

---

Route Manager™

# 9X to RMA Upgrade

Advantage Route Systems, Inc.

We deliver, so you can.

Version 2.0

Windows 2000/XP/Vista

Copyright © 1994-2009 by Advantage Route Systems, Inc. All Rights Reserved.

Printed in the United States of America.

Advantage Route Systems, Inc. Proprietary

**Advantage Route Systems, Inc.**

147 South Broadway  
Turlock, CA 95380

Phone: 209.632.1122

Toll Free: 888.294.7688

Fax: 209.632.6868

Web Site: [www.AdvantageRS.com](http://www.AdvantageRS.com)

Email: [info@AdvantageRS.com](mailto:info@AdvantageRS.com)

**Warning**

All information in this document and the on-line help system, as well as the software to which it pertains, is proprietary material of Advantage Route Systems, Inc. and is subject to a Route Manager license and non-disclosure agreement. Neither the software nor the documentation may be reproduced in any manner without the prior written permission of Advantage Route Systems, Inc.

Specifications are subject to change without notice.

Software Version 2.0, October 6th, 2008

# Contents

- Chapter 1 – Overview of the Upgrade 5**
  - Introduction ..... 5
  - General Outline..... 5
  - Every Step of the Way ..... 6
  
- Chapter 2 – Preparing for the Upgrade 7**
  - Versions ..... 7
  - Getting Started ..... 7
    - Purchase the upgrade ..... 7
    - Obtain a New Serial Number..... 7
    - Download the Upgrade File..... 8
    - Access new Training Material ..... 8
  - When should I do the Upgrade?..... 8
  - Upgrade with Ease ..... 8
  
- Chapter 3 – Converting the Data 9**
  - Data Preparation ..... 9
    - All cards are in for the day ..... 9
    - Post all transactions ..... 9
    - Pack the data..... 9
    - Print out Pre-Route Reports..... 9
    - Run a Data Integrity Check ..... 10
  
- Chapter 4 – After the Upgrade 11**
  - Introduction ..... 11
  - Completing the Conversion ..... 11
  - Required Steps ..... 12
  - Optional Steps..... 13
  
- Chapter 5 – Welcome to RMA 15**
  - Learning Materials..... 15
    - Training and Reference Videos ..... 15
  - Areas of Interest..... 16
    - Delivery Orders ..... 16
    - Route Master ..... 16
    - Handheld Class..... 16
    - New Customer W/Order Wizard ..... 16
    - Payment Entry ..... 17
    - Custom Pricing ..... 17
    - Container Deposits and Empties..... 17
    - Pre-Posting (Multi-Branch) ..... 17

<b>Appendix A: Installing the Upgrade</b>	<b>17</b>
Installing RMA.....	18
<b>Index</b>	<b>23</b>

# Chapter 1 – Overview of the Upgrade

---

## Introduction

We are excited to have you join the ranks of Route Manager Advanced customers. With the new system, you will have access to dozens of new features, more flexibility, and access to millions of dollars in upgrades that have been spent to make this the most advanced software product for route accounting.

---

## General Outline

This outline details the basic steps involved to ensure a simple and smooth upgrade experience. With this goal in mind, there are going to be items that need to be executed by ARS, as well as items that need to be completed by you. Here is an outline of the process:

1. Purchase the upgrade from ARS.
2. A “coordinator” will be assigned to you to assist with each step of the upgrade until your first month close is completed in RMA.
3. The coordinator will create a test area for RMA and convert your RM2000 data.
4. The coordinator works out a timeline with you that will involve three (3) core training sessions and your desired “go live” date.
5. You and your staff will look through the new RMA program, complete training sessions, and complete a list of items that need to be set up once you go live (the coordinator will provide you with the list).
6. If there are any issues or concerns, you will relay them to your coordinator so that they can be resolved prior to “going live.”

7. The coordinator will upgrade your data “live” on the predetermined date.
8. You will work in the live program and keep in close contact with the coordinator on your progress with the new program.
9. You will begin working with the new options available in RMA and schedule trainings on new features as needed.
10. After your first month end, you should be ready to be on your own with the latest and best software RMA has to offer!

---

## Every Step of the Way

During this process, your assigned team coordinator will be helping you through each phase of the upgrade to make the process simple and effective for you. Of course, we ask that you coordinate things on your end to ensure that your team is up-to-speed with the new program. We will do whatever it takes to make the upgrade a success for you. Please keep your coordinator apprised of any concerns you may have so that we can address them in a timely manner.

The next chapter discusses items that you can do proactively to prepare for the upgrade.

# Chapter 2 – Preparing for the Upgrade

---

## Versions

The upgrade feature is only available for companies running Route Manager 2000 Version 9x and later. It is designed to convert your data to the latest version of RMAAdvanced.

---

## Getting Started

The role of your coordinator is to accomplish all of the tasks outlined below with you. To give you an idea of what is involved, refer to the items listed below.

**NOTE:** Certain companies may decide they will upgrade without a coordinator involved and use this chapter along with Appendix A to achieve this goal.

### Purchase the upgrade

Before you upgrade to RMA, you will need to purchase it from a member of our sales team. Please contact us toll free at (866) 549-8837 ext. 255. The sales associate you speak with will also be able to provide you with further information regarding the upgrade process.

### Obtain a New Serial Number

Before you upgrade to RMA, you will need to obtain a new serial number for the program. This will be provided to you after you purchase the upgrade. If you did not receive one, contact ARS.

## Download the Upgrade File

The upgrade file is included with “full installation” versions of our software. These types of files are released periodically and can be downloaded from [www.ARS247.com](http://www.ARS247.com). All of our full installations are typically denoted as such.

## Access new Training Material

After you purchase the upgrade, your access to materials on [www.ARS247.com](http://www.ARS247.com) will change. You will now be able to download and view all of the RMA training documents and videos.

---

## When should I do the Upgrade?

Once you have assembled all of the items discussed in the previous section, you are now ready to begin the conversion process. We highly recommend that you do NOT run the conversion “live” initially. Run the upgrade in a test environment first, so that you will be able to review and test the new program to assess the changes from RM2000 and come up with a plan on how you want to apply the features of the software to the way you do business.

Because this is a major upgrade, there should not be any routes to upload or pending transactions. It is best to run the conversion when everyone can be out of RM2000 and allow for adequate time to make all of the necessary changes after the conversion. A list of things that will need to be updated after you upgrade to RMAAdvanced is included in Chapter 5 of this document.

---

## Upgrade with Ease

Upgrading to the RMA program is a big step, with the many additional features it can seem like a herculean undertaking. However, RMA is built on the RM2000 model, if you know your way around the old program, you and your staff can easily adapt to the new program. With the added assistance of your assigned coordinator, the transition will be a simple one. In Chapter 5, we discuss key areas of change that you should focus on prior to upgrading live. You do not need to learn every enhancement in RMA prior to the upgrade, instead, focus on the key areas of change to your daily process. This will make it an easy transition, and after you are comfortable with the new program, you can begin to take advantage of the added functionality.



# Chapter 3 – Converting the Data

---

## Data Preparation

Before converting to RMA, there are some preparations that need to take place in your RM2000 program. It is very important that you follow each step listed below. Your assigned coordinator will also provide you with information on these procedures.

### All cards are in for the day

Make sure that all of the routes have been uploaded for the day. If cards are still out, they will not be able to be uploaded to the RMA program, and will need to be keyed in manually.

### Post all transactions

All of your pending transactions need to be posted prior to the upgrade.

### Pack the data

Packing is the process of removing items marked for deletion in the program, this option can be found under **File>Pack** in your RM2000 menu.

### Print out Pre-Route Reports

To ensure that the conversion is successful with the migration of your route data, print out a list of all of your routes for the next business day. These will be compared to RMA after the conversion.

## Run a Data Integrity Check

The Data Integrity Check is a report that analyzes all areas of your data for consistency. If you have never run the report before, you may find that you have a bit of work to do prior to the upgrade. Most of the time, the items listed are minor and will not affect your conversion (i.e., a series of ZIP codes are missing) but the items should not be ignored indefinitely. Major items to look for on the Data Integrity Check are Balance Errors and Equipment problems, try to resolve as many of the issues reported that you can prior to upgrading.

# Chapter 4 – After the Upgrade

---

## Introduction

Once the upgrade is complete, there are still several areas that need to be addressed so that you can use all of the functions of the Route Manager Advanced software. In this chapter, we provide you with a checklist of the most important items so that you can get started right away. In addition, there are many other processes and activities that you may want to change due to the functionality that has been included.

---

## Completing the Conversion

The following checklist includes the most important areas of the program that need to be updated to complete the conversion. These steps should be followed in the order they are listed. For further information on each item listed, refer to the RMAAdvanced User Guide available on our Web site at [www.ARS247.com](http://www.ARS247.com).

## Required Steps

Check	Steps to Do
	<p><b>1. Reset Security Level Codes</b> – Browse to Lists &gt; Employees &gt; Security Level Codes and choose your Administrative security code. A new 'ALL' button has been added in RMA, choose the global 'Mark all as ALL' option. This will unlock the new features of RMA.</p>
	<p><b>2. Configure Handheld Class</b> – RMA uses unique Handheld Classes to define the handheld information for your drivers. Browse to Lists &gt; Routes &gt; Handheld Class and configure each class.</p>
	<p><b>3. Configure Route Master</b> – Route Master can be found under Lists &gt; Routes and is used for assigning drivers to routes.</p>
	<p><b>4. Configure Local Settings</b> – On each Workstation, configure Local Settings under the File menu.</p>
	<p><b>5. Run Data Integrity Check</b> – Go to Tools &gt; Administration &gt; Data Integrity Check. Check for any potential 'Show-Stoppers', things that would hinder daily operations.</p>
	<p><b>6. Preview Pre-Route Reports</b> – Review the Pre-Route Reports - make sure all of the accounts are showing up correctly (compare to the existing RM2000 print-outs).</p>
	<p><b>7. Prepare Data Cards</b> – Use the Prepare Data Card option under Handhelds &gt; Prepare Data Cards. Choose the correct handheld type and process this once per card.</p>
	<p><b>8. Process Morning Cards</b> – Process at least one card to a handheld to be sure that all of the route data shows up properly and is functional.</p>
	<p><b>9. Share and Map the new Program</b> – If you are going to use RMA in a network environment, you must properly share and map the new program on the network, contact a member of your IT department or Advantage Route Systems for further information.</p>

---

## Optional Steps

Check	Steps to Do
	<b>1. Start/Stop Groups</b> – Browse to Lists > Customer Setup Codes > Start Stop Groups. Start/Stop Groups allow you to group Start/Stop Reasons into categories. This will give you greater flexibility in looking at the sources for attracting new customers.
	<b>2. Contact Message Groups</b> – The Contact Message Groups option will make it easier to find relevant messages under Customer Information > Contacts screen. This allows you to create up to 8 groups that are then referenced by the user. The user can select to view the messages relating to none, one, or all eight groups.
	<b>3. Bank Accounts</b> – RMA enables the ability for you to use multiple bank accounts. If you are a larger company with more than one checking account, you may want to set up a separate account for each one.

For a more complete list of items that can be setup in RMA, please refer to the resources discussed in Chapter 5.



# Chapter 5 – Welcome to RMA

---

## Learning Materials

Now that you have converted your data, you will want to make sure that you are familiar with all of the resources and learning tools available for RMA. The reference material mentioned can be downloaded from our Web site directly at [www.ARS247.com](http://www.ARS247.com). You should download the complete set of RMAAdvanced manuals — the Supplemental Documents contain some of the most important additions and functions of the system. Here is a short list of the core RMA Manuals:

- Getting Started Guide
- User Guide
- Supplemental Documents
- Upgrade Guide
- Technical Reference Manual

## Training and Reference Videos

At this point, you may have already viewed the three (3) core training videos created to assist you with your upgrade. In addition to these videos, we also have standard RMA training videos and our weekly Power Hour videos available for you at [www.ARS247.com](http://www.ARS247.com).

---

## Areas of Interest

Listed below are some of the areas that have gone through a major overhaul between the two versions. These items are generally used on a daily basis. Along with each item listed, we have included references to detailed documents available for download on our Web site [www.ARS247.com](http://www.ARS247.com).

### Delivery Orders

Delivery Orders are a big change between the two versions and were previously known as Telephone Orders in RM2000. The screens are similar, but RMA offers many enhancements in this area. One of the most important features is the ability to schedule and track more than one order at a time. RM2000 is limited in this area, and this is a disadvantage to companies that need to schedule a large number of orders daily—perhaps more than one on each account—and each Delivery Order is now tracked by a unique “ticket number” to ensure each order is honored as well as closed when completed.

- Refer to Chapter 3.09 ‘Managing Delivery Orders’ available under the Supplemental Documents section on [www.ARS247.com](http://www.ARS247.com).

### Route Master

In RM2000, your route ID’s are assigned to your drivers. With RMA, we have created a ‘Route Master’ option that allows you more flexibility with each individual route. Now you have the ability to assign drivers to routes, not the other way around. This makes it easier to swap drivers daily, as well as establish unique settings per route.

- Refer to the *Route Master* section of ‘User guide A’ available under Manuals at [www.ARS247.com](http://www.ARS247.com).

### Handheld Class

The Handheld Class feature allows you to define unique settings for each individual handheld type you use. It can also be used to establish individual settings per delivery driver. This is a major advantage over RM2000, as you are limited in this area.

- Refer to the *Handheld Class* section of ‘User guide A’ available under Manuals at [www.ARS247.com](http://www.ARS247.com).

### New Customer W/Order Wizard

With all of the added functionality in RMA, this has had an impact on the new customer wizard. As this is one of the most important features, take the time to create some new accounts to get the new process down.

- Refer to the *New Customer W/Order* section of ‘User guide A’ available under Manuals at [www.ARS247.com](http://www.ARS247.com).



## Payment Entry

Standard payments can be entered using the same routines as RM2000 but there is quite a bit of added functionality to this section within RMAAdvanced.

- Refer to Chapter 3.02 'Entering Payments' available under the Supplemental Documents section on [www.ARS247.com](http://www.ARS247.com).

## Custom Pricing

RMAAdvanced offers some added pricing functionality that may benefit your company (i.e., Quantity Discount Pricing).

- Refer to Chapter 2.01 'Pricing Schemes in RMA' available under the Supplemental Documents section on [www.ARS247.com](http://www.ARS247.com).

## Container Deposits and Empties

Container deposit tracking is much more definitive in RMA. You now have the ability to track up to nine different container types. In addition, RMA uses a new Product Class (\*) that will need to be added to the system. This will be used for empty containers coming off the truck.

- Refer to Chapter 2.04 'Container Deposit Tracking' available under the Supplemental Documents section on [www.ARS247.com](http://www.ARS247.com).

## Pre-Posting (Multi-Branch)

For those companies that upgrade to RMA to take advantage of the multiple branch functions, the posting process will be modified slightly to include a new 'Pre-Posting' option.

- Refer to Chapter 3.06 'Posting Transactions' available under the Supplemental Documents section on [www.ARS247.com](http://www.ARS247.com).

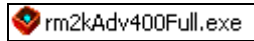
# Appendix A: Installing the Upgrade

If you are installing RMA in a network environment, make sure that you have adequate rights to install the program; you may need to consult with a

qualified IT technician for further information on network related information prior to the upgrade.

## Installing RMA

1. Double-click on the RMA installation file (similar to the following):



2. The file will proceed to unpack and may take a minute or two. Select 'Next' when prompted with the *Welcome* screen:



3. Select 'Yes' or 'No' to the License Agreement.

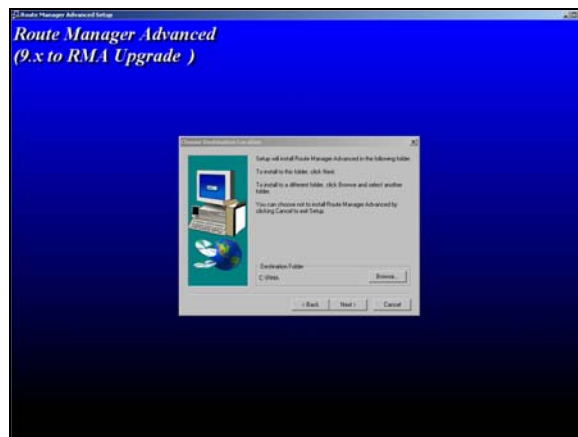


**NOTE:** If 'No' is selected, the installation is canceled.

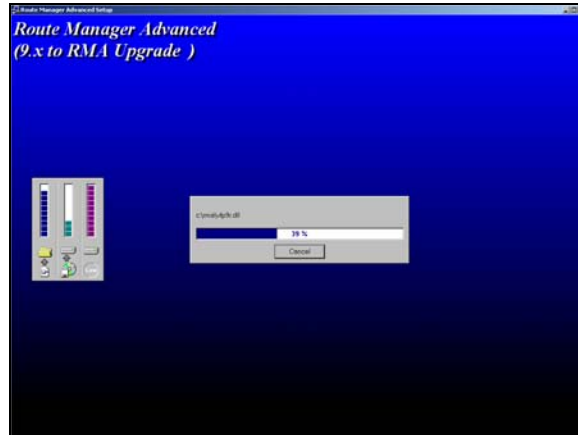
4. On the *Select Components* screen, choose the '9.x to RMA Upgrade' option and click 'Next':



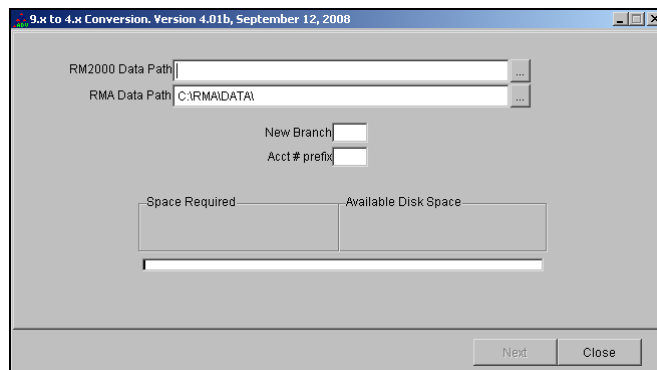
5. Enter the target directory where you would like to install the new RMA program:



6. The installation of RMA will begin:



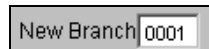
7. You will be prompted for the RM2000 data location:



8. Enter or browse  for the RM2000 'Data' folder on the screen:

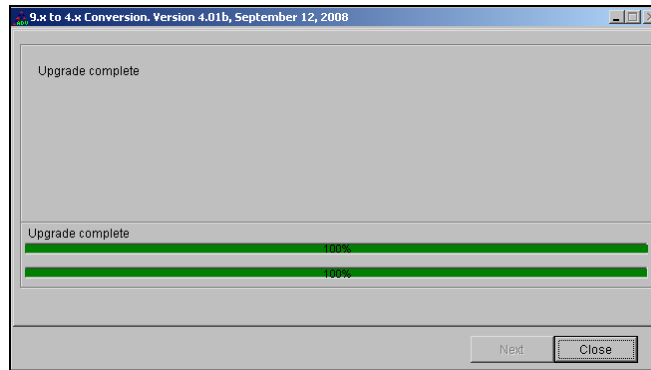


9. Enter a Branch ID that will be applied to all of your customers. This new field is required by RMA. The Branch ID can be alphanumeric and must be 4-digits in length.



10. After the RM2000 Data Path has been established and the Branch ID populated, click 'Next' to begin the conversion:

11. The conversion process may take a few minutes; the system will also create backups of your existing and new data as part of this process. Click 'Close' when prompted:



12. Select 'Finish' to close the RMA installation program, the process is now complete and you should have a new RMA icon on your desktop or Start menu.
13. Access the new RMA program and you will be prompted to enter your new serial number and CI Code (if you do not have this information, contact ARS). Enter the information and click 'OK'.



14. You should now be prompted with your new login screen. This completes the installation portion of the upgrade.



# Index

Route Master 16

## V

Versions 7

## W

When should I do the Upgrade 8

## A

After the Upgrade 11

## C

Container Deposits and Empties 17

Converting the data 9

## D

Data Preparation 9

Delivery Orders 16

## H

Handheld Class 16

## I

Installing RMA 18

Installing the Upgrade 18

## L

Learning Materials 15

Learning more on RMA 15

## N

New Customer W/Order Wizard 16

## P

Payment Entry 17

Pre-Posting (Multi-Branch) 17

Purchase the upgrade 7

## R

Required Steps 12