

Chapter 3.09: Delivery Orders

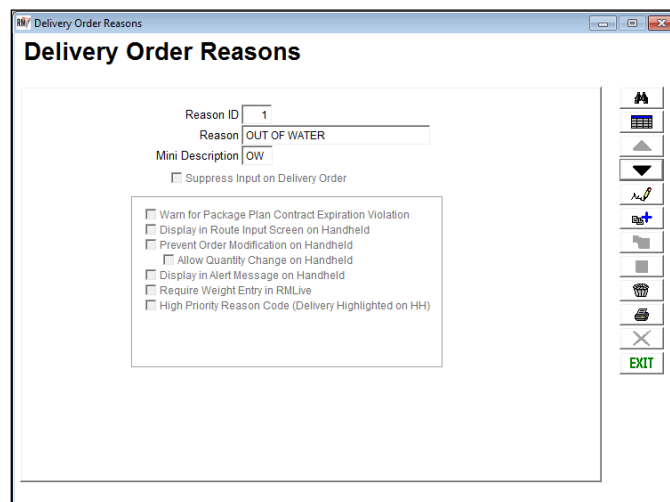
Introduction

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

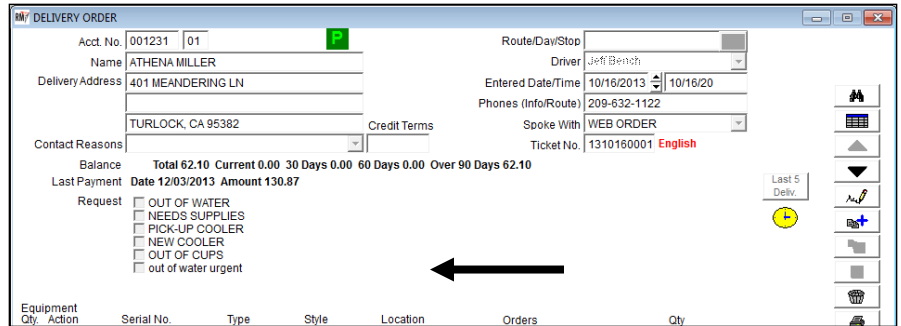
Prior to scheduling *Delivery Orders* for your customers, you will need to establish a series of 'Delivery Order Reasons' that will be used to identify each request.

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).



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:




Acct. No. 001231 01
 Name ATHENA MILLER
 Delivery Address 401 MEANDERING LN
 TURLOCK, CA 95382
 Contact Reasons
 Balance Total 62.10 Current 0.00 30 Days 0.00 60 Days 0.00 Over 90 Days 62.10
 Last Payment Date 12/03/2013 Amount 130.87
 Request
 OUT OF WATER
 NEEDS SUPPLIES
 PICK-UP COOLER
 NEW COOLER
 OUT OF CUPS
 out of water urgent

Creating a Delivery Order

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

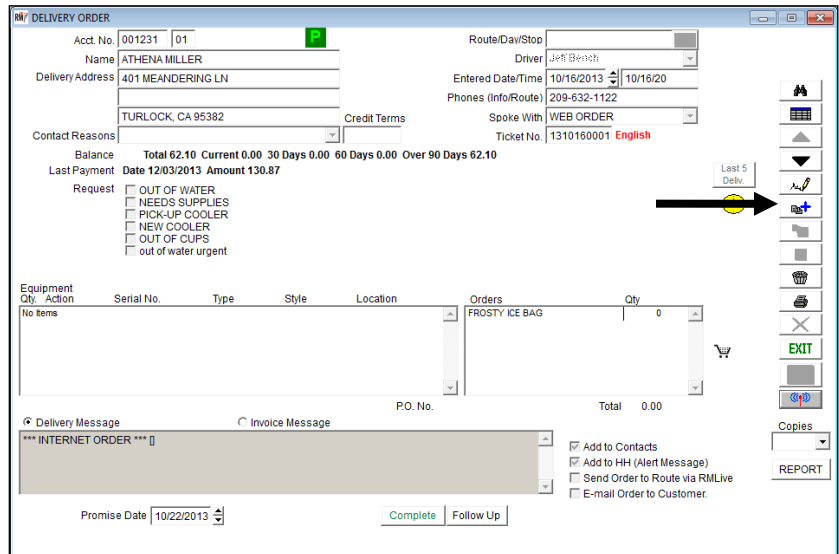
Module Bar

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



Module Date 06/10/2015 [Icons] Period MO_JUN 2015 [Icons]

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

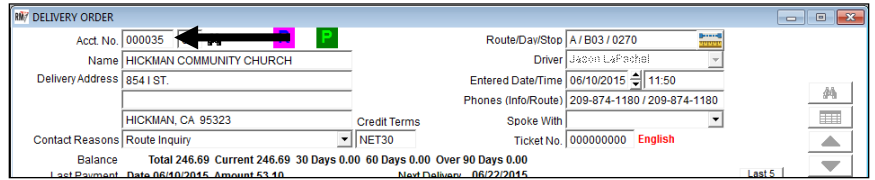



Acct. No. 001231 01
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 OUT OF WATER
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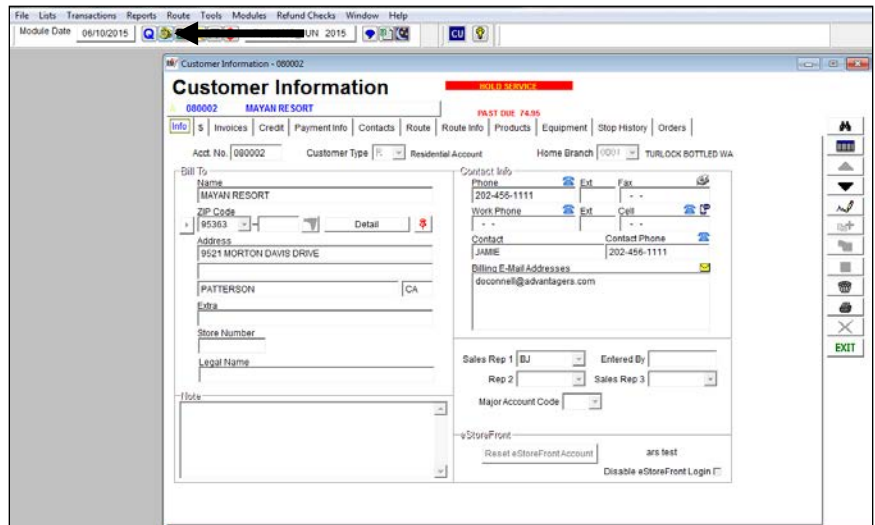
Equipment Qty	Action	Serial No.	Type	Style	Location	Orders	Qty
No Items						FROSTY ICE BAG	0

Delivery Message: *** INTERNET ORDER *** []
 Promise Date 10/22/2013
 Complete Follow Up

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

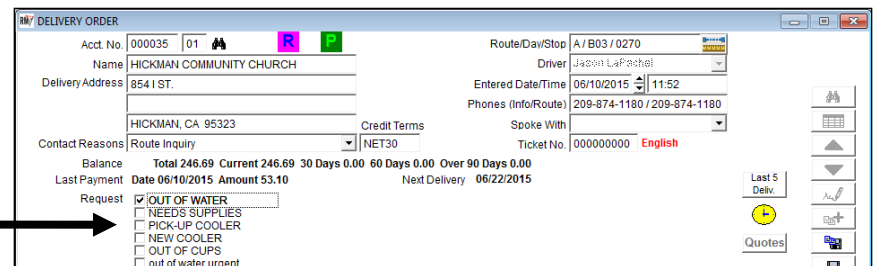


Alternatively, by clicking the  *Delivery Order* button on the 'Module Toolbar' after the customer's account has been opened, a new order will be opened automatically.



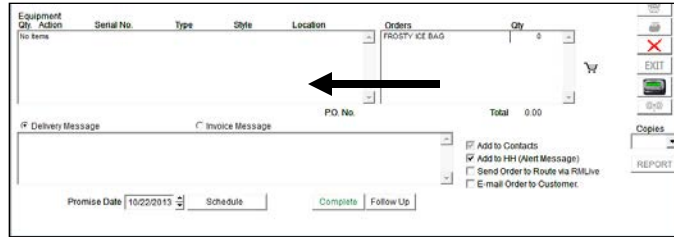
Choose a Delivery Order Reason

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.

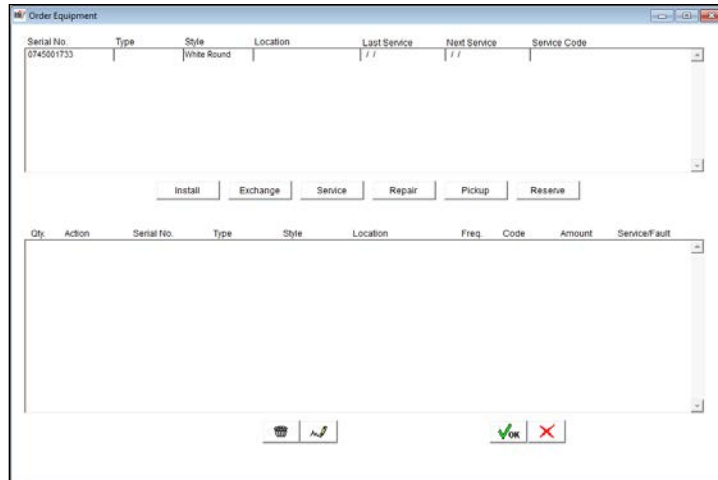


Working with Equipment

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).

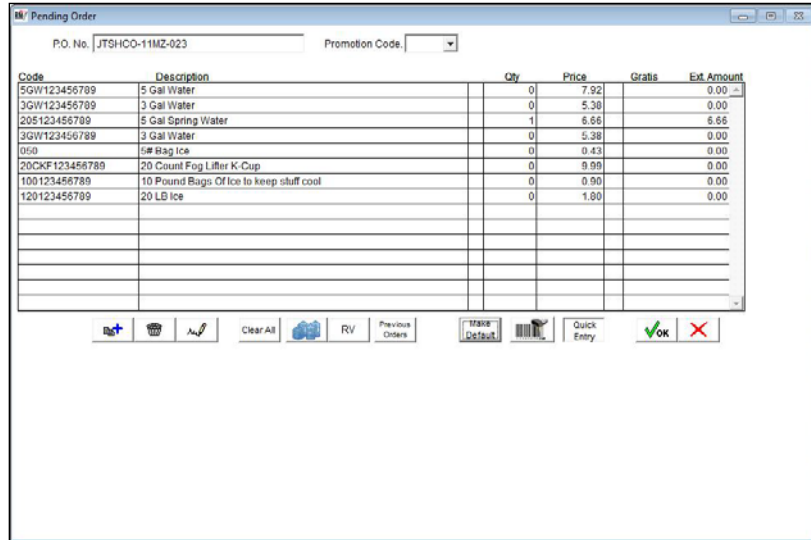
Adding Products

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



The screenshot shows a main order entry form with fields for Equipment, City, Action, Serial No., Type, Style, Location, Orders, and City. Below these are checkboxes for Delivery and Invoice messages, a Promise Date field, and buttons for Complete and Follow Up. A 'REPORT' button is also visible on the right side.

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



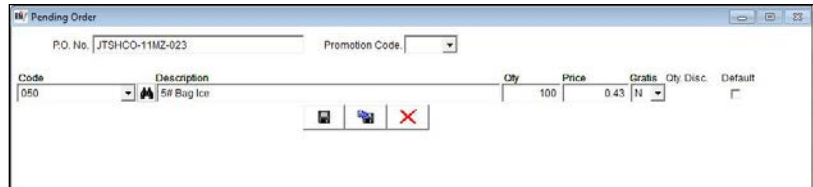
The 'Pending Order' window displays a table of items with the following data:

Code	Description	Qty	Price	Grats	Ext Amount
5GW123456789	5 Gal Water	0	7.92		0.00
3GW123456789	3 Gal Water	0	5.38		0.00
20S123456789	5 Gal Spring Water	1	6.66		6.66
3GW123456789	3 Gal Water	0	5.38		0.00
050	5# Bag Ice	0	0.43		0.00
20CKP123456789	20 Count Fog Lifter K-Cup	0	9.99		0.00
100123456789	10 Pound Bags Of Ice to keep stuff cool	0	0.90		0.00
120123456789	20 LB Ice	0	1.00		0.00

At the bottom of the window, there are several icons and buttons: a plus sign, a printer, a pencil, 'Clear All', 'RV', 'Previous Orders', 'Default', 'Quick Entry', 'OK', and 'Cancel'.

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

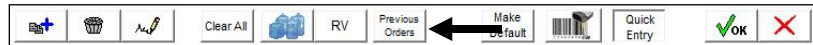
Additionally, you can select a 'Gratis' reason on applicable items or the 'Default' checkbox to add the item to the customer's *Default Products* list permanently.



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.

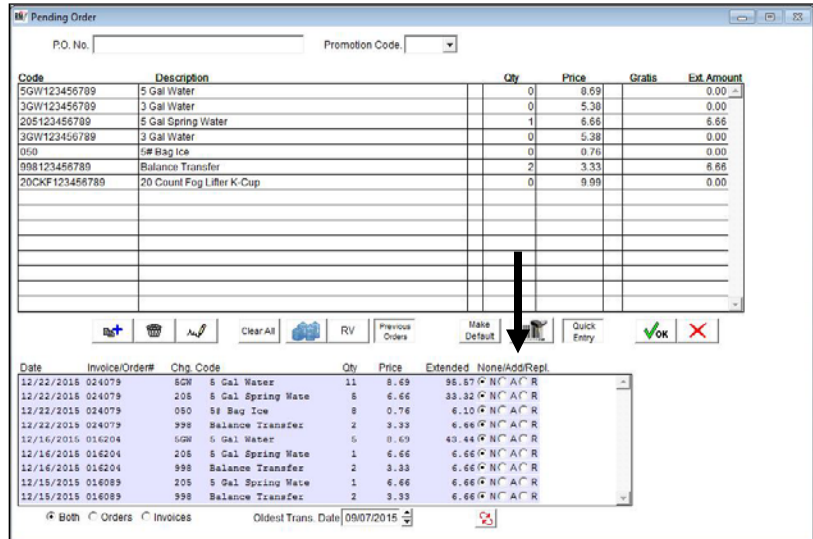


The *Previous Orders* screen allows you to view previous *Delivery Orders* or invoices based on the oldest transaction date entered.

Date	Invoice/Order#	Chg. Code	Qty	Price	Extended	None/Add/Repl.
12/22/2015	024069	700	5 Gal Deposit	-2	6.00	-12.00 <input checked="" type="radio"/> N <input type="radio"/> A <input type="radio"/> R
12/22/2015	024069	5GW	5 Gal Water	3	5.85	17.55 <input checked="" type="radio"/> N <input type="radio"/> A <input type="radio"/> R
12/22/2015	024069	205	5 Gal Spring Water	1	6.66	6.66 <input checked="" type="radio"/> N <input type="radio"/> A <input type="radio"/> R
12/22/2015	024069	998	Balance Transfer	2	2.22	4.44 <input checked="" type="radio"/> N <input type="radio"/> A <input type="radio"/> R
12/22/2015	024069	080	8# Bag Ice	14	0.65	9.10 <input checked="" type="radio"/> N <input type="radio"/> A <input type="radio"/> R
12/21/2015	020965	205	5 Gal Spring Water	1	6.66	6.66 <input checked="" type="radio"/> N <input type="radio"/> A <input type="radio"/> R
12/21/2015	020965	998	Balance Transfer	2	2.22	4.44 <input checked="" type="radio"/> N <input type="radio"/> A <input type="radio"/> R
12/21/2015	020965	080	8# Bag Ice	14	0.65	9.10 <input checked="" type="radio"/> N <input type="radio"/> A <input type="radio"/> R
12/18/2015	020446	205	5 Gal Spring Water	1	6.66	6.66 <input checked="" type="radio"/> N <input type="radio"/> A <input type="radio"/> R

Both Orders Invoices Oldest Trans. Date 09/07/2015

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:



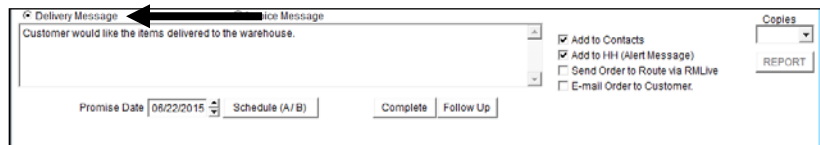
Code	Description	Qty	Price	Gratis	Ext Amount
5GW123456789	5 Gal Water	0	0.69		0.00
3GW123456789	3 Gal Water	0	5.38		0.00
20S123456789	5 Gal Spring Water	1	6.66		6.66
3GW123456789	3 Gal Water	0	5.38		0.00
050	5# Bag Ice	0	0.76		0.00
098123456789	Balance Transfer	2	3.33		6.66
20CKF123456789	20 Count Fog Lifter K-Cup	0	9.99		0.00

Date	Invoice/Order#	Chg Code	Qty	Price	Extended	None/Add/Repl.
12/22/2015	024079	5GW	5	0.69	34.57	N A C R
12/22/2015	024079	20S	5	6.66	33.32	N A C R
12/22/2015	024079	050	8	0.76	6.10	N A C R
12/22/2015	024079	998	2	3.33	6.66	N A C R
12/16/2015	016204	5GW	5	0.69	43.44	N A C R
12/16/2015	016204	20S	1	6.66	6.66	N A C R
12/16/2015	016204	998	2	3.33	6.66	N A C R
12/19/2015	016089	20S	1	6.66	6.66	N A C R
12/19/2015	016089	998	2	3.33	6.66	N A C R

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:



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



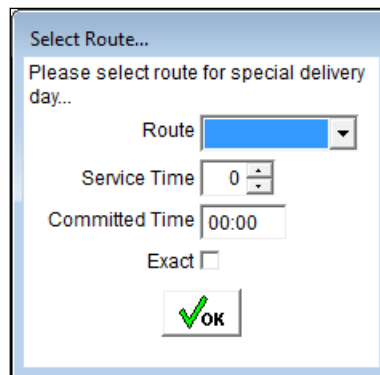
Scheduling the Delivery Order

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:



The screenshot shows a software interface with several fields and buttons. At the bottom, the 'Promise Date' field is set to '03/07/2016'. To its right is a 'Schedule' button. Other visible fields include 'Equipment', 'Serial No.', 'Type', 'State', 'Location', 'Orders', 'City', 'PIQ No.', and 'Total'. There are also checkboxes for 'Add to Contacts', 'Add to HH (Alert Message)', 'Send Order to Route via RMLive', and 'E-mail Order to Customer'.

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



The 'Select Route...' dialog box contains the following elements:

- Title: Select Route...
- Text: Please select route for special delivery day...
- Route: A dropdown menu.
- Service Time: A numeric input field with a value of 0.
- Committed Time: A time input field with a value of 00:00.
- Exact: An unchecked checkbox.
- OK: A button with a green checkmark.

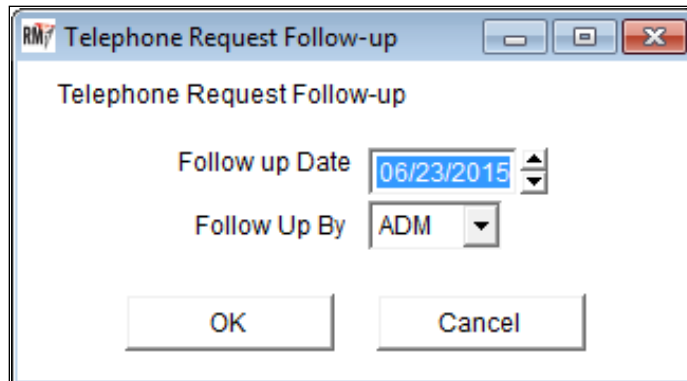
Select the desired route and click **OK**.

Additional Options

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

Follow-up Date

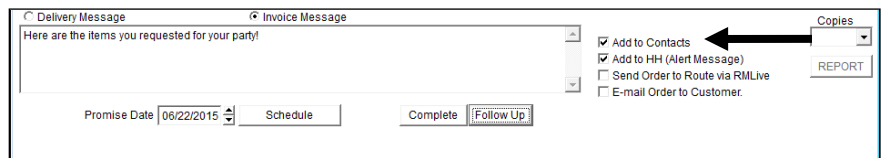
A 'Follow-Up Date' can be assigned to each order to ensure that the order has been expedited in a timely manner. Click on the 'Follow Up' button to schedule a follow-up date for the order.



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.

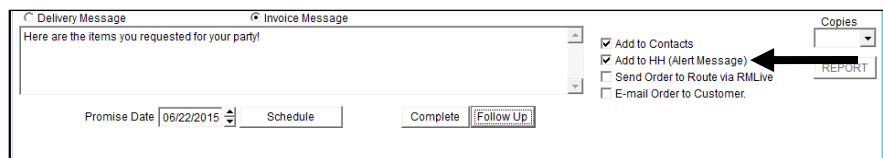
Add to Contacts

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



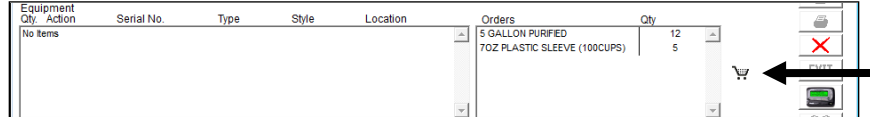
Add Info to Alert Message

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.

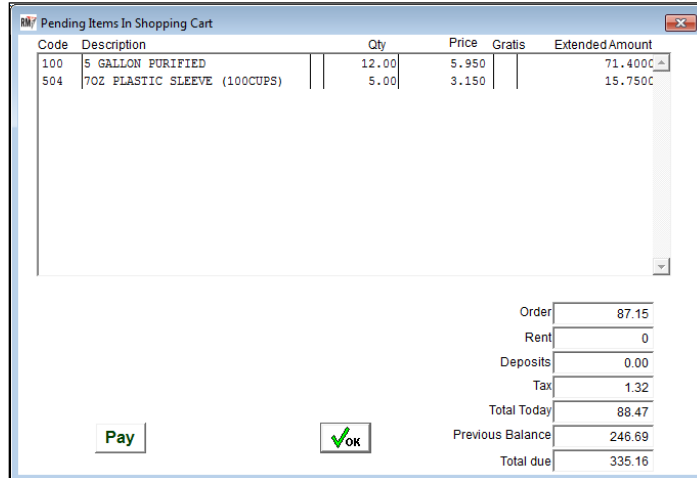


Shopping Cart

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

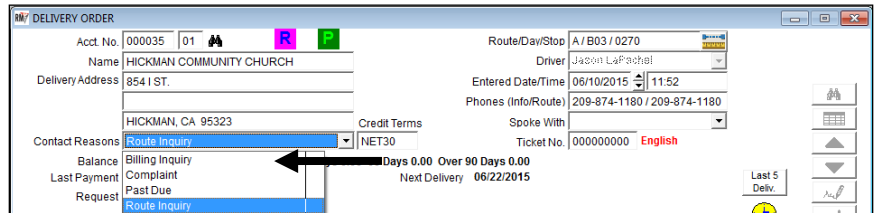


Click on the *Shopping Cart* to view the invoice total:



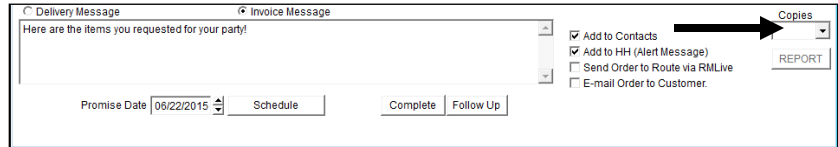
Contact Reasons

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).

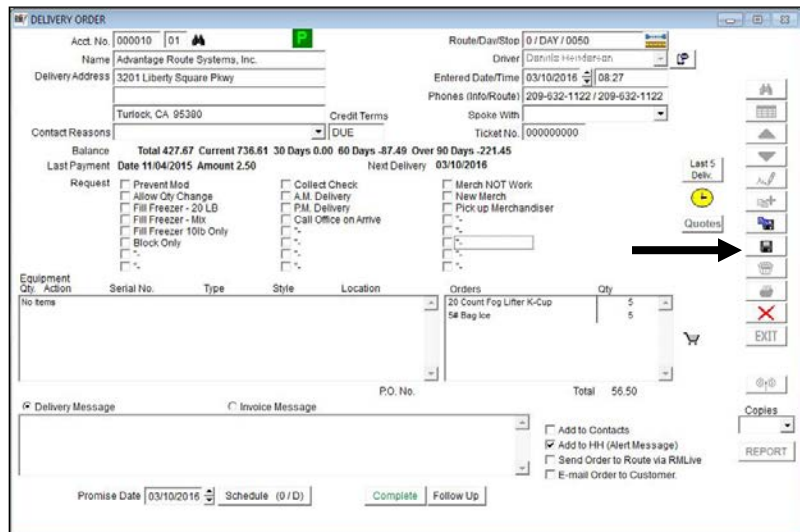


NOTE: Select 'NONE' if you will complete the order on the handheld, or do not wish to print a copy. Refer to supplemental document 4-43 for examples of the additional delivery order formats.

NOTE: Refer to the *Delivery 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.



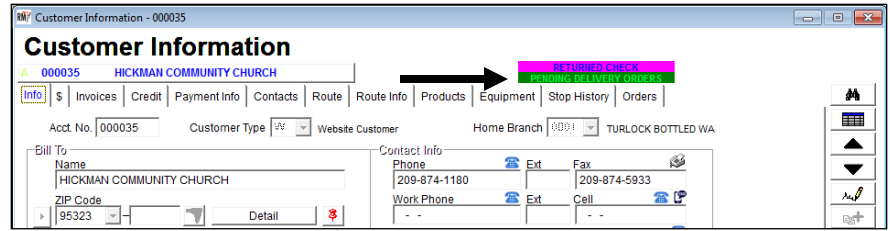
Continue to the next section to learn how to identify and manage *Delivery Orders* after they have been scheduled.

Managing Delivery Orders

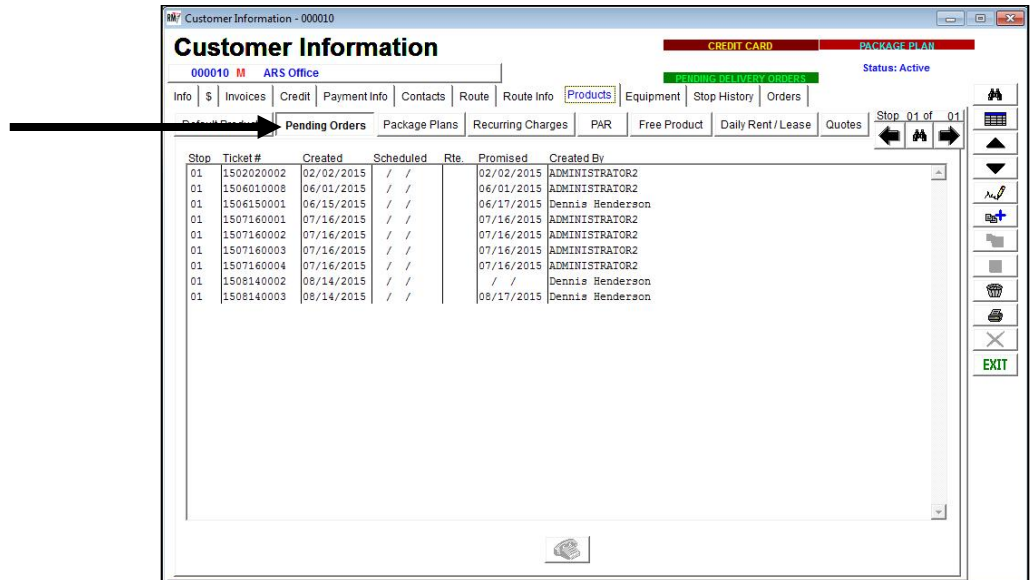
Each *Delivery Order* is identified and tracked in Route Manager to assist you with managing your deliveries daily.

Pending Delivery Order Flag

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



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



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

Stop	Ticket#	Created	Scheduled	Rte	Promised	Created By
01	1502020002	02/02/2015	/ /		02/02/2015	ADMINISTRATOR2
01	1506010008	06/01/2015	/ /		06/01/2015	ADMINISTRATOR2
01	1506150001	06/15/2015	/ /		06/17/2015	Dennis Henderson
01	1507160001	07/16/2015	/ /		07/16/2015	ADMINISTRATOR2
01	1507160002	07/16/2015	/ /		07/16/2015	ADMINISTRATOR2
01	1507160003	07/16/2015	/ /		07/16/2015	ADMINISTRATOR2
01	1507160004	07/16/2015	/ /		07/16/2015	ADMINISTRATOR2
01	1508140002	08/14/2015	/ /		/ /	Dennis Henderson
01	1508140003	08/14/2015	/ /		08/17/2015	Dennis Henderson



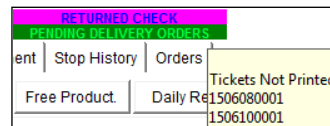
To view or make a modification to the order, highlight the item and choose the  *Delivery Order* button.

Stop	Ticket#	Created	Scheduled	Rte	Promised	Created By
01	1506080001	06/08/2015	/ /		06/19/2015	ADMINISTRATOR
01	1506100001	06/10/2015	06/22/2015	A	06/22/2015	ADMINISTRATOR

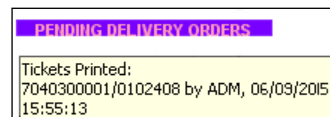
Additional Options – Paper Tickets Only

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.

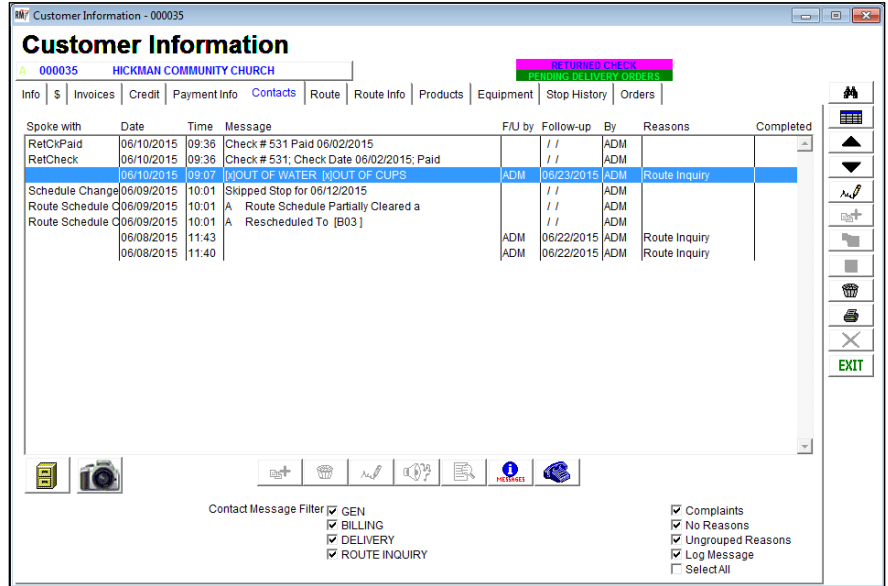


If all of the orders on the account have been printed, the *Pending Delivery Order* flag will be purple. Place your mouse cursor over the flag to view printed ticket details.




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.

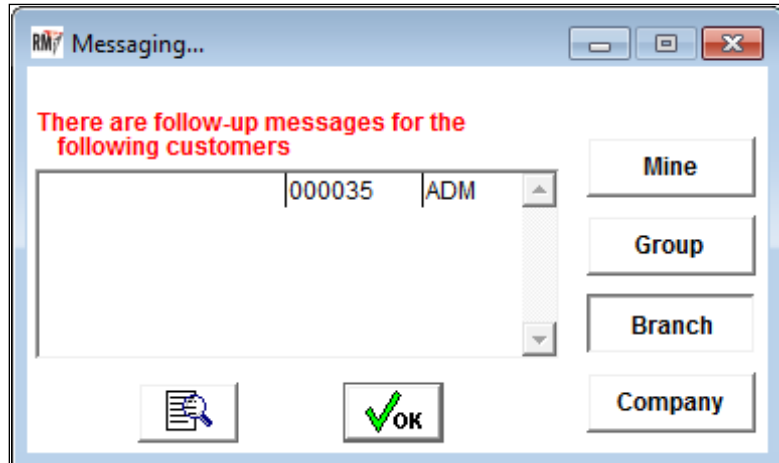


NOTE: Select the 'No Reasons' option on the bottom of the *Contacts* tab if the order is not assigned a *Contact Reason*.

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:

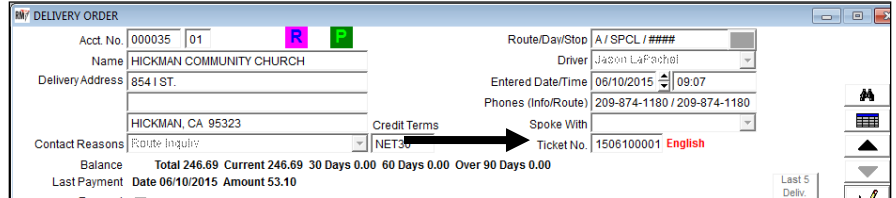


The *Follow-up Messages Report* can be printed by selecting the *Preview* button. Click **OK** to close the screen.

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

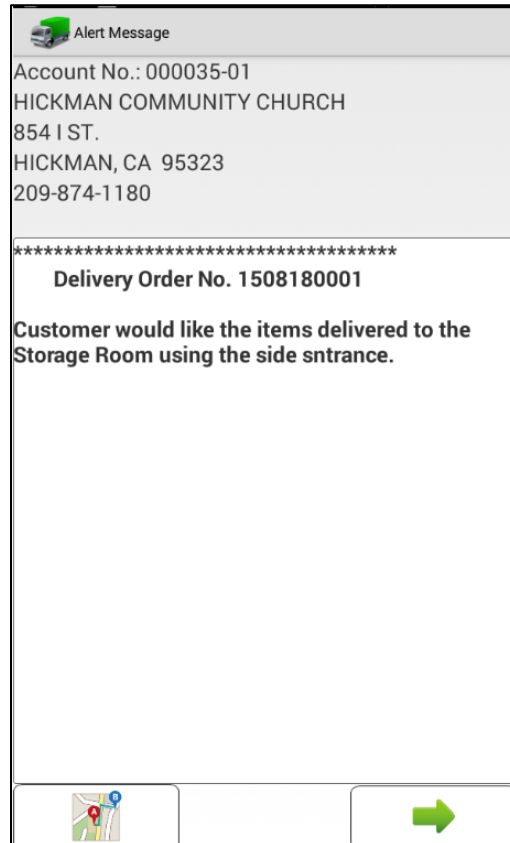
Closing Delivery Orders

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.



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.



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).

Spoke with	Date	Time	Message	F/U by	Follow-up	By	Reasons	Completed
RetChkPaid	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		/ /	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		/ /	ADM		
Route Schedule Q	06/09/2015	10:01	A Route Schedule Partially Cleared a		/ /	ADM		
Route Schedule Q	06/09/2015	10:01	A Rescheduled To [B03]		/ /	ADM		
	06/08/2015	11:43		ADM	06/22/2015	ADM	Route Inquiry	
	06/08/2015	11:40		ADM	06/22/2015	ADM	Route Inquiry	

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

RM7 Complete Delivery Order

Complete Delivery Order

Process By Completion Date

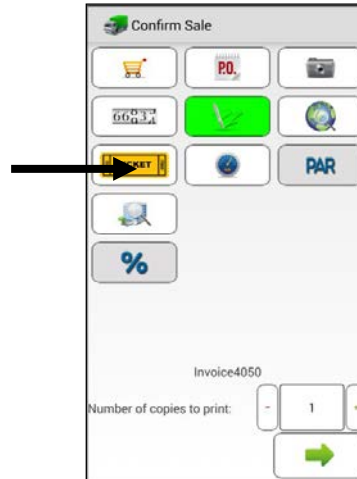
Completion Message

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

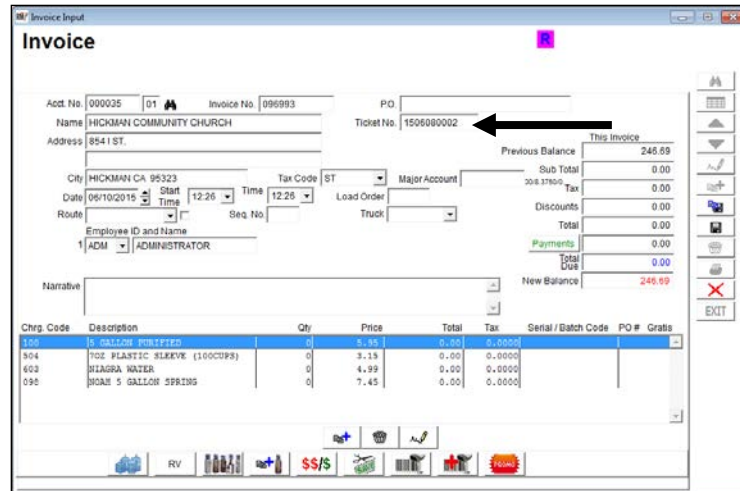
The driver can enter the ticket number on the *Confirm Sale* screen by tapping on the 'Ticket' key:



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*:

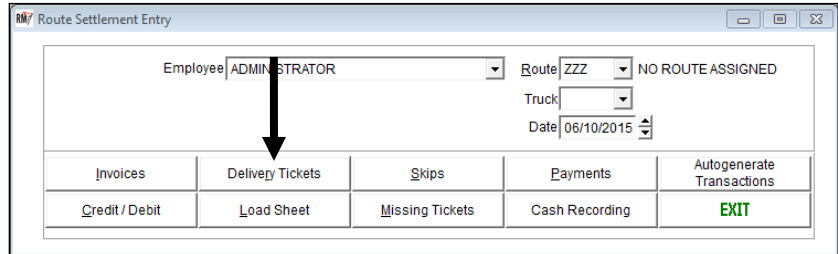


When the desktop transaction is posted, the order will be closed.

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*.



Employee	ADMINISTRATOR	Route	ZZZ	NO ROUTE ASSIGNED
		Truck		
		Date	06/10/2015	
Invoices	Delivery Tickets	Skips	Payments	Autogenerate Transactions
Credit / Debit	Load Sheet	Missing Tickets	Cash Recording	EXIT

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

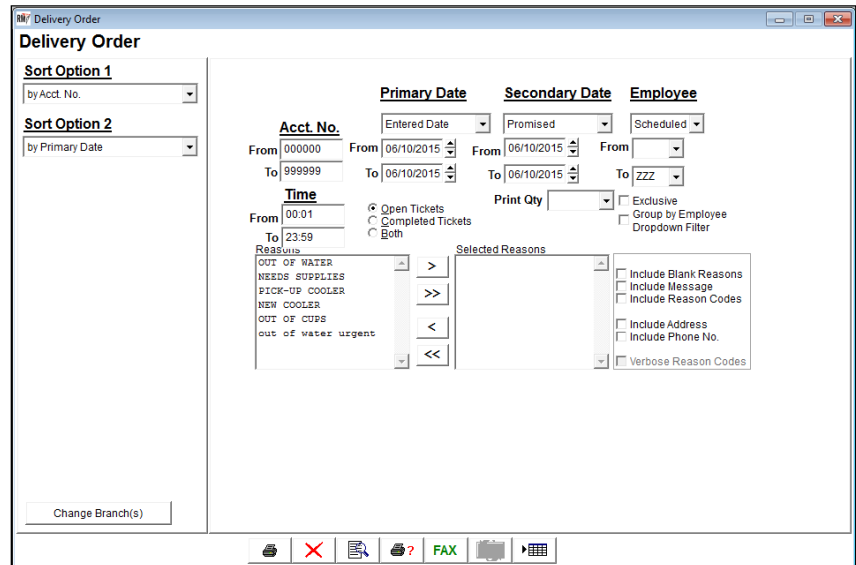
Delivery Order Reports

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*.



The screenshot shows the 'Delivery Order' report interface. On the left, there are two 'Sort Option' dropdown menus: 'Sort Option 1' set to 'by Acct. No.' and 'Sort Option 2' set to 'by Primary Date'. Below these is a 'Change Branch(s)' button. The main area contains several filter sections: 'Acct. No.' with 'From' (000000) and 'To' (999999) fields; 'Primary Date' with 'Entered Date' dropdown and 'From' (06/10/2015) and 'To' (06/10/2015) date pickers; 'Secondary Date' with 'Promised' dropdown and 'From' (06/10/2015) and 'To' (06/10/2015) date pickers; and 'Employee' with a 'Scheduled' dropdown and 'From' (ZZZ) field. There are also checkboxes for 'Open Tickets', 'Completed Tickets', and 'Both'. A 'Time' section has 'From' (00:01) and 'To' (23:59) time pickers. A 'Print Qty' dropdown is present. Below these are 'Reasons' and 'Selected Reasons' lists with navigation arrows. On the right, there are checkboxes for 'Include Blank Reasons', 'Include Message', 'Include Reason Codes', 'Include Address', 'Include Phone No.', 'Exclude Group by Employee', and 'Verbose Reason Codes'. At the bottom, there is a toolbar with icons for home, close, print, help, FAX, and a grid icon.

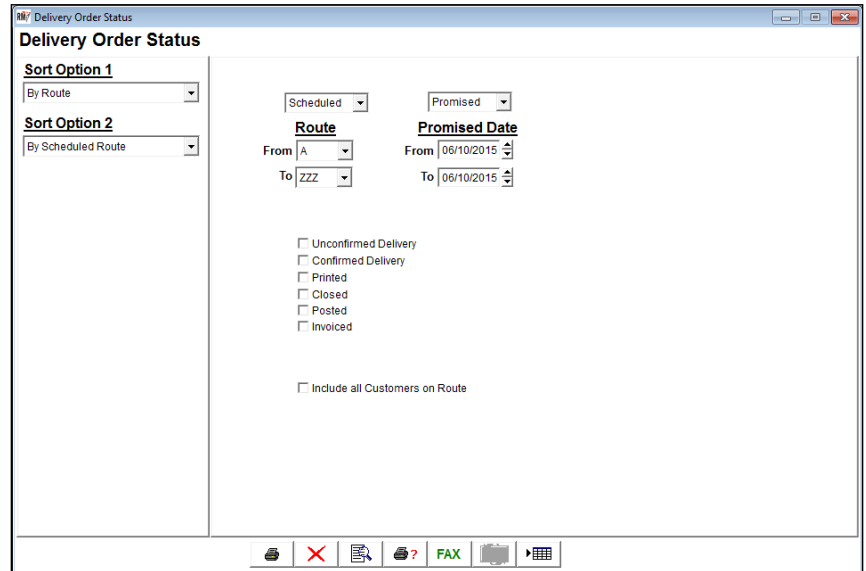
NOTE: For detailed definitions of each field within this report, refer to *User Guide B*.

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*.



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.

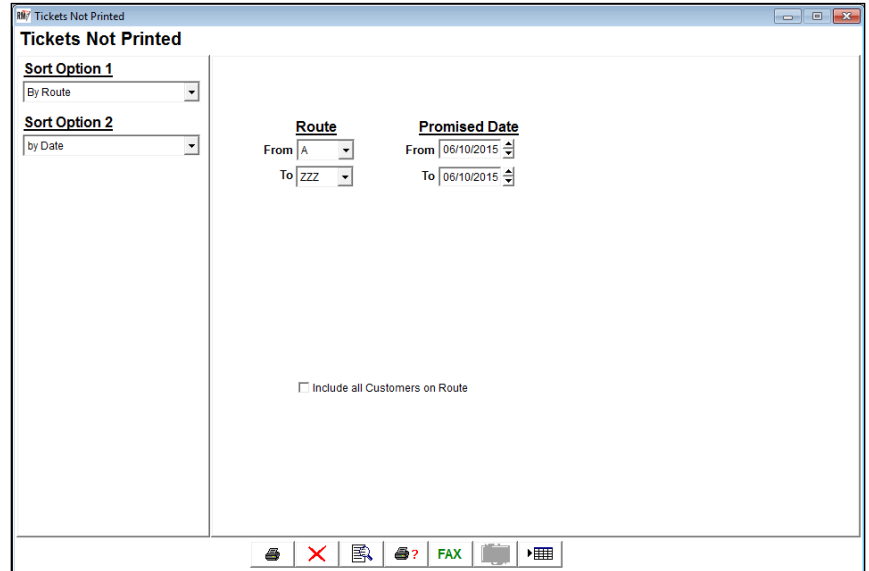
Navigate to *Reports > Route Reports > Other > Non Completed Delivery Orders without Delivery*.

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*.



Tickets Not Printed

Sort Option 1
By Route

Sort Option 2
by Date

Route
From: A
To: ZZZ

Promised Date
From: 06/10/2015
To: 06/10/2015

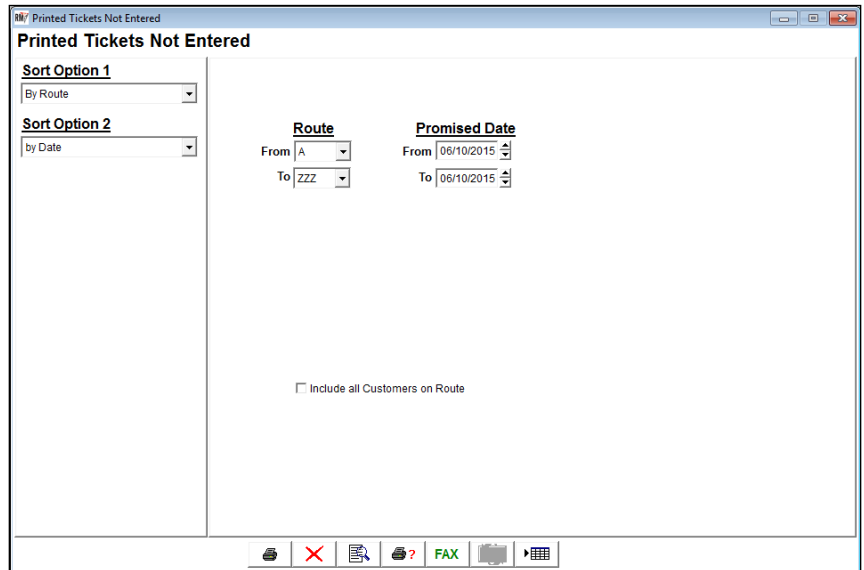
Include all Customers on Route

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*.



Printed Tickets Not Entered

Sort Option 1
By Route

Sort Option 2
by Date

Route
From A To ZZZ

Promised Date
From 06/10/2015 To 06/10/2015

Include all Customers on Route

Print Close Refresh Help FAX Calendar

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

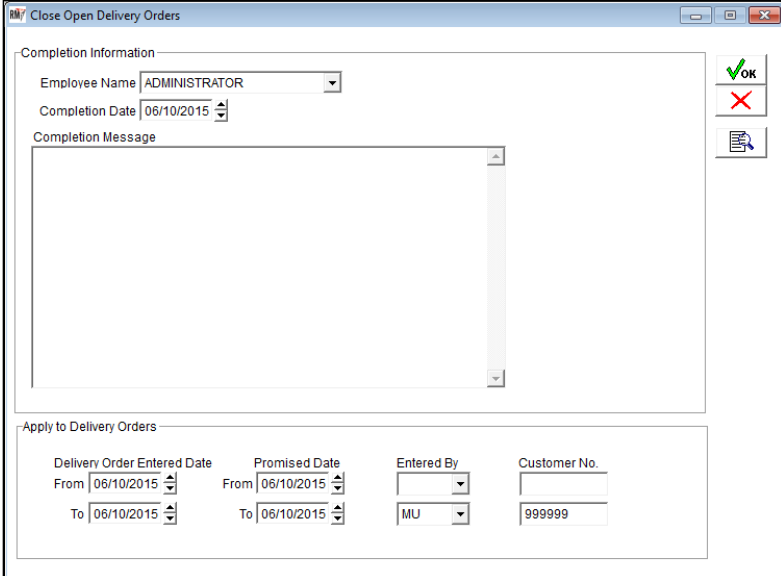
Delivery Order Utilities

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*.



Follow the steps below:

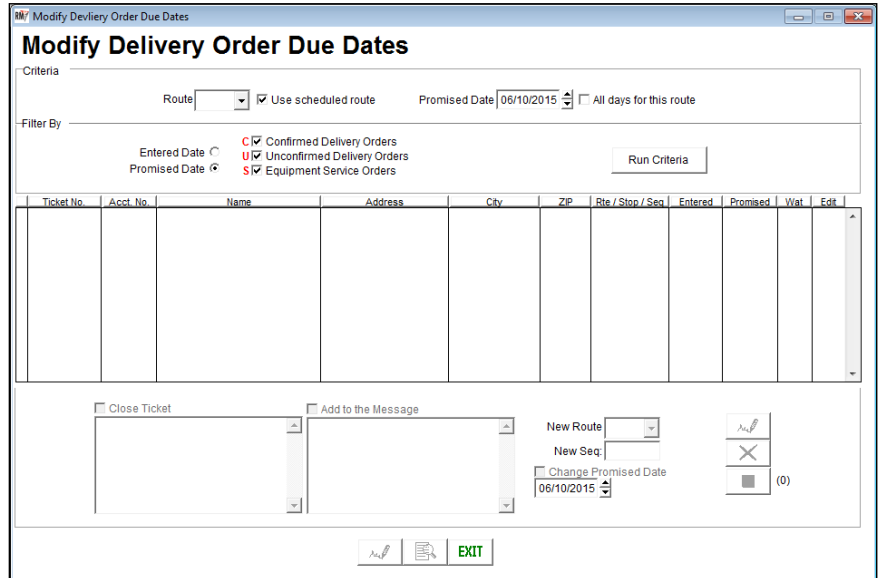
1. Enter the global *Employee* and *Completion Date* that you would like to add to all of the orders being closed.
2. Enter a global *Completion Message* that you would like to add to each order being closed.
3. Define the date range of the orders that you would like to close within the 'Delivery Order 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*.




Follow the steps below to reschedule *Delivery Orders*:

1. Select the route that the orders are assigned to from within the *Route* field.
2. 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.

- 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.'

Ticket No.	Acct. No.	Name	Address	City	ZIP	Rte / Stop / Seq.	Entered	Promised	Wat.	Edit
U	001244	JOE WILLIAMS	858 W MAIN ST	TURLLOCK	95380	/ /		06/10/2015	0	YES



Close Ticket

Add to the Message

Total Water 0

Change Promised Date

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


Modify Delivery Order Due Dates

Criteria: Route B Use scheduled route Promised Date 06/10/2015 All days for this route

Filter By:

Entered Date	<input checked="" type="checkbox"/> Confirmed Delivery Orders	0 Orders	
	<input checked="" type="checkbox"/> Unconfirmed Delivery Orders	1 Orders	
	<input checked="" type="checkbox"/> Equipment Service Orders	0 Orders	
		1 Total Orders	

Ticket No.	Acct. No.	Name	Address	City	ZIP	Rte / Stop / Seq.	Entered	Promised	Wat.	Edit
U	001244	JOE WILLIAMS	858 W MAIN ST	TURLLOCK	95380	/ /		06/10/2015	0	YES



Close Ticket

Add to the Message

Total Water 0

Change Promised Date

- 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.

Ticket No.	Acct. No.	Name	Address	City	ZIP	Sta / Stop / Seq.	Entered	Promised	Visit	Est.
001244		JOE WILLIAMS	656 W MAIN ST	TURLOCK	95380	/ /		06/10/2015	0	YES

Close Ticket Add to the Message

A

 06/10/2015

Total Water 0
 (1)

Click the **Save** key to update 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.

Ticket No.	Acct. No.	Name	Address	City	ZIP	Sta / Stop / Seq.	Entered	Promised	Visit	Est.
001244		JOE WILLIAMS	656 W MAIN ST	TURLOCK	95380	/ /		06/10/2015	0	YES

Close Add to the Message

A

 06/10/2015

Total Water 0
 (1)

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*.

Ticket No.	Acct. No.	Name	Address	City	ZIP	Sta / Stop / Sep	Entered	Promised	Wtr	Est
001244		JOE WILLIAMS	858 W MAIN ST	TURLOCK	95280		F /	06/10/2015	0	YES

Close Ticket

Add to the Message

Total Water 0

Change Promised Date
06/14/2015

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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Advantage Route Systems, Inc.

3201 Liberty Square Parkway

Turlock, CA 95380 USA

Phone: 1.209.632.1122

Website: www.AdvantageRS.com

Email: info@AdvantageRS.com

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