

# Chapter 2.16: Custom Forms

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## 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.

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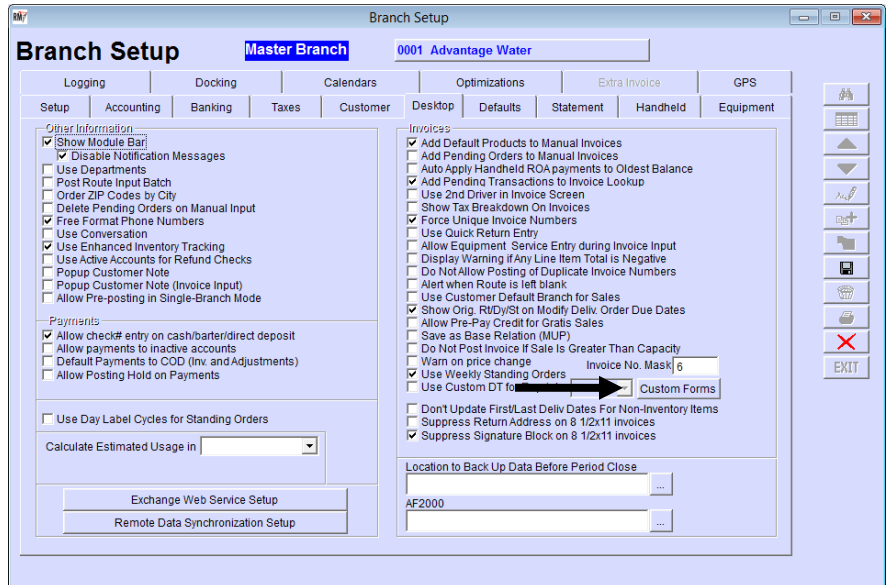
**NOTE:** You will not be able to complete the steps in this document until Advantage Route Systems has transferred your custom forms to Route Manager.

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## Enabling Custom Forms

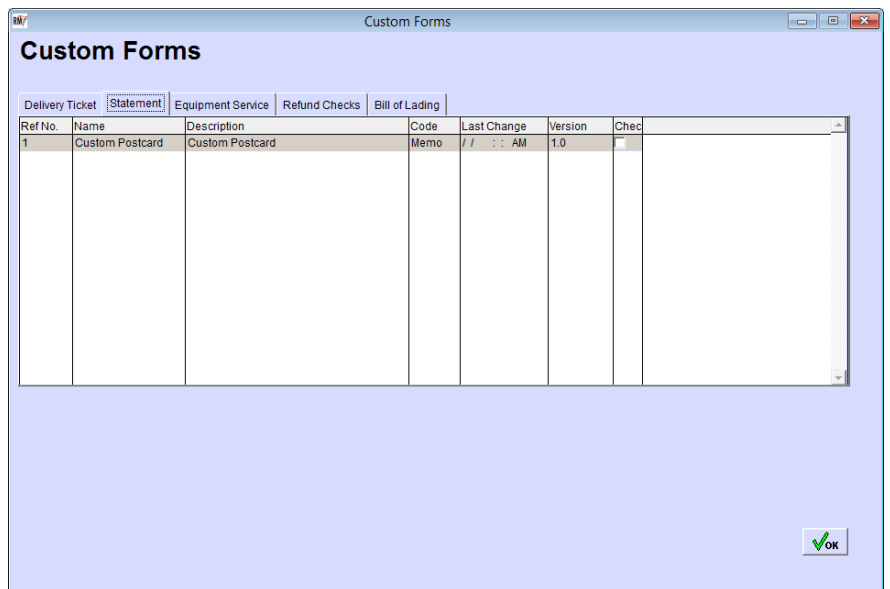
The *Custom Forms* option within *Branch Setup* allows you to enable/disable all of your custom forms within Route Manager.

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



The screenshot shows the 'Branch Setup' window for '0001 Advantage Water'. The 'Desktop' tab is selected. In the 'Invoices' section, the 'Use Custom DT to' checkbox is checked, and an arrow points to the 'Custom Forms' button next to it. Other options include 'Add Default Products to Manual Invoices', 'Add Pending Orders to Manual Invoices', 'Auto Apply Handheld ROA payments to Oldest Balance', 'Add Pending Transactions to Invoice Lookup', 'Use 2nd Driver in Invoice Screen', 'Show Tax Breakdown On Invoices', 'Force Unique Invoice Numbers', 'Use Quick Return Entry', 'Allow Equipment Service Entry during Invoice Input', 'Display Warning if Any Line Item Total is Negative', 'Do Not Allow Posting of Duplicate Invoice Numbers', 'Alert when Route is left blank', 'Use Customer Default Branch for Sales', 'Show Orig. RT/CySt on Modify Deliv. Order Due Dates', 'Allow Pre-Pay Credit for Gratis Sales', 'Save as Base Relation (MUP)', 'Do Not Post Invoice If Sale is Greater Than Capacity', 'Warn on price change Invoice No. Mask 6', 'Use Weekly Standing Orders', 'Use Custom DT to', 'Don't Update First/Last Deliv Dates For Non-Inventory Items', 'Suppress Return Address on 8 1/2x11 Invoices', and 'Suppress Signature Block on 8 1/2x11 Invoices'. The 'Location to Back Up Data Before Period Close' is set to 'AF2000'.

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



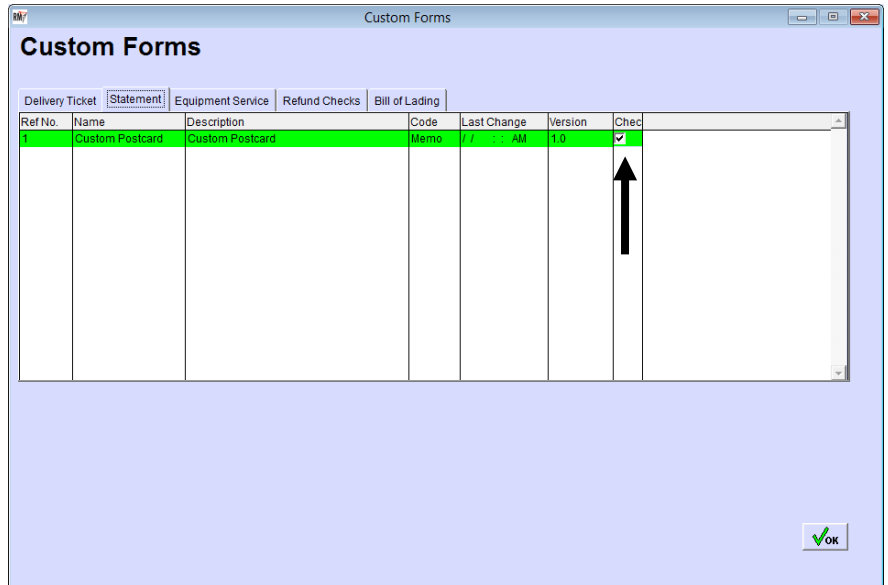
The screenshot shows the 'Custom Forms' window with a table of custom forms. The 'Statement' tab is selected. The table has the following columns: Ref No., Name, Description, Code, Last Change, Version, and Chec. There is one row with the following data:

Ref No.	Name	Description	Code	Last Change	Version	Chec
1	Custom Postcard	Custom Postcard	Memo	/ / . . AM	1.0	<input type="checkbox"/>

An 'OK' button is visible in the bottom right corner.

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:**

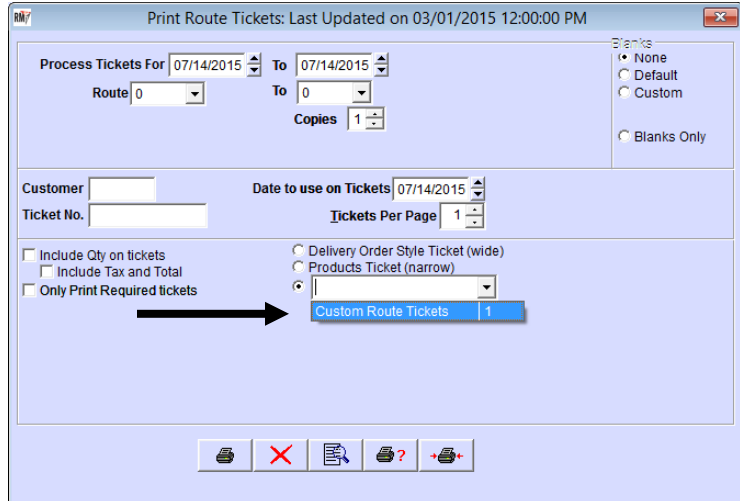
- ▶ Each file contains a date created and version number.
- ▶ Double-click on the word 'Memo' to view the source code of the file.

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.



The screenshot shows a window titled "Print Route Tickets: Last Updated on 03/01/2015 12:00:00 PM". The interface includes several input fields and options:

- Process Tickets For:** Date range from 07/14/2015 to 07/14/2015.
- Route:** A dropdown menu currently showing "0".
- To:** A dropdown menu currently showing "0".
- Copies:** A spinner control set to "1".
- Blanks:** Radio buttons for "None" (selected), "Default", "Custom", and "Blanks Only".
- Customer:** An empty text input field.
- Date to use on Tickets:** A date picker set to 07/14/2015.
- Ticket No.:** An empty text input field.
- Tickets Per Page:** A spinner control set to "1".
- Options:**
  - Include Qty on tickets
  - Include Tax and Total
  - Only Print Required tickets
  - Delivery Order Style Ticket (wide)
  - Products Ticket (narrow)
  - A dropdown menu with "Custom Route Tickets" selected and a value of "1". An arrow points to this dropdown from the text "Only the custom forms selected in Branch Setup will be displayed."

At the bottom of the window, there is a toolbar with icons for home, close, print, help, and refresh.

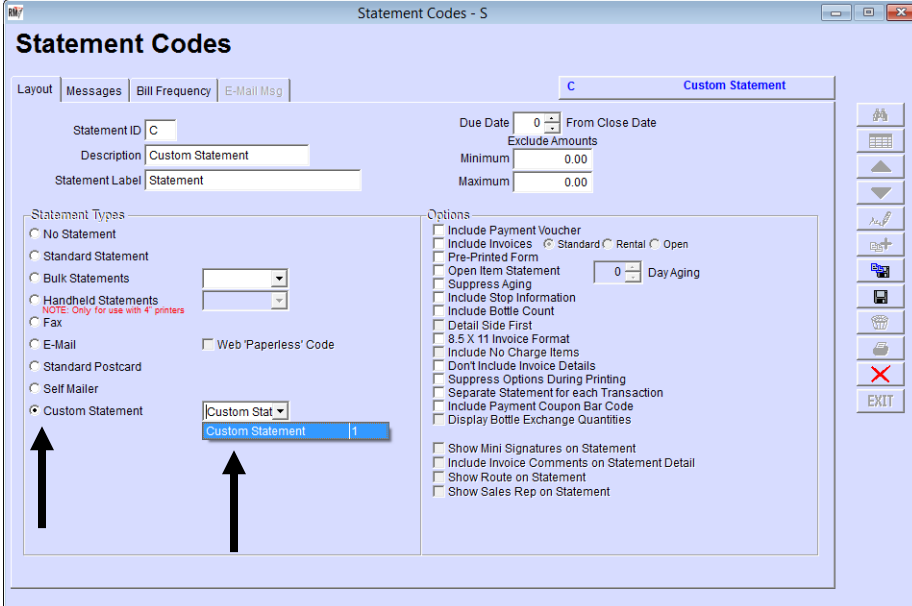
Only the custom forms selected in *Branch Setup* will be displayed.

**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.

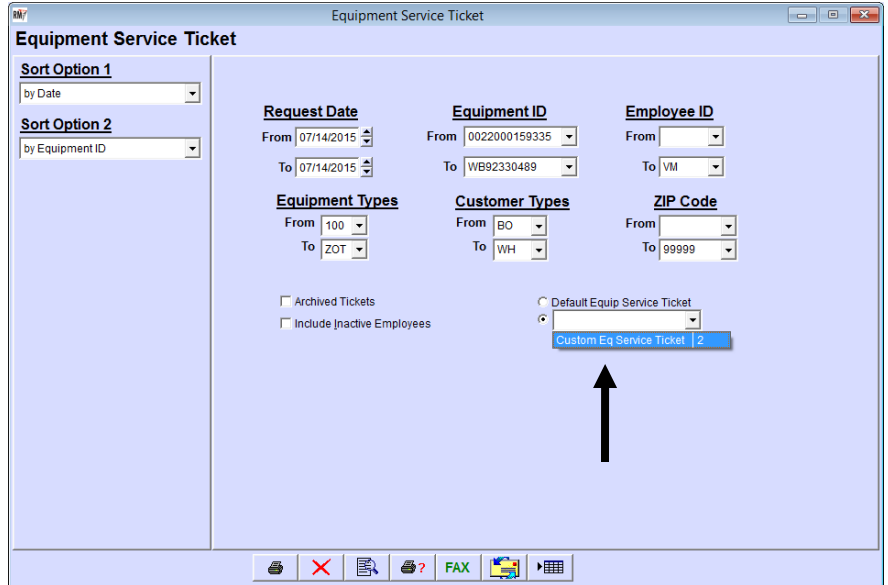
**NOTE:** Some *Custom Forms* cannot be previewed on the screen.

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.

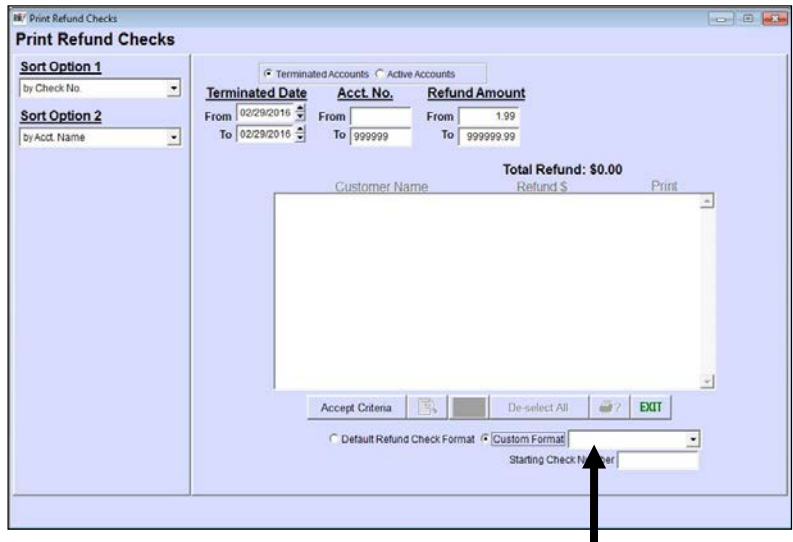


**NOTE:** Some *Custom Forms* cannot be previewed on the screen.

## 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.

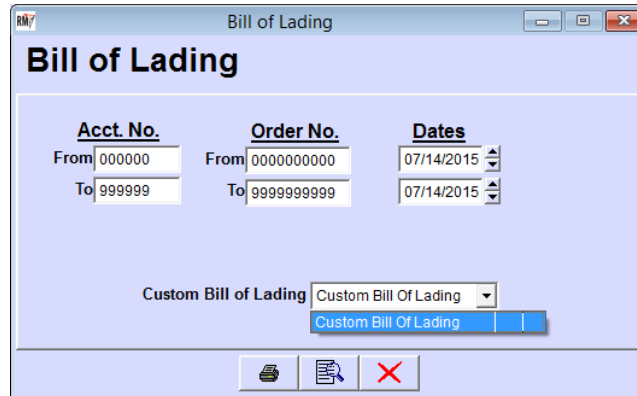


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## Custom Bill of Lading

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.

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## 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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