

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*:

Delivery Calendar

December 2015

Sun	Mon	Tue	Wed	Thu	Fri	Sat
		1) 01 ,A6 B07 ,D	2) 02 ,A7 B08 ,D	3) 01 ,A8 B09 ,D	4) 02 ,A9 B10 ,D	5)
6)	7) 01 ,A10 B01 ,D	8) 02 ,A11 B02 ,BW BW2 ,D	9) 01 ,A12 B03 ,D	10) 02 ,A13 B04 ,D	11) 01 ,A14 B05 ,D	12)
13)	14) 02 ,A15 B06 ,D	15) 01 ,A1 B07 ,D	16) 02 ,A2 B08 ,B2 D	17) 01 ,A3 B09 ,D	18) 02 ,A4 B10 ,B4 D	19)
20)	21) 01 ,A5 B01 ,D	22) 02 ,A6 B02 ,BW BW2 ,D	23) 01 ,A7 B03 ,D	24) 02 ,A8 B04 ,D	25) «HOLIDAY» 01 ,D	26)
27)	28) 02 ,A9 B06 ,D	29) 01 ,A10 B07 ,D	30) 02 ,A11 B08 ,D	31) 01 ,A12 B09 ,D		

Route:

Route:

■ Auto Schedule ■ Skip ■ Drag Stop
■ Special - Delivery Order ■ Special - RDEX Skip ■ Drag Delivery Order
■ Special - Manual / Forward Sales / Re-sequene ■ Suspended

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*:

Delivery Calendar

January 2016

Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1)	2)
3)	4)	5)	6)	7)	8)	9)
10)	11)	12)	13)	14)	15)	16)
17)	18)	19)	20)	21)	22)	23)
24)	25)	26)	27)	28)	29)	30)
31)						

Route

Acct. No.

Route

Schedule Every 0 Weeks

Schedule Every 1 Days

Schedule Every 2 Days

Schedule Every 2 Weeks

Schedule Every 3 Weeks

Clear All

OK X

■ Auto Schedule
 ■ Skip
 ■ Drag Stop
■ Special - Delivery Order
 ■ Special - RDEX Skip
 ■ Drag Delivery Order
■ Special - Manual / Forward Sales / Re-sequence
 ■ Suspended

<< MONTH
 MONTH >>
 << YEAR
 YEAR >>
 TODAY/
 GOTO

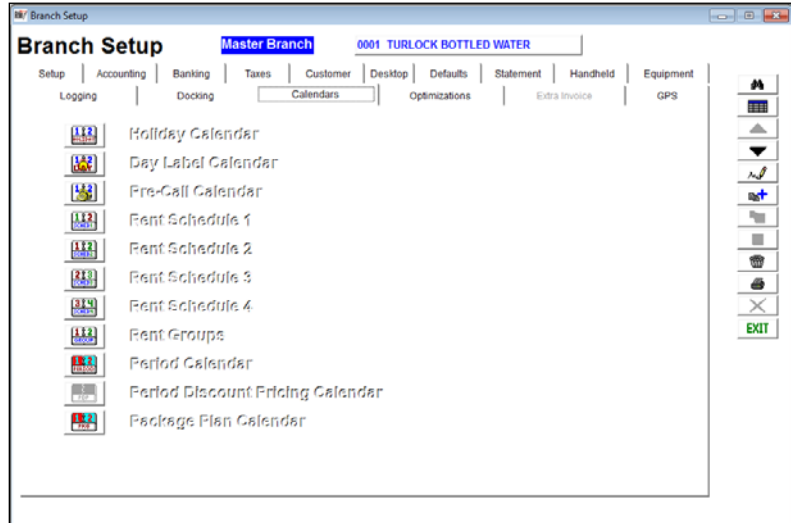
This means that the customers will not be scheduled for deliveries after December 31st.

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

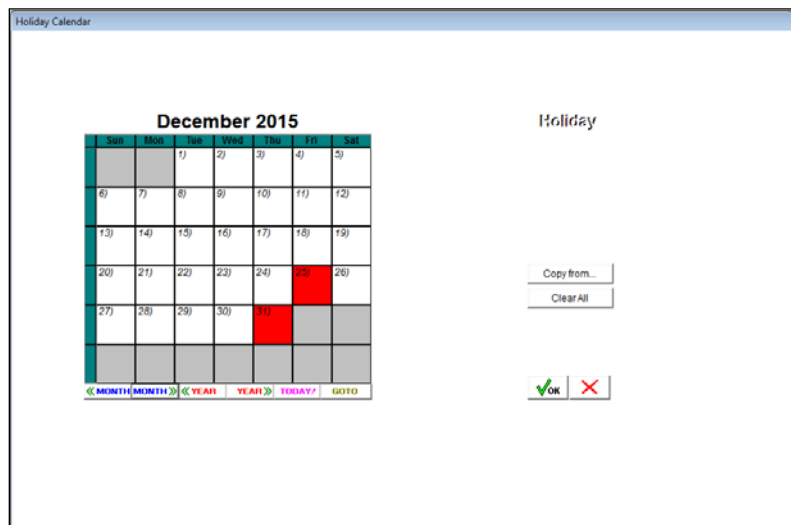
Holiday Calendar

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:

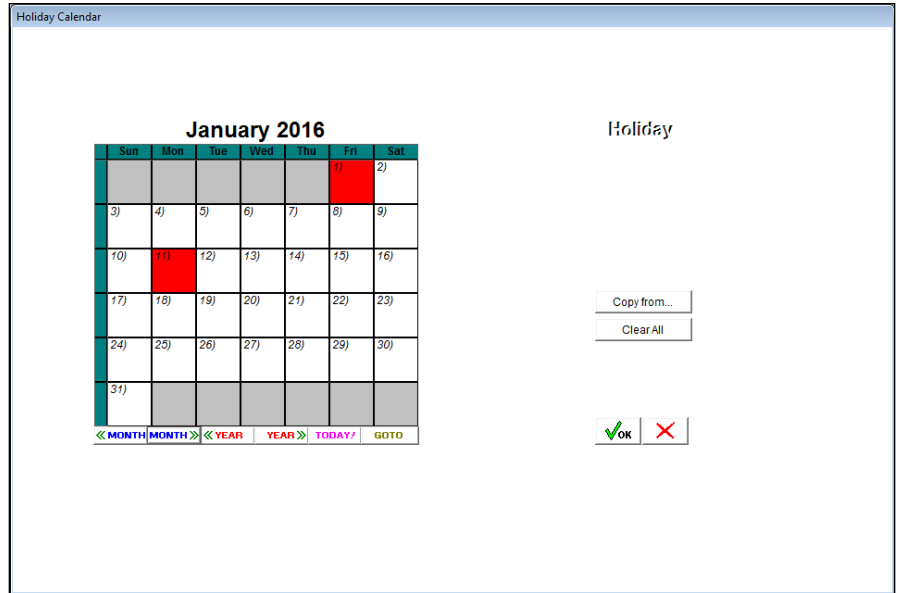


Click the  *Holiday Calendar* icon and the following screen will be displayed:

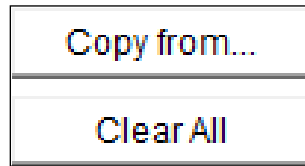


The holidays previously listed in the customer's account for December (2015) are clearly highlighted in red.

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.

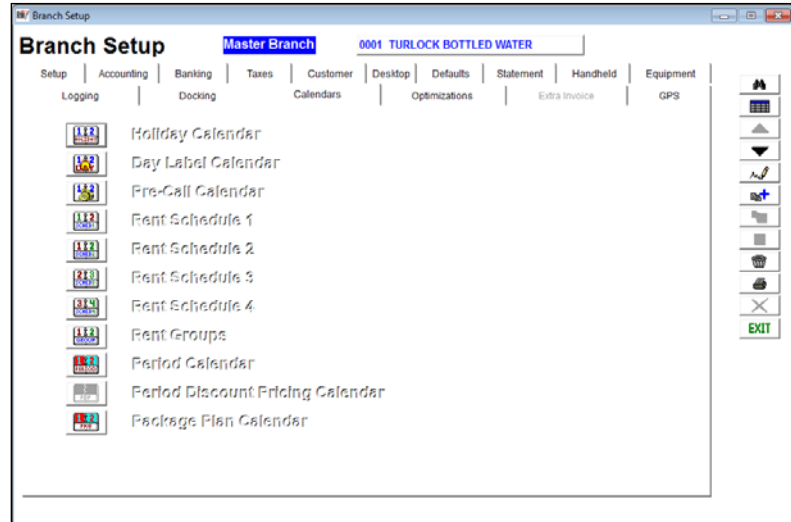
Backup


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*.

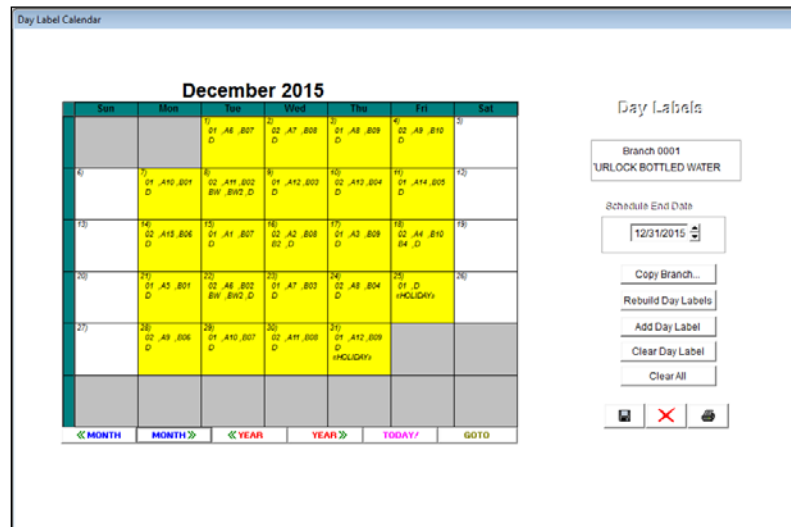
Day Label Calendar

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:

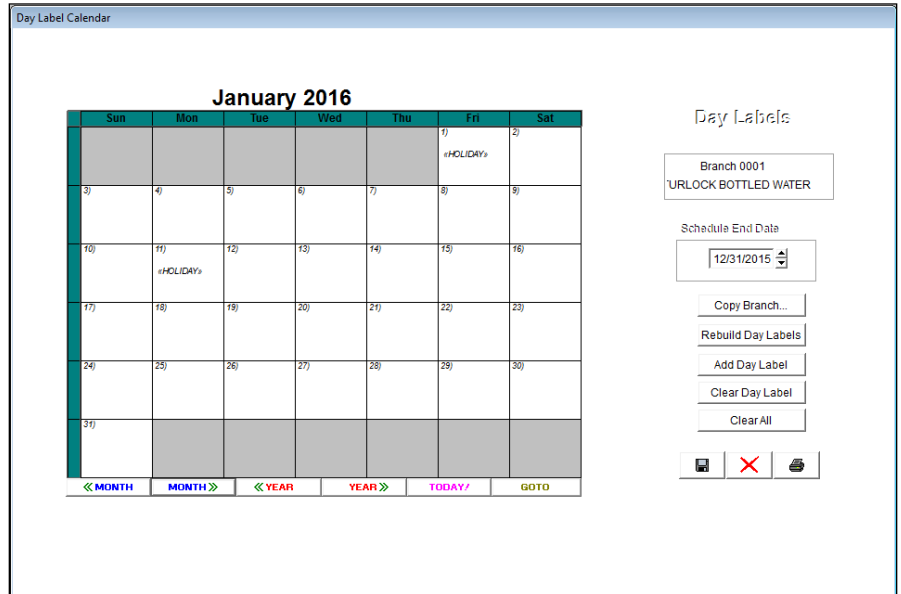


Click on the  *Day Label Calendar* icon and the following screen will be displayed:



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:

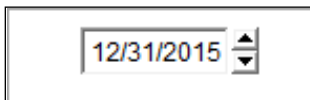


This example will guide you through extending the current *Day Label Calendar* without making any major changes.

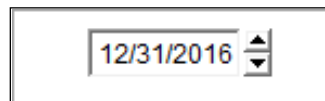
NOTE: If you need to make changes by adding or removing labels you should refer to the *Getting Started Guide*.

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):

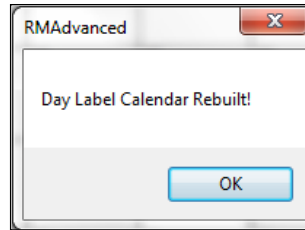


Rebuild Day Labels

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:

January 2016

Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1) D HOLIDAY	2)
3)	4) 01 ,A12 ,B01 D	5) 02 ,A13 ,B02 BW ,BW2 ,D	6) 01 ,A14 ,B03 D	7) 02 ,A15 ,B04 D	8) 01 ,A1 ,B05 D	9)
10)	11) D HOLIDAY	12) 01 ,A2 ,B07 B2 ,D	13) 02 ,A3 ,B08 D	14) 01 ,A4 ,B09 B4 ,D	15) 02 ,A5 ,B10 D	16)
17)	18) 01 ,A6 ,B01 D	19) 02 ,A7 ,B02 BW ,BW2 ,D	20) 01 ,A8 ,B03 D	21) 02 ,A9 ,B04 D	22) 01 ,A10 ,B05 D	23)
24)	25) 02 ,A11 ,B06 D	26) 01 ,A12 ,B07 D	27) 02 ,A13 ,B08 D	28) 01 ,A14 ,B09 D	29) 02 ,A15 ,B10 D	30)
31)						

Day Labels

Branch 0001
URLLOCK BOTTLED WATER

Schedule End Date

12/31/2016

Copy Branch...

Rebuild Day Labels

Add Day Label

Clear Day Label

Clear All

🖨️
✖️
🗑️

<< MONTH
MONTH >>
<< YEAR
YEAR >>
TODAY!
GOTO

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

Wed	Thu	Fri	Sat
		1) D HOLIDAY	2)
6) 01 ,A14 ,B03 D	7) 02 ,A15 ,B04 D	8) 01 ,A1 ,B05 D	9)

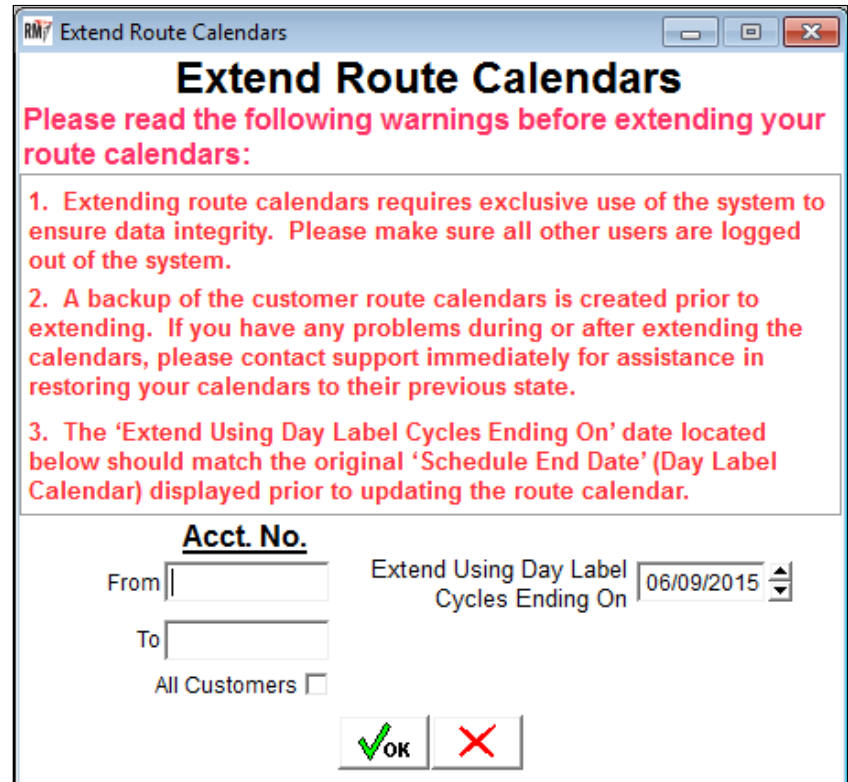
NOTE: Refer to the *Getting Started Guide* to learn more about *Day Label* and holiday scheduling.

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:



Extend Route Calendars

Please read the following warnings before extending your route calendars:

1. Extending route calendars requires exclusive use of the system to ensure data integrity. Please make sure all other users are logged out of the system.
2. A backup of the customer route calendars is created prior to extending. If you have any problems during or after extending the calendars, please contact support immediately for assistance in restoring your calendars to their previous state.
3. The 'Extend Using Day Label Cycles Ending On' date located below should match the original 'Schedule End Date' (Day Label Calendar) displayed prior to updating the route calendar.

Acct. No.

From

To

All Customers

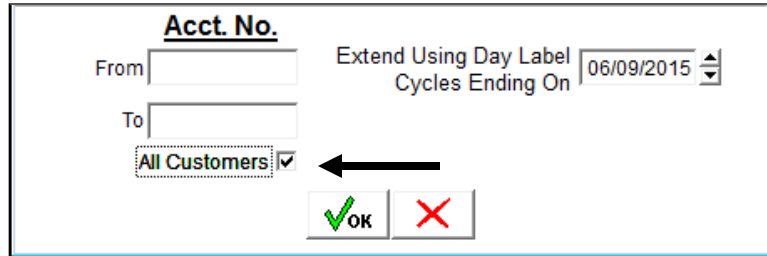
Extend Using Day Label Cycles Ending On

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).

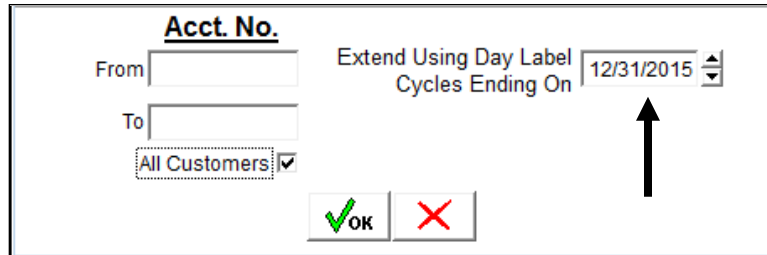
Read each message carefully before continuing.

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



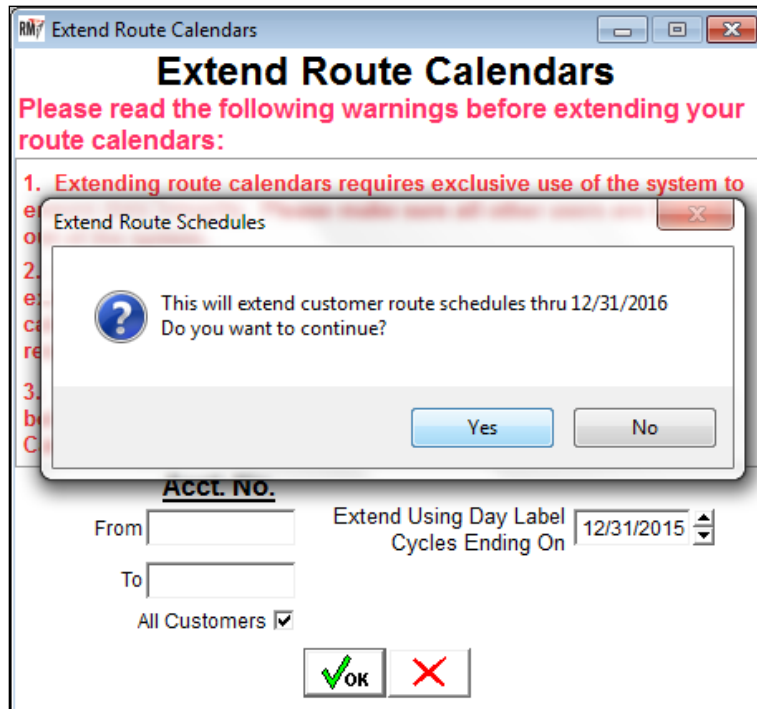
Acct. No.
From
To
 All Customers
Extend Using Day Label Cycles Ending On: 06/09/2015
[OK] [X]

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



Acct. No.
From
To
 All Customers
Extend Using Day Label Cycles Ending On: 12/31/2015
[OK] [X]

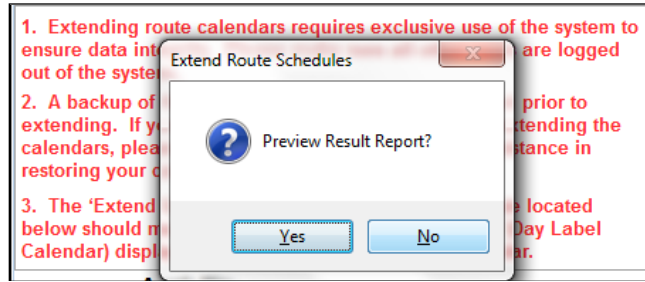
Click **OK** and confirm that the new 'Schedule End Date' is accurate on the screen:



Extend Route Calendars
Please read the following warnings before extending your route calendars:
1. Extending route calendars requires exclusive use of the system to
e
o
2.
e
ca
re
3.
b
C
Extend Route Schedules
? This will extend customer route schedules thru 12/31/2016
Do you want to continue?
[Yes] [No]
Acct. No.
From
To
 All Customers
Extend Using Day Label Cycles Ending On: 12/31/2015
[OK] [X]

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

You can view the results report once the process is complete:

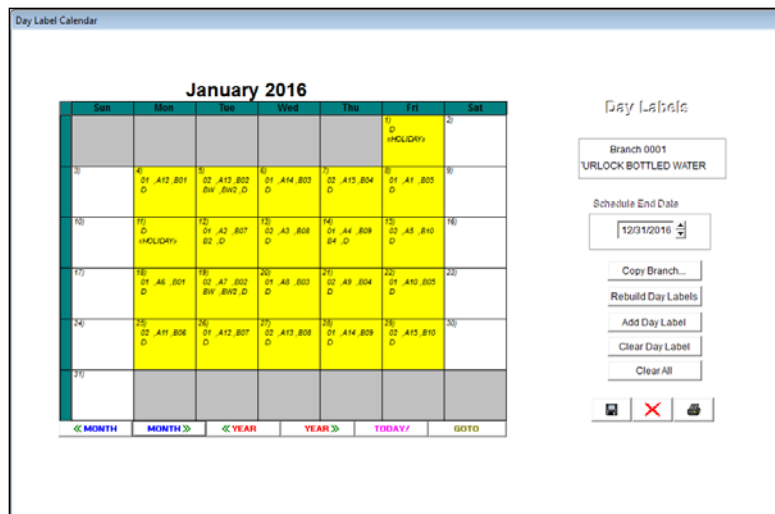


This report will list all of the accounts that were successfully updated:

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 000106 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:



January 2016						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
					01 D HOLIDAY	02
03	04 01_A12_B01 D	05 02_A13_B02 BW_B02_D	06 01_A14_B03 D	07 02_A15_B04 D	08 01_A1_B05 D	09
10	11 D HOLIDAY	12 01_A3_B07 B2_D	13 02_A3_B08 D	14 01_A4_B09 B4_D	15 02_A8_B10 D	16
17	18 01_A6_B01 D	19 02_A7_B02 BW_B02_D	20 01_A8_B03 D	21 02_A9_B04 D	22 01_A10_B05 D	23
24	25 02_A11_B06 D	26 01_A12_B07 D	27 02_A13_B08 D	28 01_A14_B09 D	29 02_A15_B10 D	30
31						

Day Labels

Branch 0001
UNLOCK BOTTLED WATER

Schedule End Date
12/31/2016

Copy Branch...
Rebuild Day Labels
Add Day Label
Clear Day Label
Clear All

<< MONTH MONTH >> << YEAR YEAR >> TODAY GOTO

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.

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