

Chapter 3.09: Delivery Orders

Introduction

Delivery Orders are used to handle special requests from your customers, and schedule special deliveries as needed. Each *Delivery Order* can be tracked and archived to ensure that each customer request has been honored. This chapter will guide you through the entire *Delivery Order* process and the many options available.

Delivery Order Reasons

Prior to scheduling *Delivery Orders* for your customers, you will need to establish a series of 'Delivery Order Reasons' that will be used to identify each request.

Navigate to *Lists > Customer Setup Codes > Delivery Order Reasons*, and add up to 27 reasons a customer may request a special delivery (e.g., Out of Product, Equipment Installation, or Damaged Items).

ery Order R	asons	
livery	/ Order Reasons	
	Reason ID 1	-
	Reason OUT OF WATER	
	Mini Description OW	
	Suppress input on Delivery Order	
	Warn for Package Plan Contract Expiration Violation	
	Display in Route Input Screen on Handheld Prevent Order Modification on Handheld	
	Allow Quantity Change on Handheld	
	Require Weight Entry in RMLive	
	High Priority Reason Code (Delivery Highlighted on HH)	
		-

NOTE: Refer to *User Guide B* for a definition of each option available within the *Delivery Order Reasons* screen.



Here is an example of the *Delivery Order* screen after a series of *Delivery Order Reasons* have been defined:

M7 DELIVERY ORDER							
Acct. No.	001231 01		P	Route/Day/Stop			
Name	ATHENA MILLER			Driver	Jeff Bench	~	
Delivery Address	401 MEANDERING L	N		Entered Date/Time	10/16/2013 韋 10/16/20		
				Phones (Info/Route)	209-632-1122		- 19
	TURLOCK, CA 9538	2	Credit Terms	s Spoke With	WEB ORDER	~	
Contact Reasons			-	Ticket No.	1310160001 English		
Balance	Total 62.10 Cur	rent 0.00 30 Days	0.00 60 Days 0.00	Over 90 Days 62.10			-
Last Payment	Date 12/03/2013 An	nount 130.87				Last 5 Deliv	
Request	OUT OF WATER NEEDS SUPPLIE PICK-UP COOLE	ES R				·	/ ∎st
	NEW COOLER						1
	out of water urge	nt		←			
Equipment							•
	Serial No. T	ine Stile	Location	Ordere	Otv		(m)

Creating a Delivery Order

This section will guide you through creating a *Delivery Order* when a customer calls the office.

Module Bar

Click on the Delivery Order button available on the 'Module Toolbar' located on the Route Manager screen:



The *Delivery Order* screen will be displayed. Click the **Add** key to create a new order:

RM7 DELIVERY ORDER										-	
Acct. No.	001231 01		P			Route/Day/Stop					
Name	ATHENA MILLER			-		Driver	Jeff Bench		-		
Delivery Address	401 MEANDERIN	IG LN			E	ntered Date/Time	10/16/2013	\$ 10/16/20			
					Ph	ones (Info/Route)	209-632-112	2			<u> </u>
	TURLOCK, CA 9	5382		Credit Terms		Spoke With	WEB ORDER	२	*		
Contact Reasons			Ŧ			Ticket No.	1310160001	English			
Balance	Total 62.10	Current 0.00 3	0 Days 0.00 (50 Days 0.00	Over 90 Day	s 62.10					
Last Payment	Date 12/03/2013	Amount 130.8	17							Last 5 Deliv.	. /
Request	OUT OF WAT NEEDS SUP	ER PLIES						_			~~~
	PICK-UP CO	OLER									
	OUT OF CUP	R S									
	🗆 out of water u	rgent									
											1
Equipment Qty. Action S	Serial No.	Туре	Style	Location		Orders		Qty			4
No Items					*	FROSTY ICE BAG		0	-		
											\rightarrow
										Ϋ́	EXIT
							-		Ψ.		@ <u>1</u> 0
Delivery Message	<u> </u>	C Invoi	ce Message	E.	U. NO.		10	tai 0.00			Ormina
*** INTERNET ORD	ER *** []						^	0			- Copies
							→ Add to	o Contacts o HH (Alert Me	(ssage)		
							_ □ Send	Order to Rou	te via RN	Live	REPORT
							🔟 🗆 E-ma	il Order to Cu	stomer.		
Promis	e Date 10/22/201	3 ≑		Co	mplete F	ollow Up					



Enter an account number, or click on the *Fast Find* key, to search for the desired account:

NY DELIVERY ORDER				- • 💌
Acct. No.	000035	Route/Day/Stop	A / B03 / 0270	
Name	HICKMAN COMMUNITY CHURCH	Driver	Jacon LaPachel 🚽	
Delivery Address	854 I ST.	Entered Date/Time	06/10/2015 불 11:50	
		Phones (Info/Route)	209-874-1180 / 209-874-1180	
	HICKMAN, CA 95323	Credit Terms Spoke With	•	
Contact Reasons	Route Inquiry	NET30 Ticket No.	000000000 English	
Balance	Total 246.69 Current 246.69 30 Days 0.0	00 60 Days 0.00 Over 90 Days 0.00		
Last Payment	Date 06/10/2015 Amount 53 10	Next Delivery 06/22/2015		Last 5

Alternatively, by clicking the Delivery Order button on the 'Module Toolbar' after the customer's account has been opened, a new order will be opened automatically.

10/ Customer Information - 080002		10
Customer Information	INST DIE FABS DUE lind DUE	
Lead Name	Sales Rep 1 [b] Entered By Rep 2 Sales Rep 3 Major Account Code -oStoreFront Reset aStoreFront Account Bas Mat aStoreFront Account Bas Mat aStoreFront Account Bas Mat aStoreFront Account Bas Mat aStoreFront Account	

Choose a Delivery Order Reason

At least one *Delivery Order Reason* should be selected per order. This information helps identify the *Delivery Order* on reports, and will be displayed on the driver's handheld.



Working with Equipment

If the nature of the order is related to equipment, simply click in the *Equipment* box to access the 'Order Equipment' screen.





All installed equipment on the account will be displayed, and you will have multiple activities that can be scheduled (defined below):



Select one of the following keys displayed on the screen:

- Install: Select this option to request that a driver install the Equipment Type and Style specified on the order.
- Exchange: Select this option to replace the selected Serial Number for the Equipment Type and Style specified on the order.
- Service: Select this option to schedule an equipment service for the selected *Serial Number*.
- Repair: Select this option to schedule an equipment service "fault" (something is broken) for the selected Serial Number.
- Pickup: Select this option to schedule an equipment pickup for the selected Serial Number.
- Reserve: Select this option to select a piece of equipment to reserve for future use.

Click **OK** on the bottom of the 'Order Equipment' screen to save the selected equipment option(s).



Adding Products

If the customer would like to request products on the order, simply click in the *Orders* box to access the 'Pending Order' screen.



The customer's assigned *Default Products* will automatically be displayed for quick entry. Doubleclick on any item displayed to update the price or quantity, and add alternate items to the order by selecting the *Add* key.



NOTE: Any items left on the screen at '0' quantity will automatically be removed from the order on *Save*.



Additionally, you can select a 'Gratis' reason on applicable items or the 'Default' checkbox to add the item to the customer's *Default Products* list permanently.

IN/ Pending Ord	er			1
P.O. No.	JTSHC0-11MZ-023	Promotion Code.		
Code	Description		Oty Price Gratis Oty Disc. Default	
0.50	- Ballow Dag to			

NOTE: The *Qty. Disc* option requires additional configuration steps. Refer to *Chapter 2.01* of the *Supplemental Guide* for further information on this pricing option.

Additional Feature - Previous Orders:

Additionally, you can select the 'Previous Orders' key to view historical orders and invoices posted on the account. This will help save time scheduling orders on accounts that typically order the same items.



The *Previous Orders* screen allows you to view previous *Delivery Orders* or invoices based on the oldest transaction date entered.

Date	Invoice/Order#	Chg. C	Code	Qty	Price	Extended None/Add/Repl.	
12/22/2015	024069	700	5 Gal Deposit	-2	6.00	-12.00 @ NC AC R	
12/22/2015	024069	5 GW	5 Gal Water	з	5.85	17.55 @ NC AC R	
12/22/2015	024069	205	5 Gal Spring Wate	1	6.66	6.66 @ NC AC R	
12/22/2015	024069	998	Balance Transfer	2	2.22	4.44 @ NC AC R	
12/22/2015	024069	080	8# Bag Ice	14	0.65	9.10 @ NC AC R	
12/21/2015	020965	205	5 Gal Spring Wate	1	6.66	6.66 @ NC AC R	
12/21/2015	020965	998	Balance Transfer	2	2.22	4.44 @ NC AC R	
12/21/2015	020965	080	8# Bag Ice	14	0.65	9.10 @ NC AC R	
12/18/2015	020446	205	5 Gal Spring Wate	1	6.66	6.66 @ NC AC R	-



If you would like to *Add* (A) or *Replace* (R) any of the items listed on the current order, select the applicable radio button displayed next to each item in the list:

DO No		Promotion Code			
P.O. NO.]		Promotion Code.	•		
Code	Description		Qtv	Price	Gratis Ext. Amour
5GW123456789	5 Gal Water		0	8.69	0.00 -
GW123456789	3 Gal Water		0	5.38	0.00
05123456789	5 Gal Spring Water		1	6.66	6.66
3GW123456789	3 Gal Water		0	5.38	0.00
050	5# Bag Ice		0	0.76	0.00
998123456789	Balance Transfer		2	3.33	6.66
20CKF123456789	20 Count Fog Lifter K-Cup		0	9.99	0.00
	and the second				
	-				
ed.	📾 🗤 🖉 Citiar All 🙈	RV Previous	Make	Quick	
Rest-	🗑 🛷 CiearAll 📦	RV Previous Orders	Make Defaut	Quick Entry	
Lata Involve Port	الله المعالم معالم	RV Previous Orders	Make Default	Quick Entry	√ок Х
Date Involce/Ord	Auf Clear All	RV Previous Orders Oty Price	Extended None/Add/Rep	Quick Entry	<u>√ок</u> ×
Date Invoice/Ord	Image: Second	RV Previous Orders Qty Price 11 8.69 5 6.66	Make Defaut Extended None/Add/Rep 95.57 © NC AC R 33.32 © NC AC R	Quick Entry	<u> </u>
Date Invoice/Ord 12/22/2015 024079 12/22/2015 024079 12/22/2015 024079	Auf CharAs CharAs CharAs CharAs ScN 5 Gal Mater 205 5 Gal Spring Mate 050 55 Bard Tate	RV Previous Orders Qty Price 11 8.69 5 6.66 8 0.76	Extended None/AddRep 95.57 ° N° A ° R 33.32 ° N° A ° R 6.10 ° N° A ° R	Quick Entry	<u></u>
Date Invoice/Ord 12/22/2015 024079 12/22/2015 024079 12/22/2015 024079 12/22/2015 024079	Au Clear As Clear Clear As Clear As Clear As Clear As Clear As	RV Previous Orders Qty Price 11 8.69 8 6.66 8 0.76 2 3.33	Make mm Detsuit mm Extended None/AddReg 95.57 ° N ° A ° R 33.32 ° N ° A ° R 6.10 ° N ° A ° R e.se ° N ° A ° R 6.50 ° N ° A ° R	Quick Entry	<u></u>
Date Involce/Ord 12/22/2015 024079 12/22/2015 024079 12/22/2015 024079 12/22/2015 024079 12/22/2015 024079	CharAl Char	RV Previous Orders Qty Price 11 8.69 5 6.66 0.76 2.333 5 0.69	Make Default Default 0 S5.57 C N C A C R 33.32 C N C A C R 33.32 C N C A C R 6.10 C N C A C R 6.50 C N C A C R 6.50 C N C A C R	Quick Entry	
Date Involce/Ord 12/22/2015 024075 12/22/2015 024075 12/22/2015 024075 12/22/2015 024075 12/12/2015 024075 12/14/2015 024075	A.J CharAs Ch	RV Previous Orders Qty Price 11 8.69 6 6.66 8 0.76 2 3.33 5 0.69 1 6.66	Make Default Image: Control of the cont	Quick Entry	<u></u>
Invoice/Ord 12/22/2016 024079 12/22/2016 024079 12/22/2015 024079 12/22/2015 024079 12/22/2015 024079 12/22/2015 024079 12/22/2015 024079 12/22/2015 024079 12/22/2015 024079 12/22/2015 024079 12/22/2015 024079 12/22/2015 024079 12/22/2015 024079 12/22/2015 024079 12/22/2015 024079 12/22/2015 024079 12/22/2015 024079 12/12/2015 015204	CharAl Char	RV Previous Orders Oty Price 11 8.69 5 6.66 8 0.76 2 3.33 5 0.69 1 6.66 2,33 5 5 0.69 1 6.66	Make Image Detended Nonel/AddReg 55.57° NC AC R 33.32° NC AC R 6.10° NC AC R 6.66° NC AC R	Quick Entry	<u>√ok</u> ×
Date Involce/Ord 12/22/2015 024075 12/22/2015 024075 12/22/2015 024075 12/22/2015 024075 12/14/2015 016204 12/14/2015 016204 12/14/2015 016204	Char As Char As 5678 Cha Code 6678 5678 S Cal Mater 205 205 S Cal Mater 205 205 S Cal Mater 205 205 S Cal Mater 206 206 S Cal Mater 206 2079 Balance Transfer 208 208 S Cal Spring Mate 209 209 Balance Transfer 205 205 S Cal Spring Mate 205	RV Previous Orders Oty Price 11 8.69 5 6.66 8 0.76 2 3.33 5 0.69 1 6.66 2 3.33 5 0.69 1 6.66 2 3.33	Nais Crist Defout Crist 56.570 / NC AC R R 50.507 / NC AC R R 6.507 / NC AC R R 6.506 / NC AC R R	Quick Entry	<u></u>

Click **OK** to complete the *Pending Order* process and add the items to the *Delivery Order*.

Entering Messages

Enter a message that will be displayed for the driver in the *Delivery Message* box:

Onlinery Message Customer would like the items delivered to the warehouse.	Add to Contacts Add to Contacts Add to HH (Alert Message) Send Order to Route via RNLW E-E-mail Order to Route via RNLW E-mail Order t
Promise Date 06/22/2015 🛫 Schedule (A/ B) Comple	Follow Up

Select the *Invoice Message* radio button to enter a message that will be printed on the customer's invoice.

C Delivery Message	Invoice Message				Copies
Here are the items you requested	for your partyl		*	Add to Contacts Add to HH (Alert Message) Send Order to Route via RMLive Ermail Order to Customer.	REPORT
Promise Date 06/22	2015 🚽 Schedule (A/B)	Complete Follow Up			
A	John Illustrator CC 2014				



Scheduling the Delivery Order

Each *Delivery Order* will need to be scheduled on a route and delivery date. Enter the delivery date of the order in the 'Promise Date' field:



Assign the order to the desired route by selecting the 'Schedule' button:

ſ	Select Route
	Please select route for special delivery day
	Route
	Service Time 0 🕂
	Committed Time 00:00
	Exact 🗌
	√ок
L	

Select the desired route and click **OK**.



Additional Options

This section will introduce you to some of the additional items available within the *Delivery Orders* screen.

Follow-up Date

A 'Follow-Up Date' can be assigned to each order to ensure that the order has been expedited in a timely manner. Click on the 'Follow Up' button to schedule a follow-up date for the order.

M Telephone Request Follow	-up 🗖 🗖 💌
Telephone Request Follov	v-up
Follow up Date Follow Up By	06/23/2015
ОК	Cancel

NOTE: The 'Follow-Up' reminder will automatically pop-up on the assigned employee's screen when it is reached. Follow-up messages will not be displayed for orders that have already been closed.

Add to Contacts

Select this option to add the *Delivery Order* to the customer's *Contacts* tab within *Customer Information*.

C Delivery Message	Invoice Message				Copies
Here are the items you requested for your	party!		*	Add to Contacts Add to HH (Alert Message) Send Order to Route via RMLive Femail Order to Customer	REPORT
Promise Date 06/22/2015 🚖	Schedule	Complete Follow Up			

Add Info to Alert Message

This option is automatically selected when a *Delivery Message* is entered on an order. The *Alert Message* will automatically be displayed on the driver's handheld screen when the order is selected.

C Delivery Message	Invoice Message				Copies
Here are the items you requested for your p	arty!		4	Add to Contacts Add to HH (Alert Message) Send Order to Route via RMLive E-mail Order to Customer.	REPORT
Promise Date 06/22/2015 🚽	Schedule	Complete Follow Up			



Shopping Cart

The *Shopping Cart* key allows you to provide the customer with an invoice total during the call based on the 'Pending Order' entered.



Click on the *Shopping Cart* to view the invoice total:

-				
M Pendir	ng Items In Shopping Cart			— ×
Code	Description	Qty	Price Gratis	Extended Amount
100	5 GALLON PURIFIED	12.0	5.950	71.4000 🔺
504	70Z PLASTIC SLEEVE (100CUPS)	5.0	3.150	15.7500
				-1
I				
			Order	87.15
			Rent	0
			Deposits	0.00
			Тах	1.32
			Total Today	88.47
	Pay	Лок	Previous Balance	246.69
			Total due	335.16
-				

Contact Reasons

Assign a *Contact Reason* to each order to identify orders on the customer's *Contacts* tab and within the *Contact History Messages Report* found under *Reports* > *Communication Reports*.





Number of Copies

You can specify the format and number of *Delivery Order* copies to send to the desktop printer prior to saving the order. Indicate whether you would like to print the wide (W), standard (S), or full (F) page format, and the number of copies to print (1-4).

C Delivery Message	Invoice Message				Copies
Here are the items you requested for your p	arty!		4	Add to Contacts Add to HH (Alert Message) Send Order to Route via RMLive Email Order to Customer	REPORT
Promise Date 06/22/2015 🚽	Schedule	Complete Follow Up			

NOTE: Select 'NONE' if you will complete the order on the handheld, or do not wish to print a copy. Refer to supplemental document 4-43 for examples of the additional delivery order formats.

NOTE: Refer to the *Deliver Orders* section of Route Manager *User Guide B* for a definition of each additional option on the screen.

Saving the Delivery Order

After you have created and scheduled the order, click the **Save** key to complete the process.

							-0-	
00010 01	*	P		Route/Day/Stop	0/DAY/0050	B		
dvantage Rou	te Systems, Inc.			Driver	Daninis Hendered	20. 7	69	
201 Liberty Sc	quare Pkwy			Entered Date/Time	03/10/2016 🗐 0	8:27		
				Phones (Info/Route)	209-632-1122/2	09-632-1122		
urlock, CA 95	380		Credit Terms	Spoke With		-		1111
		-	DUE	Ticket No.	000000000			
Total 427.0 ate 11/04/201	57 Current 736.6 15 Amount 2.50	31 30 Days 0.	00 60 Days -87.49 (Next Delive	Over 90 Days -221.45 Bry 03/10/2016			Last 5	
Prevent Mor Allow Oty Cl Fill Freezer	d hange - 20 LB	Collec	t Check elivery elivery	Merch NOT Wo New Merch	rk Indiser		- Delv.	14
Fill Freezer Block Only	10ib Only		nce on Arrive				Quotes	
T .	Time	C.	Location	Circlere .		t.		
narreo.	1)20	agre	Locatori	20 Count Fog Lifte	r K-Cup	5 ×		×
							Ж	EXIT
				-		*		0.0
	Clevel	an Hannana	P.O. No.		Total	56.50		
	1.7 IIIYO	te message		2	Add to Cor Add to HH	ntacts (Alert Message er to Route via R ter to Customer) RMLIve	REPOR
	10010 01 Nantage Rou 101 Liberty St Total 427.3 Total	10010 01 A hvantage Route Systema, Inc. 101 Liberty Square Pixey infock CA 95300 Total 427.67 Current 736.4 tate 1104/2015 Amount 2.50 Fill Freezer - No. Fill Freezer - 20.LD Fill Freezer - 20.LD Fill Freezer - 20.LD Fill Freezer - 20.LD Fill Freezer - 100 Conty Biock Conty 	00010 01 ▲ E Nantage Route Systems, Inc. 101 Liberty Square Pixay Infock CA 95380 ✓ Total 427.67 Current 736.61 30 Days 0.1 ate 1104/2015 Amount 2.50 Prevent Nod Allow Oth Change AMD Call O Fill Freezer - Mix Call O Fill Freezer - Mix Call O Fill Freezer - Mix Call O Block Only Call O Block Only Call O Block Only Call O Block Only Call O Call O Ca	0010 01 Image Route Systems, Inc. 011 Liberty Square Pixy Credit Terms infock CA 95300 Credit Terms Image CALL Image Call Total 427.67 Current 736.61 30 Days 0.00 60 Days 0.87.49 (Call Net Delive Prevent Mod Call Allow dry Change Image Call Allow dry Change Image Call Fill Freezer - Mix Call Office on Arrive Block Only Image Call Style Location	0010 01 Image Route Systems, Inc. Driver 011 Liberty Square Pixy Credit Terms Becket With office: CA 95300 Credit Terms Becket With Total 427.67 Current 736.61 30 Days 0.00 60 Days -37.48 Over 90 Days - 321.45 State 1104/2015 Amount 2.50 Net Delivery Morch NOT Werent Not Werent Fill Freezer: Mix Called Check Interny Pick to Blerchy Pick to Blerchy Pick to Blerchy Fill Freezer: Olio: Only Call Office on Arrive Call Office on Arrive Call Office on Arrive Call Office on Arrive Fill Freezer: Olio: Only Call Office on Arrive Call Office on Arrive Call Office on Arrive Call Office on Arrive Style Location Creders Call Office on Arrive Cal	0010 01 Image: Constraint of the standard of the st	0010 01 Image: Control Content Control Content Control Control Cont	0010 01 RouteDanStop 01 DAY 1080 0 Damatage Route Systems, Inc. Domet Damatage Route Systems, Inc. 0 Dit Liberty Square Pkay External Colored Signes 0 Dit Liberty Square Pkay External Colored Signes 0 India Colored Signes 0 0 Total 427.67 Carrent 736.81 30 Days 0.00 60 Days -87.48 Over 90 Days -27.45 0 Total 427.67 Carrent 736.81 30 Days 0.00 60 Days -87.48 Over 90 Days -27.45 Last 5 Prevent Mod Collect Check Dever 90 Days -27.45 Total 427.67 Carrent 736.81 30 Days 0.00 60 Days -87.48 Over 90 Days -27.45 Last 5 Prevent Mod Collect Check Dever 90 Days -27.45 Till Freezer - 0.01 B Call office on Arrive Not Delivery Pill Freezer - 0.01 B Call office on Arrive Call office on Arrive Pill Freezer - 0.01 B Call office on Arrive Call office on Arrive Biock Only Call office on Arrive Call office on Arrive Biock Only Call office on Arrive Call office on Arrive Biock Only Call office on Arrive Call office on Arrive Biock Only Call office on Arrive Call office on Arrive Biock Only Call office on Arrive Call office on Arrive Biock Only Call

Continue to the next section to learn how to identify and manage *Delivery Orders* after they have been scheduled.



Managing Delivery Orders

Each *Delivery Order* is identified and tracked in Route Manager to assist you with managing your deliveries daily.

Pending Delivery Order Flag

Pending *Delivery Orders* are uniquely identified within each *Customer Information* screen.

🛤 Customer Information - 000035	- • •
Customer Information	
A 000035 HICKMAN COMMUNITY CHURCH	
Info \$ Invoices Credit Payment Info Contacts Route Route Info Products Equipment Stop History Orders	24
Accl. No. 000035 Customer Type 🕢 👻 Website Customer Home Branch 0001 🐨 TURLOCK BOTTLED WA	
Bill To Contest Info Name Phone Ext Fax Fax HICKMAN COMMUNITY CHURCH 209-874-1180 209-874-5933 209-874-5933	
ZIP Code Work Phone Ext Cell Cell	

Simply double-click on the 'Pending Delivery Orders' label from within any screen on the account to view *Pending Order(s)*.

	Participa P	ending Orders	Package P	lans	Recurring Charges PAR Free Product Daily Rent / Lease Quotes Stop 01 of
01 01 01 01 01 01 01 01	1502020002 15061000 150615000 150716000 150716000 150716000 150716000 150716000 150716000 150716000 150716000 150716000	02/02/2015 06/01/2015 06/15/2015 07/16/2015 07/16/2015 07/16/2015 07/16/2015 08/14/2015 08/14/2015			02/02/2015 ADMINISTRATOR2 06/01/2015 ADMINISTRATOR2 06/17/2015 Dennis Henderson 07/16/2015 ADMINISTRATOR2 07/16/2015 ADMINISTRATOR2 07/16/2015 ADMINISTRATOR2 07/16/2015 Dennis Henderson 08/17/2015 Dennis Henderson



Each *Pending Order* is uniquely identified by an assigned 'Ticket Number.'

Defaul	t Products	Pending Orders	Package P	lans	Recurring Cha	rges PAR	Free Product	Daily Rent / Lease	Quotes		
Stop	Ticket #	Created	Scheduled	Rte.	Promised	Created By					
01	1502020002	02/02/2015	11		02/02/2015	ADMINISTRATO	R2			~	•
01	1506010008	06/01/2015	11		06/01/2015	ADMINISTRATO	R2				1.1
01	1506150001	06/15/2015	11		06/17/2015	Dennis Hende	rson				744
01	1507160001	07/16/2015	11		07/16/2015	ADMINISTRATO	R2				Es
01	1507160002	07/16/2015	11		07/16/2015	ADMINISTRATO	R2				Disc
01	1507160003	07/16/2015	11		07/16/2015	ADMINISTRATO	R2				
01	1507160004	07/16/2015	11		07/16/2015	ADMINISTRATO	R2				
01	1508140002	08/14/2015	11		11	Dennis Hende	rson				-
01	1508140003	08/14/2015	11		08/17/2015	Dennis Hende	rson				

To view or make a modification to the order, highlight the item and choose the *Context Delivery Order* button.

fault	Products	Pending Orders	Package R	Plans	Recurring C	charges	PAR.	Free Product.	Daily Rent / Lease	
top	Ticket#	Created	Scheduled	Rte.	Promised	Created	1 By			
1	150608000	1 06/08/2015	1.1		06/19/2015	ADHINI	STRATOR			
1	150610000	1 06/10/2015	06/22/2015	λ	06/22/2015	ADMINI	STRATOR			
						-	1			

Additional Options – Paper Tickets Only

For companies that use paper tickets to complete deliveries, there are additional options available.

If any order has not been printed, the *Pending Delivery Order* flag will be green. Place your mouse cursor over the flag to view any ticket number that has not been printed.

PENDI	<mark>Returned</mark> Ing Delive		
ent St	top History	y Orders	
Free F	Product.	Daily Re	Tickets Not Printed: 1506080001
			1506100001

If all of the orders on the account have been printed, the *Pending Delivery Order* flag will be purple. Place your mouse cursor over the flag to view printed ticket details.





Contacts Tab

If the 'Add to Contacts' option was selected on the *Delivery Order* screen prior to saving the order, the order will be displayed on the customer's *Contacts* tab.

M/7 Customer Information - 000035		×
Customer Information		
	RETURNED CHECK	
Infa & Invairage Cradit Reymont Infa Contacts Revite Revite Infa	PENDING DELIVERY ORDERS	A
nino 3 nivolces Credit Payment nino Contacto Route Route into Pro		
Spoke with Date Time Message	F/U by Follow-up By Reasons Completed	
RetCkPaid 06/10/2015 09:36 Check # 531 Paid 06/02/2015	// ADM	
RetCheck 06/10/2015 09:36 Check # 531; Check Date 06/02/2015; Pair	Id /// ADM	
Schedule Change 06/09/2015 10:01 Skipped Stop for 06/12/2015	ADM 06/25/2015 ADM Route inquiry	1
Route Schedule C06/09/2015 10:01 A Route Schedule Partially Cleared a	// ADM	*
Route Schedule C06/09/2015 10:01 A Rescheduled To [B03]	// ADM	1
06/08/2015 11:43	ADM 06/22/2015 ADM Route Inquiry	
06/08/2015 11:40	ADM 06/22/2015 ADM Route Inquiry	
		-
		10
		b
		< 1
	<u> </u>	ar
	v	
	MESSAGES TO A CONTRACT OF A CO	
Contact Message Filter 🔽 GEN	Complaints	
✓ BILLING	No Reasons	
DELIVERY	Ungrouped Reasons	
ROUTE INQUIRY	IV Log Message □ SelectAll	

NOTE: Select the 'No Reasons' option on the bottom of the *Contacts* tab if the order is not assigned a *Contact Reason*.

To view or make a modification to the order, highlight the item and choose the *Delivery Order* button on the bottom of the screen.



Follow-Up Dates

If a 'Follow-Up Date' is reached on an open *Delivery Order* that was added to the customer's *Contacts* tab, then it will be displayed on the assigned employee's screen when they login to RMA:

M Messaging	
There are follow-up messages for the following customers	Mine
000035 ADM	Group
	Branch
К	Company

The *Follow-up Messages Report* can be printed by selecting the *Preview* button. Click **OK** to close the screen.

NOTE: The *Follow-up Messages* box can also be accessed from within Route Manager under *Tools > Check for New Messages*.



Closing Delivery Orders

Each *Delivery Order* is assigned a unique ticket number that is used to track and close the order once it is delivered. More than one method is used in Route Manager to close a *Delivery Order*, and each option is discussed within this section.

DELIVERY ORDER						
Acct. No.	000035 01 R P		Route/Day/Stop	A/SPCL/####		
Name	HICKMAN COMMUNITY CHURCH	_	Driver	Jason LaPachel 🚽		
Delivery Address	854 I ST.	_	Entered Date/Time	06/10/2015 🗘 09:07		
		_	Phones (Info/Route)	209-874-1180/209-874-1180		A
	HICKMAN, CA 95323	Credit Terms	Spoke With	7		
Contact Reasons	Route Inquiry	NET30	Ticket No.	1506100001 English		
Balance Total 246.69 Current 246.69 30 Days 0.00 60 Days 0.00 Over 90 Days 0.00 Last Parment Date 06/10/2015 Amount 53.10						
					Deliv.	- x. //

Automatically Closing Orders – Handheld Only

The Route Manager handheld program makes processing and closing *Delivery Orders* a simple task. Each order is automatically displayed on the driver's handheld, along with their assigned messages and products.

Alert Message
Account No.: 000035-01
HICKMAN COMMUNITY CHURCH
354 I ST.
HICKMAN, CA 95323
209-874-1180

Delivery Order No. 1508180001
Customer would like the items delivered to the Storage Room using the side sntrance.



Once the order is uploaded at the end of the day, the *Delivery Order* is automatically closed.

A 'Y' will be placed next to the order on the *Contacts* tab (if applicable).

1	A 000035 HICKMAN COMMUNITY CHURCH RETURNED CHECK									
	Info \$ Invoices Credit Payment Info Contacts Route Route Info Products Equipment Stop History Orders							#4		
	Spoke with	Date	Time	Message	F/U by	Follow-up	Bv	Reasons	Completed	
	RetCkPaid	06/10/2015	09:36	Check # 531 Paid 06/02/2015			ADM		^	
	RetCheck	06/10/2015	09:36	Check # 531; Check Date 06/02/2015; Paid		11	ADM			
		06/10/2015	09:07	[ADM 06/10/2015 12:19] Promised Date Cha	ADM	06/10/2015	ADM	Route Inquiry	Y	
	Schedule Change	06/09/2015	10:01	Skipped Stop for 06/12/2015		11	ADM			2.0
	Route Schedule C	06/09/2015	10:01	A Route Schedule Partially Cleared a		11	ADM			
	Route Schedule C	06/09/2015	10:01	A Rescheduled To [B03]		11	ADM			100
		06/08/2015	11:43		ADM	06/22/2015	ADM	Route nquiry		1.00
		06/08/2015	11:40		ADM	06/22/2015	ADM	Routenquiry		

Additionally, the order will be updated to reflect the delivery details, and can be viewed by selecting the 'Complete' button within the order screen.

M Complete Delivery Order	
Complete Delivery Order	
Process By ACM	Completion Date 06/10/2015 🖨
Completion Message	
1	
	1
Complete	Cancel



Manually Closing Orders

Occasionally, it may be necessary to complete an order manually. For example, you may provide a driver with a ticket number while they are out in the field, and it can be manually entered on the customer's invoice.

Confirm Sale Screen

The driver can enter the ticket number on the *Confirm Sale* screen by tapping on the 'Ticket' key:



When the transaction is uploaded, the order will be closed.

Invoices & Adjustments

Ticket numbers can be manually entered on any desktop invoice to close a *Delivery Order*:



When the desktop transaction is posted, the order will be closed.



Route Settlement Entry

Select the *Delivery Tickets* button on the *Route Settlement Entry* screen to manually close orders assigned to the route and date entered.

Navigate to *Transactions > Route Settlement Entry*.

Emp	ployee ADMIN STRATOR	-	Route ZZZ V NO	ROUTE ASSIGNED
			Truck Tr	
Invoices	Delivery Tickets	<u>S</u> kips	Payments	Autogenerate Transactions

NOTE: Refer to *User Guide A* for definitions of each option available within the *Route Settlement Entry* screen.



Delivery Order Reports

Managing *Delivery Orders* successfully is an important task each day, and Route Manager includes reports that will keep you informed on the status of each order in the system.

Delivery Order Report

The *Delivery Order Report* provides you with detailed information on all open and closed *Delivery Orders* in the system.

Navigate to *Reports > Communication Reports > Delivery Orders*.



NOTE: For detailed definitions of each field within this report, refer to *User Guide B*.

NOTE: This report can also be accessed by clicking on the 'REPORT' button within the *Delivery Order* screen.



Delivery Order Status

The *Delivery Order Status Report* allows you to view the status of each *Delivery Order* in the system, for tracking purposes.

Navigate to *Reports > Route Reports > Daily > Delivery Order Status*.

NW Delivery Order Status		
Delivery Order Status		
Sort Option 1 By Route Sort Option 2 By Scheduled Route	Scheduled Promised Route Promised Date From From Jo ZZZ To Delivery Confirmed Delivery Confirmed Delivery Confirmed Delivery Olosed Posted Include all Customers on Route	

NOTE: For detailed definitions of each field within this report, refer to *User Guide B*.

Non Completed Delivery Orders without Delivery

The Non Completed Delivery Orders without Delivery Report provides you with a listing of Delivery Orders that are not scheduled on a route, and remain in the system.

Navigate to *Reports > Route Reports > Other > Non Completed Delivery Orders without Delivery.*

Non Completed Delivery Orders without Delivery							
Account No-stop	Promised Date	Account Name	Ticket Number				
000101-01	11/15/2001	Johnson; William	11113001				
000105-01	11/15/2001	Ayers; Julie	11113002				
000107-01	08/15/2005	Richmond St .Service Station	5081200001				
000114-02	08/24/2006	Modesto Express Foods	6082300001				
000114-02	08/24/2006	Modesto Express Foods	6082300002				



Tickets Not Printed (Paper Tickets Only)

The *Tickets Not Printed Report* provides you with a list of *Delivery Orders* that have not been printed using the 'Print Route Tickets' option found under the *Route* menu.

Navigate to *Reports > Route Reports > Daily > Tickets Not Printed.*

NV Tickets Not Printed		
Tickets Not Printed		
Sort Option 1 By Route Sort Option 2 by Date	Route Promised Date From ▲ From 06/10/2015 🔄 To ZZZ To 06/10/2015 🔄	
	☐ Include all Customers on Route	
	● × ► • • • • • • • • • • • • • • • • • •	

NOTE: This report does not apply to tickets sent to the handheld.



Printed Tickets Not Entered (Paper Tickets Only)

The *Printed Tickets Not Entered Report* provides you with a list of *Delivery Orders* that were printed using the 'Print Route Tickets' option found under the *Route* menu, but were not entered into the program.

Navigate to *Reports > Route Reports > Daily > Printed Tickets Not Entered.*

NW Printed Tickets Not Entered		
Printed Tickets Not En	tered	
Sort Option 1 By Route ▼ Sort Option 2 by Date ▼	Route Promised Date From A Y To ZZZ Y	
	☐ Include all Customers on Route	
	● × B ●? FAX ■ + ■	

NOTE: This report does not apply to tickets sent to the handheld.



Delivery Order Utilities

High-level utilities have been added to assist you with long-term management of *Delivery Orders* in the system.

Close Open Delivery Orders

The *Close Open Delivery Orders* option allows you to close a series of *Delivery Orders* globally. This utility can be helpful if there are a number of lingering orders that have been honored, but are still open.

Navigate to Tools > Global Changes > Close Open Delivery Orders.

Completion Information	
	√ок
	×
Completion Message	E.
▼	
Anthe Defines Order	
Apply to Delivery Orders	
Delivery Order Entered Date Promised Date Entered By Customer No.	
From 06/10/2015 🛨 From 06/10/2015 🖨 🔽 🔽	
To 06/10/2015 🖨 To 06/10/2015 🖨 MU 👻 999999	

Follow the steps below:

- 1. Enter the global *Employee* and *Completion Date* that you would like to add to all of the orders being closed.
- 2. Enter a global *Completion Message* that you would like to add to each order being closed.
- 3. Define the date range of the orders that you would like to close within the 'Delivery Order Entered Date' field.
- 4. Define the 'Entered By' and 'Customer No' criteria that you would like to include when closing the orders.
- 5. Click **OK** to close the orders.

A confirmation message will be displayed on your screen.



Modify Order Due Dates

The *Modify Order Due Dates* feature allows route supervisors to make global scheduling changes to all open *Delivery Orders*.

Navigate to *Route > Schedule > Modify Order Due Dates*.

🕷 Modify Devli	ery Order Due	2 Dates									x
Modify	/ Deliv	very Order Du	e Dates								
Criteria		-									
		Route 💽 🔽 Use sche	duled route Prom	ised Date 06/10/2	015 🗘 🗆	All days for this	route				
-Filter By			Dolivory Orders								
	Ente Promi	ered Date C UV Unconfirm ised Date SV Equipment	ed Delivery Orders Service Orders			Run Cri	teria				
Ticket No.	Acct. No.	Name	Address	City	ZIP	Rte / Stop / Seq	Entered	Promised	Wat	Edit	
											*
	Close Ticl	ket	Add to the Message	4	New Ro New S Change 06/10/201	ute eq: Promised Date 5		×	(0)		
				EXIT							

Follow the steps below to reschedule *Delivery Orders*:

- 1. Select the route that the orders are assigned to from within the *Route* field.
- Check the 'Use scheduled route' option this will ensure that only the stops scheduled on the selected route within the *Delivery Orders* screen will be displayed.
- 3. Enter the 'Promised Date' assigned to the orders that you would like to update.
- 4. Check the 'Confirmed Delivery Orders' option this will include all of the scheduled *Delivery Orders* that match the criteria entered.
- 5. Select the 'Run Criteria' button on the screen. All of the matching orders will be displayed.



6. To change the assigned route or promise date on any of the orders, simply click on each order that you would like to update to toggle the *Edit* field to 'Yes.'



7. Click the modify button, and select a new route, or choose the 'Change Promised Date' box and enter a new date.



8. Click **Save** to update the orders and complete the process.



Additional Features

There are additional features within the *Modify Delivery Order Due Dates* screen that can assist you with managing orders. Each option is discussed below.

Closing Tickets

It is possible to close any order by double-clicking on the order, and selecting the 'Close Ticket' option on the screen. Additionally, an optional completion message can be entered when closing the order.





Adding Messages

You can add a message to the order by double-clicking on the order, and selecting the 'Add to the Message' option on the screen.



Click the Save key to update the order.



View Delivery Order

To view or make changes to a selected order, click the **Modify** key on the bottom of the screen to display the selected *Delivery Order*.



NOTE: Refer to *User Guide B* for definitions on additional features within this screen.

Summary

The *Delivery Order* system in Route Manager is one of the most flexible and timesaving features that the program has to offer. If you take the time to learn all of the options available, it will provide your company with simple-to-use tools for quickly scheduling and managing customer "call-ins."



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