Chapter 2.18: Extending Route Calendars

Overview

Extending your customer 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. It is typically recommended that you only extend your route calendars a year in advance, but you do have the option of extending them further.

This document will guide you through all of the steps involved when extending your route calendars. Each step should be followed carefully. You should not attempt to extend the calendars unless you are confident that you understand all of the material and are familiar with the *Day Label Calendar*. If a mistake is made, you may be required to contact an Advantage Route Systems technician for assistance.

> **NOTE:** Only administrative users or route supervisors should attempt this process. Refer to the *Getting Started Guide* for further information on general routing and *Day Labels*.

Customer Delivery Schedules

It is important to understand how your customer's deliveries are determined within Route Manager. If you were to pull up a customer's account within *Customer Information*, you can view all of their deliveries based on the current *Day Label Calendar*:

This particular account receives a delivery on the 9th and 23rd of December 2015. Each delivery is determined by the customer's assigned *Day Label* (B03). In addition, all of the holidays in December (2015) are listed which have fallen on a weekend and do not have an impact on this company's delivery schedule – since they do not deliver on weekends. Each company has the option to skip deliveries on holidays, slide all deliveries around holidays, or ignore all holidays.

> **NOTE:** Refer to the *Getting Started Guide* for further information on creating *Day Labels* and how they handle holidays.

It is time to extend your route calendars when the delivery calendar is no longer extended. Clicking to the month of January (2016) on this account shows that there are not any scheduled deliveries or *Day Labels*:


This means that the customers will not be scheduled for deliveries after December 31st.

Continue to the next section to prepare your company's data for extending the route calendar.
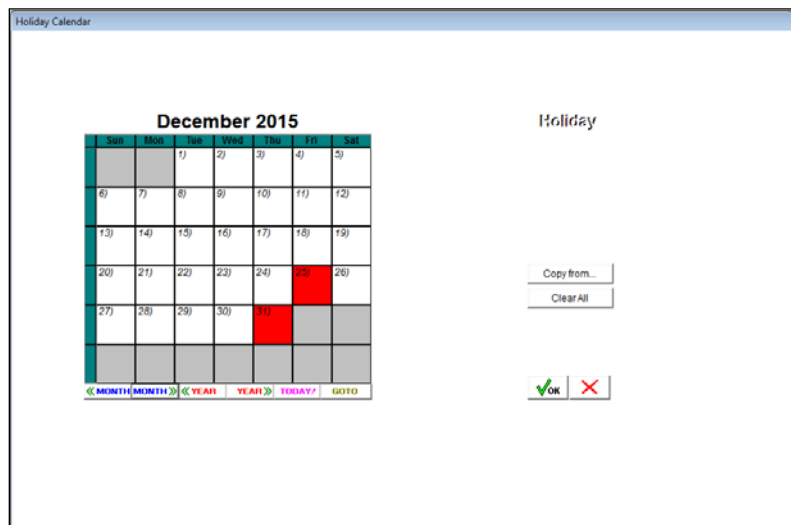
Holiday Calendar

One of the first things you will need to do to prepare for extending your route calendar is to add your scheduled holidays for the next year.

Navigate to *File > Branch Setup*, and select the *Calendars* tab:
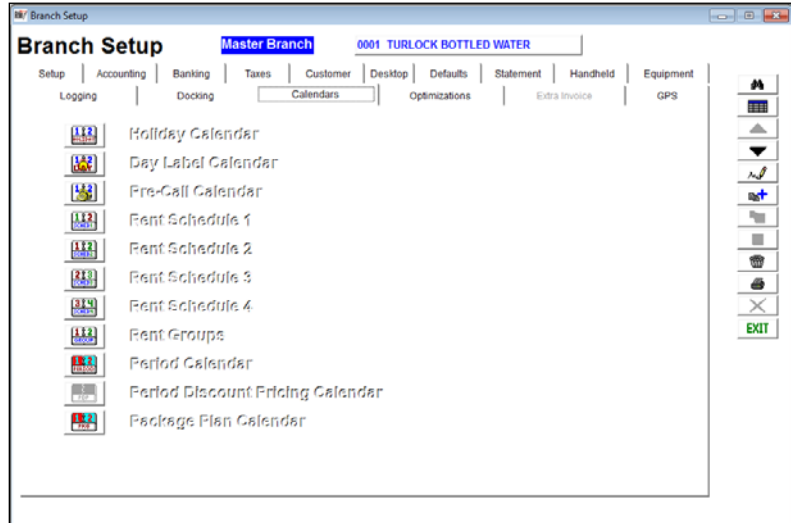
Click the [1 2 HOLIDAY] *Holiday Calendar* icon and the following screen will be displayed:

The holidays previously listed in the customer's account for December (2015) are clearly highlighted in red.

To schedule new holidays, simply use the arrows on the bottom of the screen to navigate through each month and click on the day of each holiday:
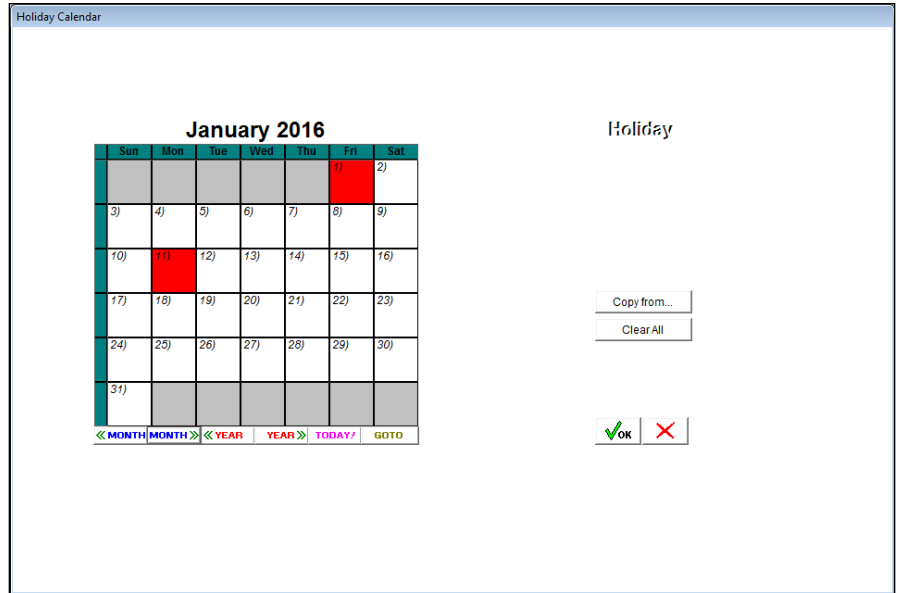
Additionally, you can use the 'Copy from...' icon to copy holidays from a different branch (if applicable) or select 'Clear All' if you make a mistake:
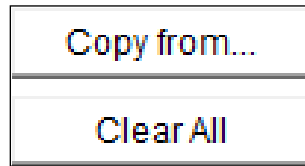
Click the **OK** key once you have scheduled all of your holidays for the year.

> **NOTE:** This process will need to be completed for each *Branch* within your Route Manager program.

Backup

After you have scheduled your holidays for the year, it is recommended that you make a backup of your data. This can be done by going to *File>Backup/Restore>Backup Data Files*.
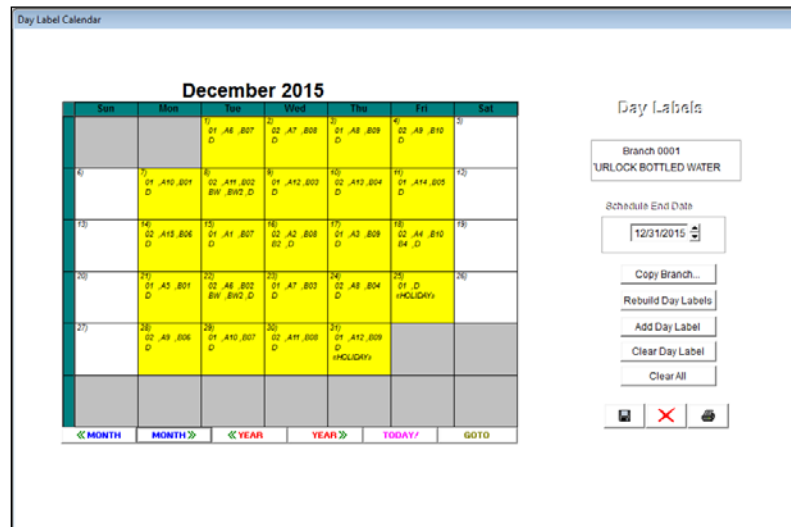
Day Label Calendar

After you have scheduled your holidays for the year, you are now ready to extend the *Day Label Calendar*.

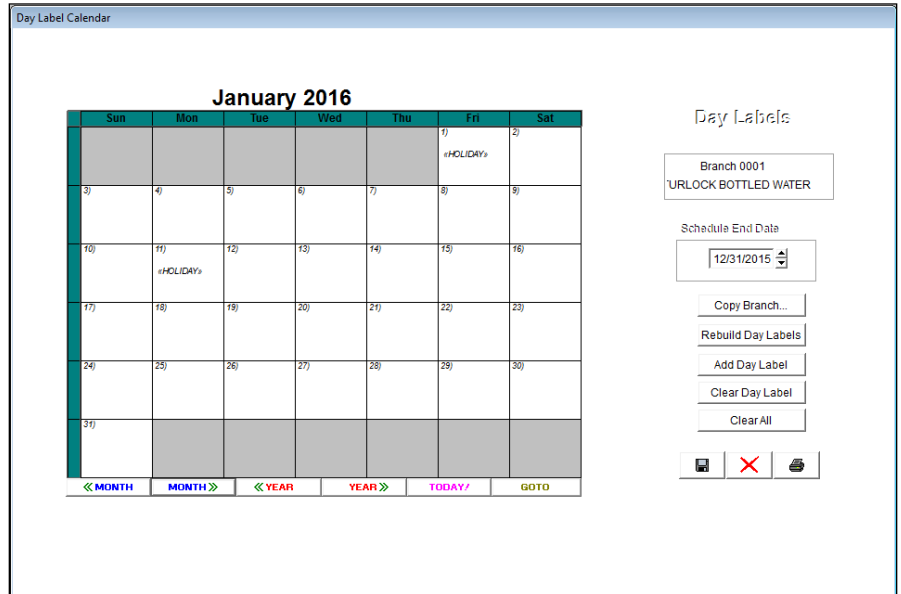Navigate to *File > Branch Setup*, and select the *Calendars* tab:
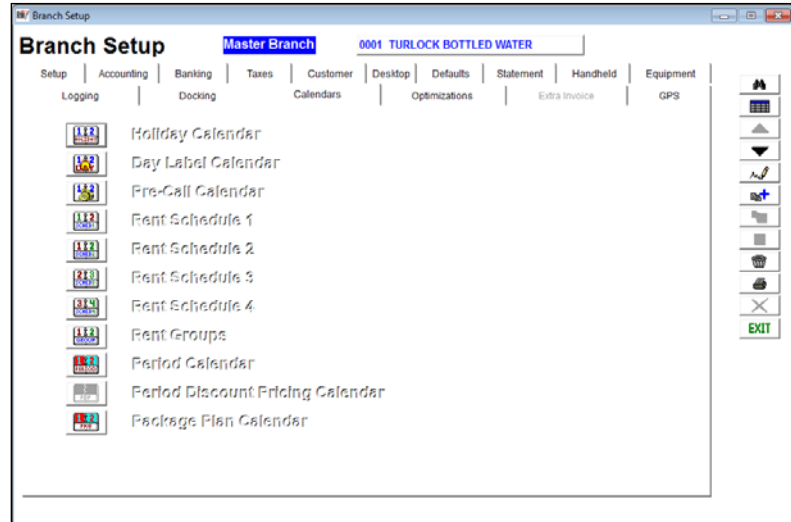
Click on the *Day Label Calendar* icon and the following screen will be displayed:

The current *Day Labels* and holidays previously listed in the customer's account for December (2015) are clearly displayed on the screen.

January (2016) for this company shows the scheduled holidays, but there are no *Day Labels* listed:
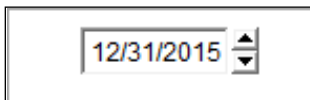
This example will guide you through extending the current *Day Label Calendar* without making any major changes.
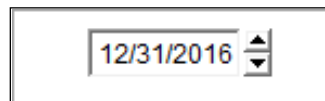
> **NOTE:** If you need to make changes by adding or removing labels you should refer to the *Getting Started Guide*.

Route Schedule End Date

It is important that you write down the date listed within the *Schedule End Date* field on the screen (this will be used later):

Change this date to the following year (or more if needed):

Rebuild Day Labels

Select the *Rebuild Day Labels* key to extend the *Day Labels* to the new end date:

Click **OK** to the confirmation message:
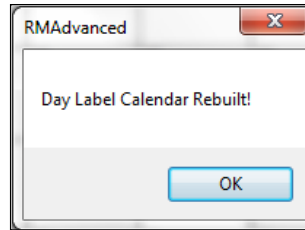
NOTE: You can use the 'Copy Branch…' key to copy the Day *Labels* from another branch if necessary.

Viewing Results

You will need to click the ▢ *Save* key on the screen prior to viewing the extended labels:

Click on the *Day Label Calendar* icon again to view the updated calendar:

Now the calendar is extended throughout the year. The current company is skipping deliveries on holidays (below):
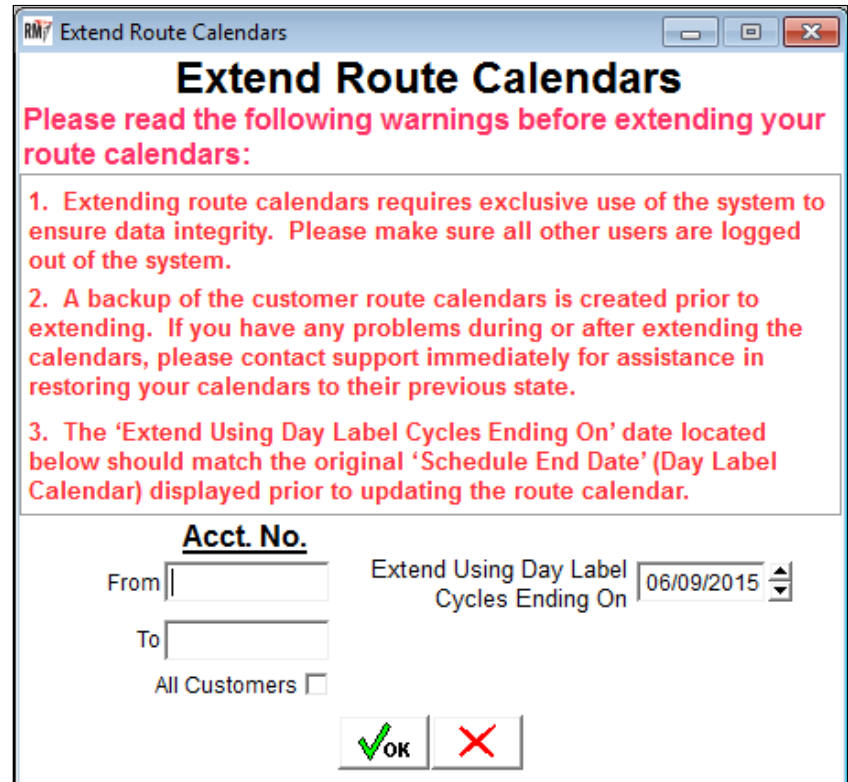

> **NOTE:** Refer to the *Getting Started Guide* to learn more about *Day Label* and holiday scheduling.

Exit the screen and repeat this process for each additional branch (if applicable).

Extend Route Calendars

The final step in this process is to apply the new route schedule to your customers.

Navigate to *Route > Utilities > Extend Route Calendars* and the following screen will be displayed:
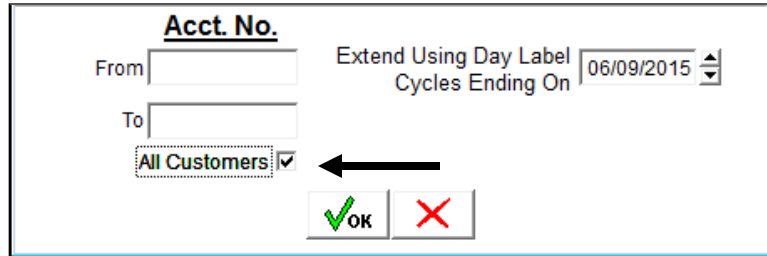

The screen lists a series of warnings that you should take into consideration before proceeding:

1. This process requires exclusive access to Route Manager. Make sure that all other users are logged out of the system.

2. A backup file is created prior to extending the calendars to ensure that if something goes wrong during the process that an ARS technician can restore your calendar data.

3. The date entered within the 'Extend Using Day Label Cycles Ending On' field listed on this screen should match the original 'Schedule End Date' that was listed within the *Day Label Calendar* (you were asked to write this date down previously).
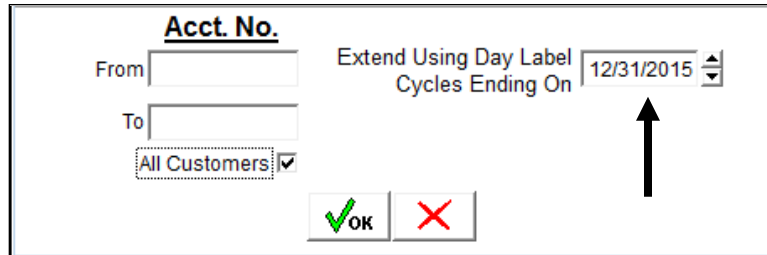
Read each message carefully before continuing.

Enter the desired account number range or select the
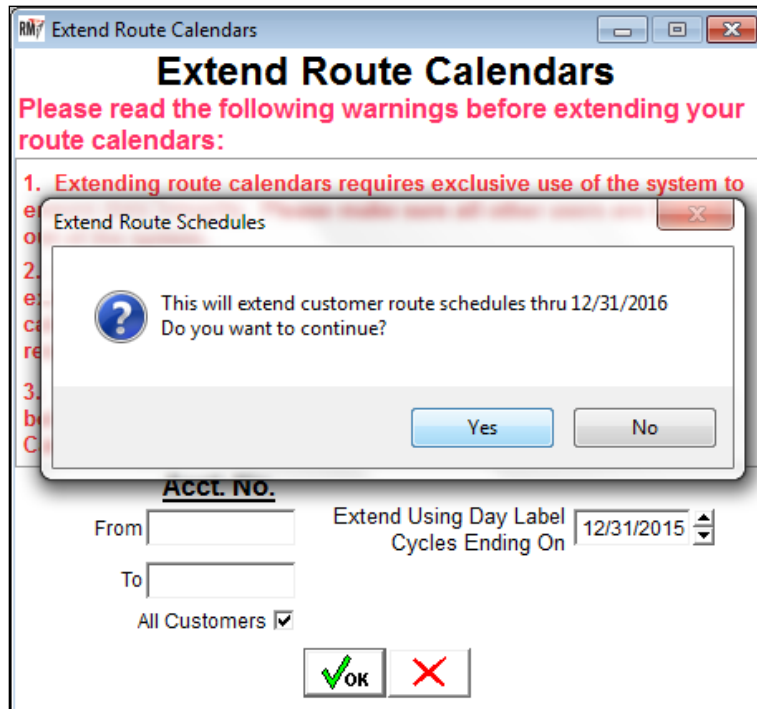'All Customers' option:

Enter the previously noted 'Schedule End Date'
(original date in *Day Label Calendar*) into the 'Extend
Using Day Label Cycles Ending On' field:

Click **OK** and confirm that the new 'Schedule End Date'
is accurate on the screen:

Click **Yes** to proceed and extend the calendars.

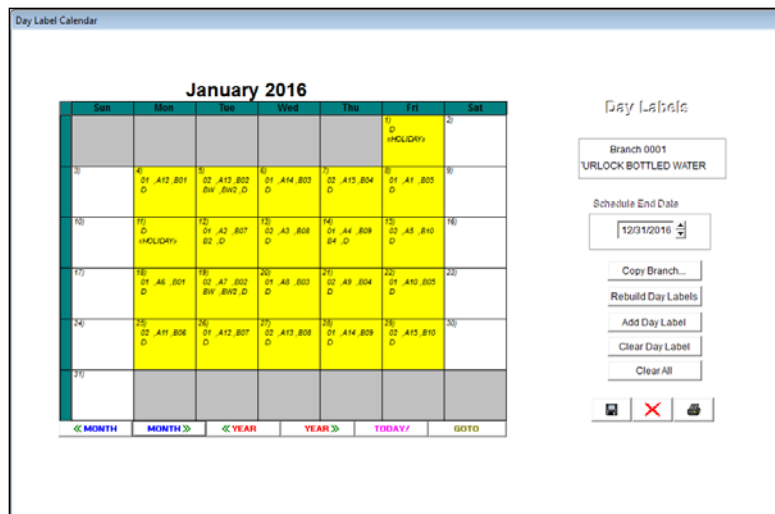You can view the results report once the process is complete:
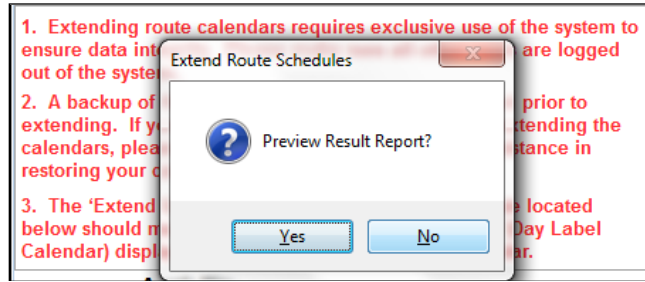
This report will list all of the accounts that were successfully updated:

Extend Customer Route Calendar Results

Scheduling Customer 100000 Stop 2 by Day Label B01
Scheduling Customer 000100 Stop 1 by Day Label B03
Scheduling Customer 000104 Stop 1 by Day Label B04
Scheduling Customer 100000 Stop 1 by Day Label B05
Scheduling Customer 000107 Stop 1 by Day Label B08
Scheduling Customer 000105 Stop 1 by Day Label W01
Scheduling Customer 000106 Stop 1 by Day Label W01
Scheduling Customer 000108 Stop 1 by Day Label W01
Scheduling Customer 000109 Stop 1 by Day Label W01
Scheduling Customer 000110 Stop 1 by Day Label W01
Scheduling Customer 000111 Stop 1 by Day Label W01
Scheduling Customer 000112 Stop 1 by Day Label W01
Scheduling Customer 000113 Stop 1 by Day Label W01
Scheduling Customer 000114 Stop 1 by Day Label W01
Scheduling Customer 000115 Stop 1 by Day Label W01
Scheduling Customer 000116 Stop 1 by Day Label W01
Scheduling Customer 000117 Stop 1 by Day Label W01
Scheduling Customer 000118 Stop 1 by Day Label W01
Scheduling Customer 000119 Stop 1 by Day Label W01
Scheduling Customer 000121 Stop 1 by Day Label W01

Click **Yes** or **No** to continue.

Navigating back to the example account shown in the first section of this document, you can now see that the customer has scheduled deliveries for 2016:

Summary

This completes the *Extending Route Calendars* process. If you find that the customers are not scheduled properly, or have encountered any other problems, please contact Advantage Route Systems immediately so that we may assist you with resolving the issue.

www.AdvantageRoute.com

Warning

Series 7: Version Date, March 13, 2016