Route Manager *Advanced* ™

Supplemental Document Index

Advantage Route Systems, Inc.

Your Route Technology Partner

Series 7.0.X

Advantage Route Systems, Inc.
3201 Liberty Square Parkway
Turlock, CA 95380

Phone: 209.632.1122
Toll Free: 888.294.7688
Fax: 775.
Web site: www.AdvantageRS.com
Email: Support@AdvantagRS.com

Warning

Specifications are subject to change without notice.

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Chapter 1.00: Supplemental Document Index

Introduction

These individual supplemental documents contain in-depth information on processes and procedures within the Route Manager system. Whereas the User Guide gives specific information about the operation of each item, these supplements provide a user-friendly "story" format. Use this index as a key to guide you to the supplemental document of your choice.

Document Index

The supplemental documents are arranged in four general sections to make it easier to find the topic that will help you most.

- Section 1: Hardware and Company Setup
- Section 2: Program Setup and Usage
- Section 3: Daily Processing
- Section 4: Optional Configurations

  Within each section you will find many articles that are specific to a topic. Most articles consist of the following subsections:

- Introduction and overview of the feature
- How to set up the feature
- Daily operations and ongoing usage of the feature
- Reporting tools relevant to the feature
- Summary and conclusions

  This layout makes it easy to learn about tools that can help you run your business more effectively. With the topic-by-topic approach, you can find just what you need.

Chapter 1 Topics – Hardware and Company Setup

1.01: Operating in a Multi-User Environment

This document details the procedures that you should follow when using Route Manager in a network environment with many users. It covers multi-user licensing, updating the program, and troubleshooting issues.

1.02: Security Level Codes and Login Policies

It is important to operate in a safe and secure environment on your computer terminals. This document covers detailed security options available within Route Manager and the best way to implement different levels of access within the system.

1.03: Guide to Training Material

ARS offers a wide range of training and technical support options. Onsite, over-the-phone, and Web based materials and support are available; this document introduces you to these options.

1.04: Language Options

Route Manager offers a flexible language option that is simple to work with and includes nine different language settings in the program. This allows the program to be used throughout the world. Refer to this document for your language options.

1.05: Route Manager Custom Logos

Route Manager offers the ability to create your own custom logos within the program. These options allow you to personalize Route Manager to reflect your own company program and image.

1.06: Dynamic Receipt Headings

One of the many new enhancements in Route Manager is the ability to print multiple headers on

your customer's handheld receipts. Perhaps you deliver for more than one company, now you will have the ability to print an alternate header on each receipt per customer.

1.07: Setting up Sales Tax

This document will guide you through a complete tutorial on how to establish sales tax within Route Manager. The tax system available in the program is robust and includes options for managing any complex tax configuration.

1.08: Alternate Invoice Labels (coming soon)

One of the many features in Route Manager is the ability to print alternate invoice labels on your customers' handheld receipts. This is especially helpful for companies that need a specific label based on the balance of the invoice (positive or negative) or if some accounts call their receipt invoice numbers something different. You will have the ability to select the invoice label that should print, per customer, and it will automatically print the proper label based on the total of the invoice.

Chapter 2 Topics – Program Setup and Usage

2.01: Pricing Schemes in Route Manager

The Route Manager software provides several ways to customize product prices for your customers. It is important that you understand the various methods, and their priority, when determining the proper price for your customers as you sell your products. This chapter covers all of the pricing methods available.

2.02: Consolidating Customer Accounting Information

Route Manager offers multiple options for associating data from a number of different accounts onto a single billing record. This can be useful for a customer that has multiple stops in different locations that are to receive the same statement, or for larger accounts that have multiple locations over a wide geographic area. This document describes all of the available options and their functions.

2.03: Customer Notes and Employee Messages

In order to keep accurate and detailed records of important information on each customer's account, the Route Manager software includes a variety of different messaging options. This chapter discusses all of the options available.

2.04: Container Deposit and Empty Container Tracking

This chapter has been designed to teach you how to setup and manage container deposits and empty containers within Route Manager. This chapter covers both the desktop and handheld device.

2.05: Driver Commissions and Compensation

If you wish to pay your drivers a commission, refer to this chapter for the commission options available within the Route Manager program.

2.06: Terminating a Customer

Occasionally, you will terminate service with a customer. This chapter guides you through the proper steps to de-activate, remove a customer from service, and close the account.

2.07: Managing Credit and Accts Receivable within Route Manager

The purpose of this chapter is to help you and other users manage credit and accounts receivable more efficiently using Route Manager. This will help you manage cash flow and eliminate the costs associated with slow paying and write-off accounts.

2.08: Advanced Credit (Dunning)

This chapter is designed for members of the finance team who are charged with establishing credit rules, collecting on slow accounts, and have a general responsibility for accounts receivable.

2.09: Prepay Products

Route Manager will allow products to be sold to customers without actually delivering the product until the customer submits a request or schedules a delivery. These "credits" can be used at the customer's discretion.

2.10: Purchase Order Setup and Usage

Often, customers will give you a purchase order to ensure their deliveries are received. This will allow them (and you) to know how, and when, you will be paid for the product you deliver. This chapter will explain how to setup, enter, and track purchase orders in the program.

2.11: Skipped

This Chapter is no longer used and reserved for a future chapter.

2.12: PDF Email Attachments

The *PDF Email Attachments* section will guide you through setting up your system to be able to email Statements and Invoice Copies from within Route Manager.

2.13: Managing Damaged Goods and Returns

Route Manager includes options that will allow you to manage returned and damaged goods information. This chapter discusses all of the options available.

2.14: Multi-Unit Pricing

This unique pricing option allows you to establish relationships between various units of sale such as, single unit, six-packs, and cases. This chapter will help you understand how to set up your system and how to operate it on the desktop and handheld.

2.15: Period Discount Pricing

This unique pricing option allows you to set up discounts or free items for customers that purchase an established quantity of items over a period of time.

2.16: Custom Forms

The *Custom Forms* option in Route Manager allows you to print customized statements, delivery tickets, and other forms created for your company by Advantage Route Systems. This document will guide you through the set up process for each form option available.

2.17: Statement Logos

Route Manager includes a wide variety of statement options to suit your needs. This chapter will teach you how to add a company logo to your statements, giving your correspondence a more professional appearance.

2.18: Extending Route Calendars

Extending your customer's route calendars is an important task that is generally performed close to the end of each calendar year. This process allows you to make route schedule changes for the following year, establish new holidays, and ensure that your delivery cycles are accurate.

2.19: Sequencing

In Route Manager, you can optimize your day by re-sequencing your stops to obtain the most efficient route. This can be done by the drivers on the

handheld, or within the desktop. This section will outline how this can be accomplished.

Chapter 3 Topics – Daily Processing

3.01: Creating Invoices and Adjustments

This chapter explains how to process invoices and adjustments easily and effectively.

3.02: Entering Payments

This chapter will guide you through the process of entering payments in the system.

3.03 Entering Statement Payments

This chapter will guide you through the process of entering *Statement Payments*. These types of payments are entered when using *Statement Numbers*, which are similar to invoice numbers — this option is used in the European market.

3.04: Route Settlement Entry

The *Route Settlement Entry* option allows you to enter an entire route of manual tickets quickly and efficiently. This is beneficial when processing routes without the use of a handheld.

3.05: Equipment Movement on the Desktop

This chapter will explain the process of moving equipment from location to location without the aid of the handheld computer unit. The process may include installing, picking up, exchanging, and moving equipment between warehouses.

3.06: Posting Transactions

This chapter covers the daily "posting" process within Route Manager, which is one of the most important functions in the program.

3.07: Returned Check Processing

This chapter explains the procedure for processing returned checks in the program.

3.08: Processing Refund Checks

This chapter explains the procedure for processing refund checks in the program.

3.09: Managing Delivery Orders

The *Delivery Order* procedure is a way of handling special requests from customers, and is used to schedule special deliveries as needed. *Delivery Orders* play an important role for companies that receive a high volume of calls or special orders from their customers.

3.10 Inventory Management

This chapter has been created to guide you through the process of managing inventory in Route Manager.

3.11: Rental Setup and Usage

This chapter will guide you through all aspects of setting up and generating rental charges in Route Manager.

3.12: End of Month Procedures

This chapter describes essential month-end procedures that are performed at the end of each accounting period.

3.13: Post Transaction Errors and Recovery

During the *Post Transactions* process, the Route Manager program moves data from a temporary "pending" file location, to a permanent "posted" file location. Unforeseen circumstances such as power outages, network issues, etc., can contribute to errors during this process. This chapter covers the proper procedure to follow should this problem occur.

3.14: Equipment Service

To provide quality service to customers, route personnel can service equipment at a customer's residence or business on a routine basis. This chapter explains equipment servicing and on-site repair within Route Manager.

3.15: Equipment Selling

This chapter will guide you through the process of properly selling equipment to a customer.

3.16: Archiving/Removing Terminated Customers

This chapter will teach you how to archive and remove customers from your system that have been de-activated or terminated.

3.17: Perpetual Inventory

The *Perpetual Inventory* option enables the ability to carry product inventory totals on each truck from one day to the next. This is helpful for companies running coffee service, snack routes, or any other product where items are left on the vehicle from one day to another.

3.18: Equipment Asset Tax

Some customer's in the United States are required to pay personal property taxes on vehicles and equipment. This chapter will guide you through the steps for establishing *Equipment Asset Codes* on your customer's accounts.

3.19: Daily Cash Recording

The *Daily Cash Recording* feature allows you to reconcile cash collected against cash recorded for each route uploaded from the handheld. Using this feature will ensure that your daily route collections are accurate.

3.20: Inventory Valuation

Route Manager includes an extensive inventory valuation system that allows you to view your inventory values based on established cost information input into the system. Depending on the option you choose, Route Manager will provide this information on a *Fixed Cost*, *FIFO* (First-in, First-out) or *LIFO* (Last-in, First-out) method of calculation. This chapter will guide you through setting up these options.

3.21: Statement Processing

This chapter will guide you through the entire *Statement* process in Route Manager.

3.22: Degree Day Forecasting

This option is used by companies in the Bulk Propane industry to help plan daily routes more effectively based on consumption, customer demand, and temperature changes.

3.23: Advanced Pre-Calling

The *Advanced Pre-Calling* option has been designed for companies that require a formal calling program to contact customers prior to delivery. The program allows you to call your customers based on an independent calendar or a fixed rotation.

3.24: Daily Billing Statements

To save printing costs and expedite billing, you may find it helpful to Email or mail a delivered goods invoice to each customer instead of printing a receipt during delivery.

3.25: Major Account Payments

This chapter introduces you to the process of entering payments by *Major Account Code*. Using this feature will allow you to enter a single payment and apply it to all of the accounts assigned to the same *Major Account Code* in Route Manager. This option will save you time and resources by eliminating the need to enter multiple payments on related accounts.

3.26: Quotations

The *Quotations* option is used to create product or equipment quotes from customers by a salesperson. These orders can be monitored and converted into *Delivery Orders* once the customer agrees to purchase the items. This chapter will guide you through the entire *Quotations* process and the many options available.

3.27: Setting Up Barcodes

Barcodes can be used in a number of different ways with the Route Manager software. The purpose of this guide is to demonstrate the various ways that you can derive greater efficiency with you operations.

3.28: Customer Finance Assistant

The *Customer Finance Assistant* allows you to create a credit, debit, or write-off transaction

directly from any of the Customer Information screens. Additionally, you also have the ability to transfer payments from one account to another — creating an easy solution when payments are applied to the wrong account.

3.29: Setting up AGW (Coming Soon)

Chapter 4 Topics – Optional Configurations

4.01: Skipped

This section is skipped and reserved for a future document.

4.02: Production Batch Codes

Production Batch Codes are identification codes that can be assigned to products in Route Manager for quality control and recall purposes.

4.03: Updating Route Manager via the Web

This chapter is designed to walk you through the process of updating your Route Manager program via the Web.

4.04: Customer Retention Program

The *Customer Retention Program* is a customer incentive program integrated into Route Manager that can offer rewards to your customer's for earning a pre-established number of 'reward' points on purchases.

4.05: Custom Reports Menu

This chapter covers the option to create and maintain links to external reports that can be added to the Route Manager *Reports* menu. This can be helpful for linking users to reports used outside of Route Manager.

4.06: Purchase Order System

This chapter guides you through the steps required to use *Purchase Orders* in Route Manager.

4.07: Deferred Rents System

Most companies prefer to bill rentals 1, 3, 6, or 12 months in advance. While this is great for cash flow, it can have an uneven effect on revenue if the entire sale is recognized in the month it is billed. By using the *Deferred Rents* option, you can track how much revenue should be recognized in each period.

4.08: Managing Contracts

Route Manager offers an option that will allow you to create, edit, and manage contract information for your customers. This feature can be used in a number of different ways. All facets of the contract management system will be addressed so that you can use it effectively in your business.

4.09: Supply Chain Orders

The *Supply Chain Order* option allows product orders to be created on the desktop that will be processed, or "picked," from the warehouse and expedited to a shipping carrier.

4.10: Handheld Lease Agreement

The *Handheld Lease Agreement* feature gives you the ability to establish new equipment lease agreements right from the handheld. The agreement details are set up on the desktop and are available on the handheld with each delivery. As equipment is installed on each account, the customer will sign the new lease agreement, and the information will be permanently stored on each account.

4.11: Enhanced New Customer Setup

The *Enhanced Handheld New Customer* feature allows the driver to create new accounts while making deliveries on the handheld. By establishing default settings on the desktop, each driver will now be able to capture important customer data on the handheld, and the new account will be added to Route Manager during the *Afternoon Card* process.

4.12: Weekly Standing Orders

The *Weekly Standing Orders* option allows you to set up recurring product orders on each customer's account that will repeat from week to week. In addition, separate product orders can be established for each day, and adjustments can be easily made when needed.

4.13: Pick Processing

The *Pick Processing* feature allows you to create a series of *Load Orders* that can be printed and distributed to your warehouse employees for order 'picking.' Each *Load Order* contains all *Delivery*

Orders, *Standing Orders*, and *Load Requests* per route. The *Pick Processing* feature is especially helpful for companies that have a high volume of orders daily.

4.14: External Price Import

This tool has been designed for companies that receive product pricing updates from suppliers or have hundreds (or thousands) of products. It allows you to update prices in Route Manager from a spreadsheet file.

4:15: Skipped

This section has been skipped and reserved for a future document.

4.16: Handheld Photo Logging

The handheld photo option in Route Manager allows your drivers to instantly take photos while on site and automatically attach the information to the customer's account for reference. This can be helpful for providing definitive proof of a complaint, the current state of equipment at the customer's location, product issues, and much more.

4.17: Legal Land Converter

The Legal Land Converter utility has been designed to help customers in the United States and Canada who have Legal Land Locations in their addresses and would like to code them with a latitude and longitude. This will allow these types of locations to be more readily used for mapping and routing purposes.

4.18: Using Route Manager in a Store

Using Route Manager as part of your daily store routine will speed up the data entry process and help provide your customers with a rewarding experience during their visit. Using a single system for all of your point of sale needs will reduce tedious double entries and human error.

4.19: Hard Drive Destruction

If you are a recycler that destroys hard drives in your business, then you may wish to use this mini-module to keep track of hard drives that you destroy for your customers.

4.20: Skipped

This section has been skipped and reserved for a future document.

4.21: Driver Manifest Codes

Driver Manifests are reports printed prior to the truck leaving the office that indicates what products are on the truck, as required by some agencies based on the product being delivered.

4.22: Email Attachments for Promos

Have you ever wanted to send a flyer or promo piece along with your email communications to your customers? Now you can! As of Version 6.0.2r5 build 6658 this is now a default feature of Route Manager.

4.23: Skipped

This section has been skipped and reserved for a future document.

4.24: Setting up PDF Afternoon Reports

If you have too many reports and too much paper being generated every day, then you may want to consider setting all of your afternoon reports from the handhelds print to .PDF format so they can be reviewed on-line at a later point in time.

4.25: Setting up Credit Card Processing Fees

Utilizing the Credit Card Processing Fee's feature will allow you to charge your customers a credit processing fees for Approved and/or Declined credit card transactions.

4.26: Importing External Inventory Transactions

Importing external inventory transactions allows you to acquire data into the inventory program without keying in every transaction. For example,

maybe your supplier provides you with a spreadsheet of goods received. If you get hundreds of transactions on each order, then this program will allow you to import an excel spreadsheet directly into RMA.

4.27: Importing Equipment

If you would like to import new equipment data into Route Manager, you can do so using our import routine. This is particularly helpful if you are buying hundreds of pieces of equipment at a time and receive data from your supplier in a spreadsheet or another database.

4.28: Automated Customer Import (coming soon)

4.29: Propane Inspection

Some propane delivery companies are required to fill out an inspection form at the time of delivery. This section will discuss setting up and filling out the Propane Inspection form at a customers stop.

4.30: Optimizing Your Data for Performance

System slowing down or using up more disk space than normal? Review the Optimizing your data for Performance guide for more help on how you can minimize data , get rid of old data, speed up your system and use less drive space.

4.31: Buying Asset Tags for your Equipment

Many of our customers have found it helpful to secure and use permanent bar code labels on equipment so they can be scanned and tracked. This section will go into further detail on how to obtain your own Asset Tags.

4.32: Using Alaska Sales Tax Limits

Residents in the state of Alaska have an opportunity to save of state sales tax if they purchase more than $500 worth of goods on a single invoice. (Some counties are now $1000) This document describes the procedure to set up the sales tax so this will

work properly. In addition, it will help you with reports that can be used for reporting purposes.

4.33: Skipped

This section has been skipped and reserved for a future document.

4.34: Marking a Stop as High Priority

From time-to-time, you may have a customer stop that needs to be serviced before other stops. Within Route Manager, you have the capability to make a stop appear on the handhelds in red or some other eye-catching color to alert your drivers that this needs to be a priority activity

4.35: Skipped

This section has been skipped and reserved for a future document.

4.36: Setting up Invoice after Delivery

Often times a customer would prefer to have a copy of their invoice sent to them right after their delivery either by email or fax. This is a standard feature of the Route Manager 6.2 software and only requires a couple of setup steps to do.

We will be utilizing our *Customer Message Centre* system for these notifications. Please refer to the *Customer Message Centre* documentation on how to get started with this module or contact ARS for more information.

4.37: Setting up Gratis

If you want a convenient system to keep track of products that you give away to your customers, you should take a look at setting up and using the Gratis functionality. This is a built-in function within RMA.

4.38: Skipped

This section has been skipped and reserved for a future document.

4.39: Popular Reports

In this section we will discuss the most popular reports amongst Route Manager customers..

4.40: Credit Card Processing Companies

Here is a list of companies that provide credit card processing services that will work with our various programs.

4.41: Deleting File from Customers' Accounts in EF2000

This section will cover how to delete a scanned EF2000 file on a customer's account.

4.42: Servicing Multiple Stop Accounts on One Invoice

Allow drivers to service a multi stop – single location account within a single invoice, rather than a new invoice for each location at the stop.

4.43: Print Examples of Delivery Order Formats

Examples of the various Delivery Order printout formats.

4.44: Salesforce Integration

Salesforce integration in Route Manage utilizes EDI Export to transfer transactions to Salesforce.

4.45: Managing Default Products on MangoMobile

Allow the drivers to be able to manage (add, remove, update price, update quantity) default products at customer stops from the MangoMobile handheld.

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