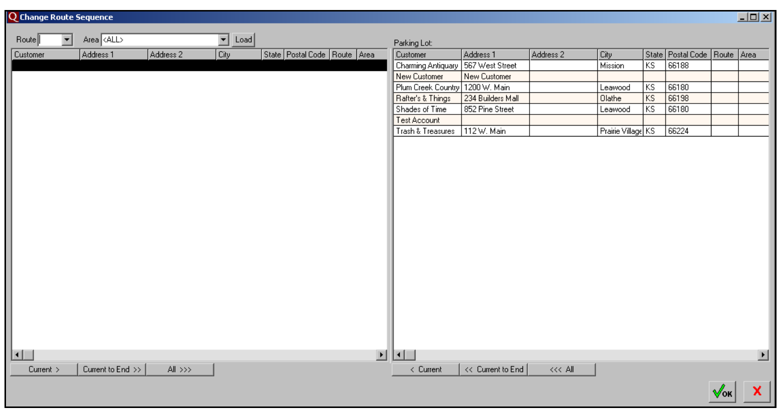


Figure 3.124

2. Load a route that one or more of the accounts will be assigned to:

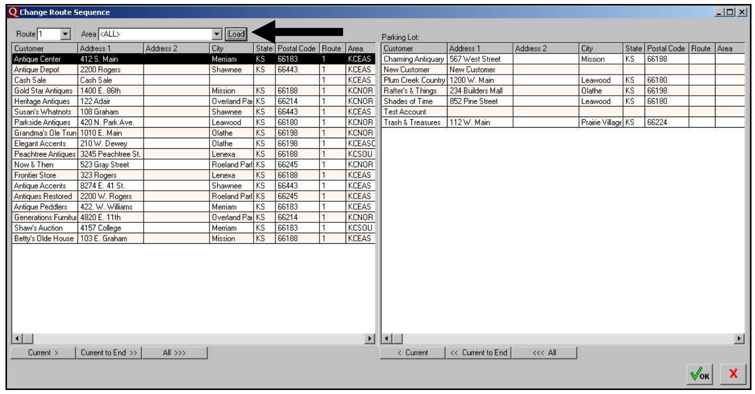


Figure 3.125

3. Drag and drop each account in the *Parking Lot* to the desired location on the new route:

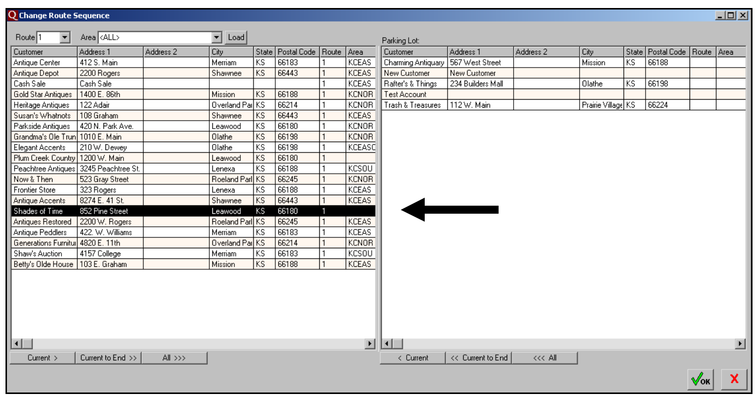


Figure 3.126

4. Assign a *Route Area Code* to each account by right-clicking on the account and selecting *Change Area*:

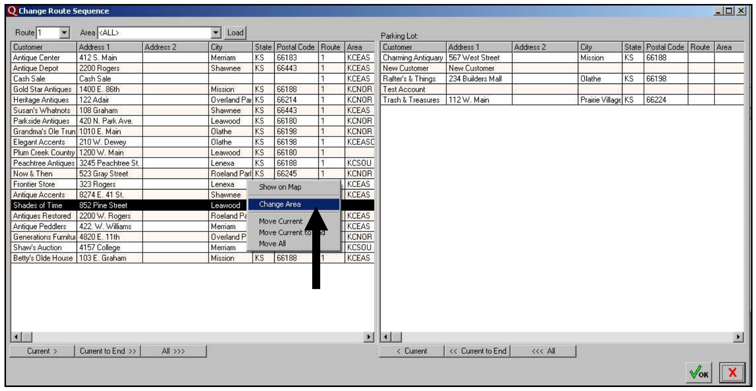


Figure 3.127

Choose the new *Route Area Code* from the drop-down list and click **OK**:

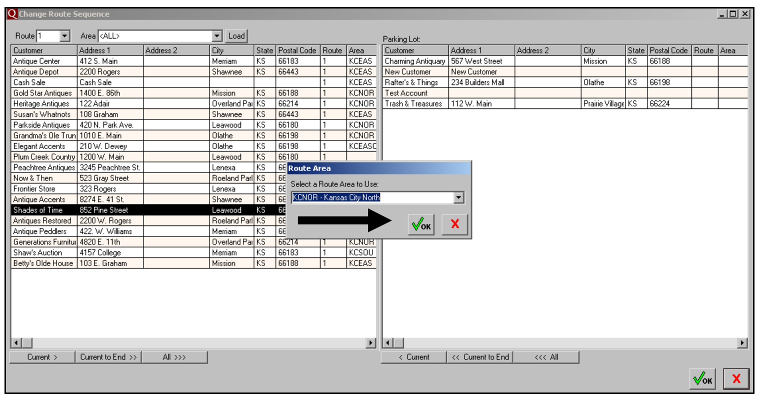


Figure 3.128

5. Click **OK** to update the accounts assigned to the current route in QuickBooks, and repeat this process until all of the accounts in the *Parking Lot* have been routed.

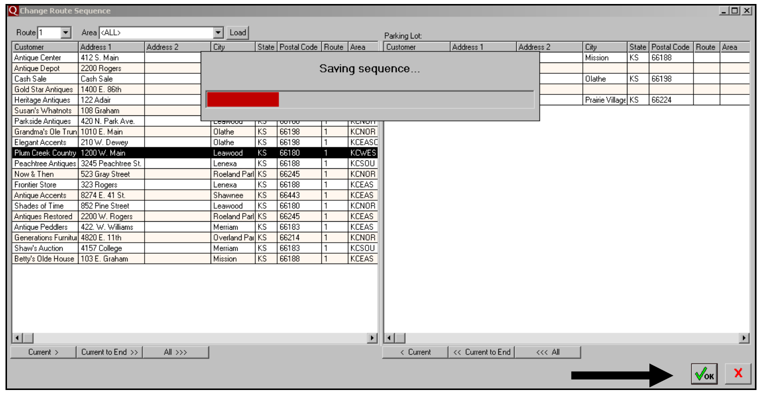


Figure 3.129

Continue to the next section to learn how to use additional features available in the *Update Route Sequence* screen.

Additional Features

This section covers additional options available within the *Change Route Sequence* screen.

Map View

You can view each customer's location on a map by right-clicking on their account and selecting the 'Show on Map' option.

NOTE: Requires an active internet connection.

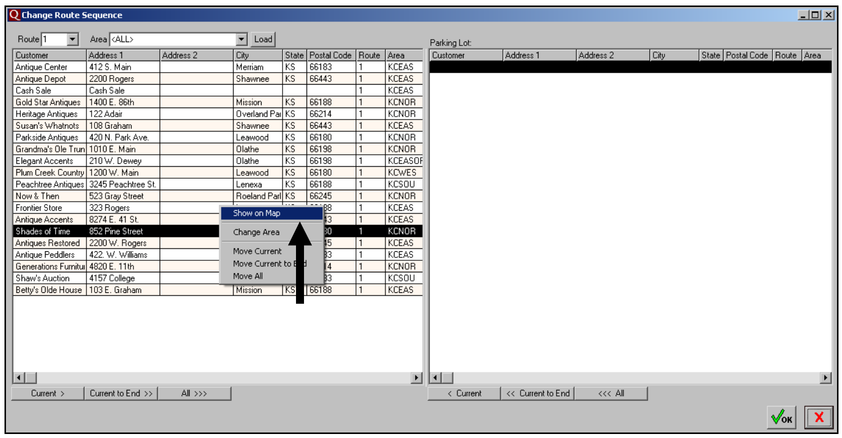


Figure 3.130

The map will be displayed on the screen to assist you with your route planning.

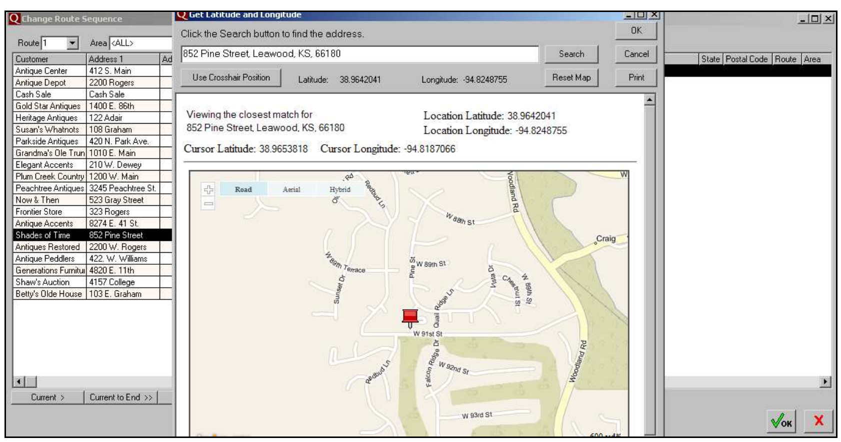


Figure 3.131

NOTE: Maps are display only, and cannot be used to update the customer's address within QuickBooks.

Right-Click Options (Parking Lot)

There are additional "right-click" options available in the *Parking Lot* screen to assist you with filtering customers in the list. Each option is defined below.

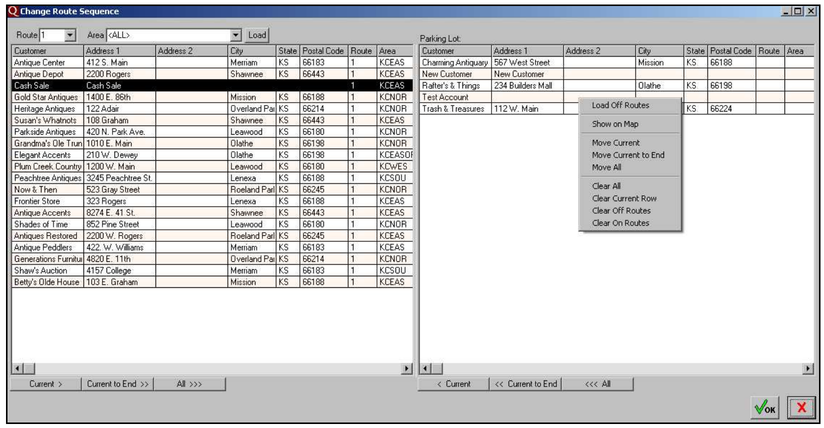


Figure 3.132

Load Off Routes: Allows you to load all customers that do not have an assigned route in QuickBooks.

Show on Map: Displays the customer's address location on a map screen (internet required).

Move Current: Select this button to add the highlighted customer to the *Route Listing Panel*.

Move Current to End: Select this button to add all customers from the highlighted account onward to the *Route Listing Panel*.

Move All: Select this button to add all of the customers listed to the *Route Listing Panel*.

Clear All: Select this option to clear all of the customers in the *Parking Lot*.

Clear Current Row: Select this option to clear the highlighted customer from the *Parking Lot*.

Clear Off Routes: Select this option to clear all customers without an assigned route from the *Parking Lot*.

Clear On Routes: Select this option to clear all customers with an assigned route from the *Parking Lot*.

Chapter 4 – Hardware Overview

Introduction

Several manufacturers produce handheld computers that are widely available in the market today and QRoute supports a large number of these devices. The list of compatible choices can be found within the *Driver Setup* and *Prepare Card* screens. All of the compatible choices have been thoroughly tested by the Advantage Route Systems team. Each device is durable, compact, lightweight, and performs well with the QRoute software package.

The following components of the handheld computer system are discussed in this section:

- The handheld computer
- Portable Printers
- Storage card types
- Battery care and usage
- Battery charge options

With this information, you can select the hardware that will work best for you. Or, if you have already purchased your hardware, you can learn more about it.

Your Handheld Computer

The handheld computer used with QRoute is a portable, Pocket PC based computer system designed for field data collection. This portion of the manual describes the components of the handheld; including, how to operate and care for your handheld computer.

Handheld Device

The handheld has a durable plastic case that should last several years under normal conditions. The case is moisture resistant, but not waterproof. Do not use the computer in heavy rain without a protective case! Use a zipper-type sandwich bag to keep the unit from getting wet. Keeping the unit in a holster will provide additional protection.

Although the handheld is durable, it needs appropriate care. Do not apply excessive pressure to the case, and avoid sitting or leaning on it. Do not stand on it! Do not pry doors open with it! You get the idea.

Touch Screen

While the computer's glass touch screen is strong, it is still vulnerable to damage. The following activities can lead to costly repair: dropping or banging the screen on hard objects; scratching the screen with a sharp object; using a dirty screen. The screen will pick up nicks through normal wear and tear.

We recommend these preventative measures to protect your touch screen:

- Carry the handheld in a holster or protective case.
- Use only a touch screen stylus on the screen. Even a fingernail can scratch the screen over a period of time.
- Keep the screen clean by wiping it daily with a soft, damp cloth.
- Use a *TouchSafe*™ screen protector to extend the life of the screen. The clear plastic safety liner is affordable and easy to install.
- Avoid excessive pressure when using the screen — press only hard enough to activate the backlight.

Power Switch

The power switch turns the computer on when the handheld is ready for use. If you have not used the handheld for several minutes, the power shuts off automatically to conserve battery life. If you press the power button after the unit shuts off automatically, the same screen will appear that was displayed when the unit was powered down.

Battery Pack

Most handheld computers contain a rechargeable battery pack. Do not remove the battery pack while the handheld is powered on.

Charging Batteries

Carefully read the instructions included with the handheld to properly charge the battery. Normally, the unit will need to be placed in a cradle or plugged in to charge the internal battery. It is important to recharge your handheld each night.

Determining Available Battery Power

To determine the remaining battery life in the handheld computer, go to *Start* > *Settings* > *System*, and touch the *Power* icon. In QRoute, go to the *Main Menu* of the program, and touch *Utilities*.

Changing the Screen Contrast

For assistance with adjusting screen contrast, refer to your Pocket PC computer's User Manual. To adjust the contrast on many handhelds: press *Start* > *Settings* > *System* tab, and then *Contrast*.

Using the Backlight

Occasionally, you may need to use the screen's backlight. When the backlight feature is activated and the handheld is not used for a period of time, the screen will shut off automatically to conserve power — these settings will vary per handheld.

Restarting the Handheld Computer

If the handheld computer freezes or becomes locked on a screen, you may need to perform a reset. Use the stylus to press the reset button on the back, side, or bottom of the handheld computer. This will perform a *Soft Reset* on the handheld. On occasion, you may be required to perform a *Hard Reset*, which restores the handheld to the original manufacturer configuration. Refer to your handheld manual for information on how to perform a *Hard Reset*.

Notes on Operation

To obtain the maximum life and performance from your handheld computer: follow the precautions in this section.

- Do not expose the handheld to extreme temperatures. For instance, avoid leaving the computer on the dash of your truck during the summer, or in direct sunlight. The intense heat can cause temporary failure of the system, and reduce battery life.
- Avoid exposing the unit to severe cold. For temperature specifications, refer to the manual included with your unit.
- Avoid using the handheld in dusty environments.
- Do not drop the unit, or subject it to a severe shock.
- If water gets on the handheld, wipe it off using a soft cloth as soon as possible.

Storage Cards

QRoute saves your route data on storage cards; some examples of the different types of storage cards are:

- *Compact Flash Card (CF)*
- *Secure Digital Card (SD)*
- *Multi-Media Card (MMC)*

These cards are ideal because they:

- Provide a convenient method of transferring data to and from the desktop PC.
- Quickly and efficiently save data.
- Protect data if the handheld computer is damaged.

Depending on your data transfer method, it will often be necessary to insert or remove the storage card from the handheld daily.

Inserting the Card

To insert the memory card into the handheld computer:

- Locate the opening for the storage card — it may be underneath a protective door.
- Note the proper direction to insert the card, and then insert the card into the slot. It should fit easily into the opening; you will feel slight resistance as you insert it.
- Do not force the card into the slot.

Removing the Card

To remove the card from the handheld computer: gently push the card in, to release the card from the spring-loaded slot.

Portable Printer

To maximize the life of your printer, follow the precautions in this section:

- Do not drop the printer or subject it to severe shock.
- Avoid using the printer in dusty environments.
- Do not operate the printer close to a television, radio, or other equipment producing a strong magnetic field.
- If water gets on the printer, wipe it off with a soft, moisture absorbing cloth, as soon as possible.
- Always use the specified printing paper.
- Avoid storing the printer near heating equipment.

These instructions apply to all printers used with the QRoute system.

Paper

There are a variety of paper types available for the printer. The most common is a fiber-based, thermal paper (like fax machine paper). ARS recommends using only this paper — other paper types can damage the print head and may void the warranty. It is important for each driver to have a spare roll of paper while on route. Paper rolls should be kept dry, clean, and cool at all times. Excessive heat can ruin the paper if it is not stored properly.

If you would like to personalize your printer paper, contact Advantage Route Systems. Receipts can be customized to include your company information, warranty info, etc., on the front and/or back of the paper.

Accessories

The items listed in this section will help maximize the efficiency of your QRoute program.

USB Card Readers

Most external card readers are easily installed using an available USB port. Once the hardware is installed on the desktop, it is as easy as putting a card in the reader, and doing a *Morning* and *Afternoon Card* daily.

Docking Cradle

Some Pocket PC handheld units come with a cradle for transferring data between the desktop and the handheld. The cradle can also be used to recharge the battery in the handheld. You should place the handheld in the cradle every night so your batteries are fully charged before going on route the next day.

Holster

Investing in one of our carrying cases can go a long way in preventing damage to your portable hardware.

AC Charger

Charging the unit is usually done in the evening when you return from your route. Most AC adapters plug directly into a wall outlet.

Truck Charger

Many manufacturers have an auto-charger that can be used while on route. It will plug into your vehicle's cigarette lighter for 12v DC current.

Stylus

Most handheld units come with a built-in stylus. These are best used for emergency purposes, as they are easily lost and rather expensive. The ARS stylus is the best tool to use on a daily basis with the handheld touch screen — they also come with a convenient clip that makes it easy to carry in your shirt pocket.

TouchSafe™

Under normal use, the touch screen of any handheld computer will receive scratches, and may even pick up a few nicks. To prevent unnecessary abuse, ARS recommends using TouchSafe™ screen protectors, a product that protects the touch screen and can be replaced every couple of weeks. TouchSafe™ comes precut in different sizes, and is made of an extremely clear plastic.

Protective Cases

If you would like to increase the durability of your handheld, there are several manufacturers of ruggedized cases. You can place your unit into the case to keep it dry, clean, and safe from dangerous drops.

All of these accessories are available from Advantage Route Systems at various prices. Check our Web site at www.QRoute.com for the current models and pricing.

For immediate assistance call our inside sales department at 866.317.6883.

Chapter 5 – QRoute Handheld (A to Z)

Introduction

This chapter details all aspects of the QRoute handheld program. The features are covered in the order they appear on the *Main Menu* of the software. Since the software can be customized on the desktop to meet the demands of many companies, this chapter has been written as a general guide to show common handheld computer functions.

Even though the program is intuitive and easy to follow, we do recommend that you read this chapter carefully before going out on route. Occasionally, you will find features within other features and may miss them if you do not read them here. We want you to derive as much benefit and use from the software as possible.

We also look to our users for suggestions on future features. Please let our support team know if there is something that could help you run your routes better.

QRoute Handheld Program

From most screens on the handheld, you will have access to the *Start* menu in the upper-left corner of the screen.

Touch the *Start* option and choose the **QRoute HH** shortcut.

Figure 5.01

NOTE: If *QRoute HH* is not available on your *Start* menu, or you have not previously set up this device to use QRoute, refer to *Appendix B*.

A screen similar to the following will appear. Tap the green arrow to continue:

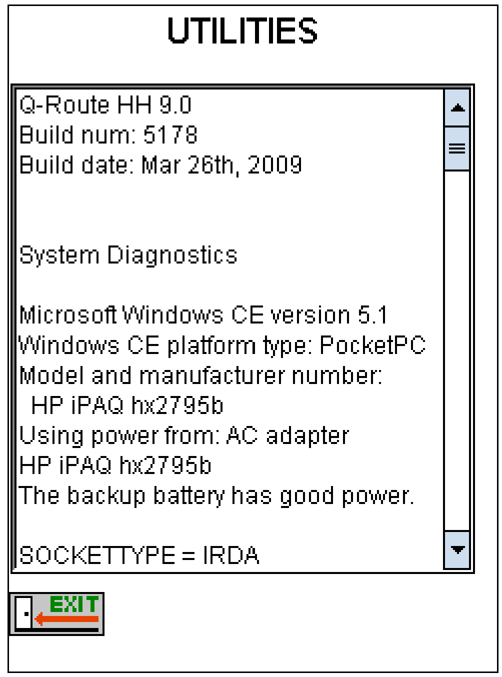


Figure 5.02

Password Entry

Before accessing the *Main Menu*, you will be prompted for a username and password:

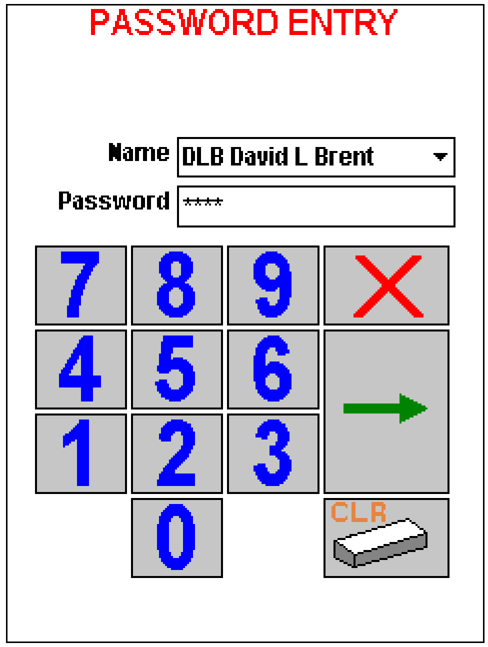


Figure 5.03

Name: The name of the driver should appear in this field automatically. If an alternate driver needs to run the current route, select the correct name from the drop-down list.

Password: Use the keypad on the screen to enter the password. After entering the password, press the green arrow key to login.

NOTE: If you were not assigned a password, simply press the green arrow to continue.

Main Menu Screen

The *Main Menu* provides access to all of the features of the handheld software. As you complete each function, you will return to this menu to make another selection.

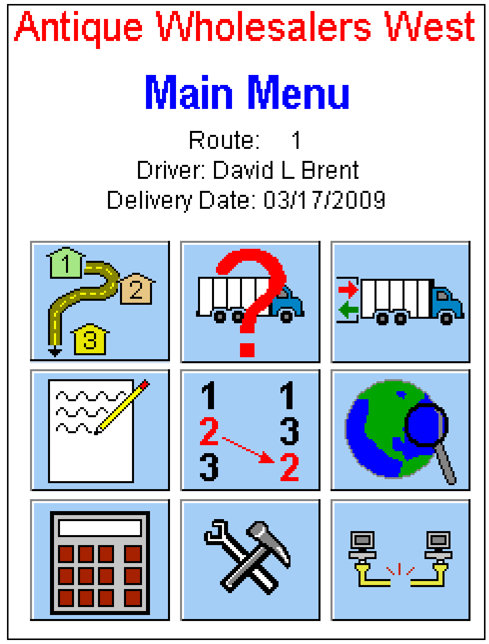


Figure 5.04

The nine options available from this screen are listed below:

1. Route Input	***2. Truck Status***	***3. Load/Unload Truck***
4. Notes	***5. Re-sequence Route***	***6. Maps***
7. Calculator	***8. Utilities***	***9. Exit Program***

1. Route Input

The most extensive area of the system is accessed through the *Route Input* key.

Stop Selection Screen

After pressing the *Route Input* key, the *Stop Selection* screen will appear:

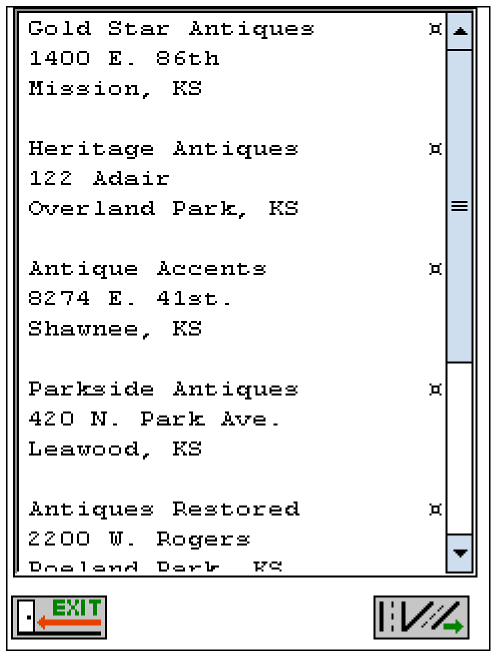


Figure 5.05

This screen allows you to:

- Choose an on-route customer to service.
- Service an off-route customer.

To exit and return to the *Main Menu*, press the *Exit* key in the lower-left corner.

On-Route Customers

To service a customer, select a name displayed on the *Stop Selection* screen.

Warning Messages

Depending on options selected within *Handheld Setup* on the desktop, a series of warning messages can appear once a customer is selected on the *Stop Selection* screen, they are:

Load Verification Required: If this option is selected, the driver is required to load and verify product information prior to servicing a customer, and the following message will be displayed:

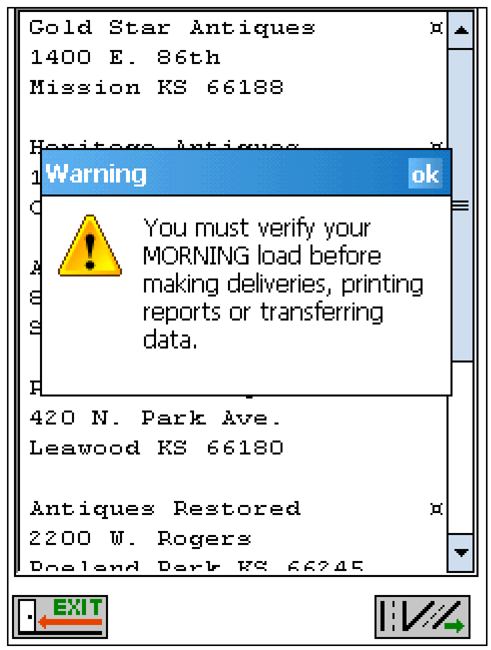


Figure 5.06

Truck Mileage Required: If this option is selected, the driver is required to enter the current mileage of the truck prior to servicing a customer, and the following message will be displayed:

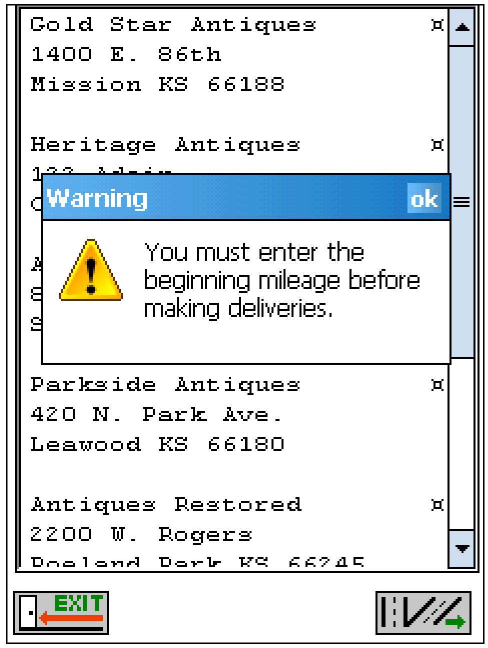


Figure 5.07

Vehicle Inspection Required: If this option is selected, the driver will be required to complete a *Vehicle Inspection* prior to servicing a customer, and the following message will be displayed:

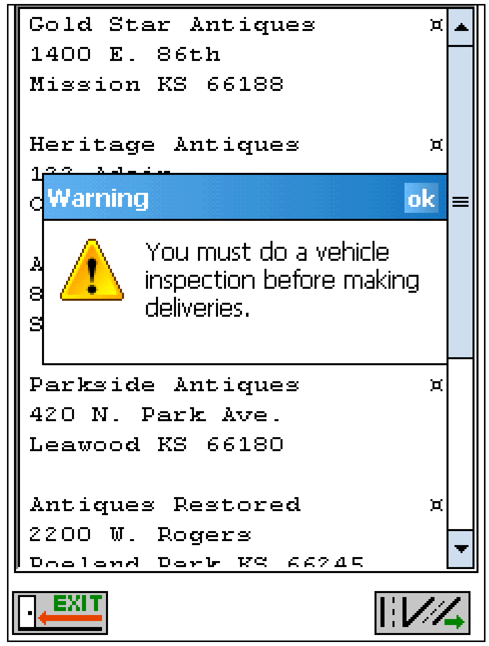


Figure 5.08

Alert Messages

If an *Alert Message* has been established for the current customer, the following dialog screen is displayed automatically:

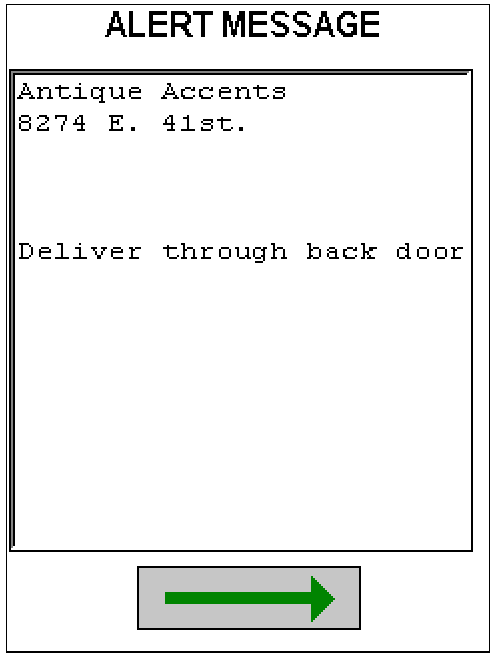


Figure 5.09

Choose the green arrow to continue.

Start Time

If the *Route Time* option 'Prompt for Start Time' has been selected within *Handheld Setup*, you will be prompted with the following option:

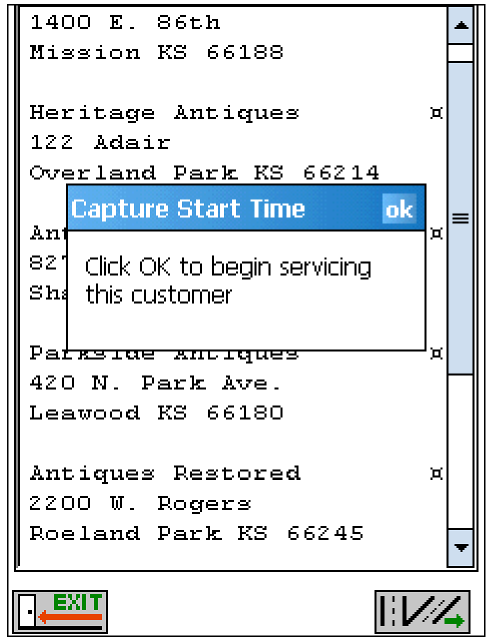


Figure 5.10

The timer will begin once **OK** has been selected.

Quick Entry Screen

The *Quick Entry* screen is displayed once a customer is selected on the *Stop Selection* screen and you have reviewed any alert messages.

At the top of the screen is the customer's name and address.

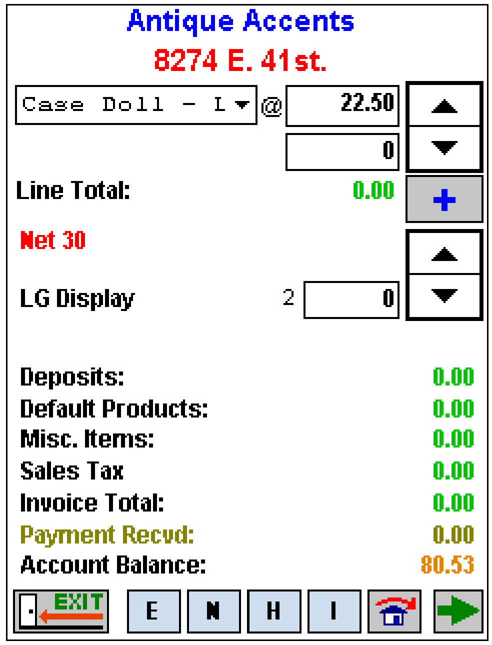


Figure 5.11

The *Quick Entry* screen has many "hot areas," or keys. When these keys are touched, other areas of the *Quick Entry* screen will be accessed. These "hot areas" will be identified with an "*" following each title in this section.

Default Product Code

This drop-down list contains up to five default products set up under *Handheld Setup* on the desktop.

NOTE: If the customer is assigned to a *Price List* in QuickBooks, the *Default Products* will be replaced with the related items.

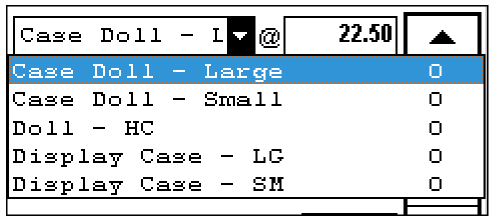


Figure 5.12

*Default Price**

If the option 'Allow Price Overrides' is selected within *Handheld Setup* on the desktop, the driver can touch the price of the item and change the price using the displayed keypad.

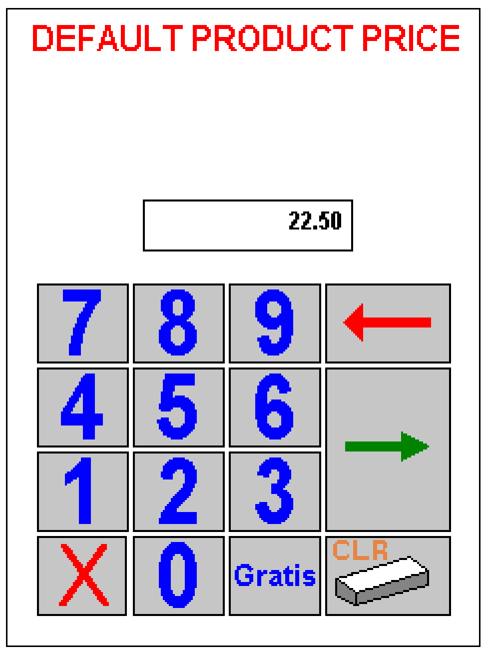


Figure 5.13

Additionally, the '**Gratis'** option can be selected if the product will be given away at no charge. This is discussed in the next section.

Gratis Reasons

The *Gratis* key allows the driver to give away product to customers at no charge. All available *Gratis Reasons* — established in the *Item List* on the desktop — will be displayed. Choosing one of these reasons will automatically change the price of the item shown to 0.00.

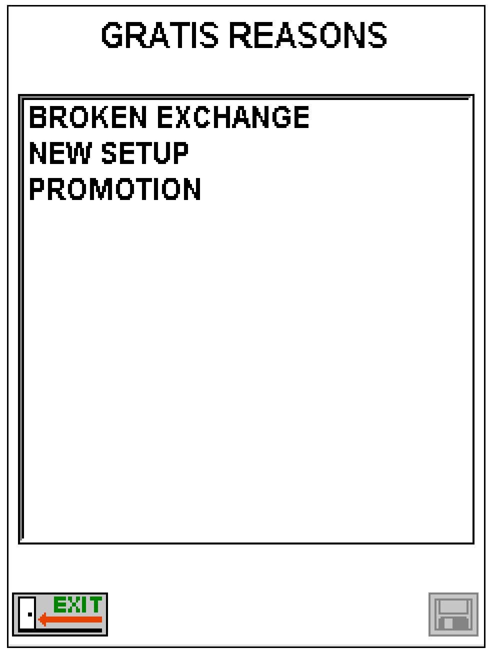


Figure 5.14

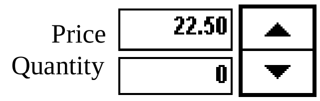
Select a reason and choose the **Save** key.

NOTE: During the *Afternoon Card* process, all *Gratis Reasons* entered will appear on the *Exceptions Report*.

---

*Default Quantity**

Use the spinner to the right of the price/quantity field to adjust the quantity of the product you are selling:



If you sell a large amount of a single product, the quickest way to enter the quantity is to press the quantity box. This will bring up a keypad that allows you to enter the quantity, instead of using the spinner.

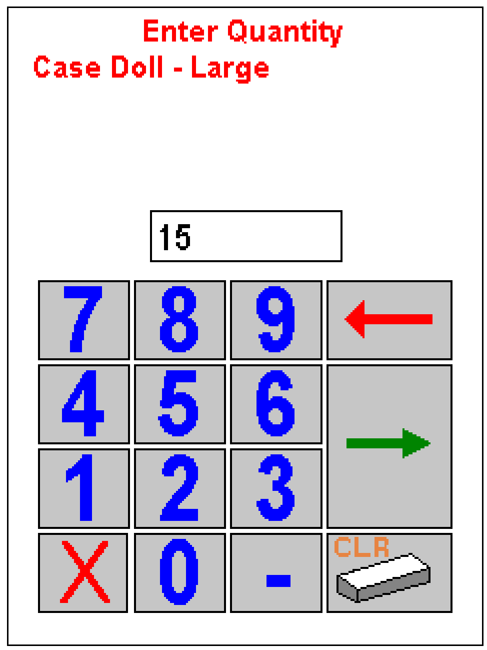
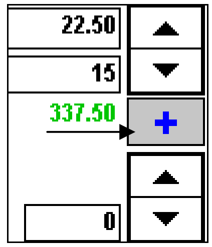


Figure 5.15

After entering the quantity, press the green arrow to return to the *Quick Entry* screen.

Another option available is to add to the quantity already established in the quantity field. To do this, press the  key shown below.



A quantity entered using this option will simply add itself to the existing quantity:

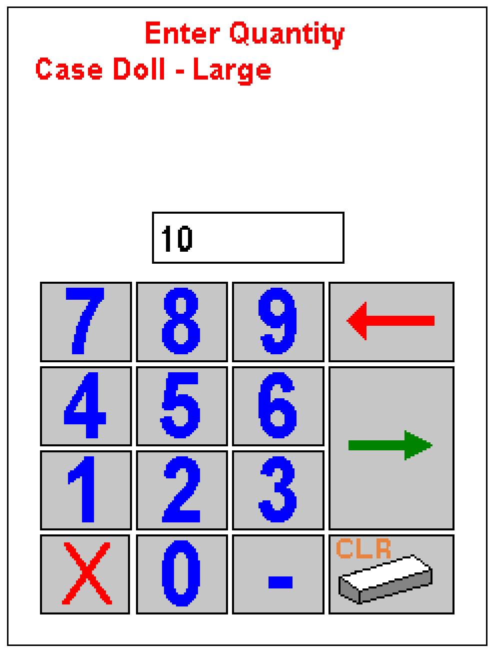


Figure 5.16

Choose the green arrow to continue.

Product Returns

If a customer needs to return an item, a negative quantity can be entered by using the spinner or selecting the minus (-) key within the *Enter Quantity* screen.

If the option 'Require Reason for Returned Goods' is selected — within *QRoute > Setup Options > Handheld Setup*, on the *Handheld* tab — the *Return Codes* screen will be displayed automatically:

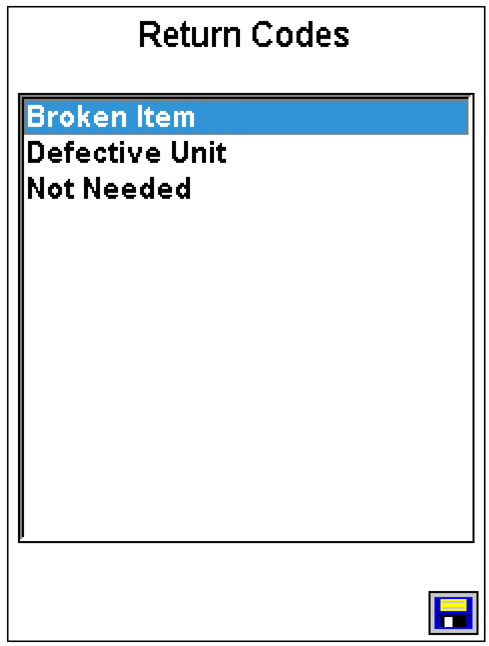


Figure 5.17

Select a reason for the return and click **Save**. This option also works within the *Misc. Items* screen, discussed later.

NOTE: *Returned Product Codes* can be defined under *QRoute > Setup Options > Optional Setup Items*. Refer to *Chapter 3* for more information on setting up *Returned Product Codes*.

The reason selected will be printed on the customer's receipt. Also, a *Returned Products Report* will be printed during the afternoon process on the desktop, and a permanent record will be stored within QRoute for future reference.

NOTE: If the option 'Require Reason for Returned Goods' is not selected within *Handheld Setup*, any negative quantities entered will not require a reason to be entered.

---

*Account Status**

Pressing the *Account Status* option on the *Quick Entry* screen will access extended customer account information:

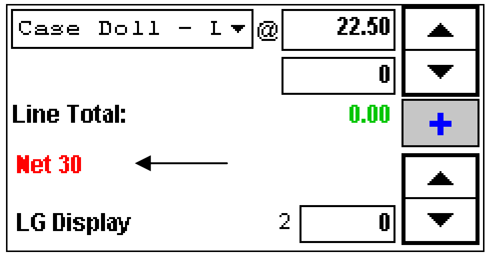


Figure 5.18

This area provides the customer's address, phone number, and deposit information.

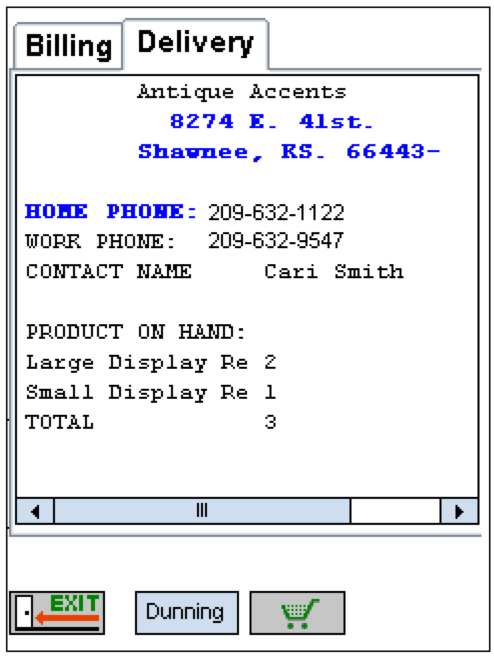


Figure 5.19

It also includes the *Dunning Message* (60, 90, and 120) options and a *Shopping Cart* for invoice review.

*Returned Container Title**

By touching this area, you may toggle between the established *Deposit Return Labels* on the desktop.

For example, if *LG Display* is being displayed and *SM Display* is being returned, tap on **LG Display**, this will display the description of the alternate container returned.

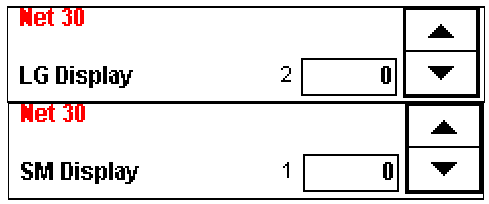


Figure 5.20

*Returned Container Quantity**

The spinner changes the number of containers (or other deposit items) being picked up at this stop. The number shown in the spinner will be the same as the number of containers being delivered:

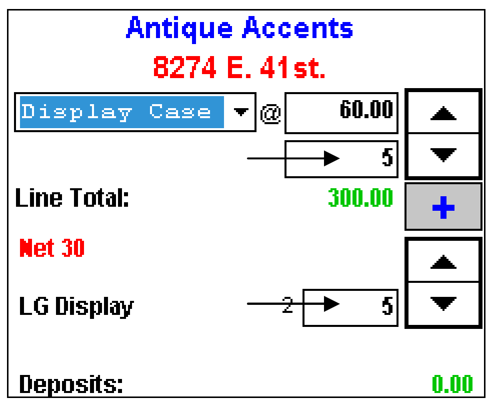


Figure 5.21

If this is not an "even swap," then an adjustment should be made to reflect the correct number of containers being returned. If, for example, the customer is not returning any containers, the quantity should be adjusted to zero (0), and QRoute will determine if a deposit is owed for the items being delivered:

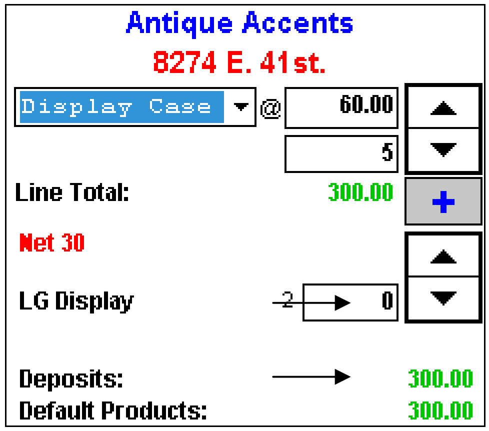


Figure 5.22

NOTE: In this example, the antiques company is billed a 60.00 dollar deposit for each *Display Case*.

---

*Containers on Hand**

The quantity of containers the customer already has on-site is displayed next to the deposit quantity field:

This will help drivers track containers more accurately.

If you need to enter a large number for containers being returned, touch the quantity field next to the spinner to bring up the keypad.

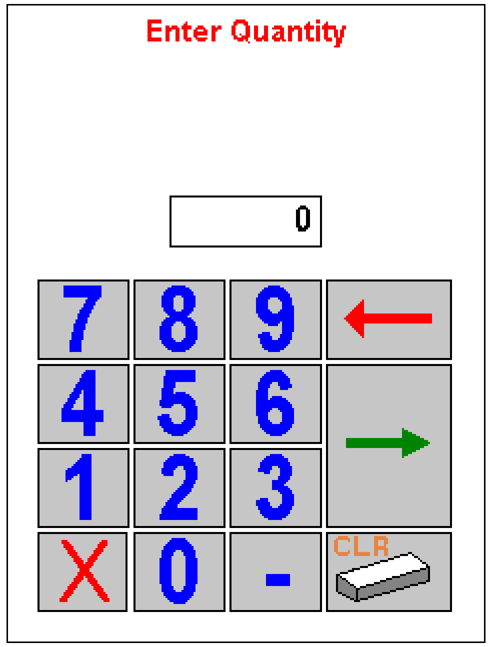


Figure 5.23

When you have entered the correct quantity, press the green arrow key to continue (above).

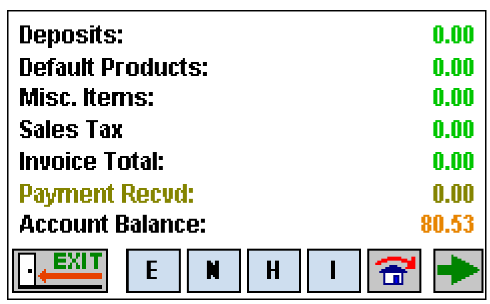


Figure 5.24

Deposits

The *Deposits* line total displays the total deposit amount added to the invoice.

Default Products

The *Default Products* line total displays the combined total for all default products added to the invoice.

*Miscellaneous Items**

The *Misc. Items* key is used to sell additional products not listed in the *Default Products* menu.

Touch the  key to choose a product.

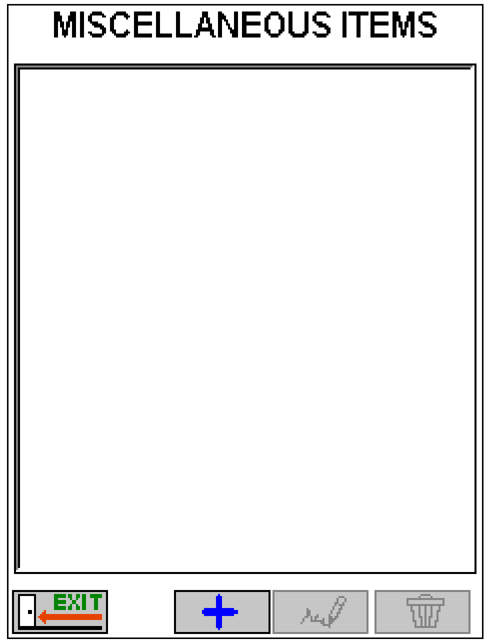


Figure 5.25

The complete list of *Items* — entered as item type: *Inventory Part* on the desktop — will be displayed on the *Choose an Item* screen.

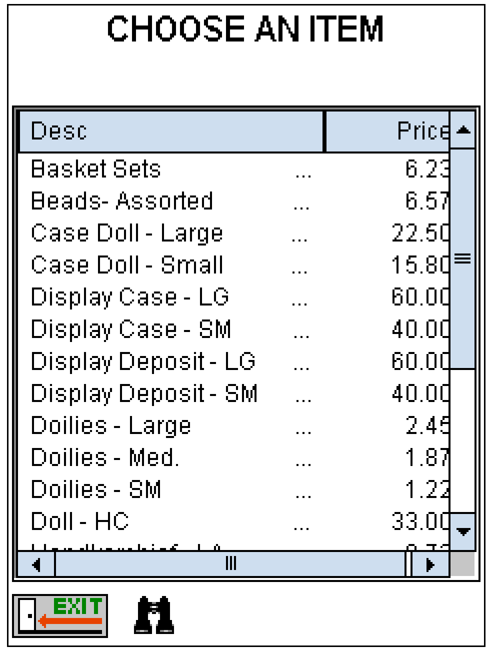
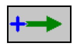


Figure 5.26

You can select products by scrolling through the list. Alternatively, you can choose the  button to search for an item by name, or partial name. This can be helpful if you cannot easily find an item, or you sell a large number of products.

Once a product is chosen, the *Miscellaneous Items Pricing* screen will appear. Enter the desired *Quantity* and *Price* information.

NOTE: To use the *Gratis* or *Price Override* options, touch the *Price* field displayed on the screen.

Choose the  key if you would like to add more than one item to the invoice, or select the standard green arrow to return to the *Miscellaneous Items* screen.

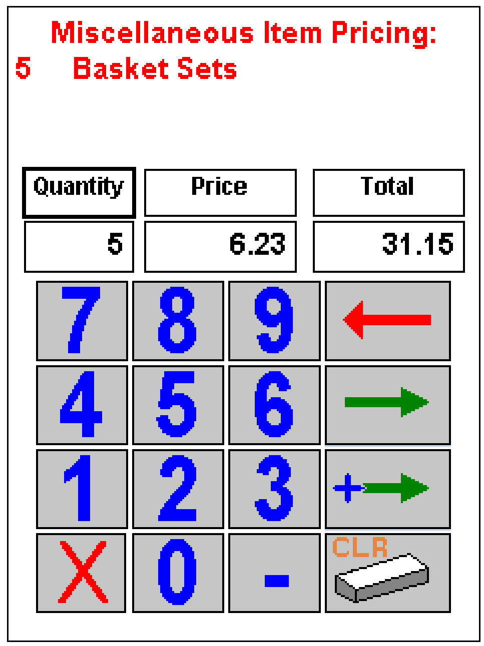


Figure 5.27

To edit or delete any of the items on the *Miscellaneous Items* screen, highlight the item and press the appropriate key located at the bottom of the screen. Use the key to edit an existing item, and the key to delete.

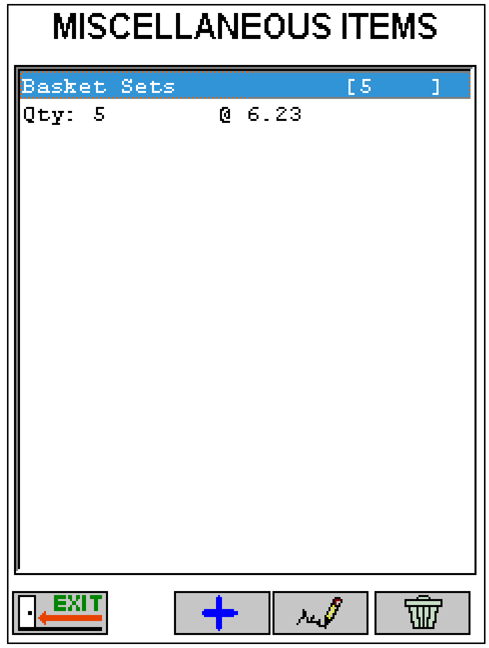


Figure 5.28

Pressing the *Exit* key will return you to the *Quick Entry* screen.

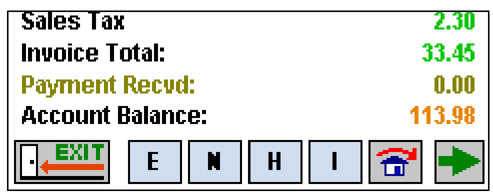


Figure 5.29

Sales Tax

The sales tax calculated for all products sold on the invoice. This is done for you automatically based on information in QuickBooks.

Invoice Total

The *Invoice Total* for all items added to the invoice for this delivery.

*Payment Received**

The *Payment Received* option allows you to collect payments for the current invoice or balance on the account. Each field is defined below.

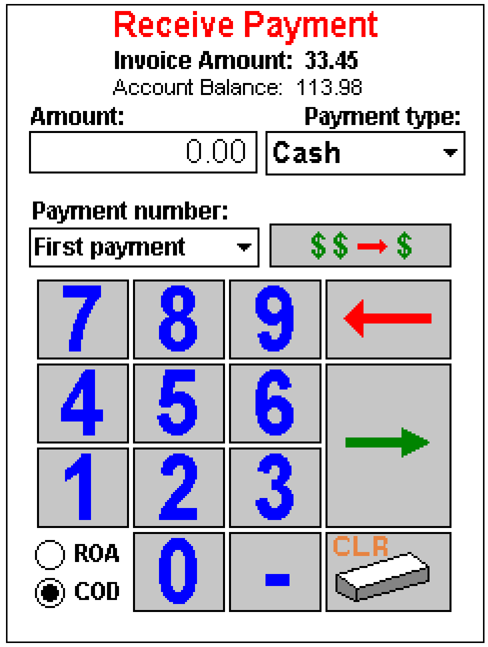


Figure 5.30

Invoice Amount/Account Balance: Touch on either of the balances displayed at the top of the screen to automatically populate the *Amount* field (for speedy entry).

Amount: Enter the payment amount in this field.

NOTE: There is no decimal key, so enter whole numbers with dollars and cents. For example, if your payment is $20.00, it should be entered as '2000', and the decimal will be inserted on the screen automatically.

Payment: QRoute will allow you to take up to three payments on one invoice (i.e., If multiple payment types are given).

ROA: Select *ROA* (Received on Account) if this payment should be applied to the customer's oldest invoices.

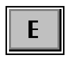
COD: Select COD (Collected on Delivery) to apply the payment manually in QuickBooks.

Account Balance

This field displays the customer's current account balance, which includes the current invoice and any payments collected on this delivery.

Exit

Select the *Exit* key if you would like to cancel the current invoice and exit the screen. If you have already entered data on the invoice, a confirmation screen will be displayed prior to exiting.



Equipment

The *Equipment* key will allow you to install, or pick-up a piece of equipment from a customer's location.

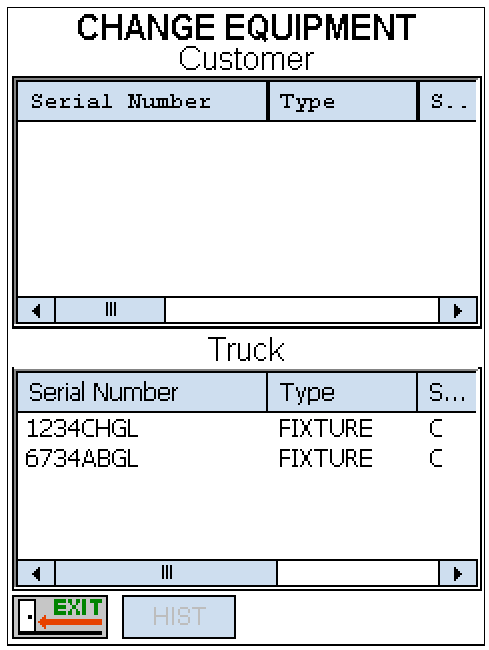


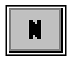
Figure 5.31

Customer: Tap on this section of the screen to enter a serial number being picked-up from the customer.

Truck: This area displays new pieces of equipment that were added to the truck during the *Morning Load* process. To install a piece of equipment on the current account, highlight it, and choose the 'Add' option.

All changes on the equipment screen will be logged on the *Equipment Movement* report during the *Afternoon Card* process.

NOTE: QRoute does not store this information on the desktop; equipment related information is printed during the *Afternoon Card* process only.



Sales Notes

The *Note* key allows the route driver to create and save a note on the handheld. Each note will automatically print on the *Driver Notes* report during the *Afternoon Card* process.

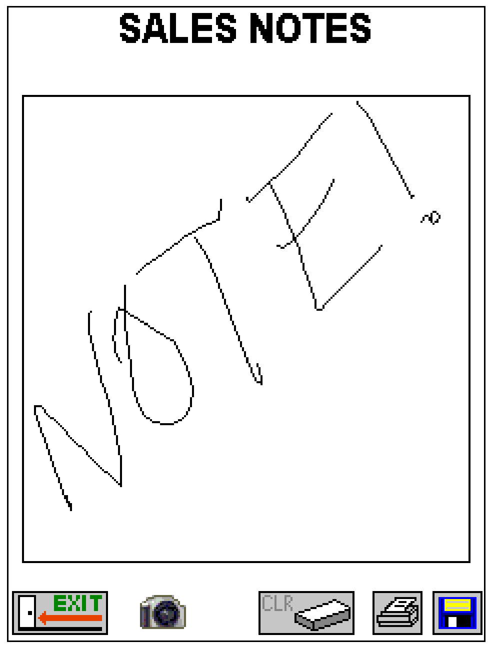


Figure 5.32

Typically, there are three main reasons to write notes:

1. Generate a reminder for the route driver, "Bring a set amount of, or certain product with next delivery."
2. Generate a note to the customer, "Account needs payment before next delivery."
3. Create a message for office staff, "Change phone number to 555-1873."

Use the stylus to write a message within the box on the screen. If you make a mistake, press the *CLR* key to restart the process. To print the note, press the *Print* key — the printout will include the customer's name and route information.

Press the *Save* key to save the note on the account.

Additionally, the driver can take a picture with a camera equipped handheld at the customer's location. This option is available if you have enabled the 'Use Camera' option within *Driver Setup* on the desktop.

Choose the  button on the screen to access the *Manage Photos* screen.

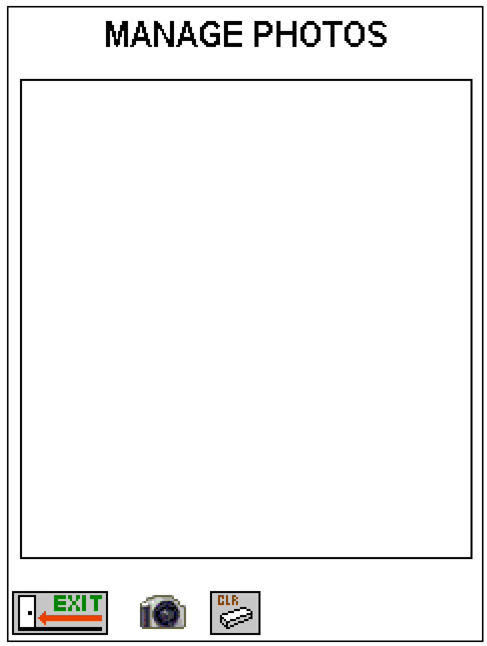


Figure 5.33

When you are ready to take a picture, choose the  button again. This will access the camera on the handheld. Snap a picture using your handheld's snapshot button.

Figure 5.34

The driver can snap multiple pictures if needed, each will be referenced on the screen.

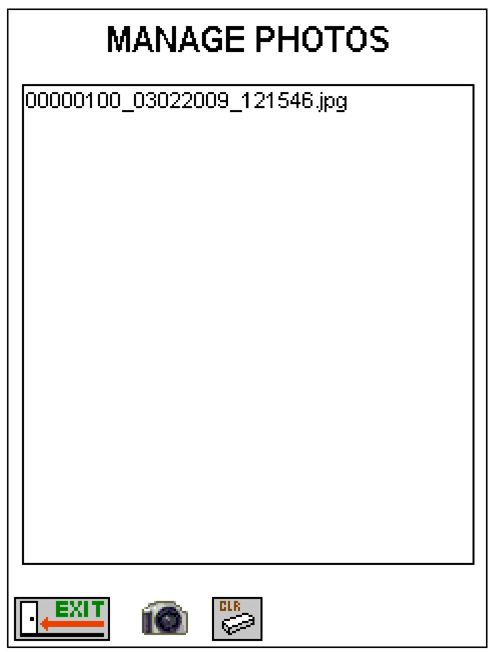
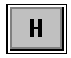


Figure 5.35

NOTE: You can delete any photo from this screen by highlighting the item and choosing the *CLR* button.



History

The *History* key allows you to view recent transactions on the customer's account. History may include the following:

- Sales made to your customer over the last three months.
- Payments made before today's delivery.
- Adjustments made to the account.
- Reasons for not making deliveries on previous visits.

This data is accumulated on both the desktop and the handheld. The number of days shown on the handheld can be adjusted within *QRoute* > *Setup Options* > *Handheld Setup,* on the *Handheld* tab.

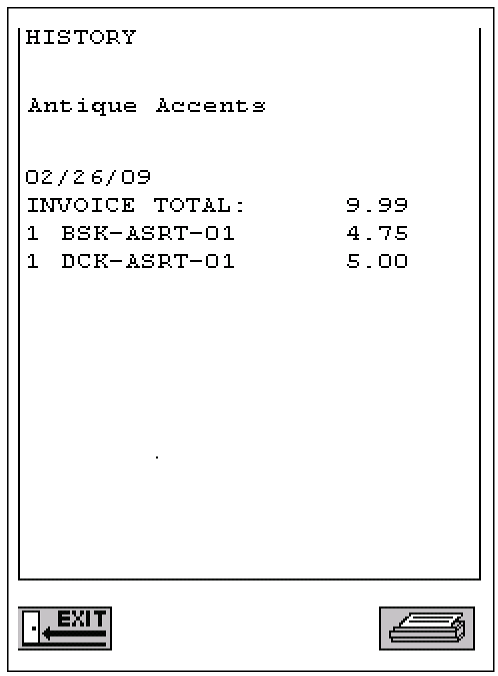
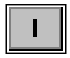


Figure 5.36

To print a copy of the transaction history, press the *Print* key.



Instructions

The *Instructions* key displays *Alert and Delivery Messages*. These messages can be helpful tools to remind the driver of important information. The *Alert Messages* appear at the top of the screen, and the *Delivery Messages* at the bottom.

NOTE: If the option 'Display Customer Custom Fields' is selected within *Handheld Setup*, *Route* and *Containers on Hand* information will be displayed within the *Driving Instructions* box.

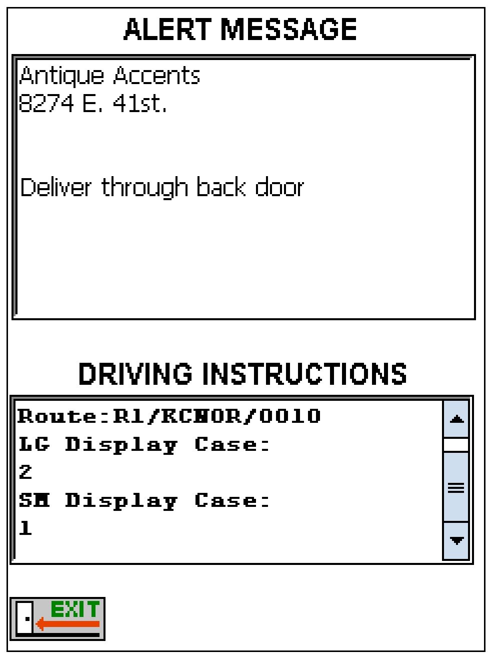


Figure 5.37

 **Skip**

The *Skip* key allows you to select a reason why a stop cannot be completed. This information will be logged on the customer's invoice for reference.

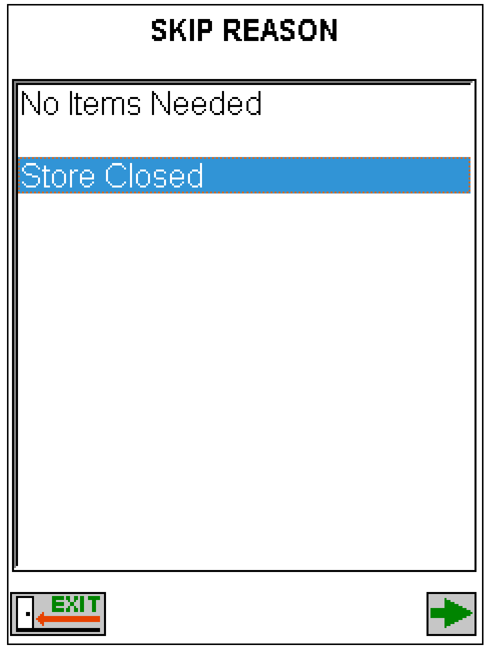
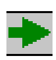
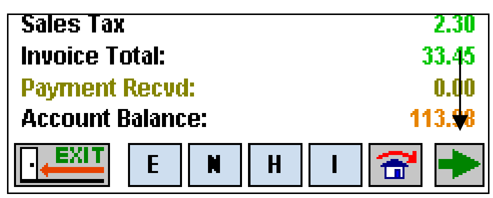


Figure 5.38

 **Continue (Skip Reason)**

The *Continue* key allows you to save the *Skip Reason* on the invoice. Then, you will be taken to the *Confirm Sale* screen.

If a *Skip Reason* is not selected and you are making a standard delivery, choose the *Continue* key on the *Quick Entry* screen to save the current invoice and continue to the *Confirm Sale* screen.



Confirm Sale

After pressing the *Continue* key on the previous screen, the *Confirm Sale* screen will appear. This screen allows you to review the invoice, perform a *Site Inspection*, and more.

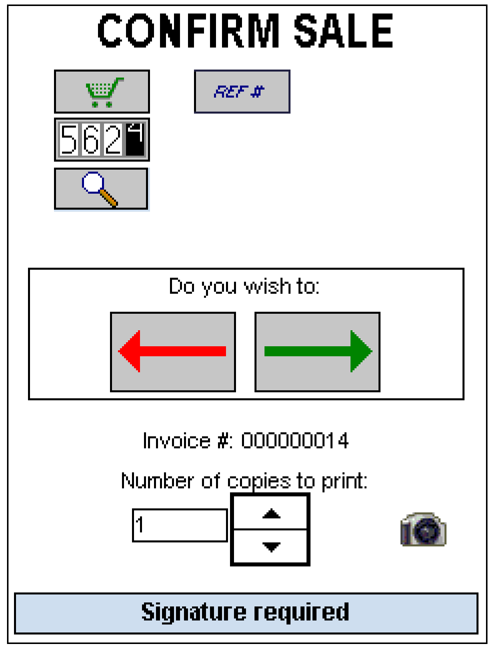


Figure 5.39

NOTE: Your screen may look slightly different based on the options selected within *Handheld Setup* on the desktop.

Each option is explained within this section.

 ***Shopping Cart***

This key allows the driver to review the invoice for accuracy prior to printing.

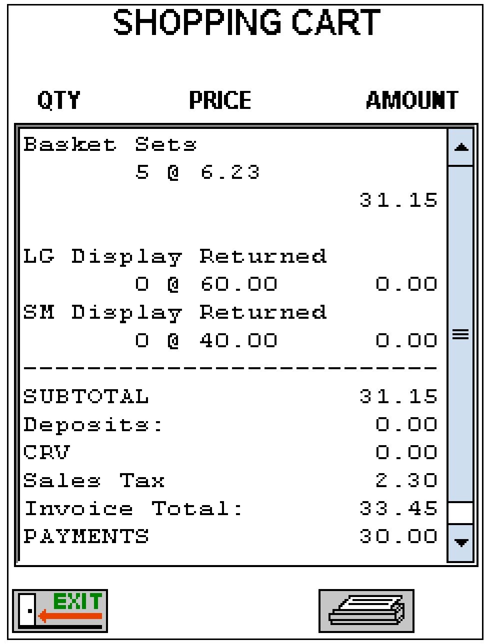


Figure 5.40

NOTE: If an adjustment needs to be made, return to the *Quick Entry* screen.

You can also print the *Shopping Cart* so that the customer can review the goods before signing for them.

Stop Mileage

This option allows the driver to enter the current vehicle mileage at each stop.

NOTE: This option can be enabled or disabled within *Handheld Setup*, on the *Handheld* tab.

Site Inspection

This key allows the driver to perform a *Site Inspection* on equipment or displays on site. The information is printed on the desktop during the *Afternoon Card* process.

NOTE: In order to use this feature, *Site Inspection Reasons* must be created on the desktop first, under *QRoute > Setup Options > Optional Setup Items > Site Inspection Setup*.

Choose a *Site Inspection Reason* from the drop-down list (multiple reasons can be selected):

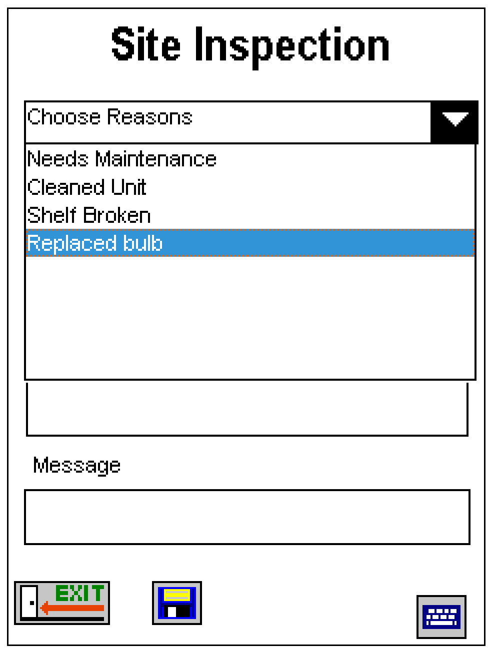


Figure 5.41

Choose the arrow again to close the selection screen, and enter a note with the stylus, if desired:

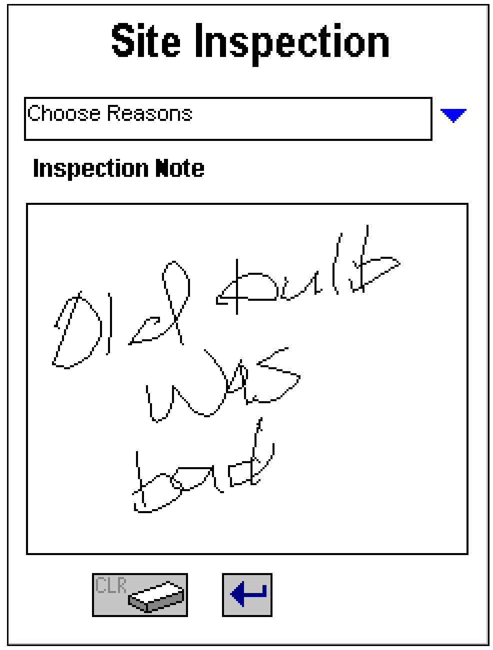


Figure 5.42

Select to exit the note entry mode option. Additionally, the driver can enter a note using the keyboard available on the screen:

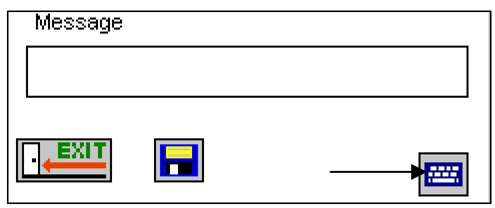


Figure 5.43

Select the  key to enter a note:

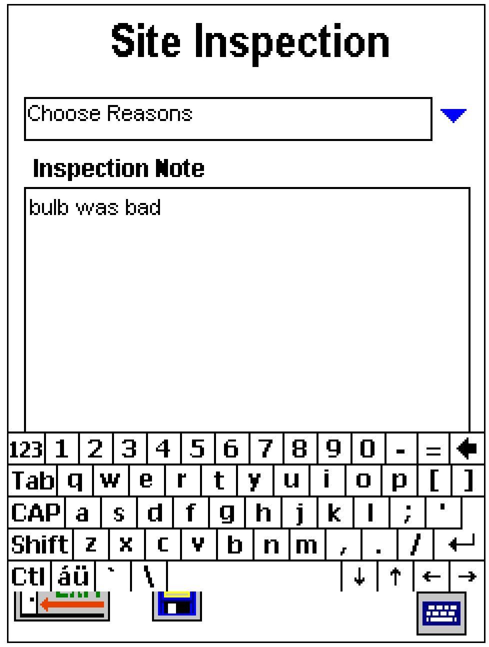


Figure 5.44

Select the keyboard again to close the message entry screen. To save the *Site Inspection* on the account, choose the **Save** key.

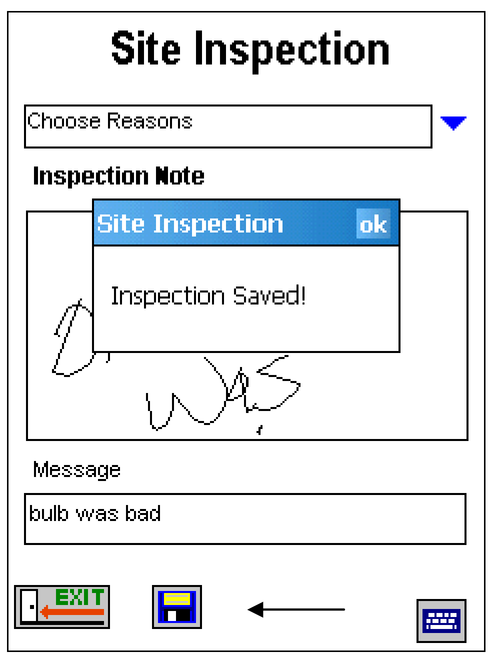


Figure 5.45

Click **OK** to the confirmation message to exit the screen.

Ref # / PO Number

This key allows the driver to log a PO Number or any reference number (up to 24 digits) needed to complete the sale. This information will be permanently stored and printed on the invoice.

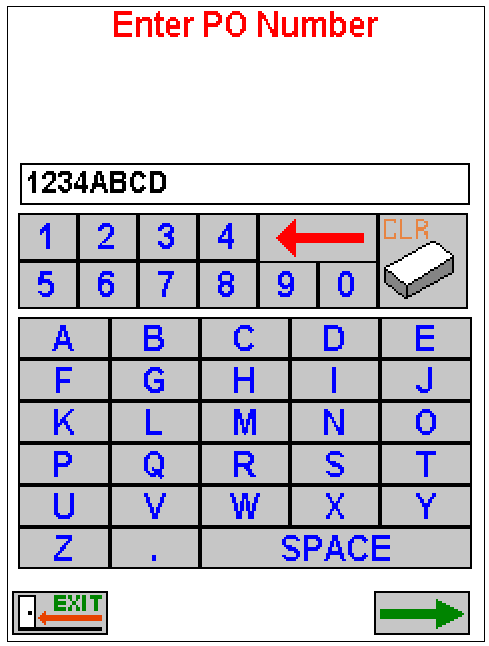
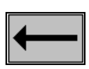
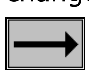


Figure 5.46



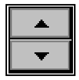
Back

This key allows you to return to the *Quick Entry* screen to make adjustments to the invoice. You can make as many changes as needed until the customer signs for the invoice.



Proceed

This key allows you to proceed to the *Capture Signature* or *Print* screens.

 **Number of Copies to Print**

This key allows you to adjust the number of invoice copies to print (1 – 5 copies). You may also select 'Receipt', which will print an invoice with all pricing information suppressed.

 ***Photo:*** Choose this option if you are using a camera equipped handheld and would like to take a photo onsite (i.e., equipment issues, broken display, etc.).

NOTE: Refer to the *Sales Notes* section covered earlier for further detail on taking a photo.

Signature Required/Signature NOT Required

By tapping this key, you will toggle between '*Signature Required'* and '*Not Required'*; this will enable or disable the *Capture Signature* option in the next step.

NOTE: This option may be enabled or disabled for each customer within *QRoute* > *Customer Information* on the desktop.

Capture Signature

When a customer's signature is required, the following *Signature Capture* screen will appear.

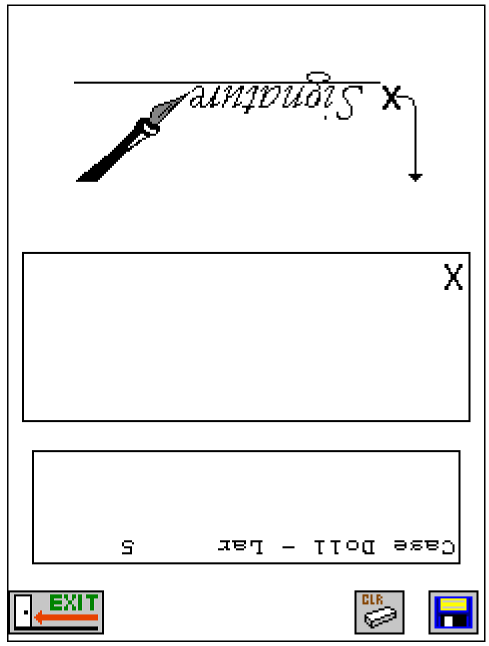
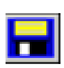


Figure 5.47

The screen is upside down so the driver can hand the customer the stylus to sign for the invoice and still hold on to the handheld.

NOTE: If the option 'Show First Three Products in Signature Screen' is selected within *Handheld Setup*, the first three products sold on the invoice will be displayed on the screen for reference.

 **Save**

Select the *Save* key to print the invoice and complete the transaction. After the initial invoice is printed, the driver will be prompted to reprint the item.

A sample of a printed receipt:

Antique Wholesalers West
147 S. Broadway
Turlock, Ca. 35980
888.294.7688

Invoice 000000001
Fri, Mar 27 2009, 09:18pm
Driver: David L Brent
Rte-Day-Stop: 1 - KCN0 -0001

Antique Accents
8274 E. 41st.
Shawnee, KS 66443

PO Number: 2378941

Item		Qty Price	Amount
Case Doll - Large	[Tx]	3 @ 22.50	67.50
Display Case - LG	[Tx]	1 @ 60.00	60.00

Damaged Product

Case Doll - Large	[Tx]	-1 @ 22.50	-22.50

Sales 105.00
Deposits 60.00
Deposit Detail
Large Display Retur Deliv: 1 Ret: 0 Net: 1

Subtotal 165.00
Sales Tax 12.16
INVOICE TOTAL 177.16
Previous balance: 80.53
Account Balance 257.69
Last Amount Paid: 1409.24 (11/06/2006)

Equipment Dropped Off

Type: FIXTURE Serial #: 1234ABCD

Received By:

Name: ABBY
Have a terrific day!
Thank you for your business!

Figure 5.48

The driver will be returned to the *Stop Selection* screen after the invoice is printed. The completed stop will now be highlighted in blue, indicating that the stop has been serviced.

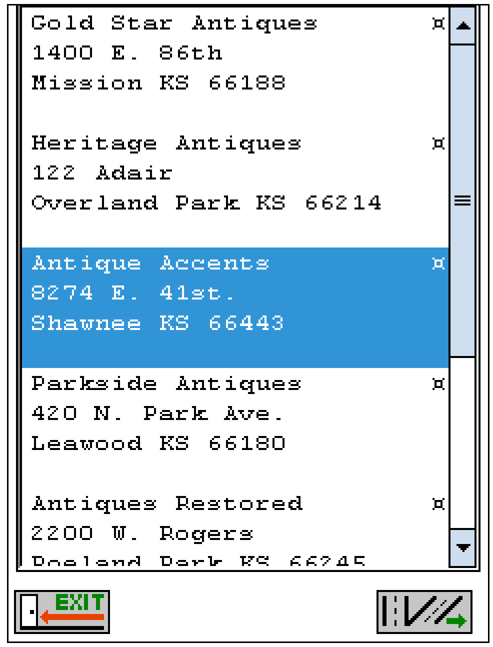


Figure 5.49

If necessary, the driver can select the serviced stop to access the following screen:

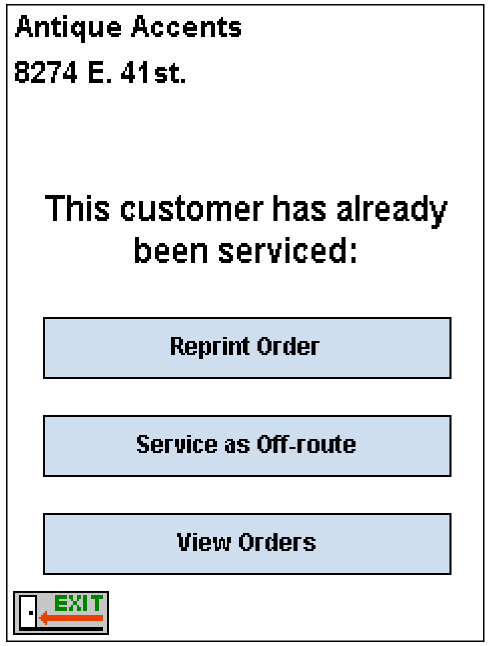


Figure 5.50

The driver can reprint the invoice (*Reprint Order*), create a new invoice (*Off-Route*), or view any invoices that have already been created on the account for the day (*View Orders*).

Off-Route

Select the *Off-Route key* on the *Stop Selection* screen to service a customer not assigned to the current route, create a cash sale, and more.

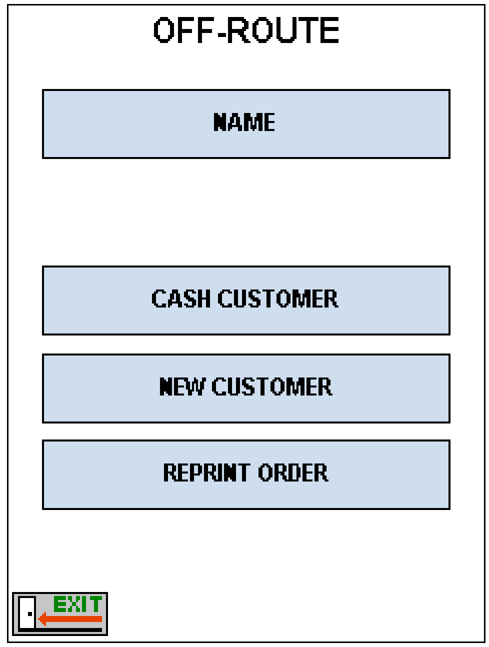


Figure 5.51

Name

Choose the *Name* key to search for an off-route customer by name.

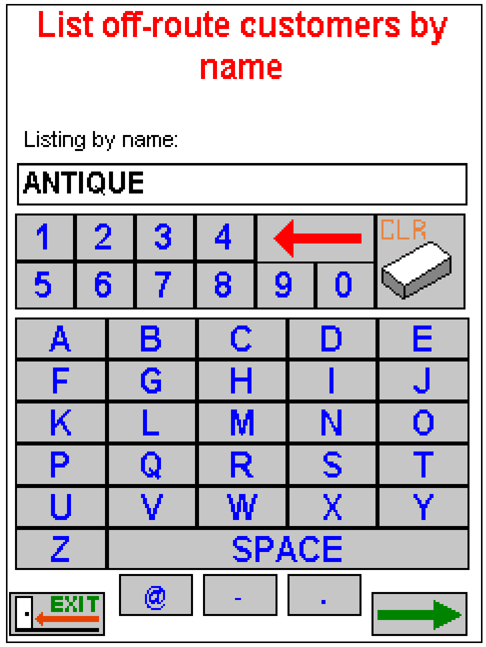


Figure 5.52

Enter a partial or full customer name, and press the green arrow key to search for the account.

NOTE: Try to key in as many letters as possible to narrow the search results.

A list of accounts will appear, in order to find the customer you are looking for, use the scroll bar on the right side of the screen, and tap on the account to pull up the *Quick Entry* screen.

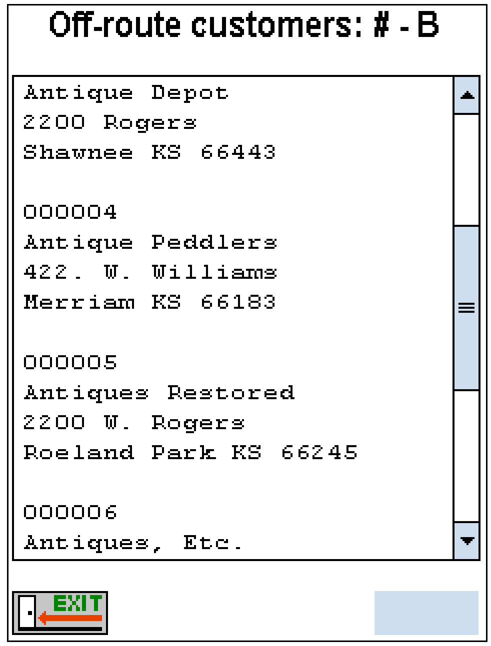


Figure 5.53

Cash Customer

The *Cash Customer* key allows the driver to make a sale to a person who does not have an account with your company. This option is useful if someone approaches the driver on route, and offers to pay cash for a product.

New Customer

To create an invoice and capture information for a new customer, tap on the *New Customer* button. Choose the proper **Sales Tax** rate and click **Save** to continue.

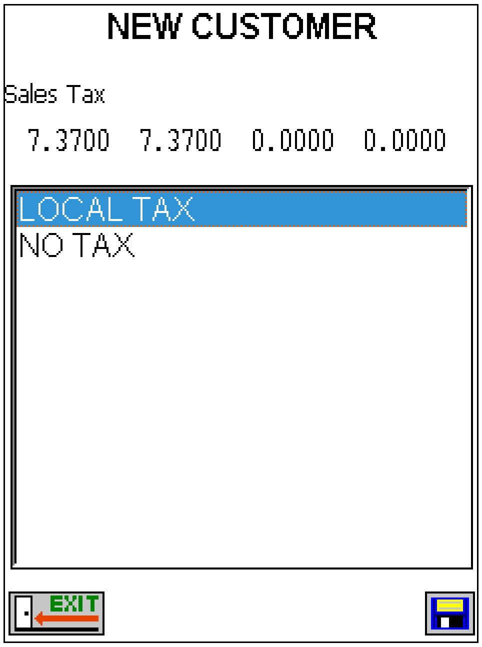


Figure 5.54

Enter the customer's name, up to 24 characters.

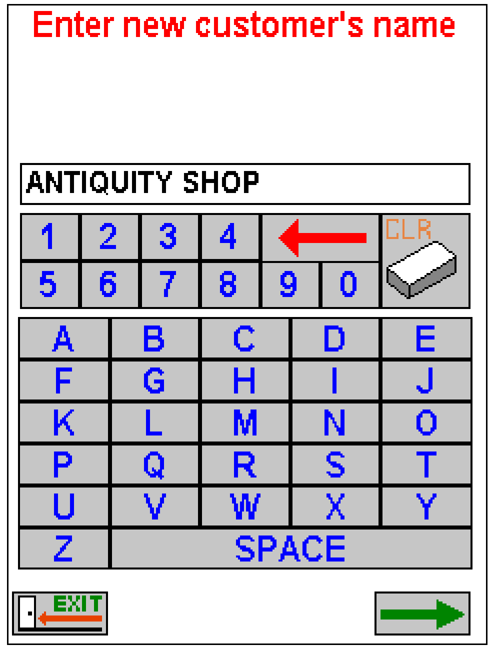


Figure 5.55

Choose the green arrow to proceed to the *Quick Entry* screen.

NOTE: In order to use the *New Customer* and *Cash Sale* options on the handheld, you must assign a QuickBooks customer account to each respective option within *Handheld Setup*, on the *General* tab.

Reprint Invoice

Select the *Reprint Invoice* key to view or print any of the invoices created for *Off-Route* customers.

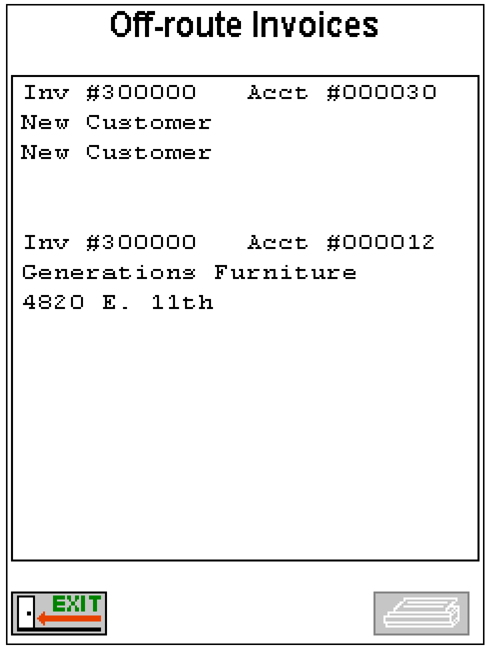


Figure 5.56

Select the account and choose *Print* to reprint the invoice.

2. Truck Status

The *Truck Status* screen allows you to access a current list of all products on the truck without having to manually inspect the vehicle. Products are sorted alphabetically by product name, listing the quantity remaining for each — the information is display only, and cannot be modified within this screen.

When a product on the truck is sold, the quantities listed are automatically decreased from truck inventory, to maintain accuracy.

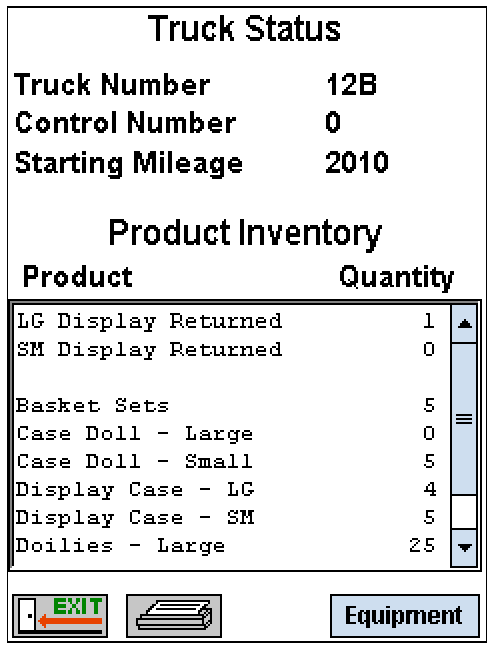


Figure 5.57

NOTE: The *LG Displayed Returned* and *SM Displayed Returned* totals represent empty containers that have been picked up.

You can also view the available (Clean) and picked up (Dirty) equipment on your truck by pressing the *Equipment* key. The following screen will appear:

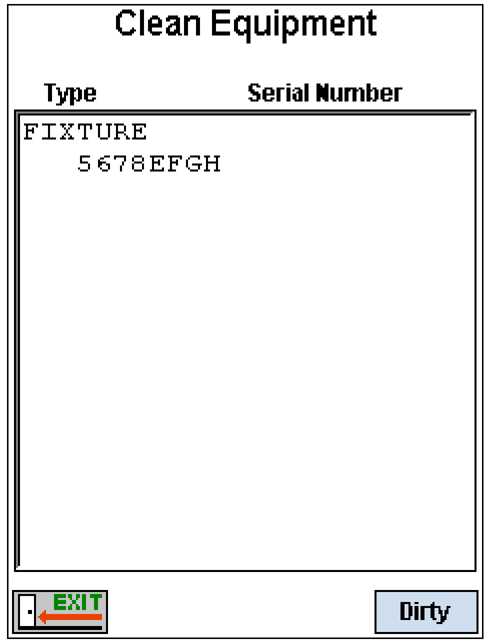


Figure 5.58

You can toggle between available (Clean) and picked up (Dirty) by pressing the **Clean/Dirty** key on the screen.

3. Load / Unload Truck

The *Load/Unload Truck* function allows you to add and remove inventory from the truck. The driver loads the truck in the morning before leaving on route, and checks in the load upon returning to the office or warehouse.

The general process is to start at the top of the screen, and work down to the bottom.

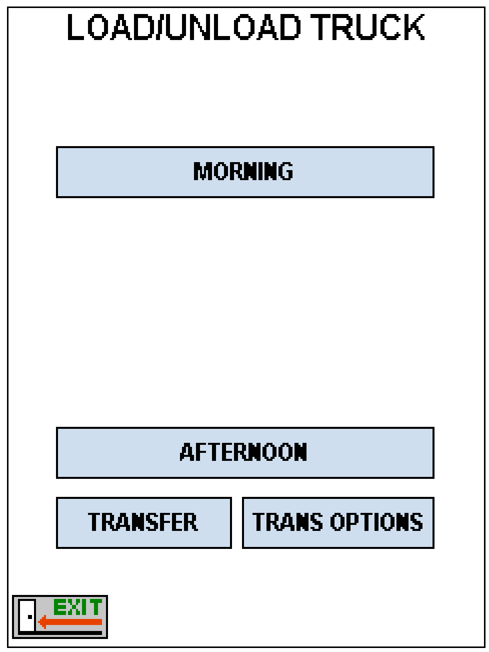


Figure 5.59

Morning Load

Morning Load allows you to count the product on the truck each day before delivering on route.

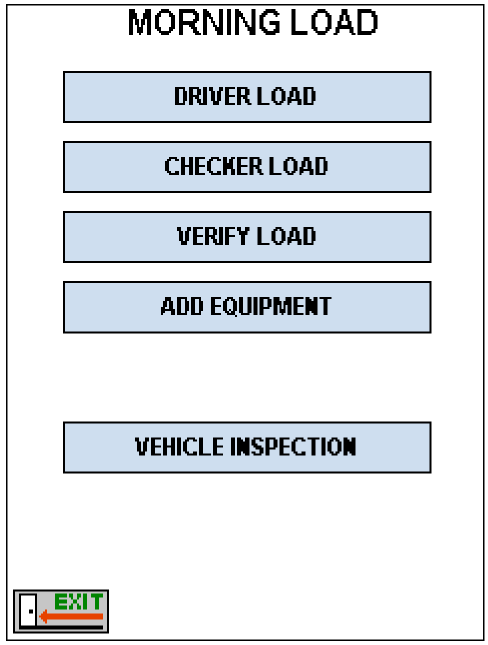


Figure 5.60

NOTE: If 'Load Verification Required' is <u>not</u> checked under *Handheld Setup* within QRoute, the screen will be slightly modified, replacing *Driver* and *Checker Load* with a single *Load Truck* button. The driver can still load the truck using this option, but it will not be required.

Driver Load / Load Truck

After selecting the *Driver Load* or *Load Truck* option, a password screen will appear — this is to prevent changes being made without proper authorization. After the password is entered, the driver will be required to choose one of the truck bays that product will be loaded into.

Choose Bay Screen

The *Choose Bay* screen below shows a sample truck with twelve (12) bays:

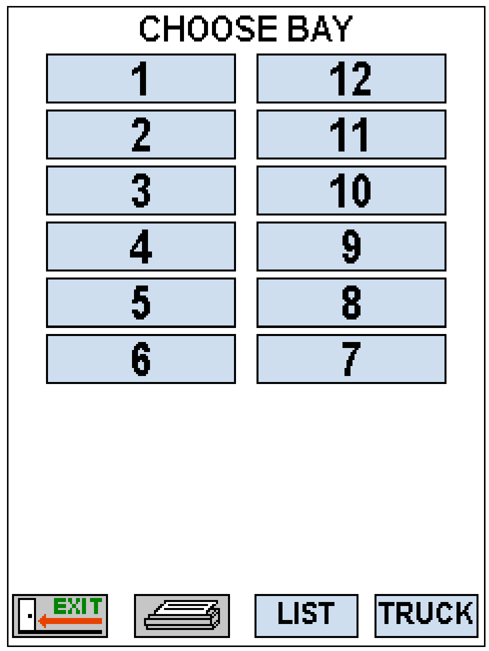


Figure 5.61

NOTE: Each truck can be assigned a unique number of bays; you can set them up individually in QRoute, under *QRoute > Setup Options > Truck Setup*.

After a bay is selected, the product list is displayed.

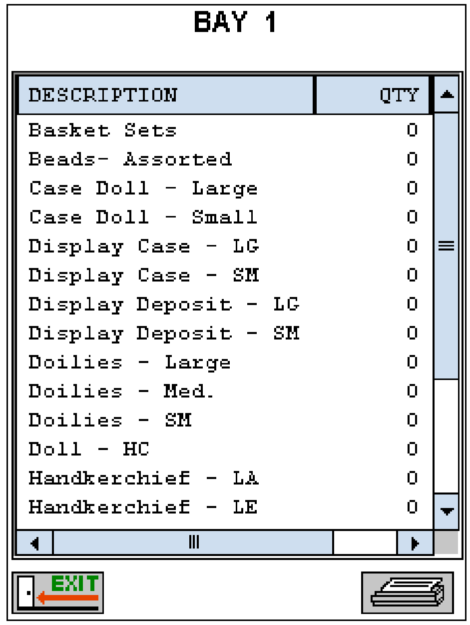


Figure 5.62

Scroll through the list to find the product you are searching for, and choose the product being loaded into the current bay. Enter the quantity loaded, and select the green arrow to continue.

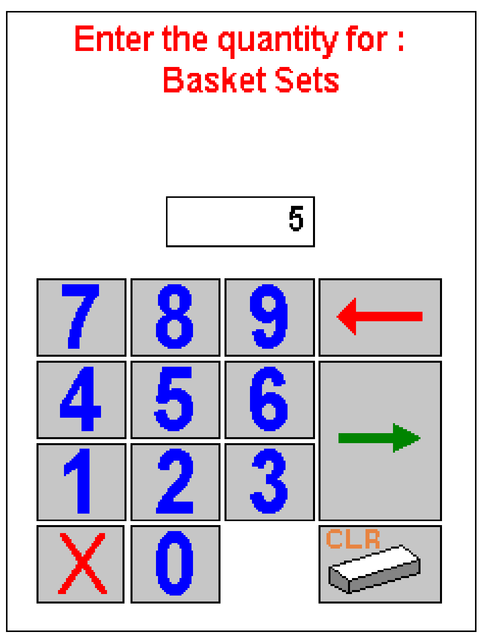


Figure 5.63

Repeat this process for each product and bay, until all of the items have been loaded onto the truck.

Truck Info

The *Truck* key allows you to change the truck number and enter the beginning mileage of your vehicle.

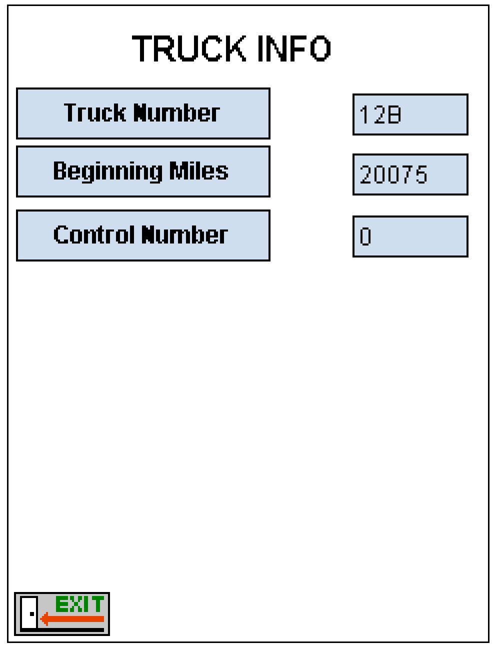


Figure 5.64

Truck Number

This key allows you to update the truck being used for the day, if necessary.

Beginning Miles

This key allows you to enter the truck's odometer reading prior to making the day's deliveries.

Control Number

This key allows you to enter a product tracking number that will print on the *Check-In* and *Check-Out* reports on the handheld. This is helpful for companies that use numbered inventory forms outside of QRoute.

NOTE: Mileage requirements can be established within *Handheld Setup* on the desktop.

Print

The *Print* key prompts you to print a listing of all the products loaded onto your truck.

Figure 5.65

Exit

The *Exit* key allows you to exit the *Choose Bay* screen and return to *Morning Load*.

Checker Load

The *Checker Load* is only required if the 'Load Verification Required' option is selected within *Handheld Setup*. The checker's responsibility is to verify product counts previously entered by the driver. The process for completing this step is the same as the *Driver Load / Load Truck* option discussed in the previous section; however, the route will only be verified when both the driver and checker quantities match.

Add Equipment

In order to deliver equipment to a customer, equipment must be loaded onto the truck. To add equipment, press the *Driver* key.

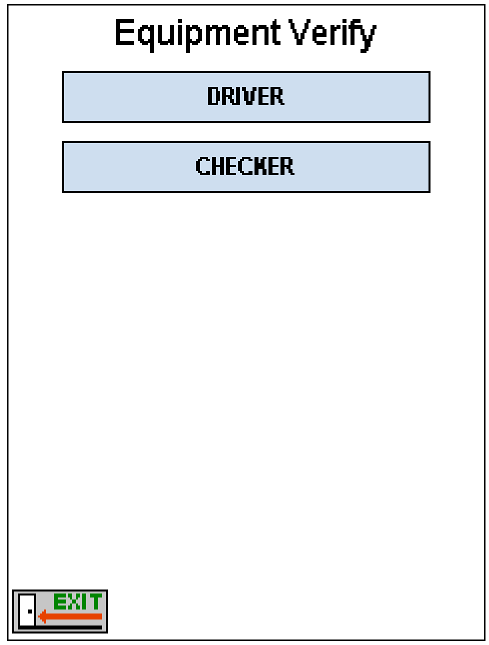


Figure 5.66

Two methods for entering equipment will appear:

- ***Barcode Reader***
- ***Keypad***

Barcode

The *Barcode* key is used to scan a serial number barcode located on each piece of equipment. To use this feature, your handheld must be equipped with a barcode reader.

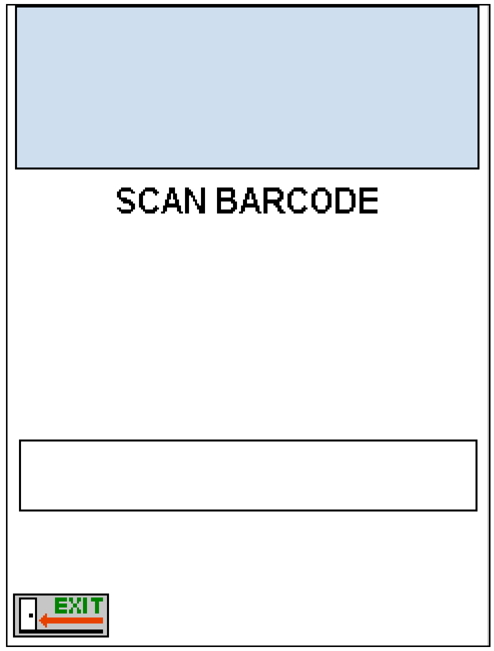


Figure 5.67

As you successfully scan each piece of equipment, the information will be displayed on the screen for confirmation.

Keypad

To add equipment using the keypad, key in the serial number manually, and choose the green arrow.

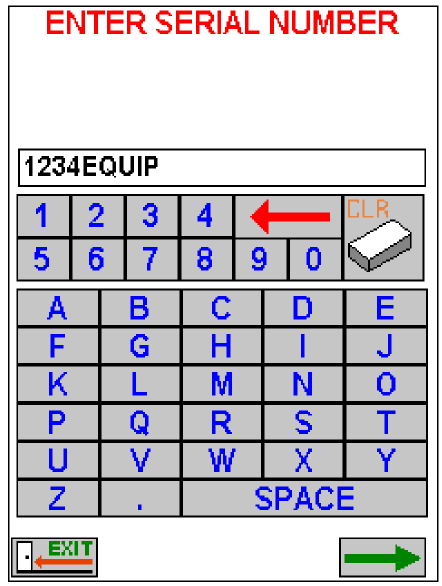


Figure 5.68

You will be prompted to enter the *Type* of equipment being loaded. Key in the equipment type and choose the green arrow to continue.

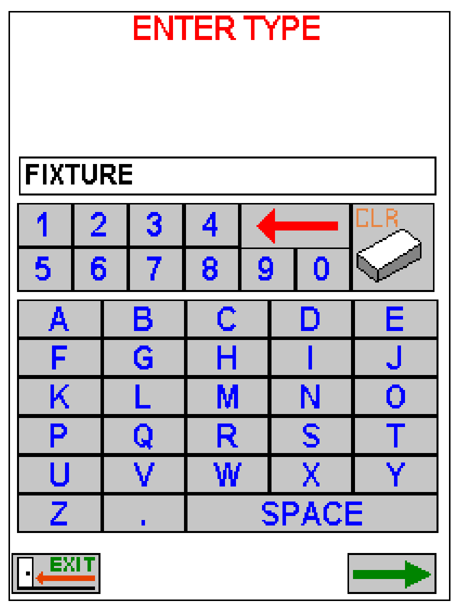


Figure 5.69

The following screen confirms that the piece of equipment has been added to the truck. Repeat this process until all of the needed serial numbers have been added to the truck.

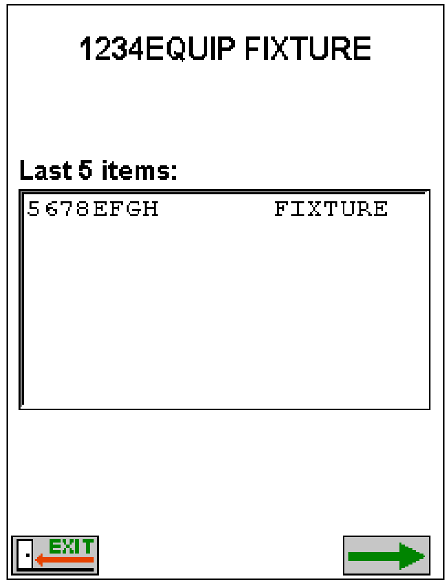


Figure 5.70

If the 'Load Verification Required' option is selected within *Handheld Setup*, a *Checker* is required to verify equipment added to the truck.

Tap the **Checker** key.

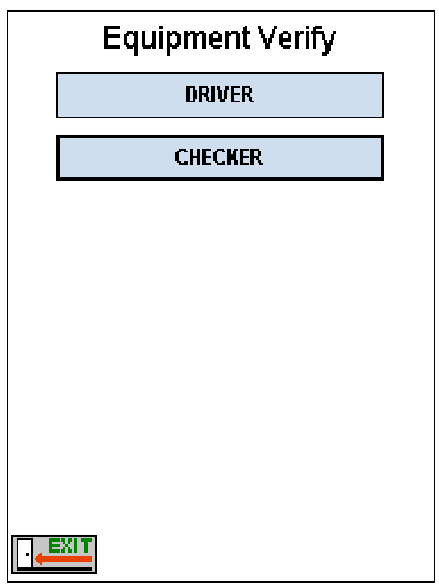


Figure 5.71

The *Checker* will login to the handheld and verify the serial numbers added to the truck by touching the screen so that a checkmark appears next to each item.

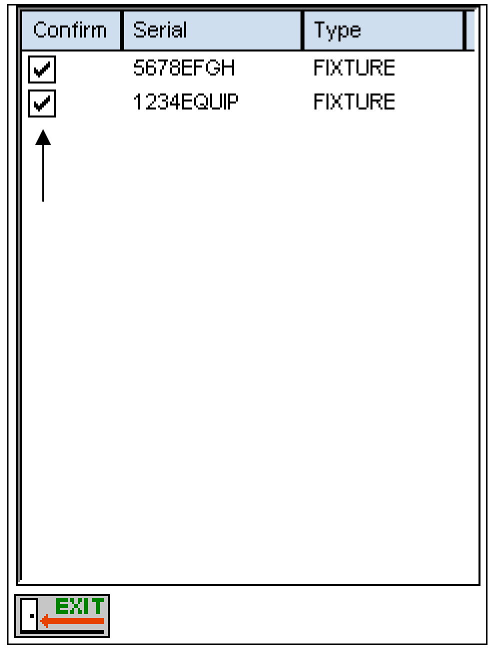


Figure 5.72

Verify Load / Confirm Load

The *Verify Load/Confirm Load* option allows you to verify the products loaded onto the truck, and print a verification report prior to departing on route.

Tap the *Verify Load/Confirm Load* option after the *Morning Load* process has been completed.

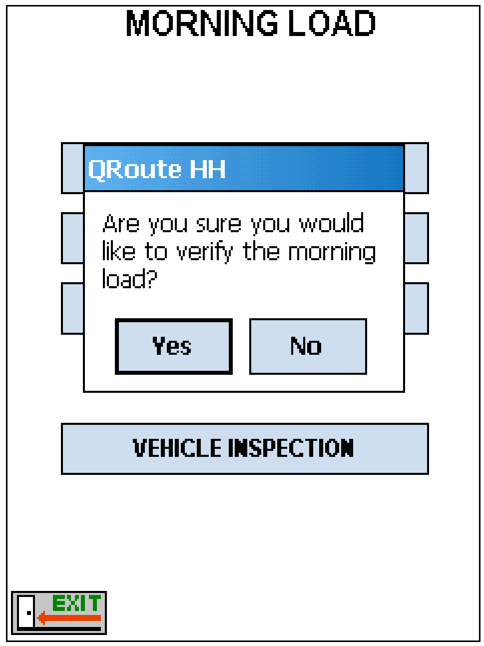


Figure 5.73

Select **Yes** to proceed.

If the option 'Load Verification Required' is selected within *Handheld Setup*, both the *Driver* and *Checker* signatures are required to verify the load. If not, you will be prompted to print the *Load Verification Report*.

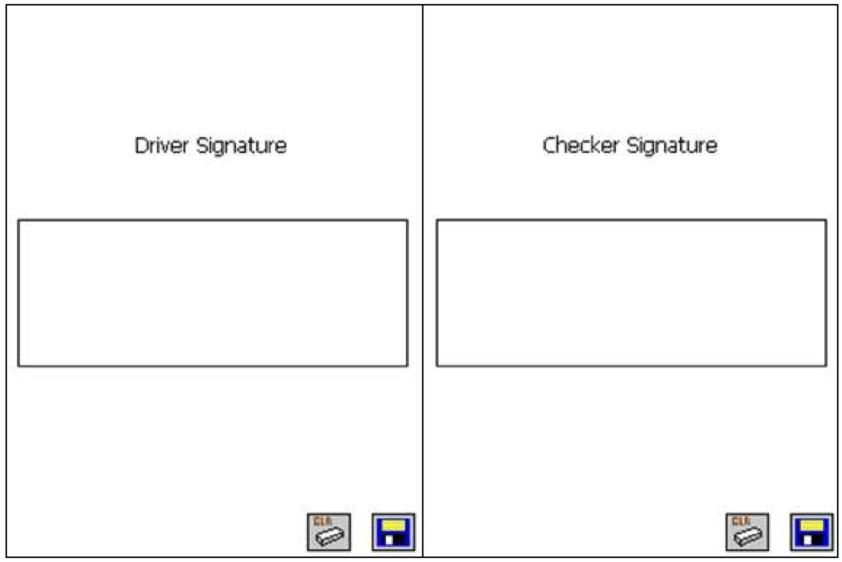


Figure 5.74

The *Load Verification Report* can be printed after all other steps have been completed:

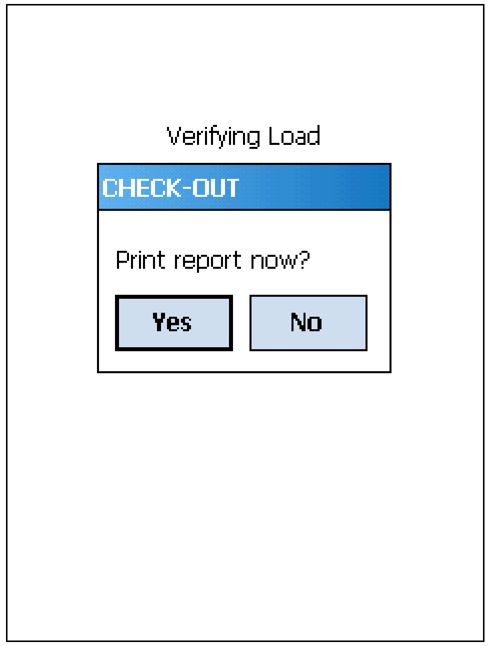


Figure 5.75

NOTE: The load will still be verified even if **No** is selected.

If there are any discrepancies between the *Driver* and *Checker Load*, the *Load Verification Error* screen will be displayed. The driver, or checker, will have to manually recount each item listed, until all of the variances have been resolved.

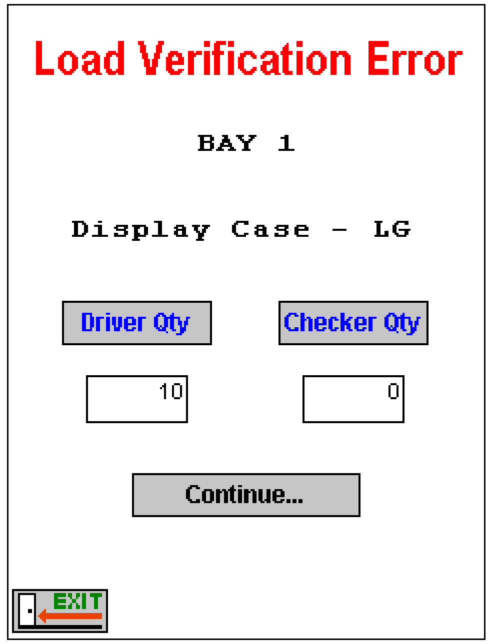
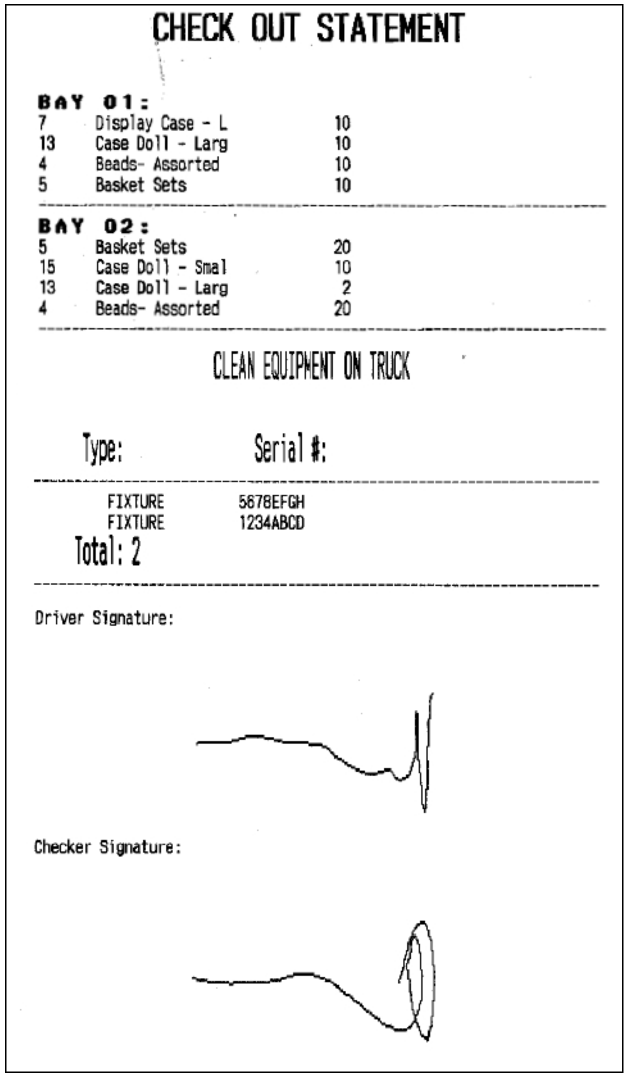


Figure 5.76

To adjust the displayed quantity, tap on the **Driver Qty** or **Checker Qty** key displayed on the screen. Login by entering your password, key in the correct quantity of the item, and select **Continue** until all of the errors have been resolved.

Once the load has been verified, the *Check-Out Statement* will automatically print from the handheld.



CHECK OUT STATEMENT

BAY 01:

7	Display Case - L	10
13	Case Doll - Larg	10
4	Beads- Assorted	10
5	Basket Sets	10

BAY 02:

5	Basket Sets	20
15	Case Doll - Smal	10
13	Case Doll - Larg	2
4	Beads- Assorted	20

CLEAN EQUIPMENT ON TRUCK

Type:	Serial #:
FIXTURE	5678EFGH
FIXTURE	1234ABCD

Total: 2

Driver Signature:

Checker Signature:

Figure 5.77

Vehicle Inspection

The *Vehicle Inspection* option is used to perform a pre-route condition inspection of the delivery vehicle.

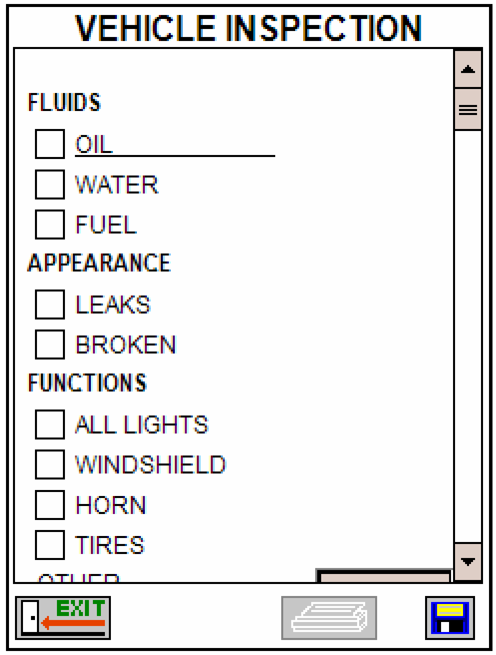


Figure 5.78

NOTE: The items listed can be customized within QRoute under *QRoute > Setup Options > Optional Setup Items> Vehicle Inspection*. Refer to *Chapter 3* for detailed information on this feature.

After you perform the inspection, you must save it by tapping the *Save* key in the lower right corner of the screen. As you do this, the *Print* key will be enabled so that you can print a copy of the inspection report for your records.

Afternoon Unload

The *Afternoon Unload* screen is used to close out the delivery day on the handheld.

NOTE: The *Afternoon Unload* process is nearly identical to the *Morning Load* process covered earlier.

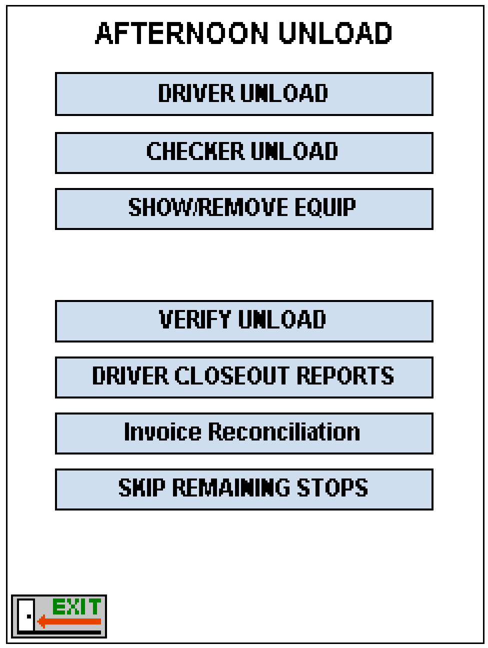


Figure 5.79

Driver Unload

The *Driver Unload* key allows you to unload the truck by selecting the bay, and choosing the product to unload. Enter the quantity being unloaded, and repeat this step until all bays have been counted.

Checker Unload

The *Checker Unload* key allows you to verify the *Driver Unload* by selecting the bay, and choosing the product to unload. Enter the quantity being unloaded, and repeat this step until all bays have been counted.

Verify Unload

The *Verify Unload* key allows you to verify the products unloaded from the truck. Tap the *Verify Load/Confirm Load* option after the *Afternoon Unload* process has been completed.

If there are any discrepancies between the *Driver* and *Checker Unload*, the *Load Verification Error* screen will be displayed. The driver, or checker, will have to manually recount each item listed, until all of the variances have been resolved.

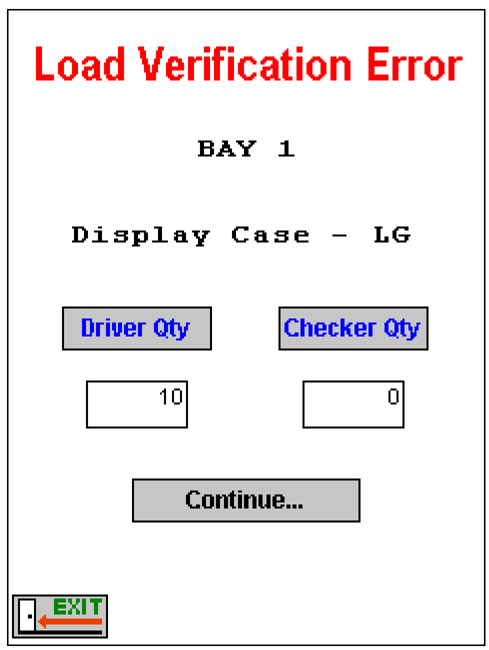


Figure 5.80

To adjust the displayed quantity, tap on the **Driver Qty** or **Checker Qty** key displayed on the screen. Enter the correct quantity of the item, and select **Continue** until all of the errors have been resolved.

If the option 'Load Verification Required' is selected within *Handheld Setup*, both the *Driver* and *Checker* signatures are required to verify the unload.

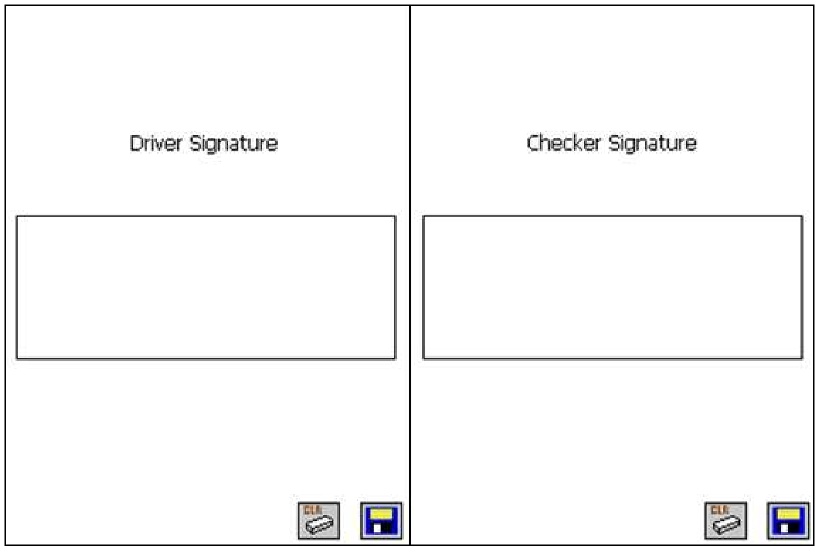


Figure 5.81

The *Unload Verification Report* will print after all other steps have been completed.

Once the load has been verified, a *Check-In Statement* will automatically print.

Driver Closeout Reports

The *Driver Closeout Reports* key has been designed to help the driver reconcile cash, checks, and products at the end of the day.

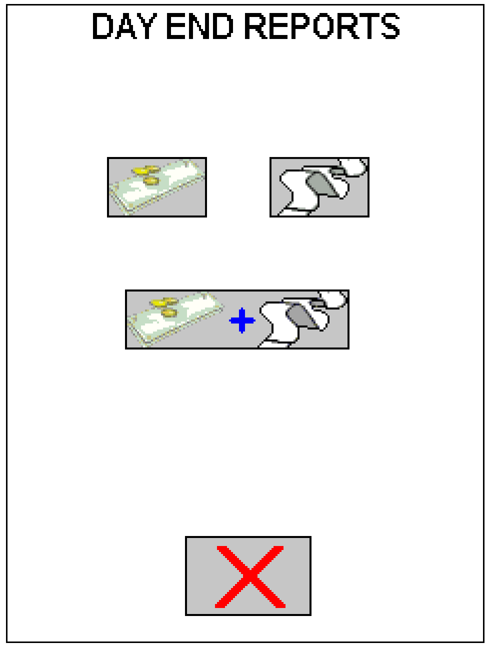
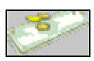


Figure 5.82

On this screen, the graphics represent four choices:

 – Print the *Day End Cash/Checks Report* only.

 – Print the *Variance Report* only.

 – Print the *Day End Cash/Checks* and *Variance Reports* together.

 – Exit the screen.

Each report is discussed within this section.

Cash/Checks Report: This report will list all of the payments collected on route.

DAY END CASH/CHECKS/CREDIT

CASH

Stop : 0001	Accou: Antique	COD	96.63
Stop : 0001	Accou: Antique	COD	112.74
Stop : 0714	Accou: Antique	COD	10.00

TOTAL = 219.37

CHECK

Stop : 0320	Accou: Antique	CHK# 8745	COD	50.00

TOTAL CHECK = 50.00

CREDIT

TOTAL CREDIT = 0.00

REFUNDS

TOTAL REFUNDS = 0.00

TOTAL RECEIVED 269.37
LESS REFUNDS 0.00

AMOUNT ON HAND 269.37

TOTAL COD 269.37
TOTAL ROA 0.00

Driver : David L Brent
Route : 1KCNO
Truck : 128
Date : 03/27/2009
Time : 22:28:46

Figure 5.83

Variance Report: This report will list product inventory information for the day.

VARIANCE REPORT

DEPOSITS: RETURNED

Large Display Retur	1
Small Display Retur	0

	Checked Out	Checked In	Product Used	Product Sold	Product Variance
Case Doll - Small	10.00	10.00	0.00	0.00	0.00
Display Case - LG	10.00	7.00	3.00	3.00	0.00
Case Doll - Large	12.00	3.00	9.00	9.00	0.00
Beads- Assorted	30.00	20.00	10.00	10.00	0.00
Basket Sets	30.00	30.00	0.00	0.00	0.00

Driver : David L Brent
Route : 1KCNO
Truck # : 12B
Date : 03/27/2009
Time : 22:29:00
Starting Mileage: 002010
Ending Miles : 002025

Starting Invoice : 000000001
Ending Invoice : 000000007

			QTY
Total Sales	:	478.20	5
Total Credits	:	0.00	0
Total Skips	:	0.00	1
Sales Tax	:	35.24	--
Total	:	513.44	6

Figure 5.84

NOTE: This report shows reconciliation information between product checked-out, sold, and checked-in. It is important to refer to the *Variance* total listed on each product — if the information balances, the variance will always be 0.

If the driver has entered any *Returned Product Reasons* for damaged or returned products during the route day, the *Product Returns Report* will print after the *Variance Report*, automatically. This information will also print during the *Afternoon Card* process on the desktop.

```
                 PRODUCT RETURNS REPORT

Damaged          [DAMAGED]
------------------------------------------------------------
Antique Accents     [Case Doll - Large   ]    1.00
------------------------------------------------------------
     Total                        1.00

Driver :   David L Brent
Route  :       1KCND
Truck  :   12B
Date   :   03/27/2009
```

Figure 5.85

NOTE: To enter reasons for product returns and damages on the handheld, choose the option 'Require Reason for Returned Products' found under *Handheld Setup*, on the *Handheld* tab.

NOTE: For further information on *Returned Product Reasons*, refer to page 109.

Invoice Reconciliation

The Invoice Reconciliation key allows you to review all of the invoices created for the route day.

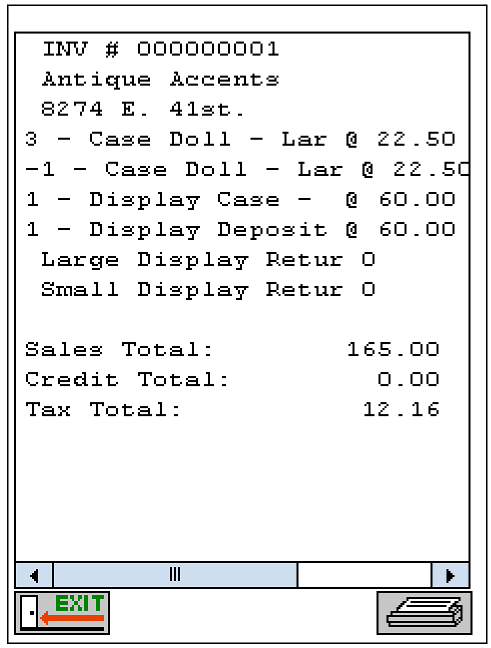


Figure 5.86

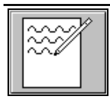
You can also print the invoices in the format displayed, if desired.

Skip Remaining Stops

The *Skip Remaining Stops* key allows you to assign a *Skip Reason* to all of the remaining (un-serviced) stops on route.

Figure 5.87

Choose a *Skip Reason* and press the *Save* key. This reason will be applied to all stops that have not been serviced for the route day.



4. Sales Notes

The *Sales Notes* screen allows notes to be written, and stored or printed, on the handheld. Each note will also be printed on the *Driver Notes* report during the *Afternoon Card* process on the desktop.

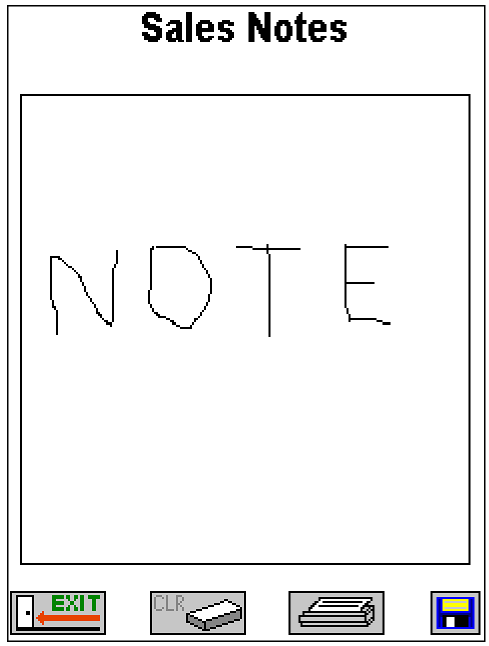
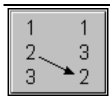


Figure 5.88

Using the stylus, write a message within the bordered area of the screen. After the note has been written, you are given four options:

- ***Exit***
- ***Clear***
- ***Print***
- ***Save***

If you would like the note to appear on the *Driver Notes Report* during the *Afternoon Card* process: select the *Save* option.



5. Resequence Route

The *Resequence Route* option gives the driver the ability to change the listed order of the stops for the delivery day. By re-sequencing stops in the morning, the route can often be run more efficiently.

NOTE: The *Route Resequence Report* will be printed during the *Afternoon Card* process, listing the changes the driver has made. It is the responsibility of the office staff to make the changes permanent within each customer's account.

Drag & Drop

The drag-and-drop method is used to move a customer to a new location on route. Simply place your stylus on a customer's name — while maintaining constant contact with the screen — and move it up or down until the desired location is found.

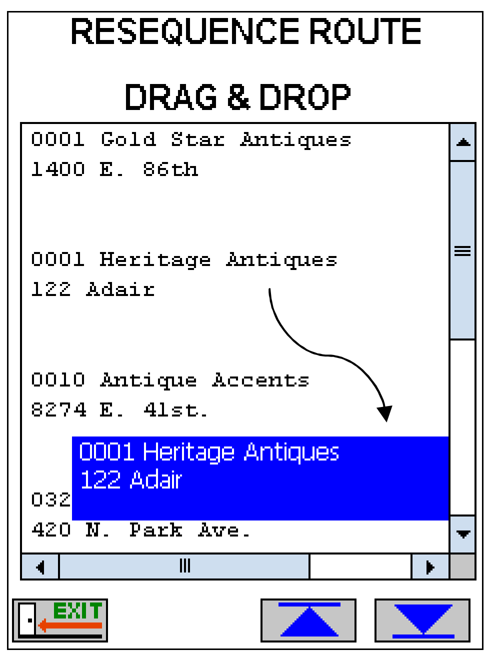


Figure 5.89

Release the stylus from the screen, and the customer will appear in the new location.

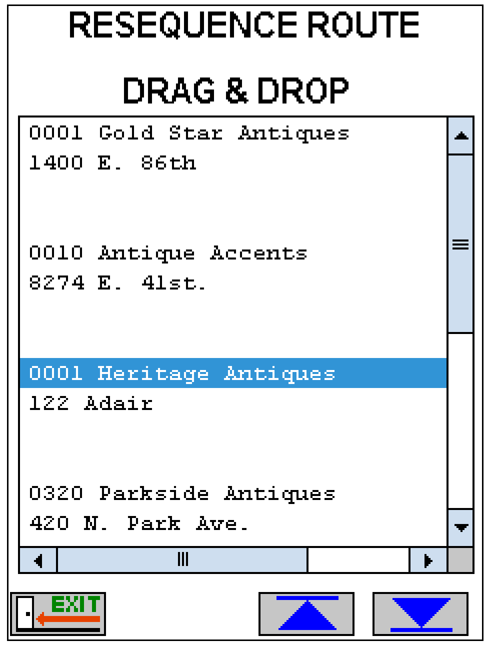


Figure 5.90

Once you are satisfied with the order of the route, press the *Exit* key. You will be prompted to save your changes.

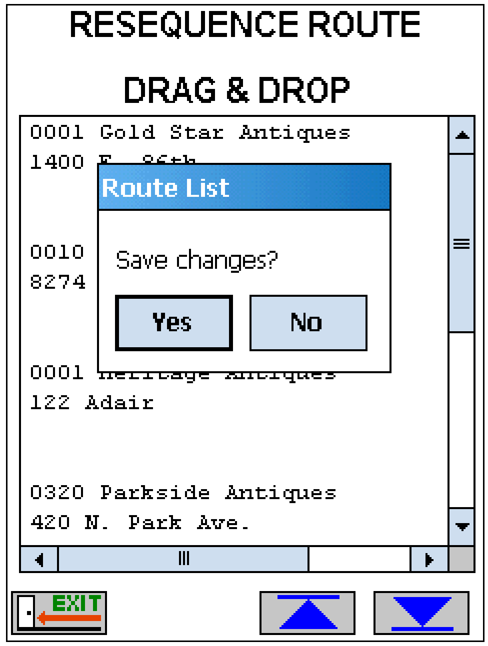


Figure 5.91

NOTE: Use the up-and-down arrows on the screen if you would like to move a customer to the top or bottom of the route.

6. Route Maps

This option is reserved for future use with the *QRoute Mapping Module*.

7. Calculator

The calculator button permits you to perform simple math calculations on the handheld.

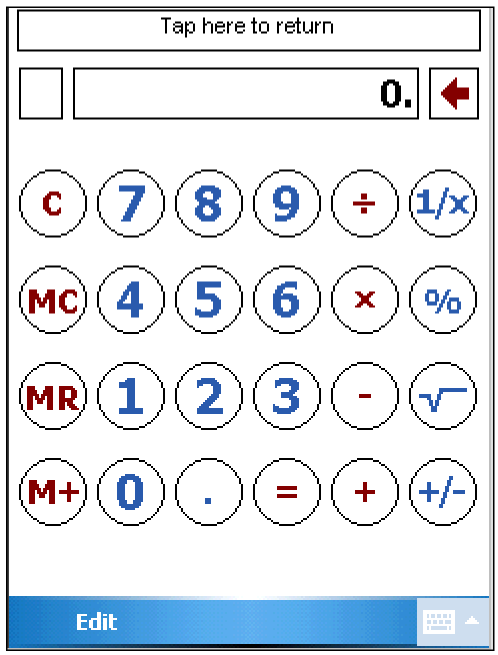


Figure 5.92

After you are through using the calculator, tap the 'Tap here to return' option on the top portion of the screen to return to QRoute.

8. Utilities

This screen displays information regarding the QRoute program and handheld system diagnostics.

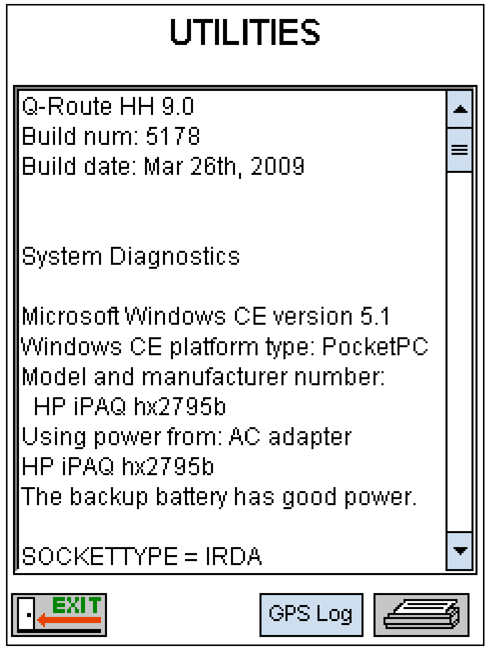
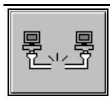


Figure 5.93



9. Logout

By selecting the *Logout* key, you will be given two options:

Login: To return to the *QRoute Main Menu*, press the  *Login* key.

Exit: To exit the QRoute program, press the  *Exit* key.

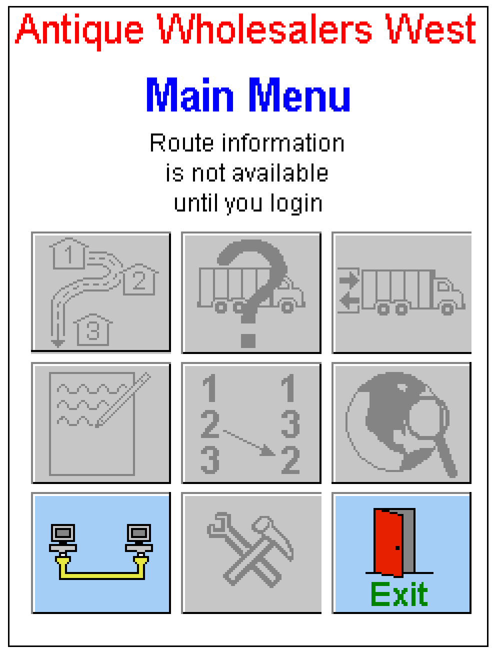


Figure 5.94

NOTE: Always exit the QRoute program before removing the storage card.

Notes

Canadian QuickBooks Addendum

Introduction

This *Canadian QuickBooks Addendum* has been added to centralize all of the unique settings for our Canadian clients.

Topics

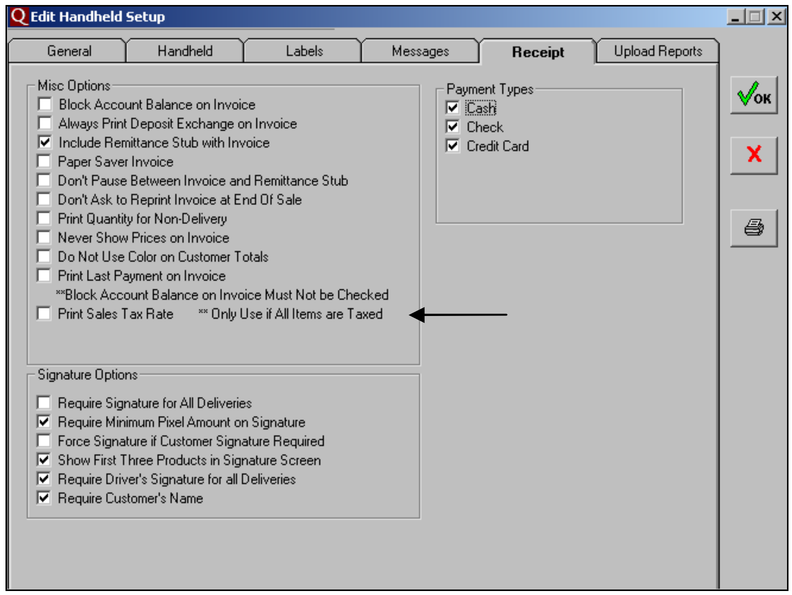
Listed below are the items covered:

- ***GST and PST on Invoice***
- ***Postal Code Length***

If your topic is not listed, please contact Advantage Route Systems.

GST And PST on Invoice

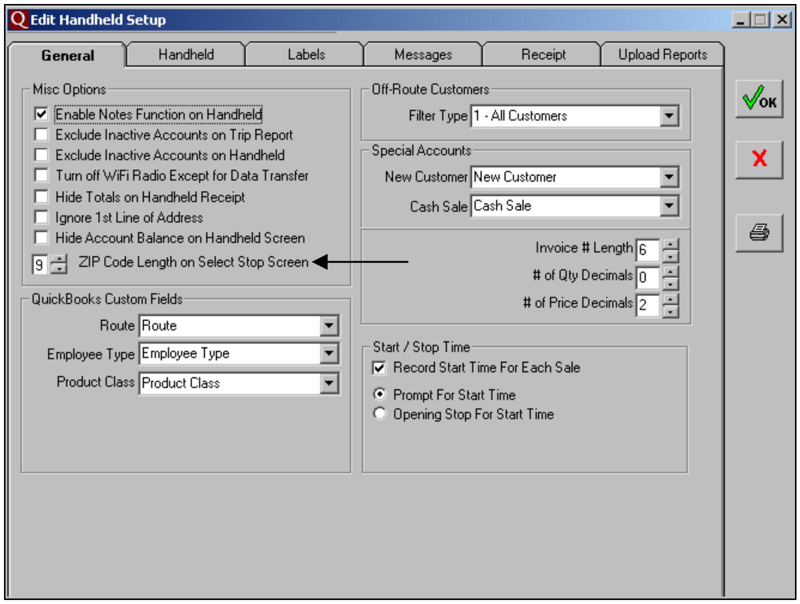
If you would like *GST* and *PST* tax totals printed on the customer's handheld receipt, enable the 'Print Sales Tax Rate' option under *Customers > QRoute > Setup Options > Handheld Setup*, on the *Receipt* tab.



NOTE: This information will not be printed on the receipt if the 'Hide Totals on Invoice Receipt' option is selected on the *General* tab of *Handheld Setup*.

Postal Code Length

To accommodate for standard postal code lengths in Canada, you have the ability to display up to 9 digits on the handheld by adjusting the 'ZIP Code Length on Select Stop Screen' option found under *Customers > QRoute > Setup Options > Handheld Setup*, on the *General* tab.



Notes

Appendix A – Sample Reports

Overview

This appendix includes example reports from the QRoute program in the following categories:

- *List Reports*
- *Daily Reports*
- *Afternoon Reports*

These reports may be updated from time-to-time, and the current version may include additional reports, or slight variances.

List Reports

List reports can be printed from within the following setup areas of QRoute:

- Driver Setup
- Handheld Setup
- Gratis Setup
- Site Inspection
- QRoute Settings
- Truck Setup
- Route Area Setup
- Vehicle Inspection
- Returned Product Codes

Each *List Report* is designed to include all of the items added to each 'setup' area of QRoute.

08:17 AM

6/11/2004

Antique Wholesalers West

Truck List Report

ID	Description	Bays	Mileage	LicensePlate	VIN	NextService
2B	YellowTruck	2	100300	B8481340	1548797645FV12354	6/3/2004
6B	2 Bay Truck	6	20000	C3412679	1254545644FLA231	6/3/2004

08:18 AM

6/11/2004

Antique Wholesalers West

Gratis List Report

ID	Description
B	Broken/Replacement
D	Defective Unit/Replace

08:18 AM

6/11/2004

Antique Wholesalers West

Route Area List Report

Code	Description
KCEAS	Kansas City East
KCNOR	Kansas City North
KCSOU	Kansas City South
KCWES	Kansas City West

08:18 AM

6/11/2004

Antique Wholesalers West

Employee List Report

SSN	Name
111-22-1234	Bill B Jackson
222-11-9876	David D Donaldson
404-33-5005	J. C. J Bryson
999-33-9876	Joshua J Redfern

09:08 AM

6/11/2004

Antique Wholesalers West

Handheld Setup Report

General

Misc Options

NO Enable Notes Function on Handheld

NO Exclude Inactive Accounts on Trip Report

NO Exclude Inactive Accounts on Handheld

NO Turn off WiFi Radio Except for Data Transfer

Off-Route Customers

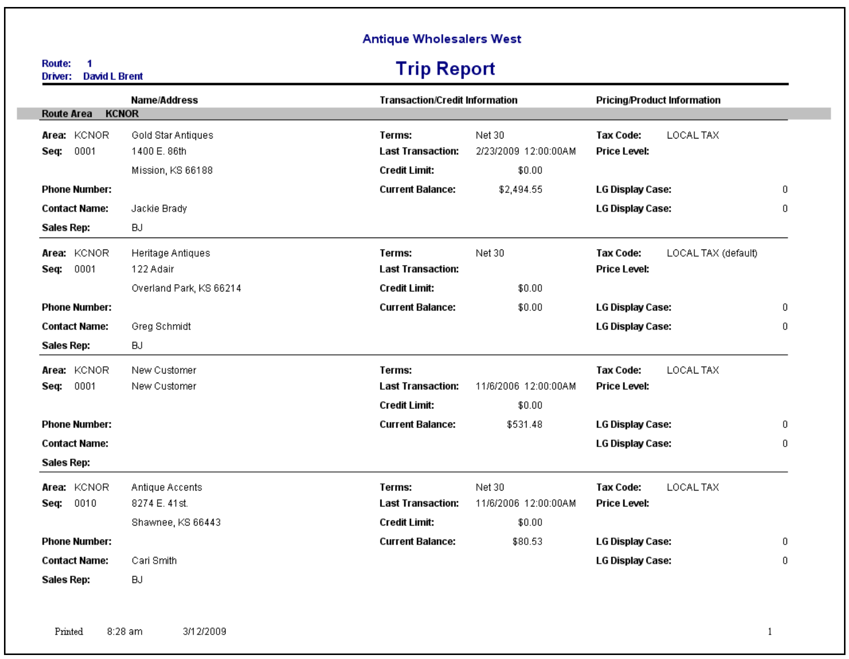
Filter Type All Customers

Daily Reports

Daily reports can be generated on the desktop, and will provide you with miscellaneous route sales information, they are:

- Route Trip
- Route Times
- Invoice Lookup
- Special Price Customers
- Driver Notes (Reprint)
- Site Inspection (Reprint)
- Returned Products
- Gratis Products

Trip Report



Antique Wholesalers West

Route: 1
Driver: David L Brent

Trip Report

	Name/Address	Transaction/Credit Information		Pricing/Product Information	
Route Area KCNOR					
Area: KCNOR	Gold Star Antiques	**Terms:**	Net 30	**Tax Code:**	LOCAL TAX
Seq: 0001	1400 E. 86th	**Last Transaction:**	2/23/2009 12:00:00AM	**Price Level:**	
	Mission, KS 66188	**Credit Limit:**	$0.00		
Phone Number:		**Current Balance:**	$2,494.55	**LG Display Case:**	0
Contact Name:	Jackie Brady			**LG Display Case:**	0
Sales Rep:	BJ				
Area: KCNOR	Heritage Antiques	**Terms:**	Net 30	**Tax Code:**	LOCAL TAX (default)
Seq: 0001	122 Adair	**Last Transaction:**		**Price Level:**	
	Overland Park, KS 66214	**Credit Limit:**	$0.00		
Phone Number:		**Current Balance:**	$0.00	**LG Display Case:**	0
Contact Name:	Greg Schmidt			**LG Display Case:**	0
Sales Rep:	BJ				
Area: KCNOR	New Customer	**Terms:**		**Tax Code:**	LOCAL TAX
Seq: 0001	New Customer	**Last Transaction:**	11/6/2006 12:00:00AM	**Price Level:**	
		Credit Limit:	$0.00		
Phone Number:		**Current Balance:**	$531.48	**LG Display Case:**	0
Contact Name:				**LG Display Case:**	0
Sales Rep:					
Area: KCNOR	Antique Accents	**Terms:**	Net 30	**Tax Code:**	LOCAL TAX
Seq: 0010	8274 E. 41st.	**Last Transaction:**	11/6/2006 12:00:00AM	**Price Level:**	
	Shawnee, KS 66443	**Credit Limit:**	$0.00		
Phone Number:		**Current Balance:**	$80.53	**LG Display Case:**	0
Contact Name:	Cari Smith			**LG Display Case:**	0
Sales Rep:	BJ				

Printed 8:28 am 3/12/2009 1

Driver Notes

Route: 1

3/12/2009

Antique Wholesalers West

Driver Notes Report

Gold Star Antiques
Invoice 000000004

Driver note!

Route Times

Route: 1
Driver: David L Brent

Antique Wholesalers West

Route Times Report

03/12/2009 Truck: 12B Start Miles: 20,000 End Miles: 20,075 Total Miles: 75

Sequence	Customer Name	Start Time	Invoice Time	Duration	Invoice Amount	Mileage
0001	Gold Star Antiques	08:13 AM	08:19 AM	00:06	$172.50	20050
0001	Heritage Antiques	09:20 AM	09:22 AM	00:02	$249.80	20055
0010	Antique Accents	10:22 AM	10:23 AM	00:01	$0.00	20061
OFF	Betty's Olde House	11:23 AM	11:24 AM	00:01	$120.00	20066
0320	Parkside Antiques	12:25 PM	12:25 PM	00:00	$328.50	20070
			Total Elapsed Time:	04:12	**$870.80**	

Site Inspection

Route: 1

03/12/2009

Antique Wholesalers West

Site Inspection Report

Customer Name	Invoice Number	Inspection Date
Gold Star Antiques	000000004	03/12/2009

Site Inspection Reasons

Replaced bulb

Comment:
Replaced bulb.

Note:

Bad bulb

Invoice Lookup

Antique Wholesalers West
147 S. Broadway
Turlock, Ca. 35980
888.294.7688

INVOICE 000000004

Thu Mar 12, 2009, 8:19:00 A
Driver: David L Brent
Rte-Day-Stop: 1--0001

Gold Star Antiques
1400 E. 86th
Mission KS 66188

Item		Qty	Price	Amount
Case Doll - Large	[TX]	5	@ 22.50	112.50
Display Case - LG	[TX]	1	@ 60.00	60.00

Sales 172.50

---- Deposit Detail ----

LG Display Returned Dlv: 1 Ret: 1 Net: 0

Subtotal 172.50

Tax 12.71

Invoice Total 185.21
Previous Balance 2,494.55

** Payment Received 185.21
(Cash)

ACCOUNT BALANCE 2494.55

Received By:

Name: MIKE

Antique Wholesalers West
147 S. Broadway
Turlock, Ca. 35980
888.294.7688

INVOICE 000000005

Thu Mar 12, 2009, 9:22:00 A
Driver: David L Brent
Rte-Day-Stop: 1--0001

Heritage Antiques
122 Adair
Overland Park KS 66214

Item		Qty	Price	Amount
Basket Sets	[TX]	10	@ 6.23	62.30
Basket Sets		1	@ 0.00	0.00
Case Doll - Large	[TX]	3	@ 22.50	67.50
Display Case - LG	[TX]	1	@ 60.00	60.00

Sales 189.80
Deposits 60.00

---- Deposit Detail ----

LG Display Returned Dlv: 1 Ret: 0 Net: 1

Subtotal 249.80

Tax 18.41

Invoice Total 268.21
Previous Balance 0.00

** Payment Received 268.21
(Check 1456)

ACCOUNT BALANCE 0.00

Received By:

Returned Products

Route: 1
From: 3/12/2009
To: 3/12/2009

Antique Wholesalers West

Returned Products Customer Detail

Antique Depot

Returned Products

Route	InvoiceNumber	Date	Quantity	ProductDescription	Price	Tax	Total
Return Code: N	Not Needed						
1	000000010	03/12/2009	-1.00	Basket Sets	$-5.61	$-0.41	$-6.02

Grandma's Ole Trunk

Damaged Product - These products were automatically returned to inventory by QuickBooks, an inventory adjustment is needed.

Route	InvoiceNumber	Date	Quantity	ProductDescription	Price	Tax	Total
Return Code: D	Defective Unit						
1	000000009	03/12/2009	-1.00	Case Doll - Large	$-22.50	$0.00	$-22.50

** QuickBooks automatically returns items to inventory. Please adjust the inventory in QuickBooks appropriately for the damaged products.

Printed 8:59 am 3/13/2009 1

Special Price Customers

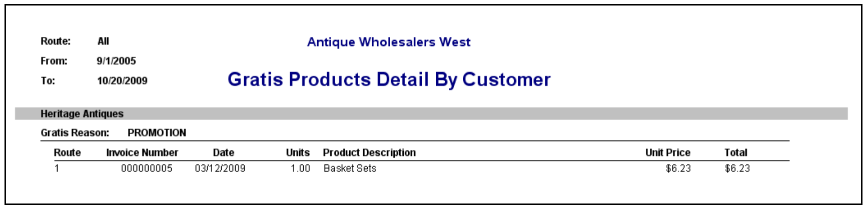
Antique Wholesalers West

Route: All

Special Price Customers

	Name/Address	Phone	Terms	Last Transaction
Price Level: 10% Discount				
Route: 1 **Area:** KCWES **Seq:** 6778	Finders Keepers 1620 S. Chestnut Shawnee, KS 66443		Net 30	11/06/2006
Route: 1 **Area:** KCEAS **Seq:** 2001	Frontier Store 323 Rogers Lenexa, KS 66188		Net 30	11/06/2006
			10% Discount	**2 Customers**
Price Level: Excellent Account Price List				
Route: 3 **Area:** KCEAS **Seq:** 4632	Antiques, Etc. 8720 N. 97th Roeland Park, KS 66245		Net 30	11/06/2006
			Excellent Account Price List	**1 Customer**
Price Level: Excellent Cust. Price List				
Route: 1 **Area:** KCSOU **Seq:** 1866	Antique Center 412 S. Main Merriam, KS 66183		Net 30	11/06/2006
Route: 1 **Area:** KCNOR **Seq:** 1804	Antique Depot 2200 Rogers Shawnee, KS 66443		Net 30	03/12/2009
Route: 1 **Area:** KCNOR	Antiques Restored 2200 W. Rogers		Net 30	03/12/2009

Gratis Products



Route: All
From: 9/1/2005
To: 10/20/2009

Antique Wholesalers West

Gratis Products Detail By Customer

Heritage Antiques

Gratis Reason: PROMOTION

Route	Invoice Number	Date	Units	Product Description	Unit Price	Total
1	000000005	03/12/2009	1.00	Basket Sets	$6.23	$6.23

Afternoon Reports

Afternoon Reports are automatically printed when a route is uploaded from a storage card, they are:

- Transaction Detail
- Exceptions Report
- Resequence Report
- Payment Summary
- Inventory Sold / Variance
- Driver Notes
- Equipment Movement
- Photos
- Site Inspection
- Returned Products

Transaction Detail

Antique Wholesalers West

Route: 1

03/12/2009

Transaction Details Report

Invoice	Route	Stop	Date	Time	Account
000000004	1	0001	3/12/2009	04:19	Gold Star Antiques

Item		Qty	Amount	
∘ Case Doll - Large	Qty:	5 @ $22.50	Amount: $112.50	[Tx]
∘ Display Case - LG	Qty:	1 @ $60.00	Amount: $60.00	[Tx]

Payment: Cash $185.21 (C)

Subtotal: $172.50 Tax Total: $12.71 **Invoice Total:** $185.21 **Signature:**

Invoice	Route	Stop	Date	Time	Account
000000005	1	0001	3/12/2009	04:22	Heritage Antiques

Item		Qty	Amount	
∘ Basket Sets	Qty:	10 @ $6.23	Amount: $62.30	[Tx]
∘ Basket Sets	Qty:	1 @ $0.00	Amount: $0.00	
∘ Case Doll - Large	Qty:	3 @ $22.50	Amount: $67.50	[Tx]
∘ Display Case - LG	Qty:	1 @ $60.00	Amount: $60.00	[Tx]
∘ Display Deposit - LG	Qty:	1 @ $60.00	Amount: $60.00	[Tx]

Payment: Check (1456) $268.21 (C)

Subtotal: $249.80 Tax Total: $18.41 **Invoice Total:** $268.21

Invoice	Route	Stop	Date	Time	Account
000000006	1	0010	3/12/2009	04:23	Antique Accents

Item		Qty	Amount
∘ Store Closed	Qty:	1 @ $0.00	Amount: $0.00

Subtotal: $0.00 Tax Total: $0.00 **Invoice Total:** $0.00

Invoice	Route	Stop	Date	Time	Account
000000007	1	OFF	3/12/2009	04:24	Betty's Olde House

Item		Qty	Amount	
∘ Display Case - LG	Qty:	1 @ $60.00	Amount: $60.00	[Tx]
∘ Display Deposit - LG	Qty:	1 @ $60.00	Amount: $60.00	[Tx]

Subtotal: $120.00 Tax Total: $8.84 **Invoice Total:** $128.84

Invoice	Route	Stop	Date	Time	Account
000000008	1	0320	3/12/2009	04:25	Parkside Antiques

Item		Qty	Amount	
∘ Beads- Assorted	Qty:	50 @ $6.57	Amount: $328.50	[Tx]

Subtotal: $328.50 Tax Total: $24.21 **Invoice Total:** $352.71

Total Invoices: 5 **Total Payments: $453.42**

Total Sales: $870.80 **Total Taxes: $64.17** **Invoice Totals: $934.97**

Exceptions Report

Antique Wholesalers West

Route: 1

3/12/2009

Exceptions Report

Invoice	Stop	Date	Time	Account
000000011	0714	3/12/2009	04:38	Antiques Restored
∘ Product [Display Case - LG] Price reduced [Old Price 50.00] [New Price 45.00]				
000000012	0320	3/12/2009	04:39	Parkside Antiques
∘ Stop Skipped [No Items Needed]				
000000013	OFF	3/12/2009	04:39	Cash Sale
∘ Sale to Cash Customer Account []				

Resequence Report

Antique Wholesalers West

Route: 1

03/12/09

Resequence Report

Account	Old Sequence	Requested Sequence
Gold Star Antiques	0001	0010
Antique Accents	0010	0020
Heritage Antiques	0001	0030
Parkside Antiques	0320	0040
Antiques Restored	0714	0050
Antique Depot	1804	0060
Grandma's Ole Trunk	0820	0070

Payment Summary

Antique Wholesalers West

3/12/2009

Route: 1

Payment Summary Report

CASH RECEIVED:	**Account** Gold Star Antiques			$185.21 (C)
TOTAL OF 1 CASH TRANSACTIONS				TOTAL CASH AMOUNT $185.21
CHECKS RECEIVED:	**Account** Heritage Antiques	CHECK NO:	1456	$268.21 (C)
TOTAL OF 1 CHECK TRANSACTIONS				TOTAL CHECK AMOUNT $268.21

Inventory Sold / Variance Report

Antique Wholesalers West

Route: 1

03/12/09

Variance Report

Product	Checked Out	Checked In	Used	Sold	Variance
Basket Sets	25	14	11	11	0
Beads- Assorted	200	150	50	50	0
Case Doll - Large	10	2	8	8	0
Display Case - LG	10	7	3	3	0
Store Closed	0	0	0	1	-1

Deposit Item	Returned	Check-In	Variance
LG Display Returned	1	0	1
SM Display Returned	0	0	0

Driver Notes

Antique Wholesalers West

Route: 1

3/12/2009

Driver Notes Report

Gold Star Antiques
Invoice 000000004

Driver Note!

Equipment Movement

Antique Wholesalers West

Route: 1

03/12/09

Equipment Transfer Report

Equipment Installed

Account	Parkside Antiques	
Installed	1784EQ	LG DIS

Photos

Route 1 Photos - 3/12/2009 | Page 1 of 1

Antique Wholesalers West
Route 1 Photos - 3/12/2009

Antiques Restored

Antiques Restored

Page 1

Site Inspection

Antique Wholesalers West

Site Inspection Report

Route: 1
03/12/2009

Customer Id	Customer Name	Invoice Number	Inspection Date
00001300	Gold Star Antiques	000000004	03/12/2009

Site Inspection Reasons

Replaced bulb

Comment:
Replaced bulb.

Note:

Bad Bulb

Returned Products

Route: 1
Date: 3/12/2009

Antique Wholesalers West

Returned Products Afternoon Report

Damaged Product - These products were automatically returned to inventory by QuickBooks, an inventory adjustment is needed.

CustomerName		InvoiceNumber	Date	Quantity	ProductDescriptio	Price	Tax	Total
Return Code: D	Defective Unit							
Grandma's Ole Trunk		000000009	03/12/2009	-1.00	Case Doll - Large	$-22.50	$0.00	$-22.50

Returned Products

CustomerName		InvoiceNumber	Date	Quantity	ProductDescriptio	Price	Tax	Total
Return Code: N	Not Needed							
Antique Depot		000000010	03/12/2009	-1.00	Basket Sets	$-5.61	$-0.41	$-6.02

Appendix B – Handheld Installation

Overview

The following chapter guides you through the process of setting up QRoute on a handheld for the first time.

There are three separate procedures detailed within this section:

- ***USB Card Reader:*** Follow these steps if you are using a card reader to transfer data to the storage card.
- ***USB Cradle/Cable Transfer:*** Follow these steps if you are using a handheld cradle or cable to transfer data to the storage card.
- ***Preparing the Handheld:*** Follow these steps to setup QRoute on the handheld for the first time.

USB Card Reader

Preparing the Data Card

1. Open QuickBooks and login to your company file.
2. Go to *Customers > QRoute > Prepare Card*.
3. Choose your card reader **Drive Letter** and **Handheld Type** from the drop-down list.
4. Click **OK**.
5. Follow the prompts on the screen to complete the process.

Leave your storage card in the reader.

Preparing your Morning Card

1. Go to *Customers > QRoute > Morning Card*.
2. Double-click on the **Route/Driver** name that you would like to process.
3. Enter the **Route Date** that you would like to use on the handheld invoices.
4. Choose the correct card reader **Drive Letter** (if necessary).
5. Choose the **Route Area(s)** to include on the route.
6. Press **OK** to process the route.

To continue, skip to the section labeled: 'Preparing the Handheld'.

USB Cradle/Cable

Preparing the Data Card

1. Place your handheld in the cradle, or plug the cable into the handheld.
2. Wait for *ActiveSync* to sync to the handheld.
3. Open QuickBooks and login to your company file.
4. Go to *Customers > QRoute > Prepare Card*.
5. In the *Drive Letter* field, choose **USB**.
6. In the *Type* field, select your handheld type.
7. Click **OK**.
8. Follow the prompts on the screen to complete the process.

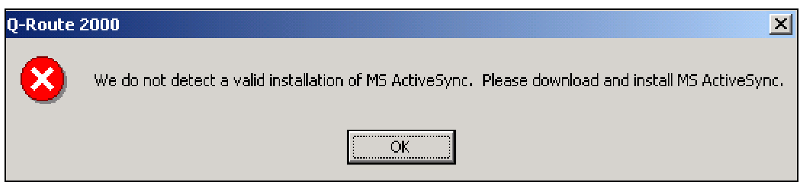
Leave your storage card in the handheld.

Preparing your Morning Card

1. Place your handheld in the cradle, or plug the cable into the handheld.
2. Wait for *ActiveSync* to sync to the handheld.
3. Go to *Customers* > *QRoute* > *Morning Card*.
4. Double-click on the **Route/Driver** name that you would like to process.
5. Enter the **Route Date** that you would like to use.
6. In the *Drive Letter* field, choose **USB**.
7. Choose the **Route Area(s)** to include on the route.
8. Press **OK** to process the route.
9. Follow the prompts on the screen to complete the process.

Warning Messages – ActiveSync

If ActiveSync is not installed on your PC, you will receive the following message:



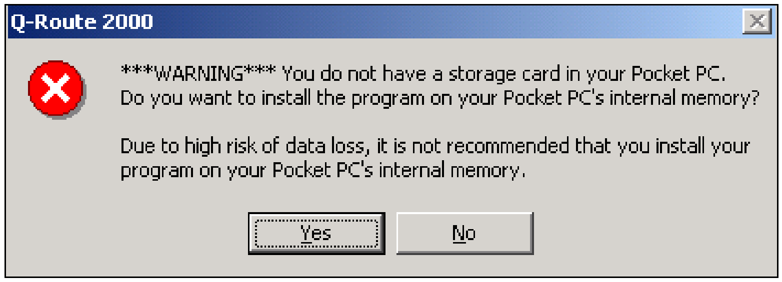
ActiveSync is a requirement when using the *Cradle/Cable* transfer method; check www.microsoft.com for the latest free download.

If the handheld is connected but ActiveSync is not running, you may receive the following message:

Ensure that ActiveSync is connected and active prior to attempting data transfer in QRoute.

Warning Message – Storage Card

If you do not have a storage card inserted in the handheld, you will receive the following message:

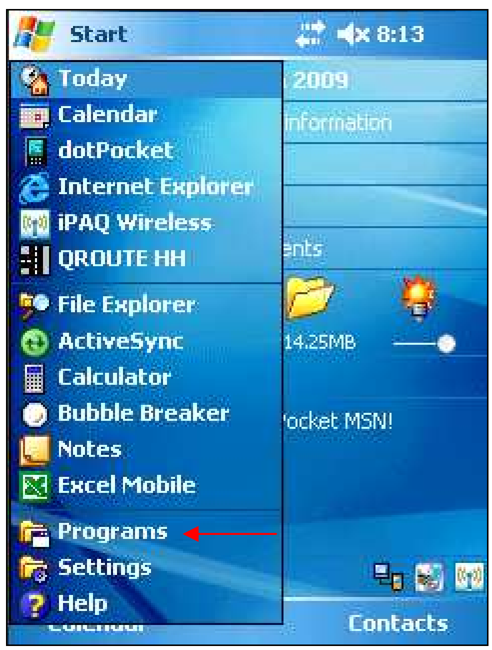


You do have the option of installing the program on the internal drive of the handheld; however, this option is not recommended — you can easily lose all QRoute data if the handheld's battery is drained using this method.

Preparing the Handheld

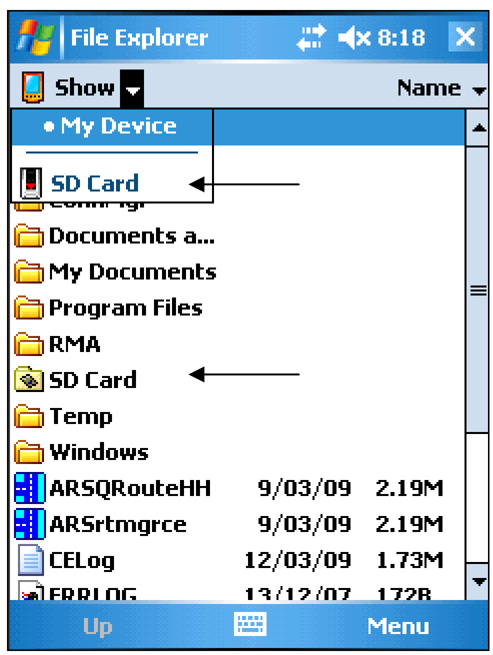
With the prepared storage card in the handheld, touch the upper-left corner of the handheld screen to view the **Start** menu.

Select **Programs** from the drop-down list.



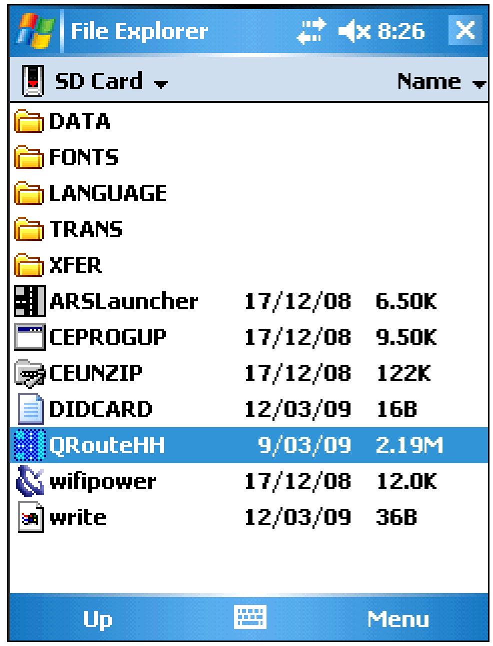
Choose **File Explorer**.

Near the top-left corner of the screen, you will see *My Documents* or *My Device*. Select the drop-down arrow next to the item and choose **SD Card**, **Storage Card**, or **CF Card**.

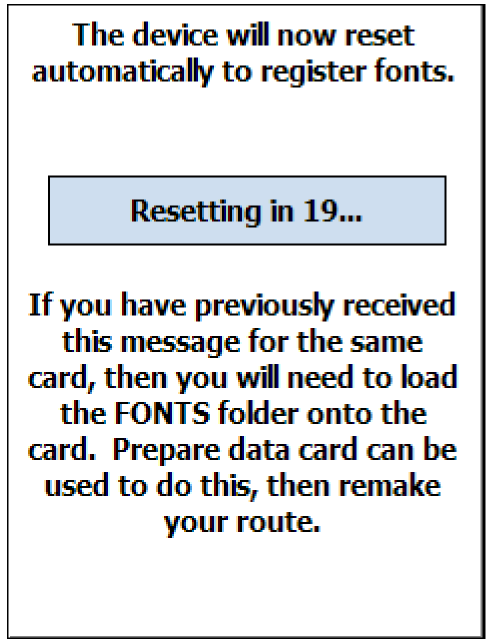


NOTE: If none of the 'Card' options mentioned above are listed, you may find it within the listed folders on the screen.

Select the '**QRouteHH'** file.



Font files will need to be registered on the handheld the first time you access QRoute. The handheld will automatically reset during this process.



NOTE: You can restart the handheld manually by pressing the reset button on the handheld with your stylus. Refer to the original manufacturer's documentation for information on the location of the reset button.

After the handheld has been reset, click on the **Start** menu.

Tap the '**QRoute HH'** option to login to the program.

This completes the handheld setup process, repeat these steps on each handheld.

Notes

Appendix C – Handheld Receipt and Printer Setup

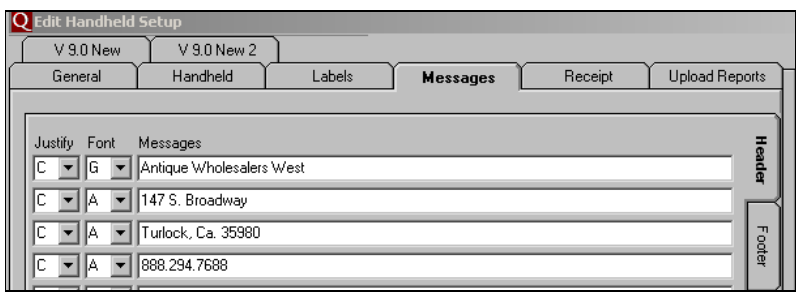
Introduction

The printed receipt given to your customers can be tailored to include your company's information. The receipt consists of three parts: header, body, and footer. In the header and footer, you may print up to ten lines of text in a variety of styles. The body is standard, and cannot be modified.

This information can be found under *QRoute* > *Setup Options* > *Handheld Setup*, on the *Messages* tab.

Setting up the Receipt

Each line in the header and footer will begin with a *Justify* and *Font* option, followed by up to 72 bytes of text.

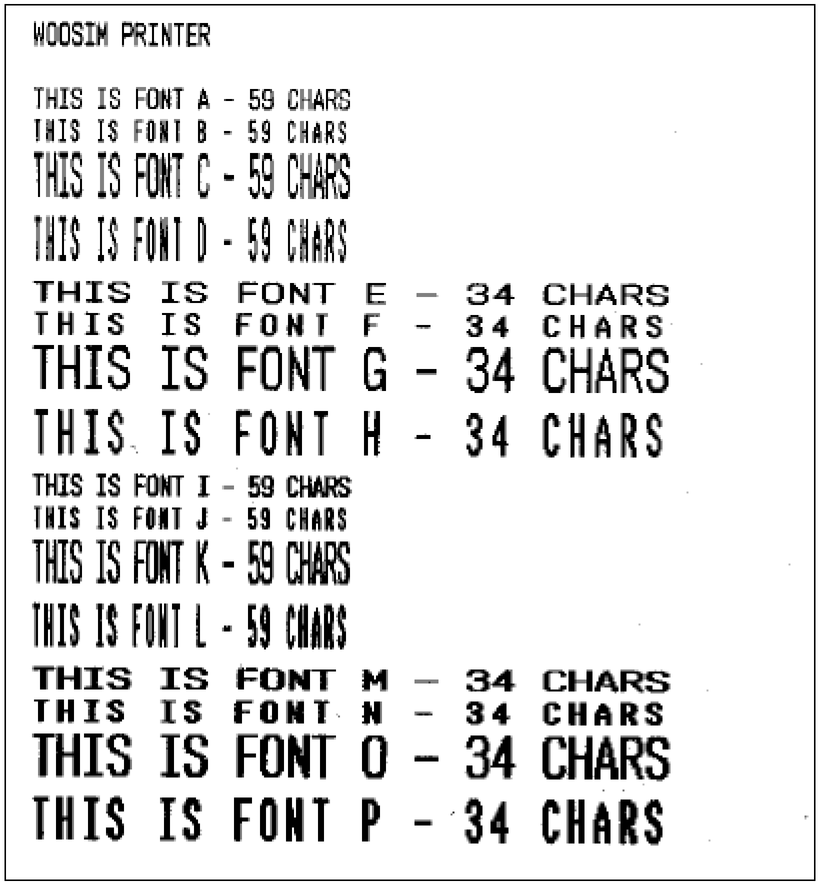


The *Justify* field controls the location of the text on the receipt, select one of the choices below:

- **C** – Centers the text on the receipt (commonly used).
- **L** – Prints the text in the left-column of the receipt.
- **R** – Prints the text in the right-column of the receipt.
- **I** – Attaches a company image file to the receipt (Refer to the next section).

The *Font* field controls the size and style of the text on the receipt, select one of the choices below based on the included examples:

Advantage BT-4 Printer (Woosim)



Citizen Printer

```
CITIZEN CMP10 PRINTER

THIS IS FONT A - 32 CHARS
THIS IS FONT B - 42 CHARS
THIS IS FONT C - 32 CHARS
THIS IS FONT D - 42 CHARS
THIS IS FONT E -
 16 CHARS
THIS IS FONT F - 21 C
HARS
THIS IS FONT G -
 16 CHARS
THIS IS FONT H - 21 C
HARS
THIS IS FONT I - 32 CHARS
THIS IS FONT J - 42 CHARS
THIS IS FONT K - 32 CHARS
THIS IS FONT L - 42 CHARS
THIS IS FONT M -
 16 CHARS
THIS IS FONT N - 21 C
HARS
THIS IS FONT O -
 16 CHARS
THIS IS FONT P - 21 C
HARS
```

```
CITIZEN PD-04 PRINTER

THIS IS FONT A - 46 CHARS
THIS IS FONT B - 55 CHARS
THIS IS FONT C - 46 CHARS
THIS IS FONT D - 55 CHARS
THIS IS FONT E - 23 CHA
RS
THIS IS FONT F - 27 CHARS
THIS IS FONT G - 23 CHA
RS
THIS IS FONT H - 27 CHARS
THIS IS FONT I - 46 CHARS
THIS IS FONT J - 55 CHARS
THIS IS FONT K - 46 CHARS
THIS IS FONT L - 55 CHARS
THIS IS FONT M - 23 CHA
RS
THIS IS FONT N - 27 CHARS
THIS IS FONT O - 23 CHA
RS
THIS IS FONT P - 27 CHARS
```

Seiko DPU-3445

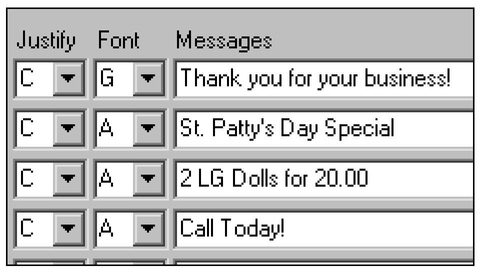
```
SEIKO PRINTER

THIS IS FONT A - 52 CHARS
THIS IS FONT B - 52 CHARS
THIS IS FONT C - 52 CHARS
THIS IS FONT D - 52 CHARS
THIS IS FONT E - 26 CHARS
THIS IS FONT F - 26 CHARS
THIS IS FONT G - 26 CHARS
THIS IS FONT H - 26 CHARS
THIS IS FONT I - 69 CHARS
THIS IS FONT J - 69 CHARS
THIS IS FONT K - 69 CHARS
THIS IS FONT L - 69 CHARS
THIS IS FONT M - 35 CHARS
THIS IS FONT N - 35 CHARS
THIS IS FONT O - 35 CHARS
THIS IS FONT P - 35 CHARS
```

In the *Messages* section, type the text that you want to print on the header of the invoice, for example:

NOTE: Do not exceed the maximum number of characters per line. In some cases, it may be necessary to view a printed receipt from the handheld before deciding on the final format.

Repeat these steps for the footer message that you would like to print as a trailing message on the invoice, for example:



Attaching Images to your Receipt

You may include a bitmap image on each customer's printed handheld receipt by following the steps below.

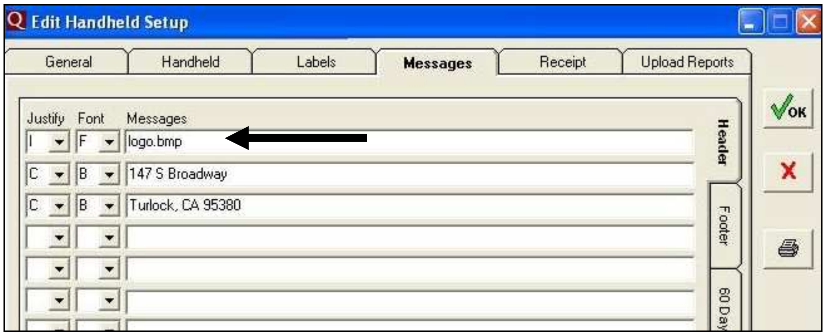
Create an image file using any image editing program desired. When formatting the image, it should be monochrome, and saved as a .BMP file within the *Handheld* folder of your *QR2000* directory (example below):

NOTE: The filename should not contain any spaces.

The dimensions of the image file will depend on the type of printer that is being used; refer to the table below:

Printer Name	Width x Height
Advantage BT-4	224 x 320
AP400	576 x 320
Seiko DPU-3445	224 x 320
O'Neil Microflash 3T	576 x 320
O'Neil Microflash 2T	384 x 320
O'Neil Microflash 2I	384 x 320

To attach the image file to the handheld receipt, enter an 'I' in the *Justify* field, an 'F' in the *Font* field, and the name of the image file (including .BMP) in the *Messages* field (below):



Click **OK** to save your changes and complete the process.

Appendix D – Handheld Optimization

Introduction

It is important to have sufficient battery power on your handheld to complete your route each day. This appendix addresses battery management, including:

- How to configure the handheld for optimal performance.
- External sources for additional power.

Optimal Performance

There are two key settings that will help you conserve power on the handheld:

- Power-Off Settings
- Backlight Settings

Change the Power-Off Settings

- Tap the **Start** menu on the handheld.
- Tap **Settings**.
- Tap the **System** tab.
- Tap the **Power** button.
- Tap the **Advanced** tab.
- Check the option **'On Battery Power'** and select **3 minutes** from the drop-down menu.
- Press **OK** to save changes.

To change the Brightness settings

- Tap the **Start** menu on the handheld.
- Tap **Settings**.
- Tap the **System** tab.
- Tap the **Backlight** button.
- Tap the **Brightness** tab.
- Within the *On Battery* option, make sure that the slider is not above the halfway point.

NOTE: Adjust this setting to meet your comfort level. Just remember: the brighter the screen, the quicker the battery will be drained.

To change the Backlighting settings

- Tap the **Start** menu on the handheld.
- Tap **Settings**.
- Tap the **System** tab.
- Tap the **Backlight** button.
- On the *Battery Power* tab, check the option: **'Turn off backlight if device is not used for'**, and select **30 seconds** from the drop-down list.
- Press **OK** to save changes.

As a final note, extreme temperatures while operating the handheld can decrease battery life. If it is either very cold, or very hot, battery life will be reduced. Handheld power performs better in moderate temperatures (45F – 100F, or 10C – 35C).

Additional Power

Most handheld devices can utilize a vehicle charger while driving to your next stop. This can be helpful if there are long periods of time between route deliveries. In some rare situations, you may find it necessary to mount a cradle in the vehicle — connected directly to the DC power of your vehicle — that you can place the handheld in while driving.

Low Battery Symptoms

There are a couple of signs to determine if your handheld is running low on battery power while on route:

- Unable to print. If the printer's 'feed' button still works, the handheld battery is likely drained.
- The handheld shuts down after a few moments.
- The backlight will not stay on.

If you are experiencing any of these symptoms regularly, make sure you are charging the handheld each night, and/or invest in a car charger for your handheld unit.

Also, you may find that after a year or two power issues might occur more frequently. It may be necessary to replace the main lithium ion battery. With the handhelds being used daily, it is not uncommon to replace these after two years.

Notes

Appendix E – Desktop Hardware Requirements

Overview

This appendix lists the latest hardware requirements at the time this document was published. Contact Advantage Route Systems or visit www.QRoute.com for the latest specifications.

Hardware

The following chart identifies hardware items that will help you run QRoute effectively.

Item	Information	Supplier
Handheld Computer	Pocket PC handheld: Mango1, MangoGT, M3, Asus, Dell, HP, Intermec and many others.	Check www.QRoute.com for the latest information.
USB Cradle	Generally an option when you order the handheld computer	Advantage M3, Asus, HP
Portable Printer	Several choices from 2.25” to 4” printing.	Advantage BT4, Citizen, Seiko, O’Neil, others. Available at: www.QRoute.com
USB Card Reader	We generally recommend SanDisk. Purchase a model that	SanDisk, available at: www.QRoute.com

Item	Information	Supplier
	supports your storage card.	
Desktop PC	Minimum 1Ghz Processor with 512MB Ram. At least a 20GB HDD and 2 USB ports available.	Many: Dell, HP, Gateway, others.
Printer	Laser or Inkjet printer.	HP, Epson, Lexmark, others.

Software

The following chart identifies software programs to help you run QRoute effectively.

Item	Information	Supplier
QuickBooks 2007-2010	Pro, Premier, or Enterprise	Intuit – Can be ordered at: QuickBooks.com
Operating System	Windows 2000, XP, Vista	Microsoft
ActiveSync, latest version available.	Required if you want to do a USB transfer	Microsoft www.Microsoft.com

Supplies

The following chart identifies additional supplies that will help you run QRoute effectively.

Item	Information	Supplier
Data Storage Card	Varies according to your Handheld. Formats are: Secure Digital, Mini-SD, Micro-SD, Compact Flash, and more.	Available at: www.QRoute.com
Carrying Case	Leather holsters, nylon pouches, and more.	Available at: www.QRoute.com
Protective Case	For moisture, drop proof, etc.	Available at: www.QRoute.com
Stylus	Screen safe, Teflon ® tip – ARS Stylus, and more.	Available at: www.QRoute.com
Screen Protectors	Clear and easy to use. Protect your handheld screen.	Available at: www.QRoute.com
Car Charger	DC Adapter for most handhelds.	Available at: www.QRoute.com
Thermal Paper for portable printers.	All sizes for all printers from ARS.	Available at www.QRoute.com

Appendix F – QRoute Floating Toolbar

Overview

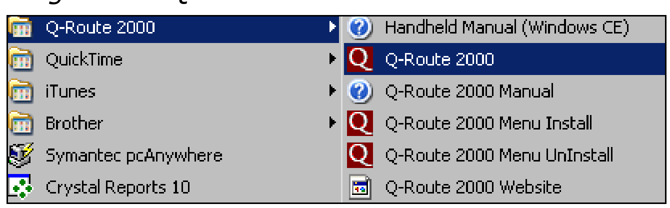
Occasionally, the QRoute menu cannot be integrated into QuickBooks; this is generally because of the computer environment or version of QuickBooks. This does not mean that QRoute cannot be used; it simply means that QRoute will function outside of the QuickBooks menu.

Follow the steps in this appendix if your QRoute menu did not show up in the QuickBooks menu after installation.

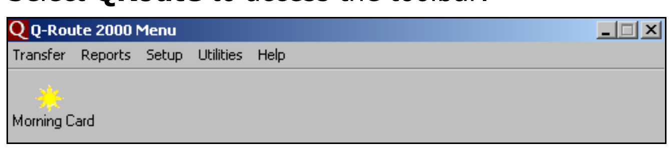
QRoute Toolbar

To access the QRoute Toolbar:

1. Login to QuickBooks.
2. In Windows, select your Start menu and browse to *Programs > QRoute*.



3. Select **QRoute** to access the toolbar.



The toolbar contains all of the options detailed in this manual and can be moved to any location on your screen. **All references to the integrated menu in the manual should be ignored.**

NOTE: The toolbar can only be accessed when you are logged in to QuickBooks.

Appendix G – Windows Vista Installation Procedures

Overview

This appendix guides you through the installation of QRoute on a PC running *Microsoft Windows Vista*. The installation process should be followed exactly as detailed within this appendix.

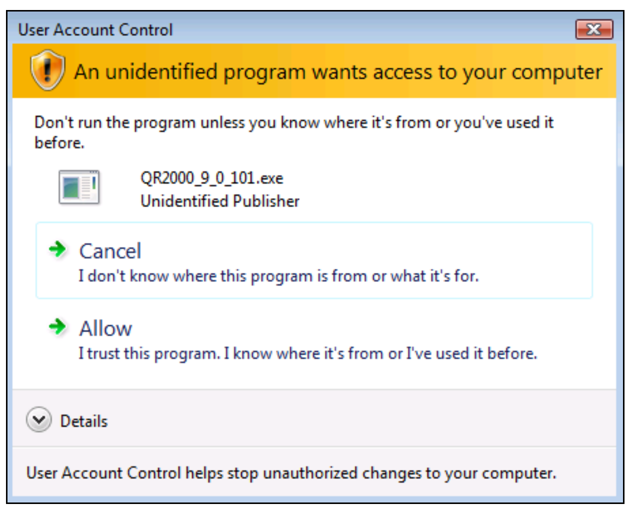
If you require additional assistance with your installation, contact our technical support department at 209.485.9395.

Installation Steps

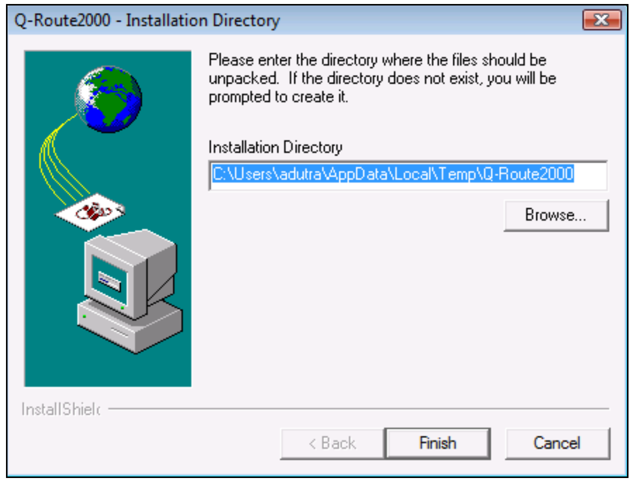
1. Download the latest QRoute release from www.QRoute.com.

NOTE: Must be version 9.1 or above.

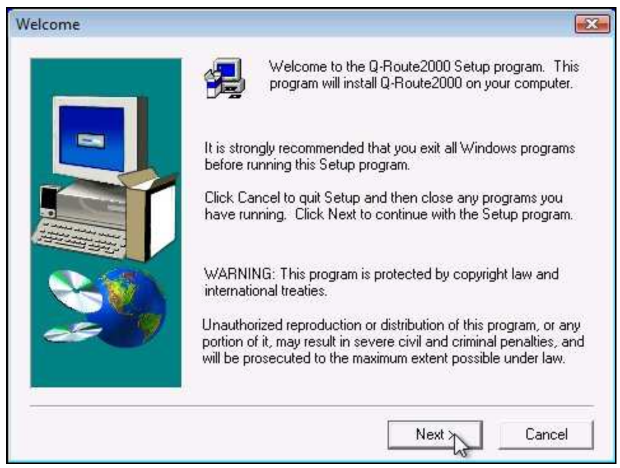
2. Double-click on the QRoute installation file.
3. When prompted by the *User Account Control* dialog screen, select **Allow**.



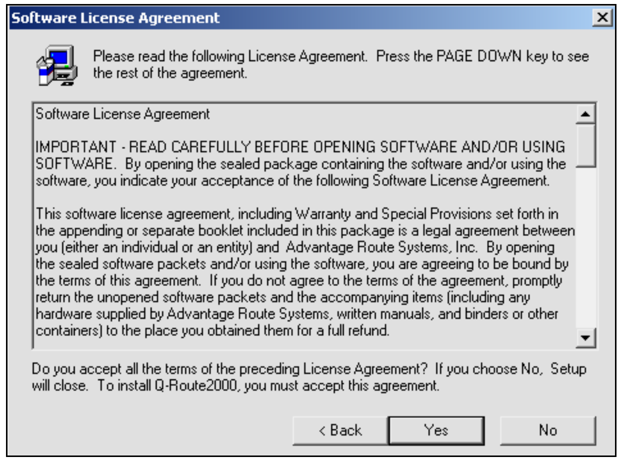
4. Select **Finish** to extract the setup files.



5. Click **Next** on the *Welcome* screen to continue.



6. Carefully read the license agreement. If you agree to the terms displayed, select **Yes**.

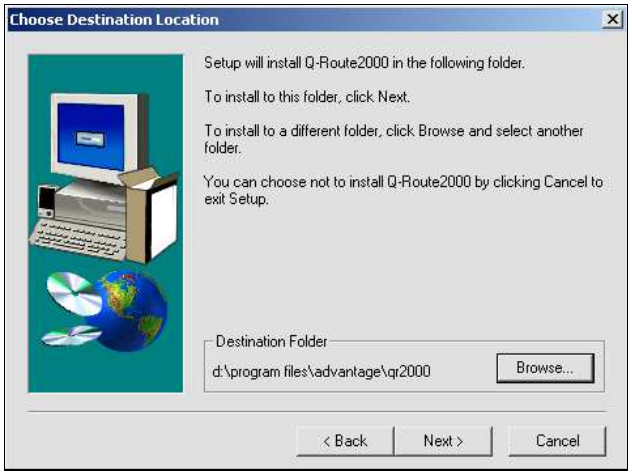


NOTE: If you do not agree to the terms of the license agreement, select **No**. This will cancel the installation process.

7. You will now be prompted with the **Setup Type** menu. There are three options to choose from:
   - ***Server/Standalone:*** For installations on a file server, or single user environment.
   - ***Client:*** If you have a network with more than one user, you should first install QRoute on the server, and then go to each workstation and run the *Client* install. This will give additional users access to the same data.
   - ***Update:*** Use this option to update an existing version of QRoute.

   Make your selection and click **Next**.

8. Choose the location to install the QRoute package. Unless you have a conflict with other programs, use the default location shown.



NOTE: If you are installing QRoute on a file server, make sure you install the program in a network shared directory so that all other workstations may access the program.

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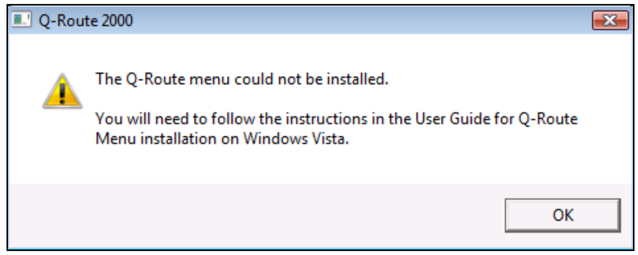
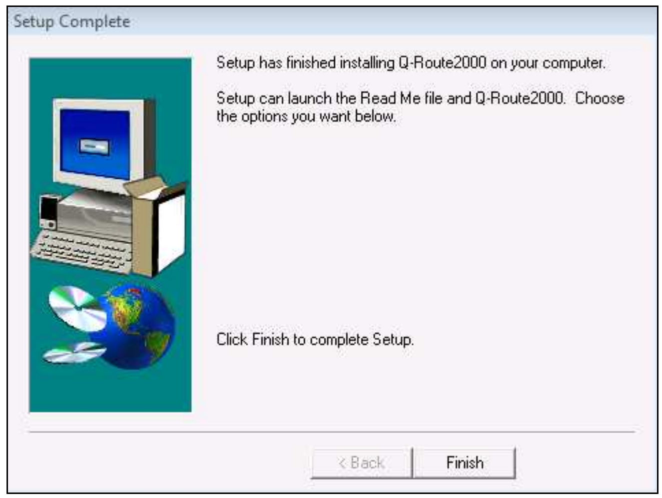
9. Once the file installation is complete, choose **Finish**.

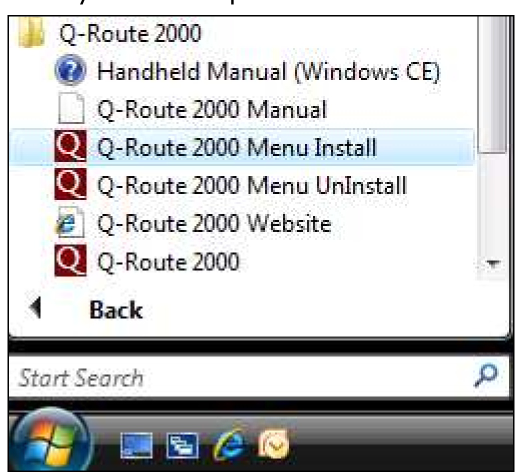
10. Click **OK** when the following dialog box is displayed:



11. Choose **Finish** on the QRoute installation screen once it appears.



12. Open QuickBooks and login to your company file.
13. Choose the **QRoute Menu Install** from *Start > All Programs* on your desktop.



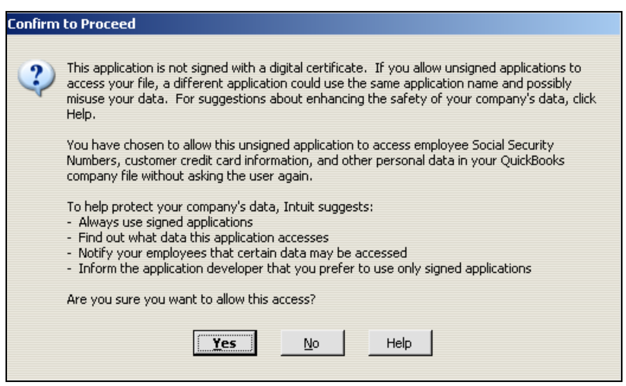
14. A dialog screen similar to the following will appear:

A. Under the question: 'Do you want to allow this application to read and modify the company file?' Choose the option: **Yes, whenever this QuickBooks company file is open.**

B. Additionally, check the option: **Allow this application to access Social Security Numbers and customer credit card information.**

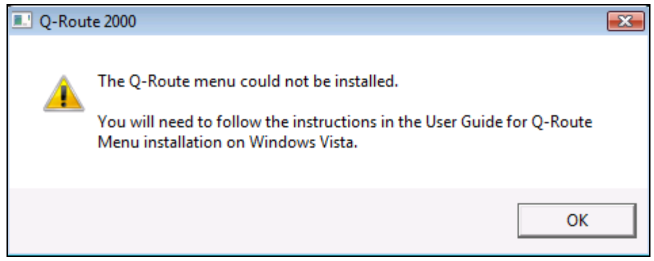
15. Select **Continue**.

16. You will now be prompted with a 'Confirm to Proceed' screen, click **Yes** to continue, or **No** to cancel.

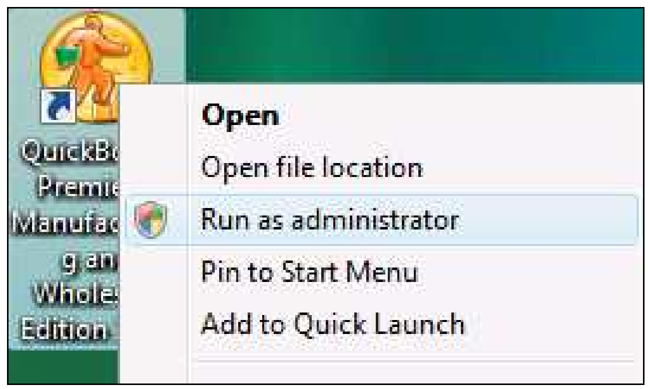


NOTE: If prompted, click **Done** when the *Program Access* confirmation window appears (not all versions).

17. You will receive the same dialog screen that was displayed in *Step 10*. Click **OK** to the message and exit the QuickBooks program.



18. Right-click on your QuickBooks icon (from the *Start Menu* or desktop shortcut) and choose the **Run as Administrator** option from the menu.



19. Choose **Continue** when the *User Account Access* dialog screen is displayed, and login to your QuickBooks company file.
20. Once you have successfully logged in to your QuickBooks company file, exit the program again.
21. Login to your company file and QRoute will now be available within the *Customers* menu.

You have now successfully installed QRoute on a *Windows Vista* PC. At this point, refer to *Step 9* on *Page 12* to continue.

Notes

Appendix H – Advanced Communications

Introduction

The *Advanced Communications Module* allows you to wirelessly transfer route data to and from each handheld daily. This can be done within the office, or from a remote location, depending on your needs. In this appendix we will guide you through setting up the module using two methods of transfer: Wi-Fi and Bluetooth Modem. If you would like to use an alternate configuration, refer to the settings used in each example to assist you, or contact Advantage Route Systems.

Preparation

Before you can get started with the *Advanced Communications Module,* there are a few items that need to be addressed.

Using Wi-Fi Transfer:

1. You will need to configure FTP access to the PC that will be running the *Advanced Communications Module*.
2. Each handheld will need to be configured for wireless access.

Using Bluetooth Modem Transfer:

1. A dial-up modem is needed on your PC. This is used to receive data from the handheld.
2. Wherever the handheld is located, it is necessary to have a dedicated phone line, an external Bluetooth modem, and a docking cradle.

Both of these transfer methods are covered in detail within this appendix. Refer to the appropriate section based on your method of transfer.

Wi-Fi Transfer

On a daily basis, the handheld will connect to the host computer to send and receive data through an active Wi-Fi connection. In order to use the Wi-Fi transfer method, you must configure the following:

- *FTP Transfer*
- *Handheld Access Point*

Each item is discussed below.

FTP Transfer

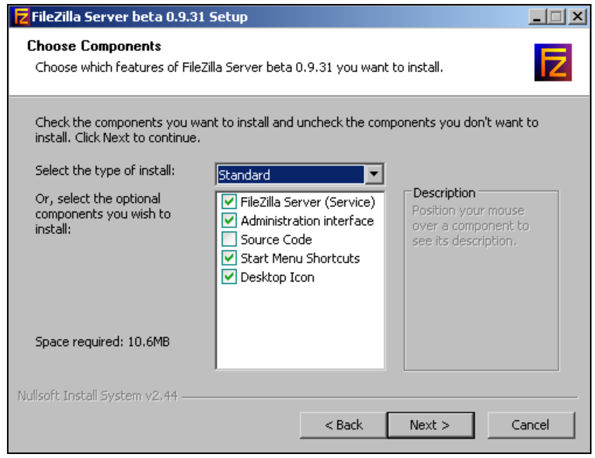
There are numerous programs available to configure FTP transfers on your local PC. Many of them are free programs readily available on the Web that allow you to easily manage FTP transfers. In this document, we will walk you through installing and configuring a popular FTP program called FileZilla. Of course, there are many alternatives to FileZilla and since most of the programs are similar, you should be able to apply the same settings covered in this section.

FileZilla

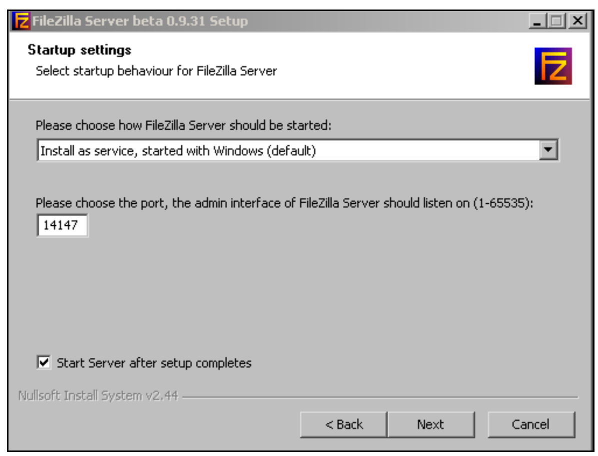
1. Download the *FileZilla Server* program from the following link: http://filezilla-project.org/

2. After the file has been downloaded, double-click on it to initiate the installation.
3. Choose **I Agree** or **Cancel** to the *License Agreement*.

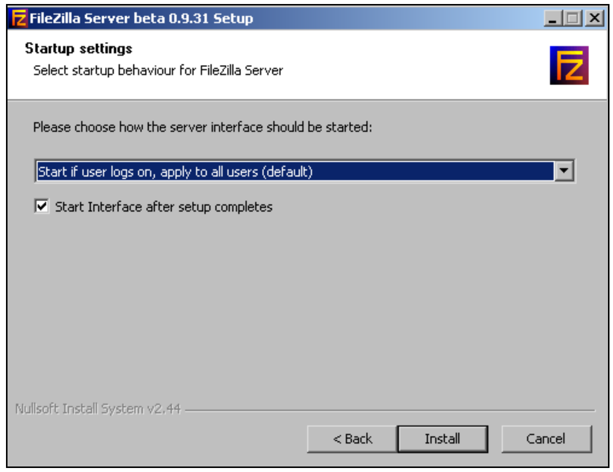
4. On the *Choose Components* screen, the installation type should be *Standard*. Select **Next**.



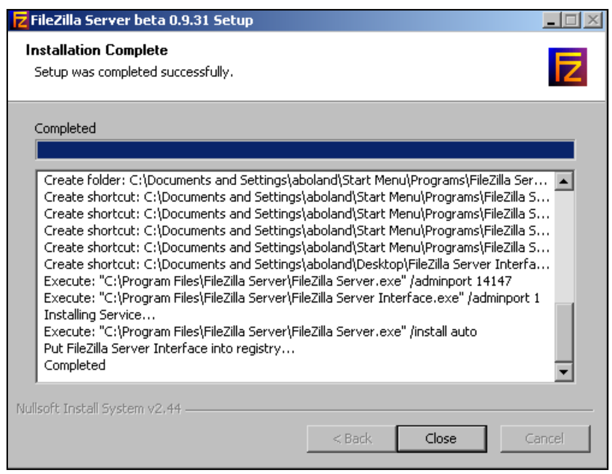
5. Choose an installation directory or use the default directory listed and click **Next**.
6. On the *Startup Settings* screen, select the **Install as service, started with Windows (default)** option and use the default port number displayed. Choose **Next**.



7. Select the option **Start if user logs on, apply to all users (Default)** and click **Install**.



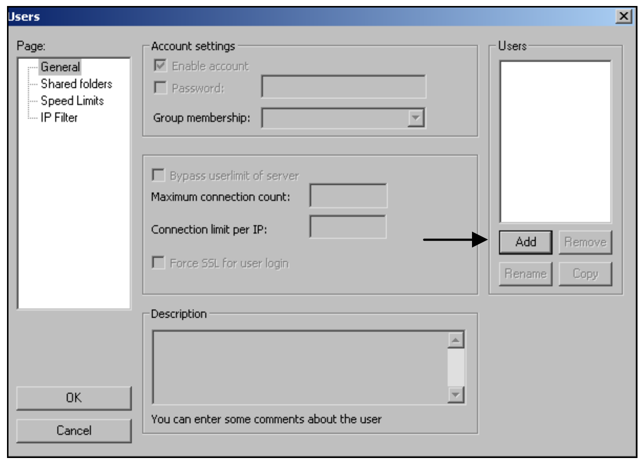
8. The installation will begin. Once complete, choose **Close**.



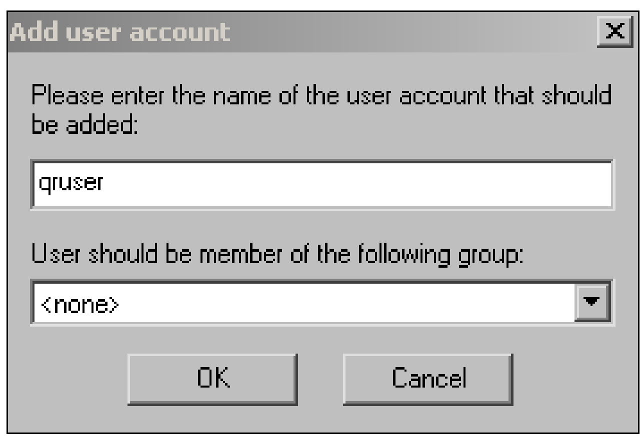
9. Open the **Filezilla Server Interface** by going to *Start > Programs > Filezilla Server*.

10. Select *Edit* > *Users* within the *FileZilla Server* screen.

11. Click **Add**.

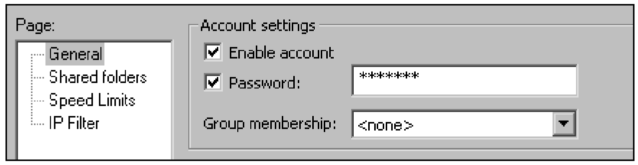


12. Enter a user name that will be used for FTP transfers. Click **OK** to continue.

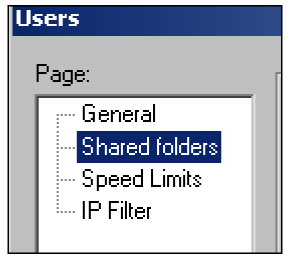


NOTE: The user name should be easy to identify for QRoute transfers (e.g., qruser).

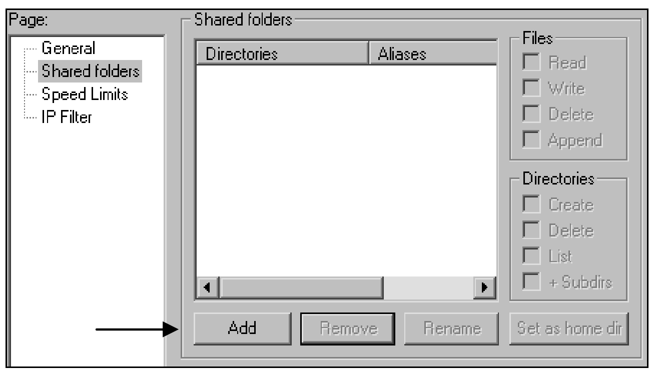
13. Check the **Password** option on the screen and enter a password that will be used for all FTP transfers.



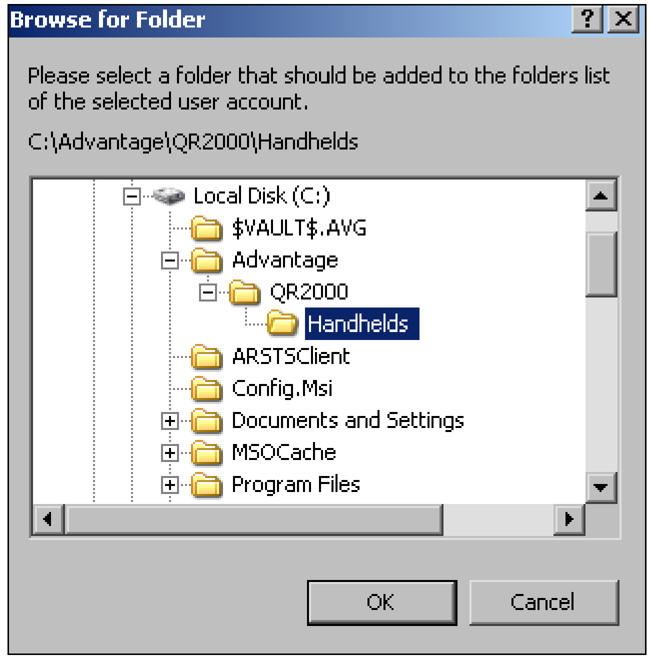
14. Select the **Shared Folders** option.



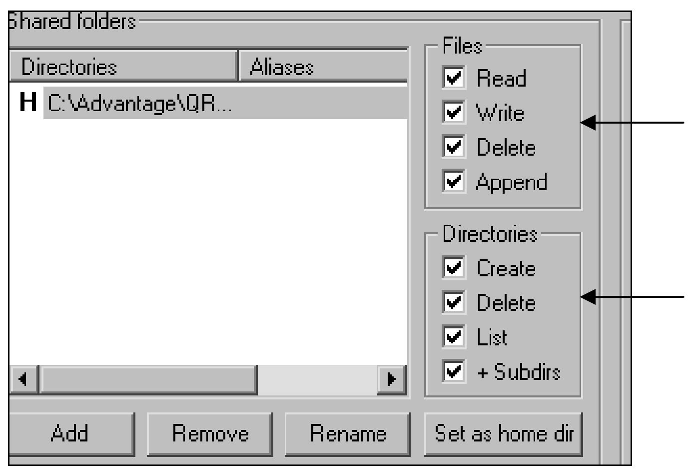
15. Choose **Add**.



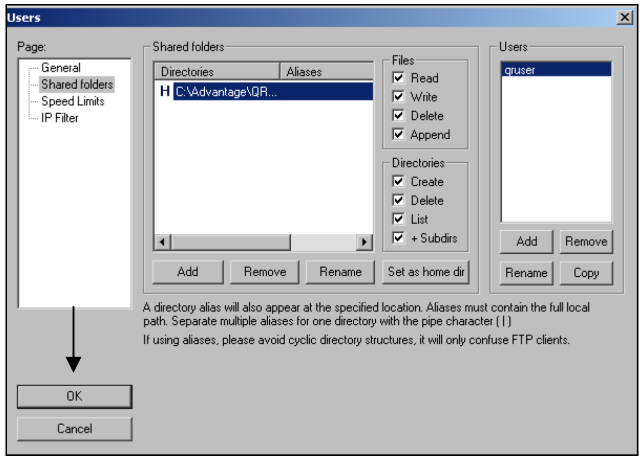
16. Browse to the *QR2000* directory and select the **Handhelds** folder. Click **OK**.



17. Place a checkmark in all of the options available under the *Files* and *Directories* section of the screen.



18. Click **OK** to complete the setup process.

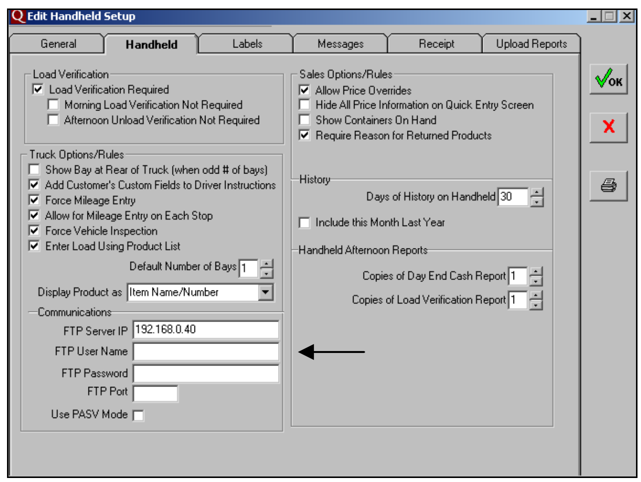


QRoute Settings

There are a few modifications that need to be made within QRoute. Follow the steps below to complete the setup process.

1. Navigate to *Customers* > *QRoute* > *Setup Options* > *Handheld Setup* and select the **Handheld** tab.
2. In the *Communications* section of the screen, enter the **FTP Server I.P.** (Internet Protocol) address that the handheld should connect to for FTP transfers.

NOTE: The I.P. address used in the example below is an internal address (starts with 192) and FTP transfers will only take place within the office.



NOTE: To transfer data remotely, you will generally need to use an external I.P. address. This requires that you allow access to the local PC by opening ports on your firewall or router (i.e., ports 20 and 21). If you are on a network with multiple PC's connected to the internet from the same source, you may need to use port forwarding. Consult an I.T. professional or contact ARS if you have questions on connectivity.

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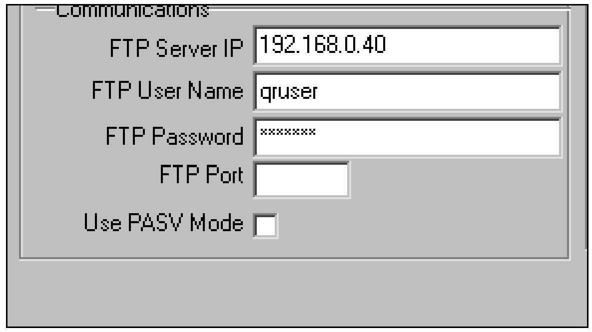
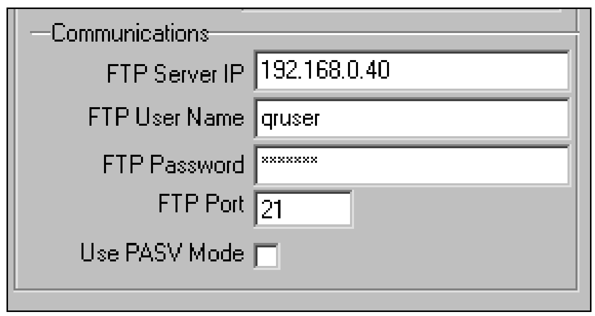
3. Enter the **FTP User Name** and **Password** that you previously established within FileZilla.



4. Enter the **FTP Port** that you will be using for data transfers. The standard port is 21, but can vary depending on your configuration.



NOTE: *Use PASV Mode* should only be selected if you have been instructed to do so by an I.T. professional.

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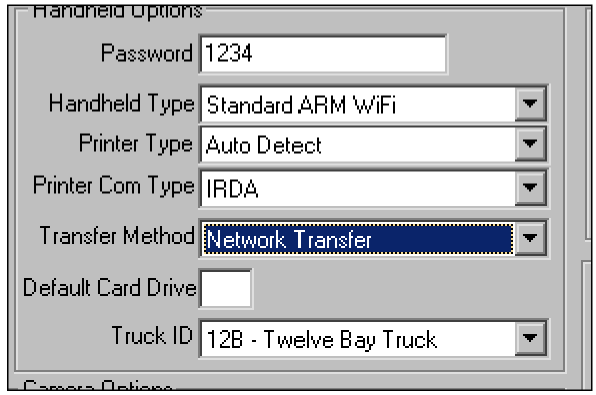
5. Click **OK** to save your changes.
6. Browse to *QRoute* > *Setup Options* > *Driver Setup*.
7. Double-click on any driver that will be using the wireless transfer method.

8. In the *Transfer Method* field, choose **Network Transfer**.



NOTE: If there is a drive letter entered in the *Default Card Drive*, remove it at this point.

9. Click **OK** to save your changes.

Repeat these steps for each driver that will be using wireless transfer.

Handheld Settings

Follow the steps below to configure the handheld for Wi-Fi transfer.

NOTE: The handheld being used in this tutorial is an HP Ipaq, your wireless options may vary slightly.

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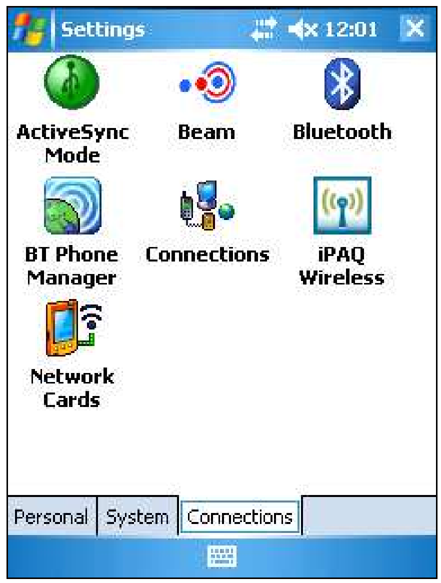
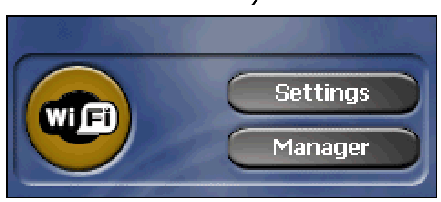
1. Navigate to *Start* > *Settings* > *Connections* and choose the **Wireless** option (or *Wireless Manager*).

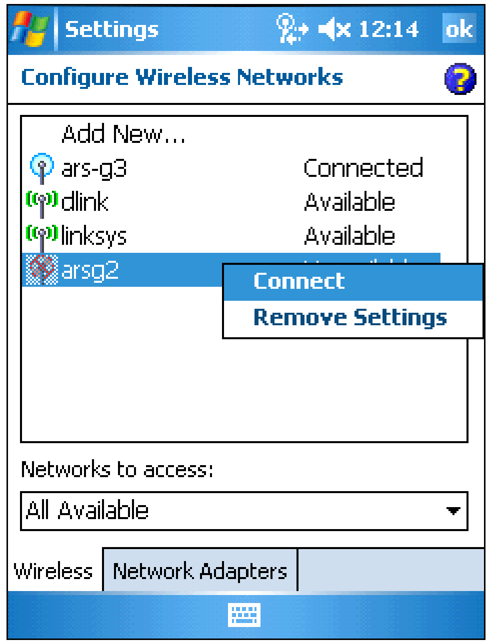


2. Click on the **Wi-Fi** option to enable it (make sure there is not an 'X' over it).



3. Choose **Settings** (or *Menu* > *Wi-Fi Settings*).

4. Tap and hold on an available access point and choose **Connect**.



NOTE: You may be required to enter a WEP key or password for security purposes.

The handheld will need to be connected to an available Wi-Fi connection prior to transferring data. For instructions on adding a new connection or further information on your handheld wireless options, refer to the original handheld manufacturer's documentation.

To complete the process and begin using wireless transfers, you will need to process a *Morning Card* (using a card reader or cradle) for each handheld that will use the *Advanced Communications Module*. If you have not previously installed QRoute on your handheld(s), refer to *Appendix B*.

Bluetooth Modem Transfer

The Bluetooth modem transfer method allows the driver to transfer data to and from the office using a standard dial-up connection.

Desktop Configuration

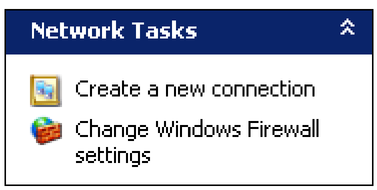
If your drivers are going to transfer their data using a dial-up connection, you will need to do the following:

- Install an internal or external modem on the host PC.
- Configure an incoming connection on the host PC.
- Set up FTP transfers.

Configuring an incoming connection is relatively simple to do. Refer to the steps listed for your operating system.

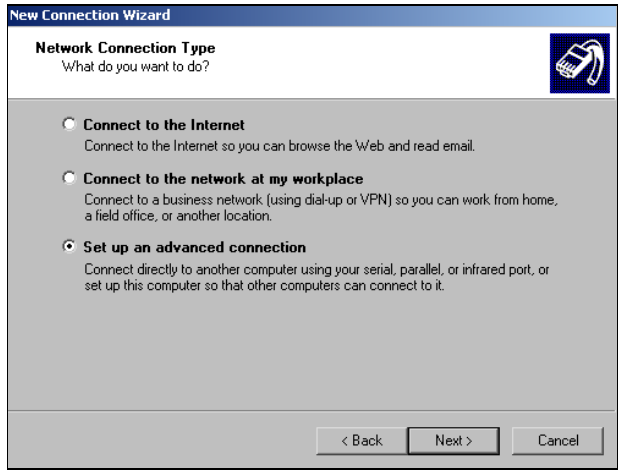
Windows XP Users

1. Navigate to *Start > Control Panel > Network Connections*.
2. Select **Create a New Connection**.

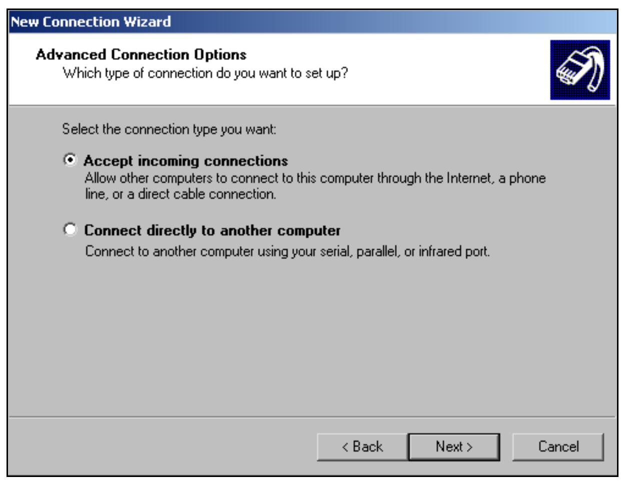


3. On the welcome screen, choose **Next**.

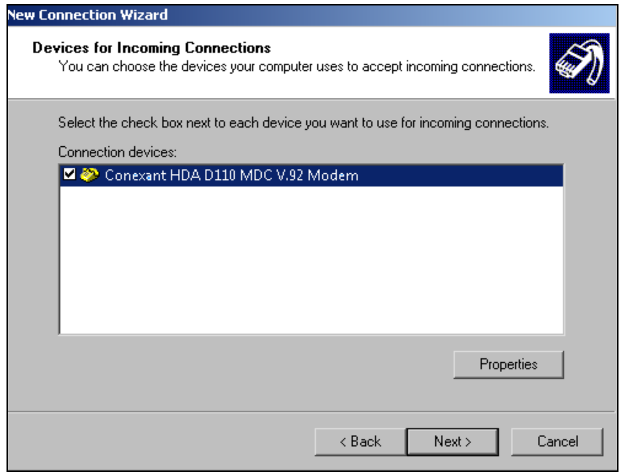
4. Select the **Set up an advanced connection option** and click **Next**.



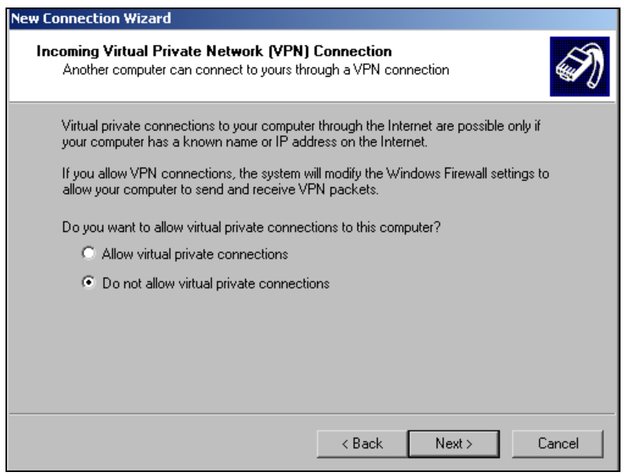
5. Choose the **Accept incoming connections** option.



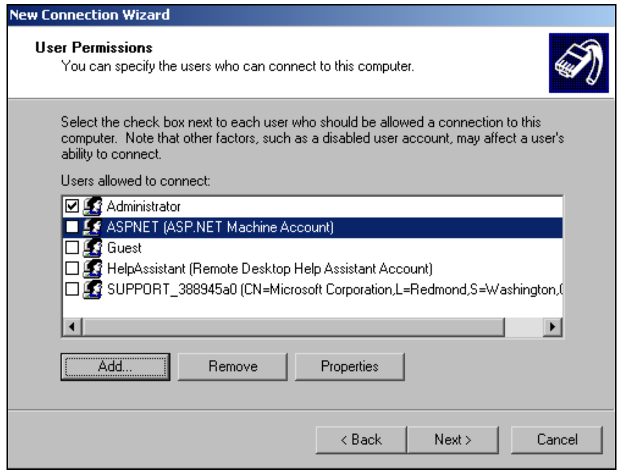
6. Check the box next to your dial-up modem and click **Next**.



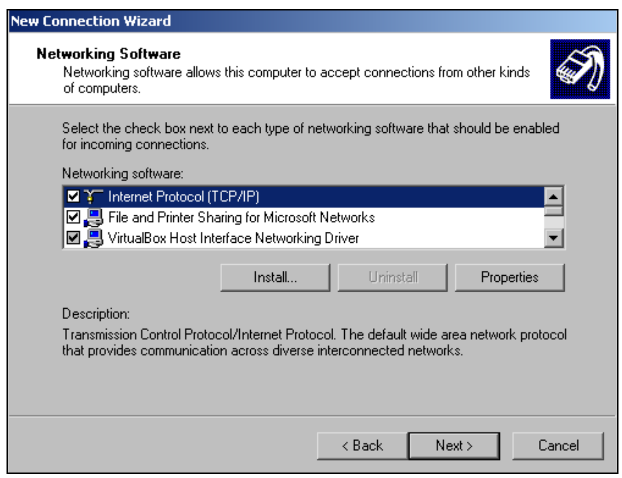
7. Choose the option **Do not allow virtual private connections** and click **Next**.



8. Select all users that can connect to the PC through dial-up or choose **Add** to create a new one — this information will also be entered on the handheld later. Once you have selected at least one user, click **Next**.



9. On the *Networking Software* screen, leave all items checked by default and choose **Next**.

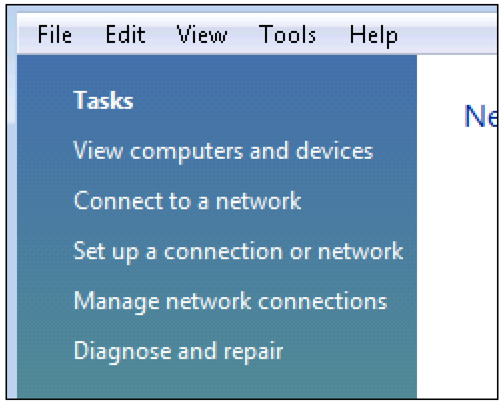


10. Choose **Finish** to complete the configuration.

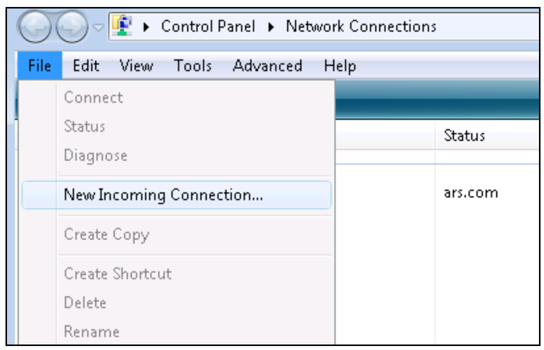
Your new connection is now complete. Refer to page 337 to learn how to set up FTP transfers.

Windows Vista Users

1. Navigate to *Start > Control Panel > Network Connections*.
2. Select **Manage network connections**.



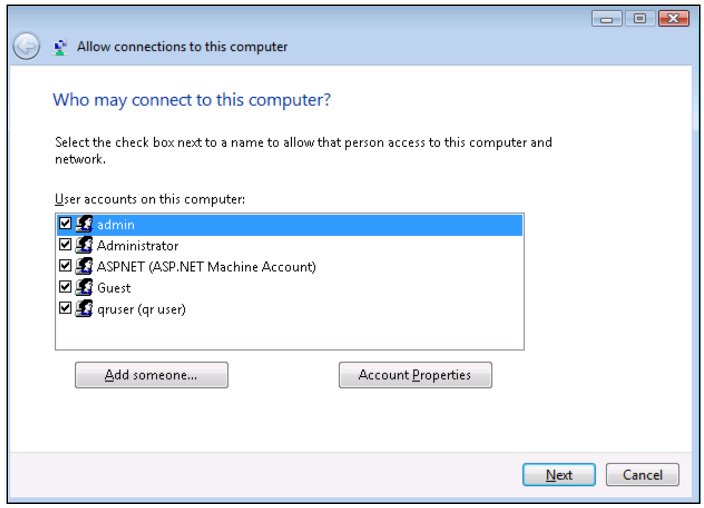
3. Select *File > New Incoming Connection*.



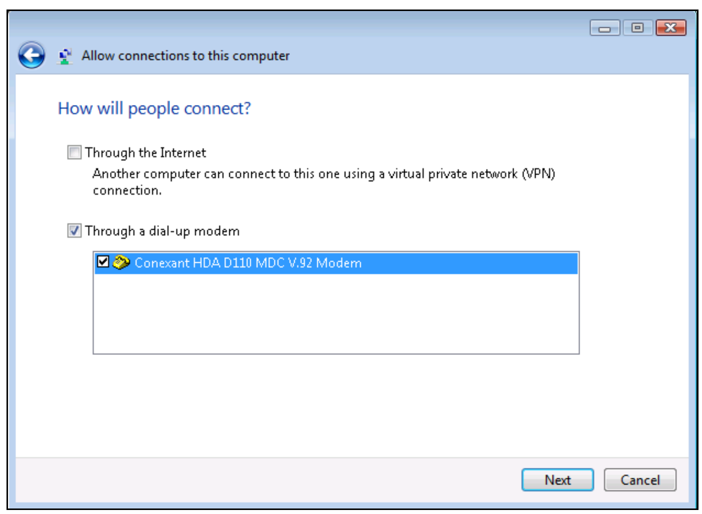
NOTE: If you do not have a *File* option available, click the **Alt** key on your keyboard.

---

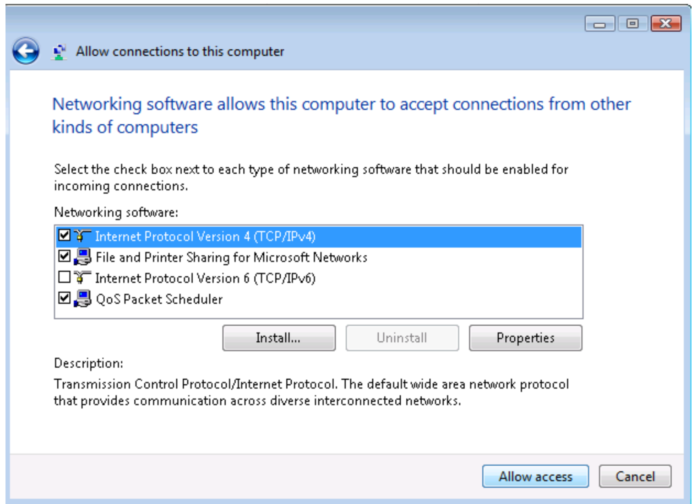
4. Select all users that will connect to the PC through dial-up or choose **Add someone** to create a new one — this information will also be entered on the handheld later. Once you have selected at least one user, click **Next**.



5. Choose the **Through a dial-up modem** option and place a checkmark next to the modem you will be using for incoming connections.



6. Leave all of the items checked by default and choose **Allow access** to complete the set up process.



Your new connection is now complete. Continue to the next section to learn how to configure FTP transfers.

FTP Transfer

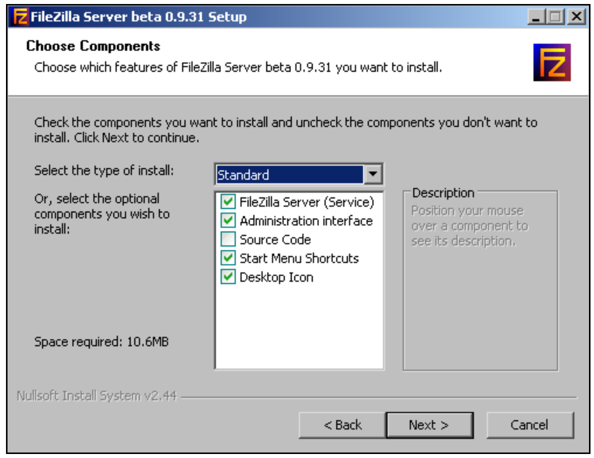
On a daily basis, the handheld will connect to the host computer via Bluetooth modem to send and receive data. In order for this process to function correctly, the data must be transferred using an FTP transfer. There are numerous programs available to configure FTP transfers on your local PC. Many of them are free programs readily available on the Web that allow you to easily manage FTP transfers. In this document, we will walk you through installing and configuring a popular FTP program called FileZilla. Of course, there are many alternatives to FileZilla and since most of the programs are similar, you should be able to apply the same settings covered in this section.

FileZilla

1. Download the *FileZilla Server* program from the following link: http://filezilla-project.org/

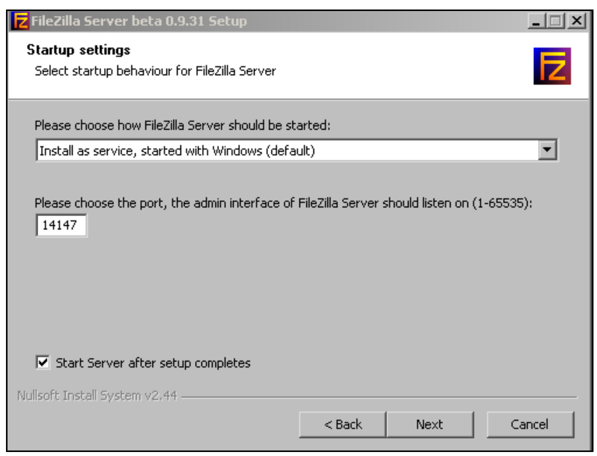
2. After the file has been downloaded, double-click on it to initiate the installation.
3. Choose **I Agree** or **Cancel** to the *License Agreement*.

4. On the *Choose Components* screen, the installation type should be *Standard*. Select **Next**.

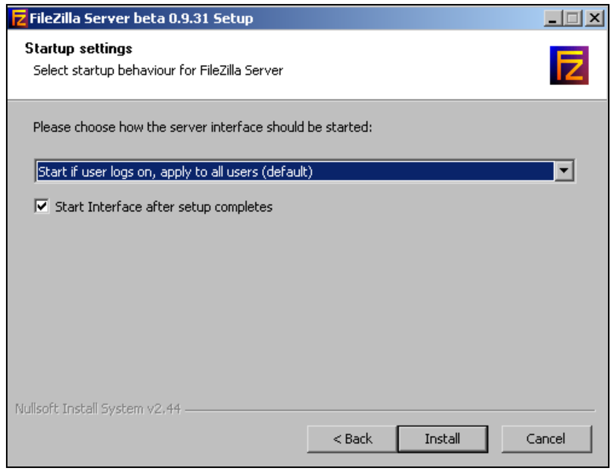


5. Choose an installation directory or use the default directory listed and click **Next**.

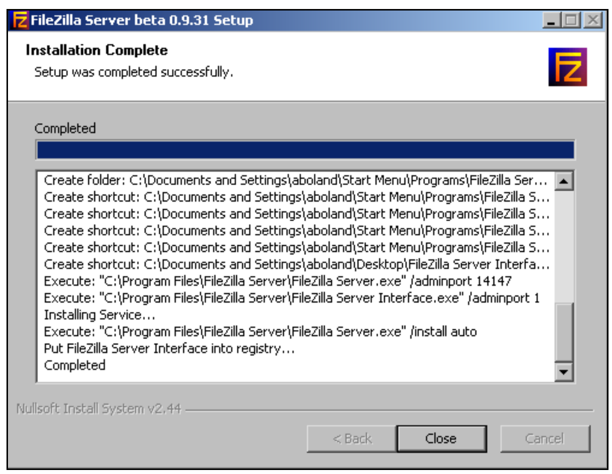
6. On the *Startup Settings* screen, select the **Install as service, started with Windows (default)** option and use the default port number displayed. Choose **Next**.



7. Select the option **Start if user logs on, apply to all users (Default)** and click **Install**.

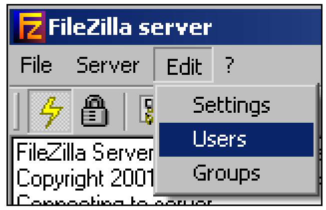


8. The installation will begin. Once complete, choose **Close**.

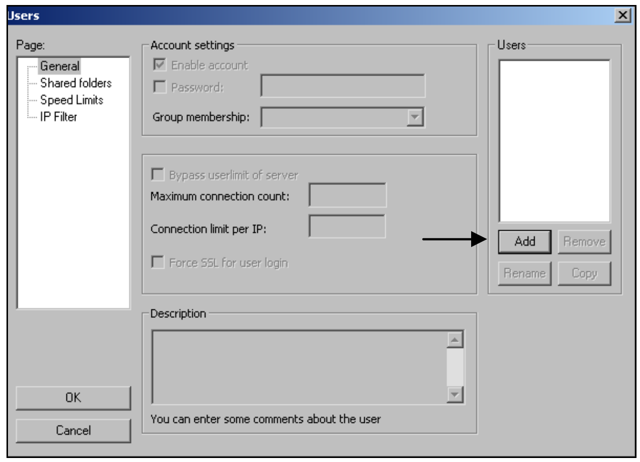


9. Open the **Filezilla Server Interface** by going to *Start > Programs > Filezilla Server*.

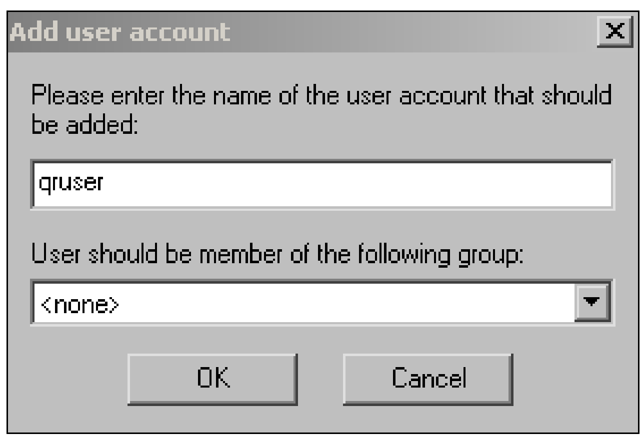
10. Select *Edit > Users* within the *FileZilla Server* screen.



11. Click **Add**.

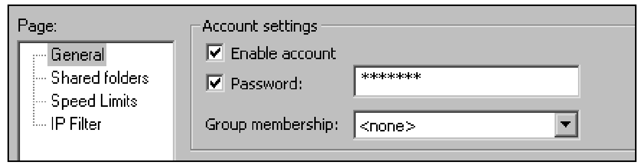


12. Enter a user name that will be used for FTP transfers. Click **OK** to continue.

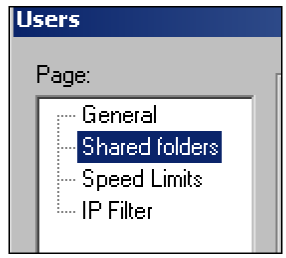


NOTE: The user name should be easy to identify for QRoute transfers (e.g., qruser).

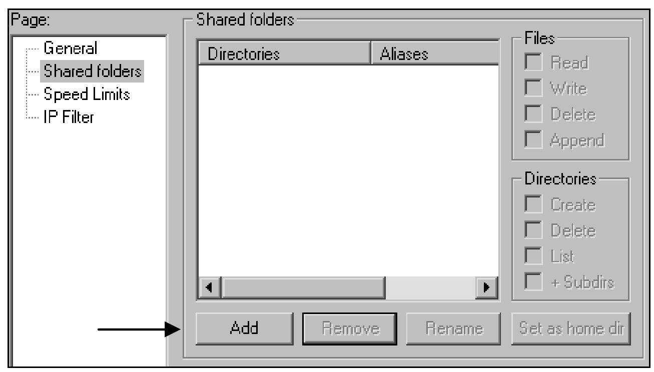
13. Check the **Password** option on the screen and enter a password that will be used for all FTP transfers.



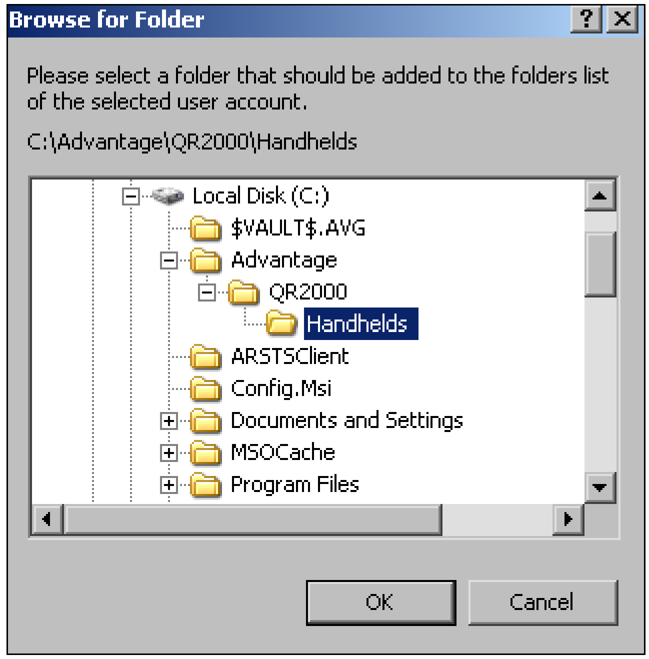
14. Select the **Shared Folders** option.



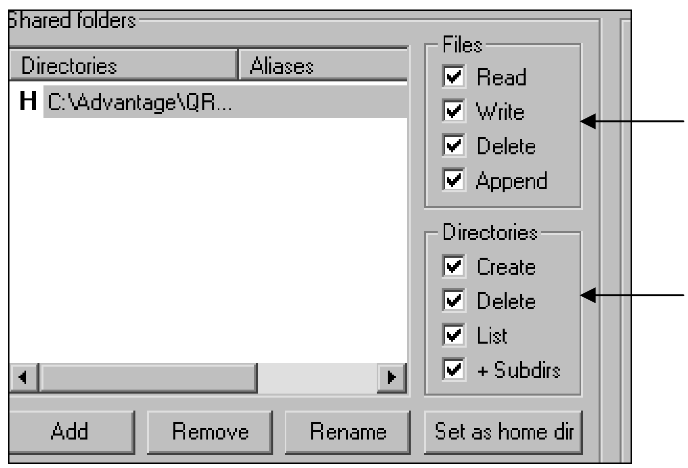
15. Choose **Add**.



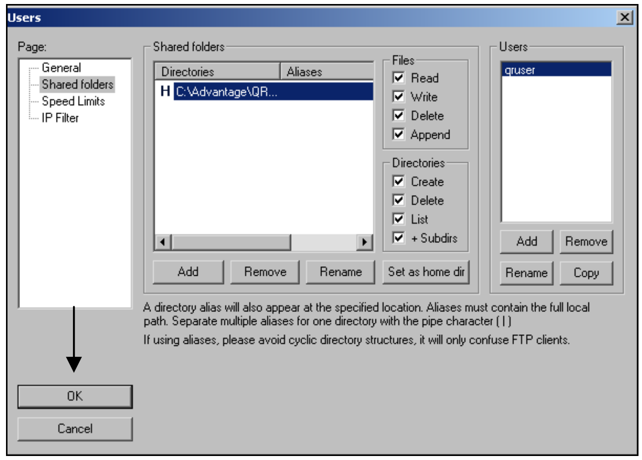
16. Browse to the *QR2000* directory and select the **Handhelds** folder. Click **OK**.



17. Place a checkmark in all of the options available under the *Files* and *Directories* section of the screen.



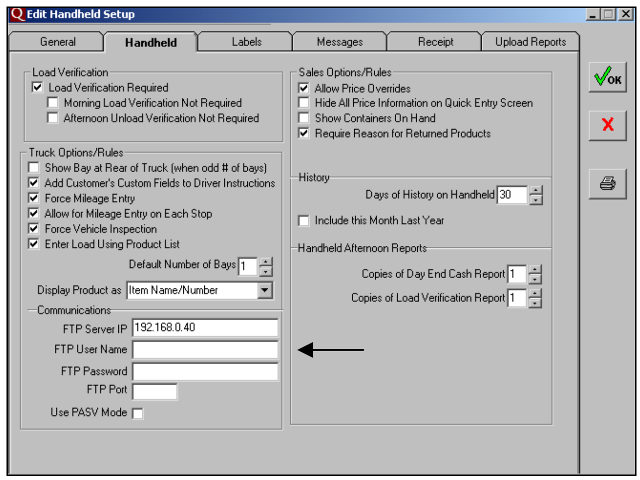
18. Click **OK** to complete the setup process.



QRoute Settings

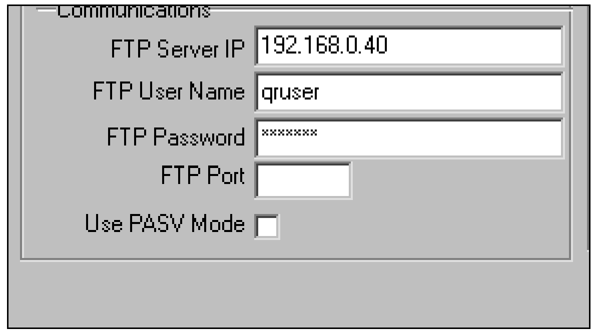
There are a few modifications that need to be made within QRoute. Follow the steps below to complete the setup process.

1. Navigate to *Customers* > *QRoute* > *Setup Options* > *Handheld Setup* and select the **Handheld** tab.
2. In the *Communications* section of the screen, enter the **FTP Server I.P.** (Internet Protocol) address that the handheld should connect to for FTP transfers.

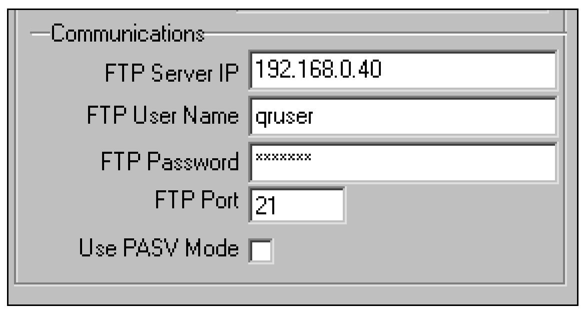


NOTE: To transfer data remotely using a direct modem connection to the office, you will generally use an internal I.P. address (starts with 192). However, if the driver connects to an internet service provider outside of the office, this will require that you allow access to the local PC by opening ports on your firewall or router (i.e., ports 20 and 21) so that the driver can transfer data through the internet. If you are on a network with multiple PC's connected to the internet from the same source, you may need to use port forwarding. Consult an I.T. professional or contact ARS if you have questions on connectivity.

3. Enter the **FTP User Name** and **Password** that you previously established within FileZilla.



4. Enter the **FTP Port** that you will be using for data transfers. The standard port is 21, but can vary depending on your configuration.



NOTE: *Use PASV Mode* should only be selected if you have been instructed to do so by an I.T. professional.

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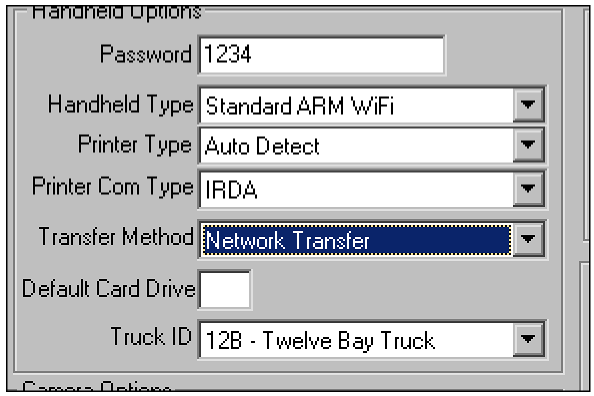
5. Click **OK** to save your changes.

Driver Setup

1. Browse to *QRoute* > *Setup Options* > *Driver Setup*.
2. Double-click on any driver that will be using the wireless transfer method.
3. In the *Transfer Method* field, choose **Network Transfer**.



NOTE: If there is a drive letter entered in the *Default Card Drive*, remove it at this point.

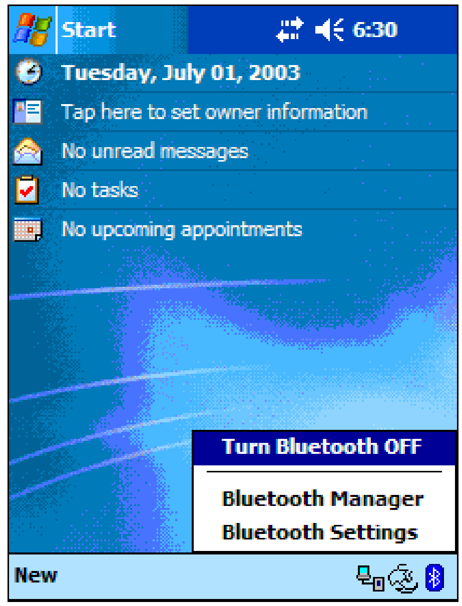
4. Click **OK** to save your changes.

Repeat these steps for each driver that will be using wireless transfer.

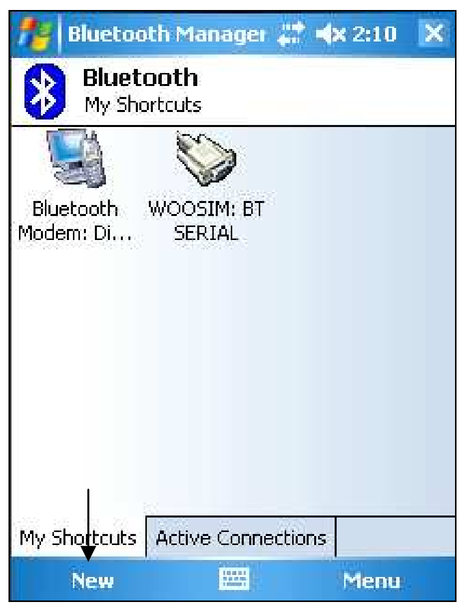
In the next section, we will guide you through setting up your handhelds for Bluetooth modem transfers.

Handheld Configuration

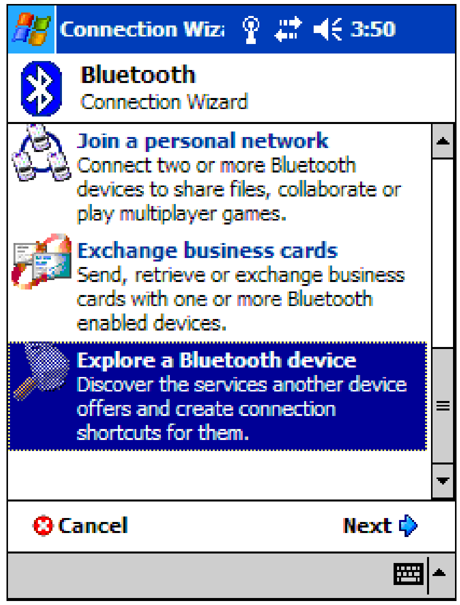
1. Navigate to your handheld's Bluetooth menu. This can generally be found on the *Main Menu* or within *Start > Settings*.



2. Choose **New**.



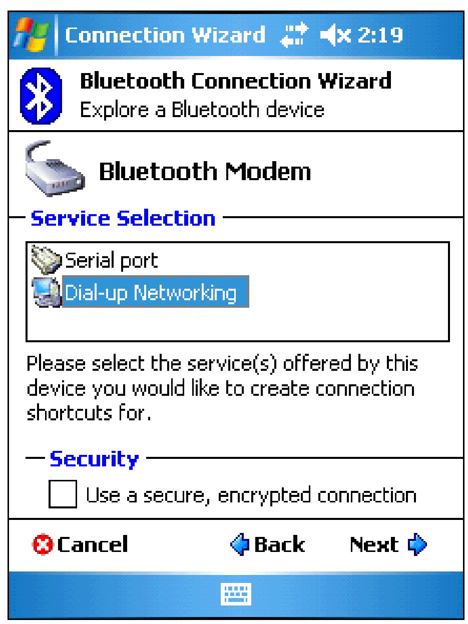
3. Turn on your *Bluetooth Modem* and tap **Explore a Bluetooth device**.



4. Select your Bluetooth modem from the list once it appears.

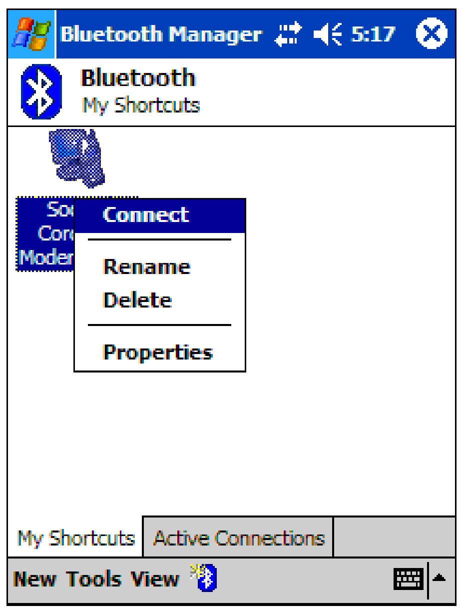
5. You will be prompted to enter the device passkey. This information can generally be found on the bottom of the Bluetooth modem. Enter the passkey and click **OK**.

6. Choose **Dial-up Networking** and click **Next**.

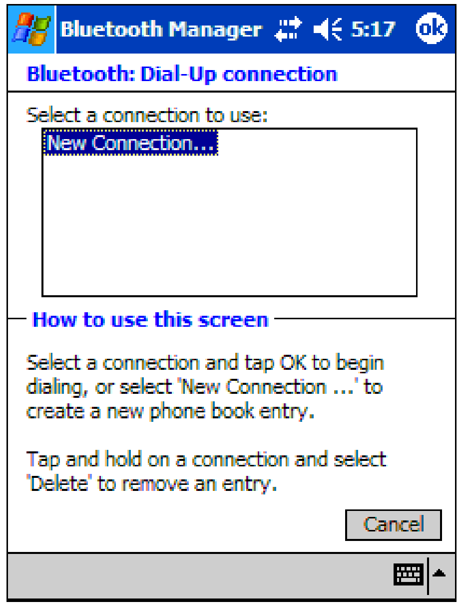


7. Choose **Finish**.

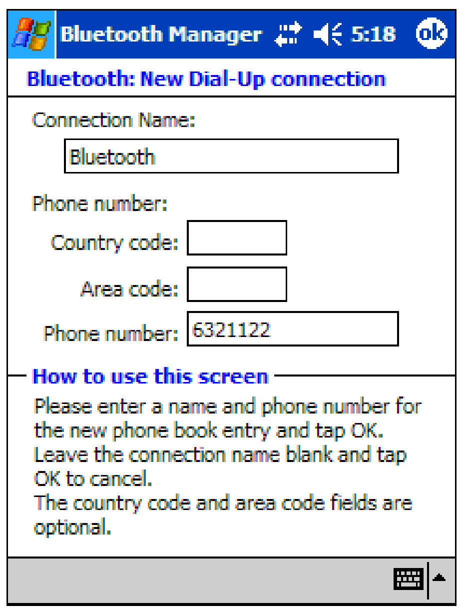
8. Tap and hold on the Bluetooth shortcut and select **Connect**.



9. Choose the **New Connection** option.

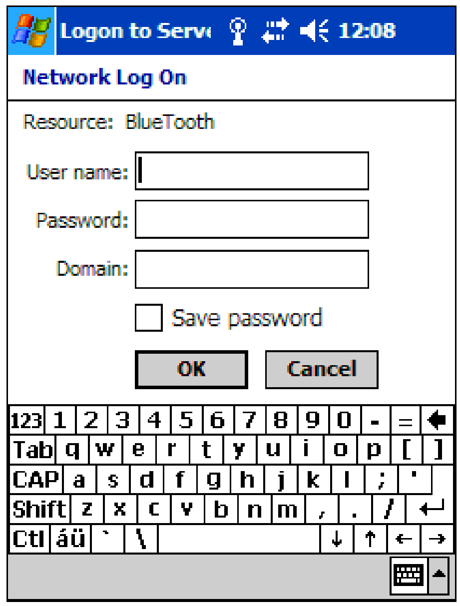


10. Enter the **Area Code** and **Phone Number** that will be used when dialing in for remote transfer — this is the incoming line connected to the PC in the office.

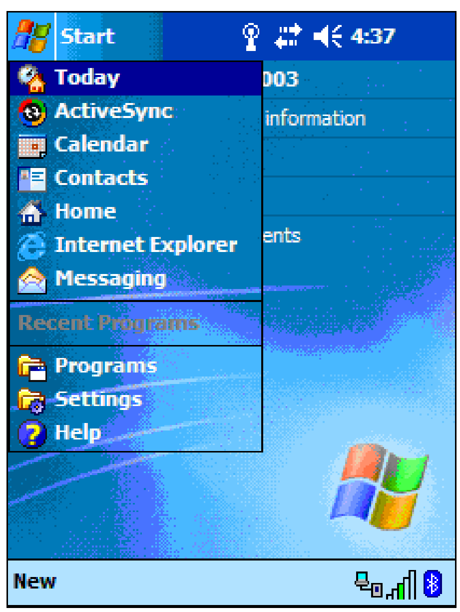


11. Enter the *User Name*, *Password*, and *Domain* that will be used when dialing in to the PC.

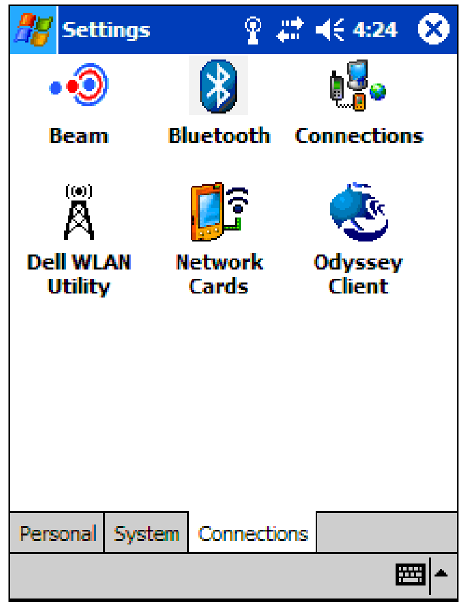
NOTE: The *User Name* and *Password* entered should match the user set up on the desktop in the previous section.



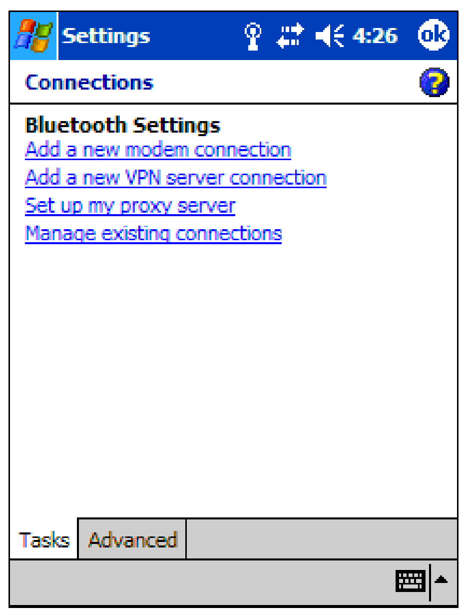
12. Click **OK** to save your changes and tap on the **Start** menu.



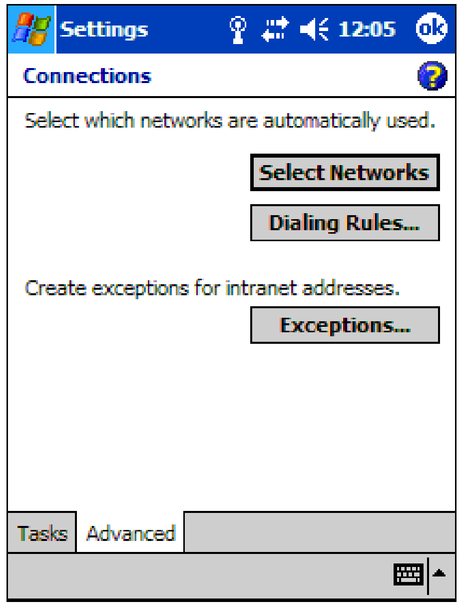
13. Choose *Settings* and click on the **Connections** tab.



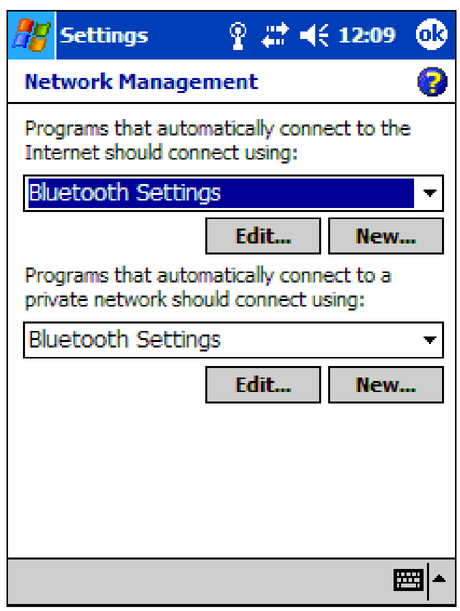
14. Tap on the **Advanced** tab.



15. Tap **Select Networks**.



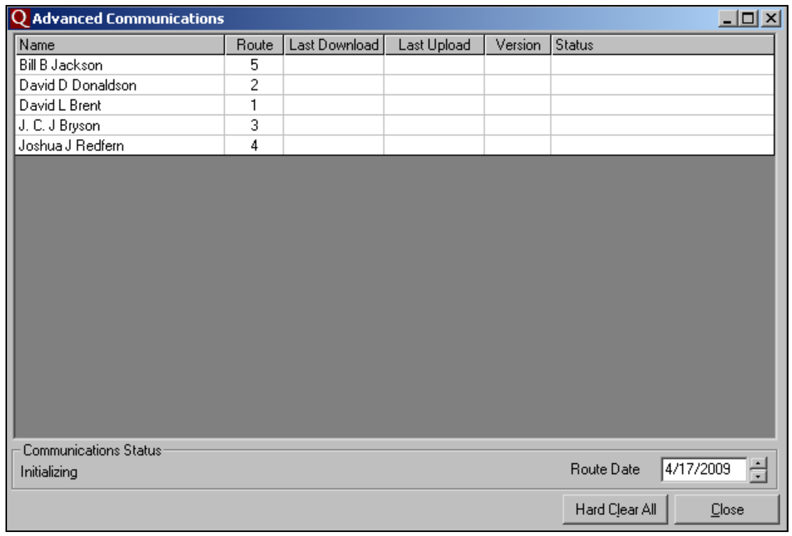
16. Choose **Bluetooth Settings** (Or *Bluetooth Internet*) from the drop-down list in both sections of the screen. Click **OK** to save your changes.



This completes the set up process for dial-up modem transfers. Each driver is required to plug an outgoing phone line into the Bluetooth modem prior to initiating a data transfer.

Advanced Communications Screen

The *Advanced Communications* screen can be accessed under the *Modules* section of the QRoute menu. Each field on the screen is defined below.



Fields:

Name: The name of the driver.

Route: The route number assigned to the driver.

Last Download: The date of the last download for this driver.

Last Upload: The date of the last upload for this driver.

Version: The handheld version for this driver.

Current Status: The status of each route. Each line will be color coded and will reflect the following information:

- ***Red (1):*** There has been an error processing the route. Try again.
- ***Yellow (2):*** The route is ready to be downloaded.
- ***Blue (3):*** The route has been uploaded.
- ***Green (4):*** The route has been downloaded by the driver.

Other Fields:

Communications Status: The current status of the link between the desktop system and the handheld.

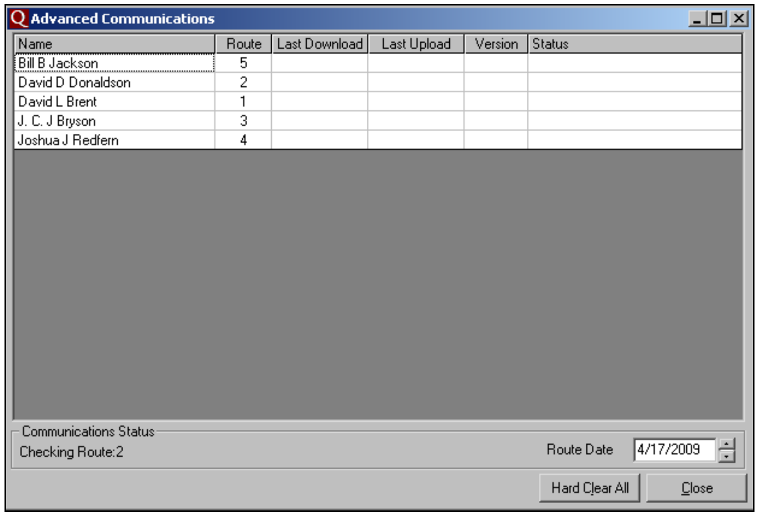
Route Date: The date that will be used for all handheld transactions.

Hard Clear All: This option is used if there is a problem transferring data from the handheld. *Hard Clear All* will delete partially uploaded route files and allow you to attempt the transfer again.

Close: Choose this option to close the *Advanced Communications* screen.

Daily Processing (Desktop)

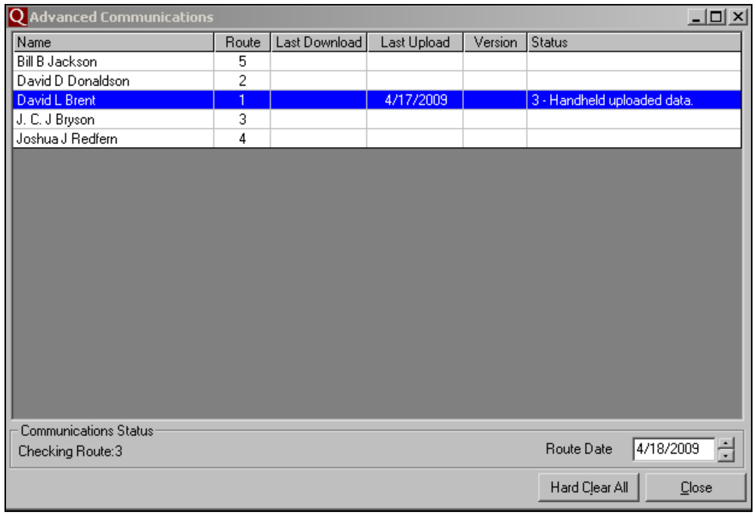
On a daily basis, there is very little user interaction needed to manage your wireless data transfers. As each driver initiates a transfer, QRoute will process the route and print the afternoon reports automatically, as well as send new data back to the handheld.



In order for this process to work, you must perform the following steps daily:

1. Open the *Advanced Communications* screen. In order for data transfers to work properly, the *Advanced Communications* screen must be open.
2. Enter the correct *Route Date*. The date displayed will be used on all handheld transactions each time the driver receives fresh data.

As each route is processed, the screen will be updated to reflect the activity completed:

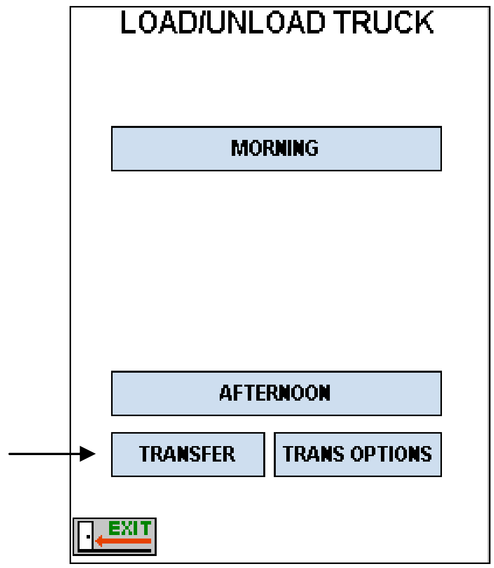


Afternoon Reports will be printed as each route is uploaded.

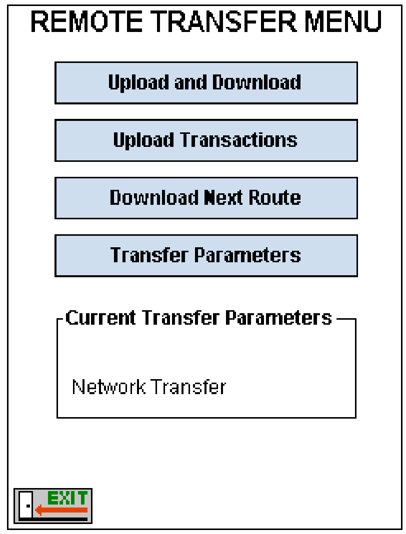
Daily Processing (Handheld)

Follow the steps below to successfully transfer data to and from the handheld(s) each day.

Tap on **Load/Unload Truck** and click **Transfer**.



Depending on the type of transfer you need to do, choose the appropriate option from the list:



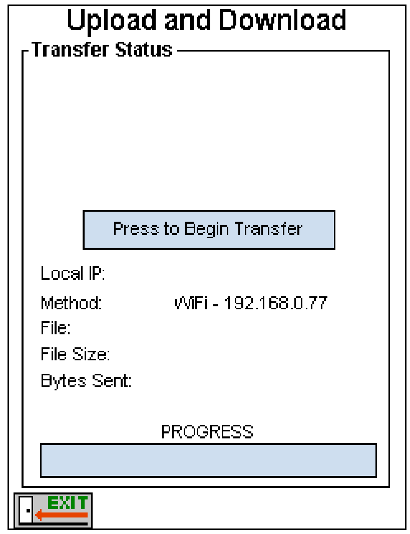
Upload and Download: Choose this option to upload your transactions and download a new route.

Upload Transactions: Choose this option to upload the current route.

Download Next Route: Choose this option to download a new route.

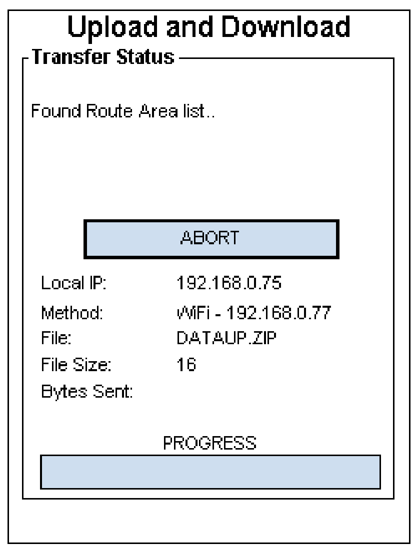
Transfer Parameters: Choose this option to enter new transfer parameters manually. This will overwrite the existing wireless transfer parameters temporarily.

After a selection is made, the driver will be prompted to begin the data transfer:

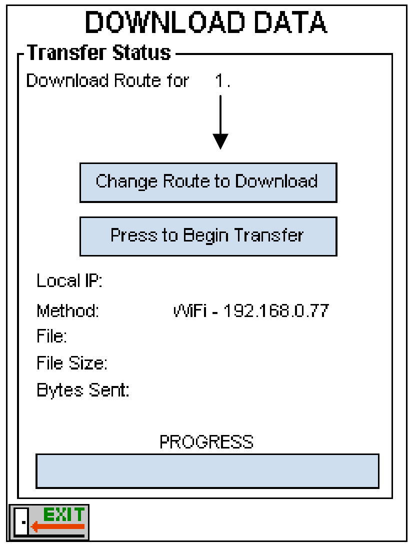


NOTE: Prior to initiating a data transfer, the handheld must be connected to an available access point or Bluetooth modem.

Tap on the **Press to Begin Transfer** option. Information will be updated on the current screen during the transfer process.

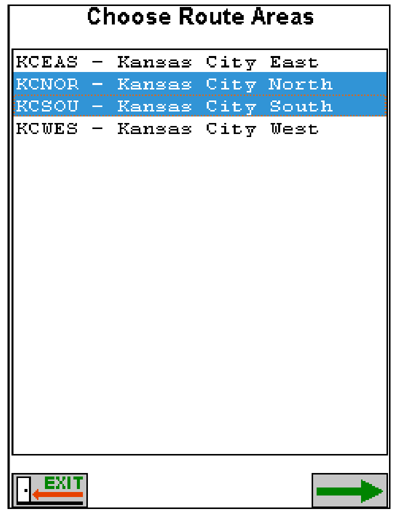


NOTE: If you select the *Download Next Route* option, you have the ability to download an alternate route:



Select the **Change Route to Download** option and key in the route number you would like to download.

You will be prompted to select the *Route Areas* to download for the current route.



Tap on the *Route Areas* you would like and choose the green arrow to process the route.

After the route has been processed successfully, a confirmation screen will be displayed and you will be automatically logged out of QRoute (to refresh the data). Login again to view the new route.

Notes

Appendix I – Cash Refunds

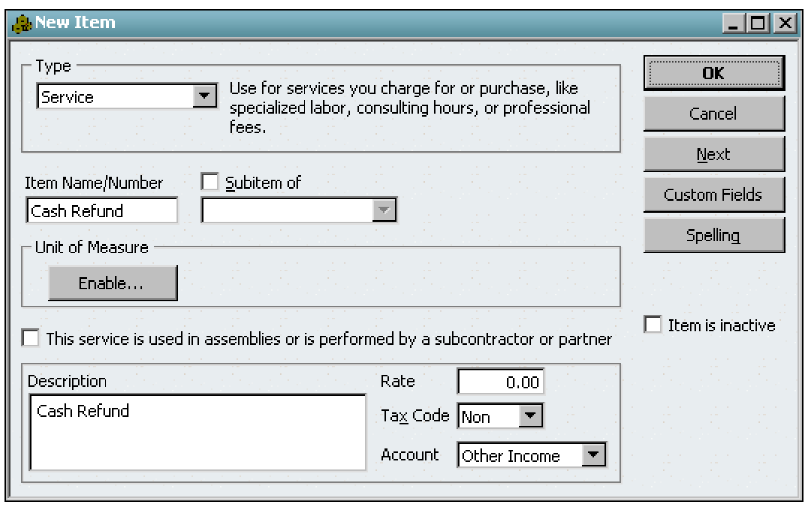
Introduction

In order for QRoute to issue a refund properly, steps need to be taken that will allow a 'Credit Memo' to be created each time this activity is required. The following appendix guides you through the proper setup and usage of issuing a cash refund on the handheld.

Desktop Setup

In order for QRoute to issue a cash refund on the handheld properly, it is necessary to create a 'Cash Refund' *Item* in QuickBooks.

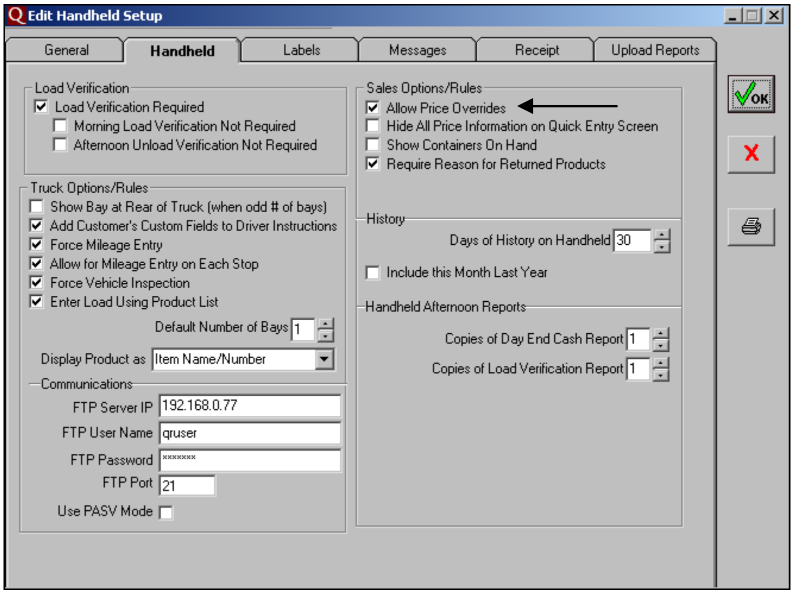
The *Item Type* should be set up as **Service**, and it is a tax exempt item. The *G/L Account* can be any income account of your choice (e.g., Other Income).



Handheld Setup

Before the new 'Cash Refund' code can be used on the handheld, it is required that you enable the 'Allow Price Overrides' option with *Handheld Setup*.

Navigate to *Customers > QRoute > Customers > Setup Options*, and select *Handheld Setup.* Choose the *Handheld* tab and check the option 'Allow Price Overrides'.



Click **OK** to save and exit.

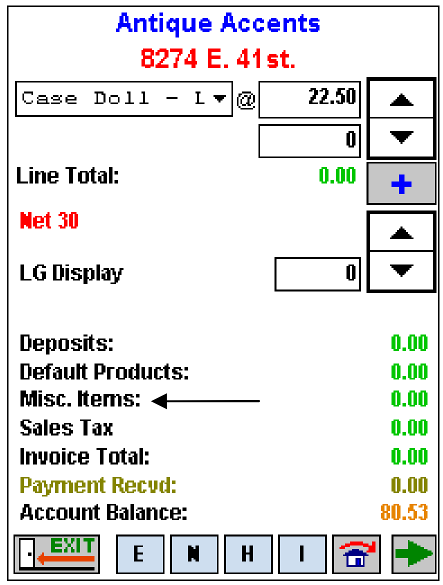
This completes the setup process for this feature. Create a new *Morning Card* and continue to the next section on daily processing.

Daily Processing

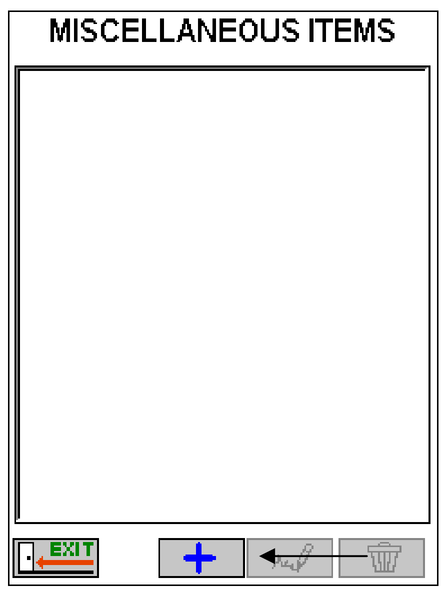
In this section, you will be guided through issuing a refund on the customer's account via the handheld.

Handheld Processing

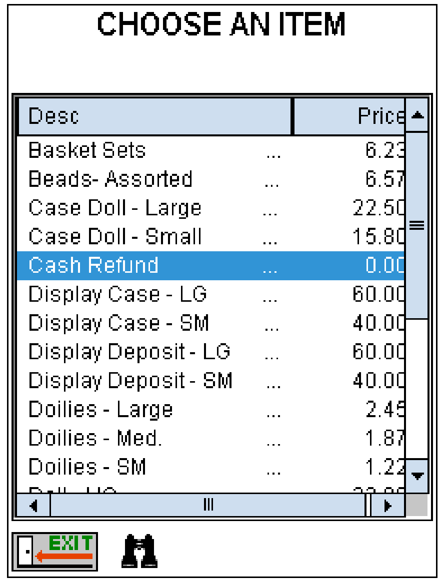
To issue a refund on the handheld, simply navigate to **Misc. Items** from the *Quick-Entry* screen.



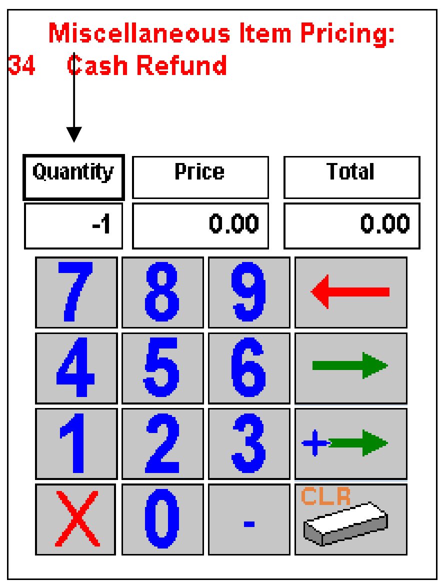
Select the **Add** key.



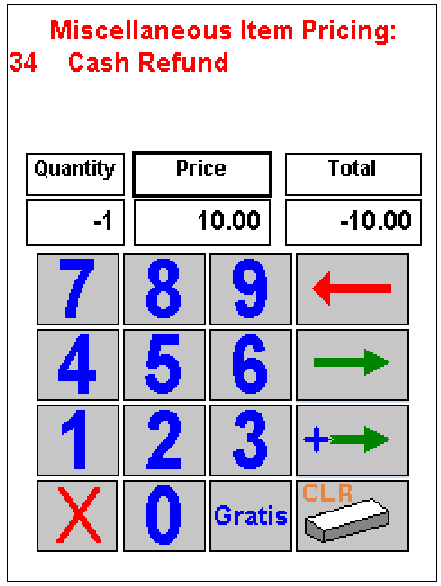
Tap the new 'Cash Refund' code in the list.



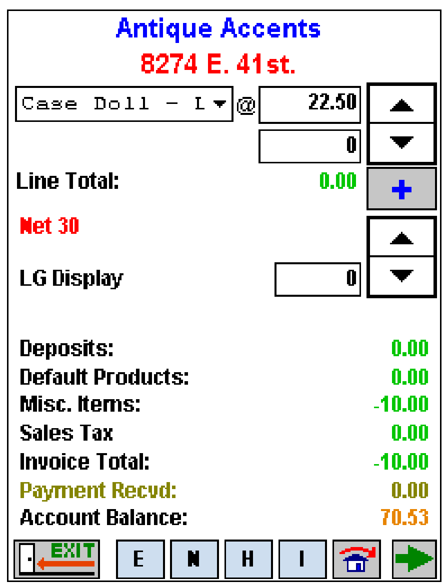
Enter a quantity of negative (-)1 by selecting the minus sign on the screen.



Enter the total that is being refunded to the customer by tapping on the **Price** field and keying in the amount (in this case, 10 dollars).



Choose the green arrow to continue. After you exit from the *Misc. Items* screen, you will notice that the customer now has a credit issued.



At this point, you can add payments or products to the invoice as needed.

QuickBooks Credit Memo’s

When the QRoute data is uploaded from the handheld, any cash refunds will be applied as credit memo’s in QuickBooks.

NOTE: If the customer’s balance is less than zero after each credit memo is applied, it may be necessary to take additional action in order to correctly apply the refund. You should follow the instructions outlined in your version of QuickBooks to apply the refund to the customer’s account.

Appendix J – QuickBooks 2013 Installation and Upgrade Requirement

Introduction

In order to properly install or upgrade your QRoute version running QuickBooks 2013, a minor adjustment will need to be made to your QuickBooks program. Follow the steps below prior to upgrading to QRoute version 13.

Disabling Instant Start

QuickBooks *Instant Start* is a feature that enables QuickBooks 2013 to load your company file faster by leaving the QuickBooks application process (QBW32.exe) running in the background. This feature prevents QRoute from installing or upgrading successfully and will need to be disabled.

NOTE: You can enable the *Instant Start* option after the installation process, if desired.

1. Press Ctrl+Shift+Esc on your keyboard to open the Windows Task Manager.
2. Click the 'Processes' tab.
3. Right-click the 'QBW32.exe' process and select **End Process**.
4. Open QuickBooks.
5. Choose *Edit* > *Preferences*.
6. Select **General**, and click the *My Preferences* tab.
7. Clear the 'Keep QuickBooks running for quick startups' checkbox and click **OK**.
8. Close QuickBooks and restart your computer.

After the computer is restarted, you can proceed with the QRoute installation or upgrade.

Appendix K – Barcode Scanning

Introduction

Q-Route includes barcode scanning features that enable the ability to scan products on and off the delivery vehicle at the warehouse and to the customer. All that is required is a scanner equipped handheld device that is compatible with Q-Route. This appendix will guide you through the complete process of setting up and using barcode scanning.

Creating the Barcode Field

In order to use the barcode features you will need to enable a new custom field within QuickBooks. This custom field will contain the barcode information for each product, allowing Q-Route to properly determine which item you are scanning on the handheld.

Follow the steps below to create a new custom field:

1. Navigate to *Lists* > *Item List* within QuickBooks and double-click on an item that you will scan.
2. Select the **Custom Fields** option.
3. Click **Define Fields**.
4. Click on an empty line and enter a label for the new field, such as 'UPC Code' and place a checkmark in the use column to the right of it by clicking within the box.
5. Click **OK** and your new field will appear on the screen.
6. Enter the complete UPC Code listed on the product's barcode within the new field and click **OK**.
7. Click **OK** again to exit the *Edit Item* screen.

Repeat steps 4-7 on each product that you would like to scan.

Now that you have created the new custom field within QuickBooks, you will need to assign it to Q-Route within the *Handheld Setup* screen by following the steps below:

1. Navigate to *Customers* > *Q-Route* > *Setup Options* > *Handheld Setup*.
2. Select the new custom field from the drop-down menu next to the *UPC Code* field on the *General* tab.
3. Click **OK** to save your changes and exit the screen.

Once you have added the barcode information to each product and established the custom field within Q-Route, you are now ready to begin using barcode scanning on the handheld. The next section will guide you through the handheld process.

Scanning on the Handheld

Create a new *Morning Card* for your scanner equipped handheld to begin the process. It should be noted that each handheld is unique, and we have included technical documents on our Web site www.ARS247.com that will guide you through enabling the scanner on each handheld unit that we offer.

Morning/Afternoon Load Scanning

To scan items on and off of the delivery vehicle at the warehouse follow the steps below:

1. Navigate to *Load/Unload Truck* on the handheld and choose either **Morning** or **Afternoon**.
2. Click on **Load Truck** or **Driver Load**.
3. Select the desired *Bay* to scan items onto/from.
4. Scan the UPC barcode on the item you are loading or unloading and you will be prompted to enter the quantity.
5. Enter the quantity and continue.
6. You can now complete the process by repeating steps 3-5.

Repeat this process each day to load or unload your delivery vehicle at the warehouse.

Misc. Items Scanning (Invoice)

To scan items that you are selling to the customer follow the steps below:

1. Pull up a customer that you are delivering to and select the **Misc. Items** option on the *Quick Entry* screen.
2. Scan the item that you are selling to the customer and the quantity screen will be displayed.
3. Enter the desired quantity and continue.
4. Scan any additional items that you are selling to the customer to complete the process.

This completes the tutorial on scanning your items using the Q-Route program. Please contact ARS if you have any additional questions on this feature.

Index

I

K

L

M

N

O

P

Q

R

S

T

U

V

W