Chapter 2.16: Custom Forms

Overview

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.
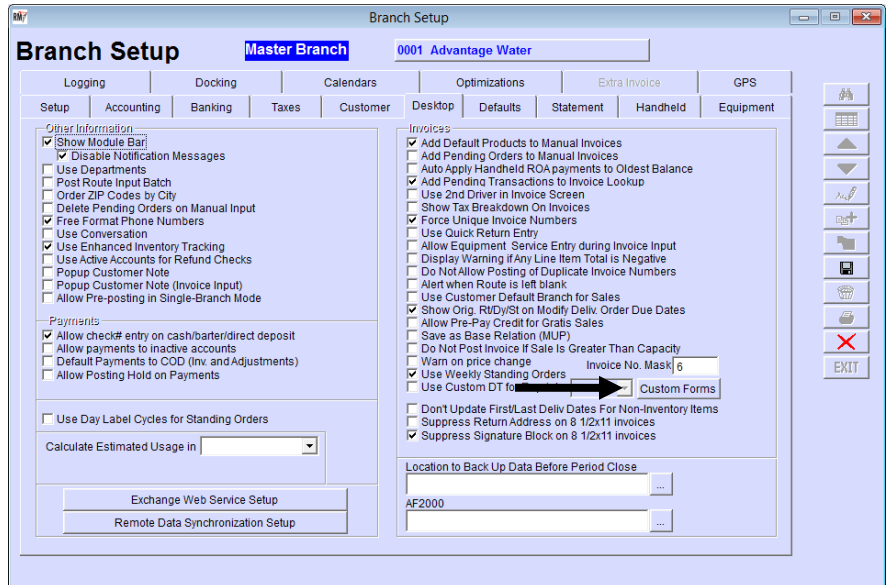
NOTE: You will not be able to complete the steps in this document until Advantage Route Systems has transferred your custom forms to Route Manager.
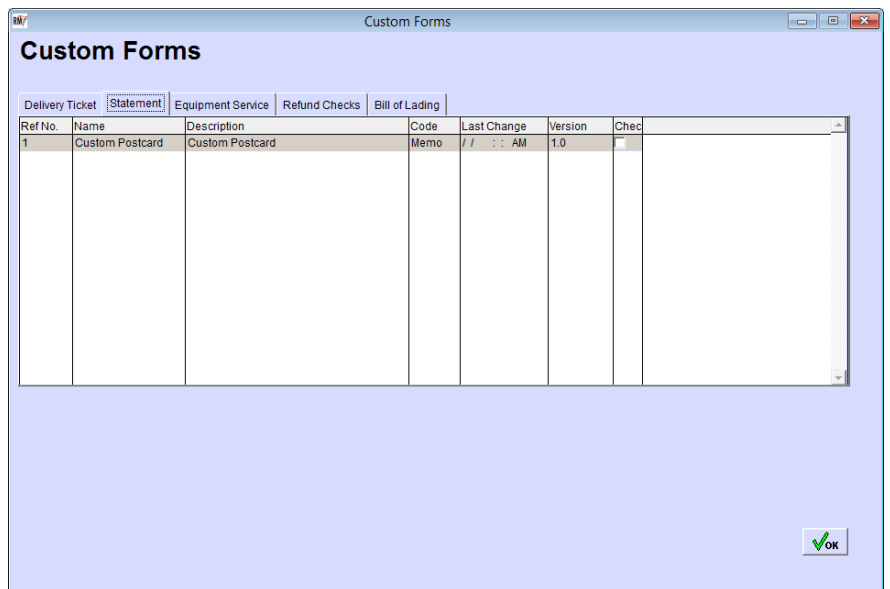
Enabling Custom Forms

The *Custom Forms* option within *Branch Setup* allows you to enable/disable all of your custom forms within Route Manager.

Navigate to *File > Branch Setup*, and select the *Desktop* tab. Click **Modify** and select the 'Custom Forms' button.

Any custom forms available will automatically be displayed on the screen on the tab it relates to.

To use any displayed *Custom Form* within the program, simply check the box to the right of each form.

NOTE: Multiple forms may be enabled if necessary.
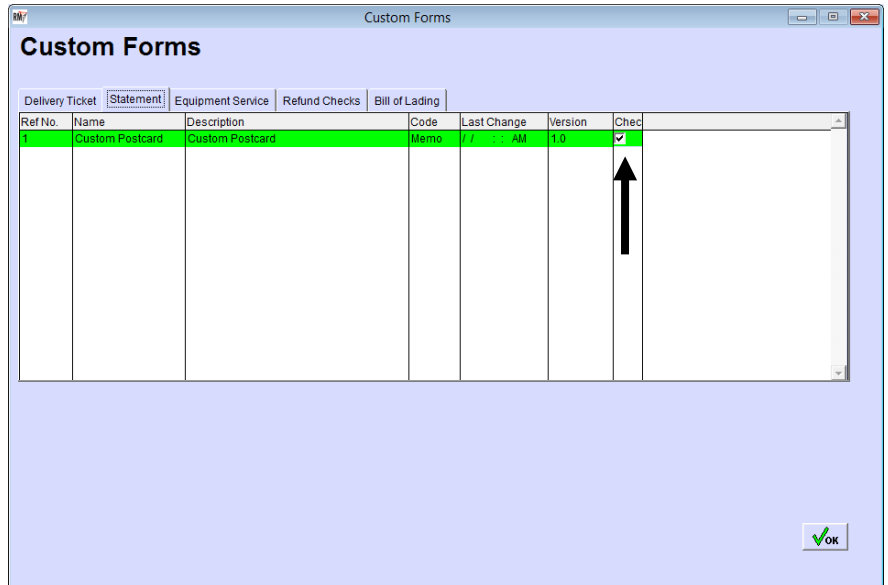
Available Forms:

Delivery Note: This option replaces the standard *Delivery Tickets* printed under *Route > Print Route Tickets*.

Invoice: This option replaces the standard desktop invoice (statement in US) full page printout.

Equipment Service: This option replaces the standard *Equipment Service Ticket* printed under *Reports > Equipment > Equipment Service Ticket*.

Refund Checks: This option replaces the standard *Refund Checks* printed under *Transactions > Refund Checks > Print Refund Checks*.

Bill of Lading: This option replaces the standard *Bill of Lading* form printed under *Transactions > Supply Chain Order > Print Bill of Lading*.
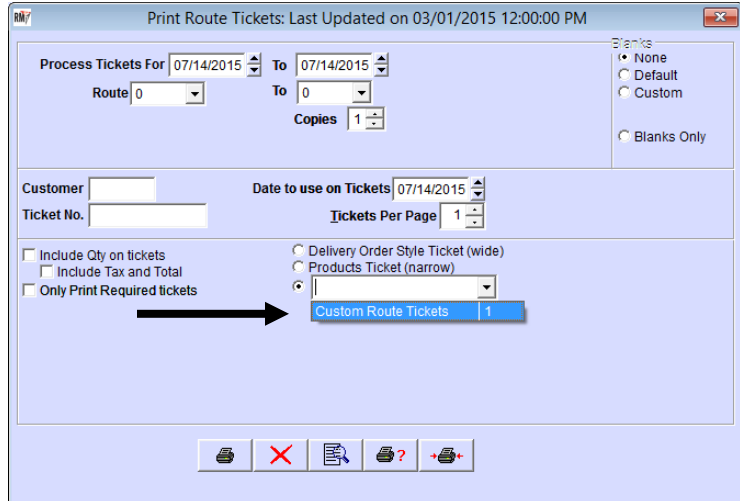
Additional Information:

► Each file contains a date created and version number.

► Double-click on the word 'Memo' to view the source code of the file.

Refer to each *Custom Form* section within this document that applies to your company for any additional steps on setting up and printing your custom form.

Custom Delivery Ticket

Navigate to *Route > Print Route Tickets* to view, or print, your custom *Delivery Ticket*.

Select the form within the drop-down list available on the bottom right portion of the screen.

Only the custom forms selected in *Branch Setup* will be displayed.

NOTE: Some *Custom Forms* cannot be previewed on the screen.

Custom Invoice

Navigate to *Lists > Customer Setup Codes > Statement Codes* to assign your custom form to an *Invoice* (*Statement* in US).

Choose the **Modify** key on the desired *Statement Code,* and select the 'Custom Statement' radio button, followed by the custom form within the drop-down list.

Save your changes and exit the screen.
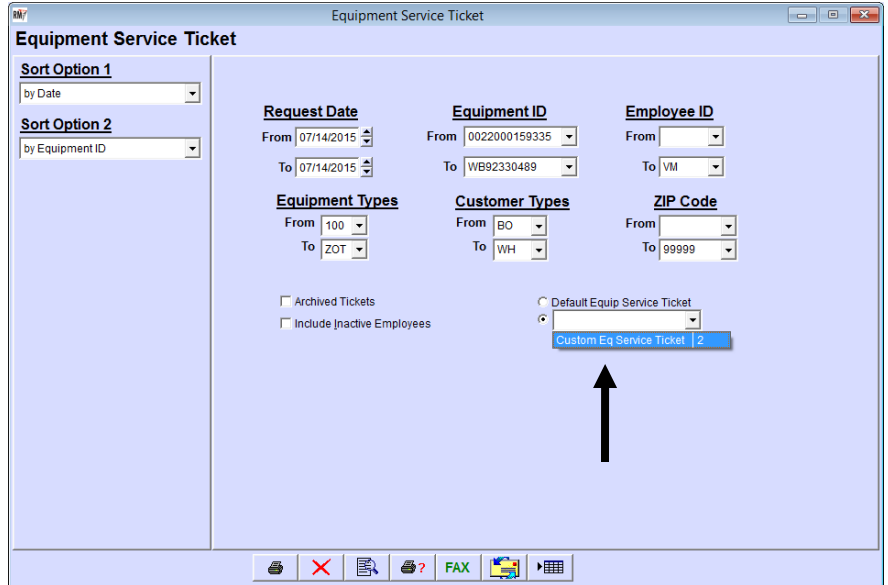
> **NOTE:** Some *Custom Forms* cannot be previewed on the screen.

The new custom form will now be used when you generate *Invoices* (*Statements*) using the *Statement Code* above.

Custom Equipment Service Ticket

To view, or print, your custom *Equipment Service Ticket*, browse to *Reports > Equipment > Equipment Service Tickets*.

Select the form within the drop-down list available on the bottom right portion of the screen.

NOTE: Some *Custom Forms* cannot be previewed on the screen.

Custom Refund Checks

To view, or print, your custom *Refund Check* form, browse to *Modules > Refund Checks > Print Refund Checks.*

Select the 'Custom Format' radio button, and choose the custom form within the drop-down list available on the bottom right portion of the screen.

Custom Bill of Lading

To view, or print, your custom *Bill of Lading*, browse to *Modules > Supply Chain Orders > Print Bill of Lading.*

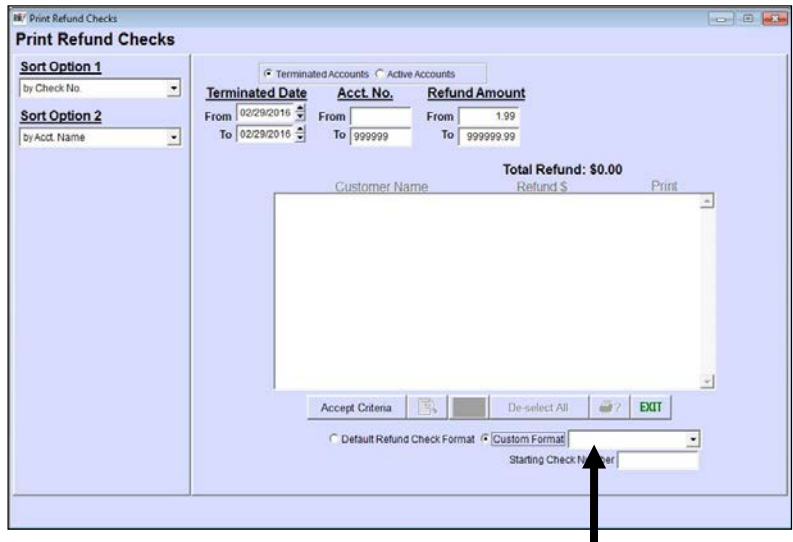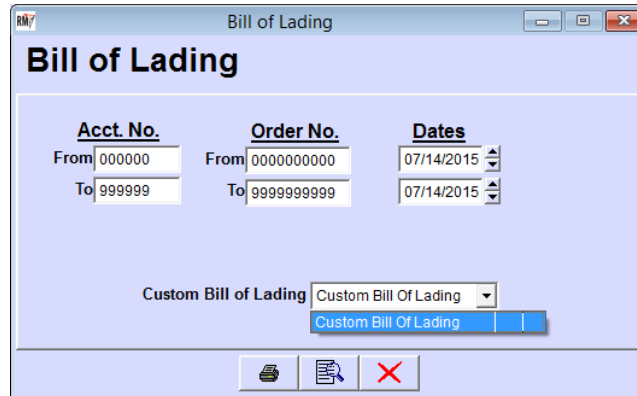Select the form within the drop-down list available on the bottom right portion of the screen.

NOTE: Some *Custom Forms* cannot be previewed on the screen.

Summary

The *Custom Forms* option allows you to tailor RMA to suit the needs of your company by taking advantage of our custom services available to you at minimal costs. For further question on *Custom Forms* and other services available, please contact Advantage Route Systems.

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