

3.23: Advanced Pre-Calling

Introduction

The *Advanced Pre-Calling* program has been designed for companies that require a formal calling program to contact customers prior to delivery. The program allows you to call your customers based on an independent calendar (similar to Day Labels) or a fixed rotation, such as every 6 weeks.

After the customers have been scheduled for pre-calling, you will use the *Route Pre-Sale* screen to easily contact and update customer delivery schedules and take orders painlessly.

How it Works

The *Advanced Pre-Calling* program uses fields available within the *Precalling* section of the *Route* tab within *Customer Information* to determine which accounts should be called, and how often. Each account will receive a call based on the *Next Call* date on their account, which is updated automatically as transactions are posted. This information is gathered and used by the *Route Pre-Sale* calling screen found under the *Route* menu. From within this screen, you will have the ability to pre-call customers, update *Delivery Orders*, skip deliveries, and more.

Which Option Should I Use?

The *Advanced Pre-Calling* system includes two methods of managing pre-calling schedules for your customers:

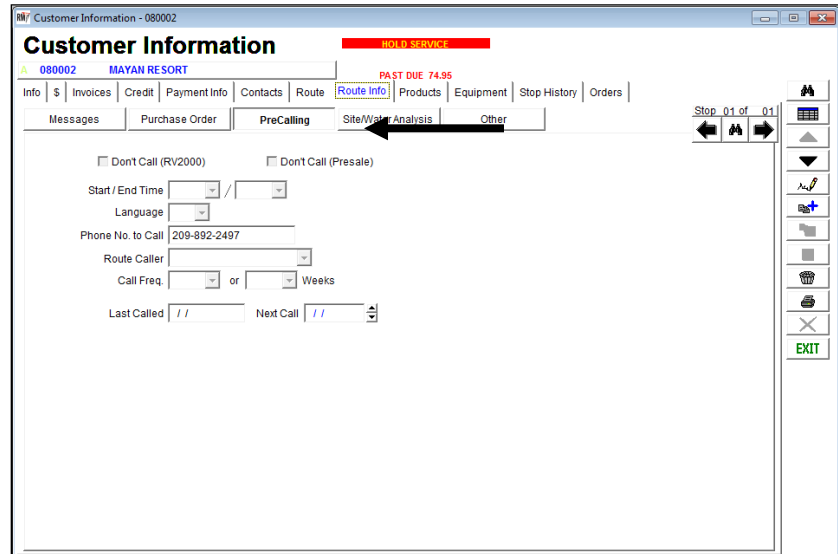
- ▶ **Fixed Rotation:** Gives you the option of using fixed rotation codes that determine the number of weeks between deliveries that should pass before the customer should receive a call. These codes are typically sufficient for companies that use standard repeating schedules such as weekly, bi-weekly, etc.
- ▶ **Pre-Call Calendar:** For our clients that have a more complex routing system (e.g., propane delivery, recycled oil), we have created an independent calendar that allows you to establish a series of custom codes within the *Pre-Call Calendar* — similar to the *Day Label Calendar* — that gives you more flexibility with non-standard scheduling needs.

The calling option that you choose is entirely based on your company's requirements. Both methods are discussed within the next two sections of this document.

Standard Pre-Call Scheduling (Fixed Rotation)

The standard pre-call scheduling option is simple and effective. Each account contains pre-calling fields on the *Pre-Calling* sub-tab of the *Route Info* tab in *Customer Information*. By establishing the following criteria, you can begin using the Advanced Pre-Calling system. As well as delivery contact information on the *Route* tab in *Customer Information*.

Navigate to *Lists > Customer Information > Route Info*, and select the *PreCalling* option:



Delivery Contact Info:

Navigate to the *Route* Tab in *Customer Information* to enter the Delivery Contact info noted below.

Name: Enter a contact name in the *Delivery Contact Info* section. This will appear as the *Name* displayed in the *Pre-Sale* screen.

Phone: Enter a contact phone number in the *Phone* field found within the *Delivery Contact Info* section. This is the *Alternate Phone* number that will be used in the *Pre-Sale* screen.

E-mail: Enter an e-mail address in the *E-mail* field found within the *Delivery Contact Info* section. This is the e-mail address that will be used in the *Pre-Sale* screen.

Delivery Contact Info			
Delivery Phone	Ext	Fax	
209-892-2497		209-892-2719	
Delivery Work Phone	Ext	Cell	
- -		702-423-3954	
Name	Contact Phone		
JAMIE	209-620-9438		
E-Mail	Contact Via		Freq.
doconnell@advantagers.com	<input checked="" type="checkbox"/>		
Send Invoice Options			

PreCalling Contact Info:

Navigate to the PreCalling sub-tab on the Route Info tab in Customer Information, and enter the details noted below:

Phone No. to Call: Enter the customer's phone number in the *Phone No. to Call* field to be displayed as the *Phone No.* field in the *Pre-Sale* screen.

<input type="checkbox"/> Don't Call (RV2000)	<input type="checkbox"/> Don't Call (Presale)
Start / End Time	/
Language	
Phone No. to Call	209-892-2497
Route Caller	
Call Freq.	or Weeks
Last Called	Next Call

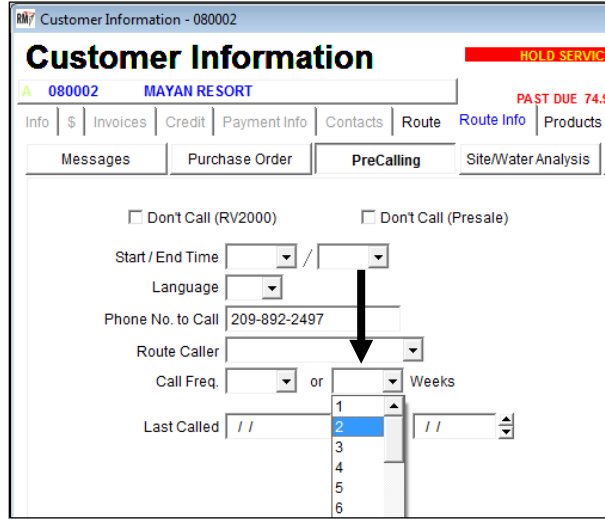
Call Frequency (Weeks):

The standard pre-calling option involves the *Weeks* field under the *PreCalling* option on the *Route* tab.

<input type="checkbox"/> Don't Call (RV2000)	<input type="checkbox"/> Don't Call (Presale)
Start / End Time	/
Language	
Phone No. to Call	209-892-2497
Route Caller	
Call Freq.	or Weeks
Last Called	Next Call

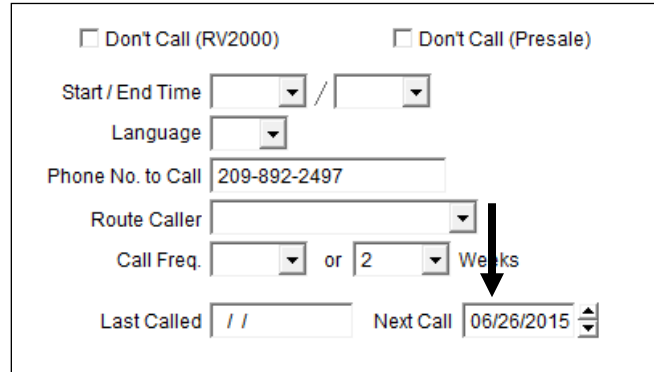
Simply choose the number of weeks that you would like the customer to receive a pre-call from the drop-down menu. Route Manager will schedule a pre-call after each transaction is posted on the customer's account based on the number of weeks selected.

For example, if 2 weeks is selected and the customer's last posted transaction was dated 06/26, Route Manager will automatically schedule a pre-call for 07/10.



NOTE: You have the option of selecting 1-52 week cycles.

The first time that you establish pre-calling settings on each account, enter the starting date that they should receive a call within the *Next Call* field under the *PreCalling* section.



Don't Call (RV2000) Don't Call (Presale)

Start / End Time [] / []

Language []

Phone No. to Call 209-892-2497

Route Caller []

Call Freq. [] or 2 Weeks

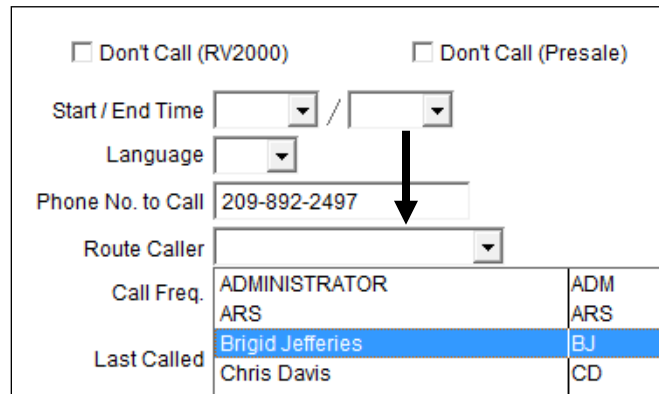
Last Called [] / [] Next Call 06/26/2015

NOTE: After the initial date is established within the *Next Call* field, the date will be updated automatically after each transaction has been posted on their account.

Additional Fields:

In addition to the required fields already discussed, the following optional fields are available within the *Precalling* screen.

Route Caller: If you would like to assign an employee to be in charge of all pre-calling on the current account, select a *Route Caller* from the drop-down list. Each *Route Caller* will be able to load only their assigned accounts within the *Route Pre-Sale* screen discussed later in this document.



Don't Call (RV2000) Don't Call (Presale)

Start / End Time [] / []

Language []

Phone No. to Call 209-892-2497

Route Caller []

Call Freq.	ADMINISTRATOR	ADM
	ARS	ARS
	Brigid Jefferies	BJ
	Chris Davis	CD

Last Called [] / []

Call Freq: The *Call Frequency* field is discussed in the next section. This option allows you to create your own pre-calling schedule by establishing a *Pre-Call Calendar*. This option is helpful for companies that have complex route schedules.

<input type="checkbox"/> Don't Call (RV2000)	<input type="checkbox"/> Don't Call (Presale)
Start / End Time	/
Language	
Phone No. to Call	209-892-2497
Route Caller	
Call Freq.	or 2 Weeks
Last Called	/ /
Next Call	06/26/2015

Repeat the steps covered above on each account scheduled to receive a delivery pre-call.

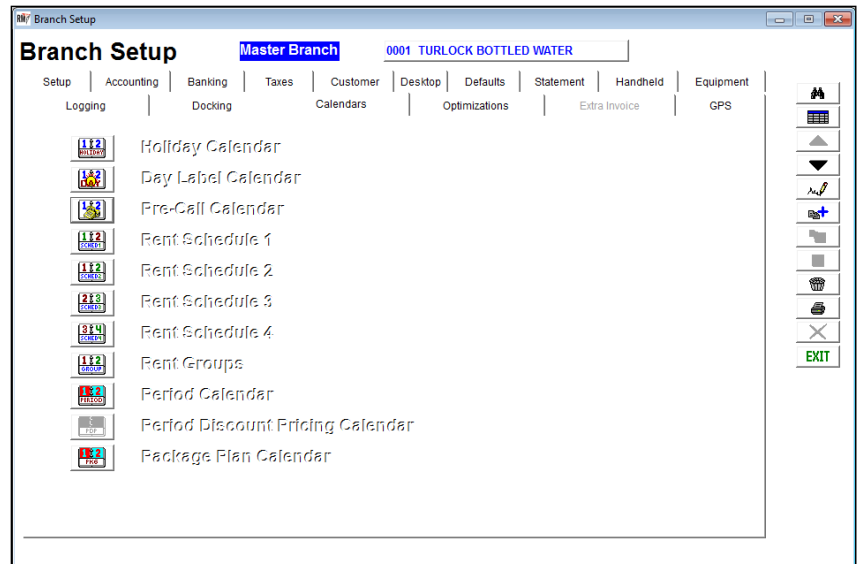
The next section discusses the more advanced scheduling option available with *Advanced Pre-Calling*. To learn how to pre-call customers after you have established their frequency, skip to the *Daily Usage* section.

Pre-Call Calendar Scheduling

The *Pre Call Calendar* allows you to establish a series of pre-call codes (similar to *Day Labels* used for route scheduling) that can repeat weekly, bi-weekly, every Monday, or any other frequency that you need. After the calendar has been established, you simply assign a pre-call code to each account on the *Route* tab of *Customer Information*. This method of scheduling pre-calls is extremely flexible and can be used to simplify complex route schedules.

Creating the Pre-Call Calendar

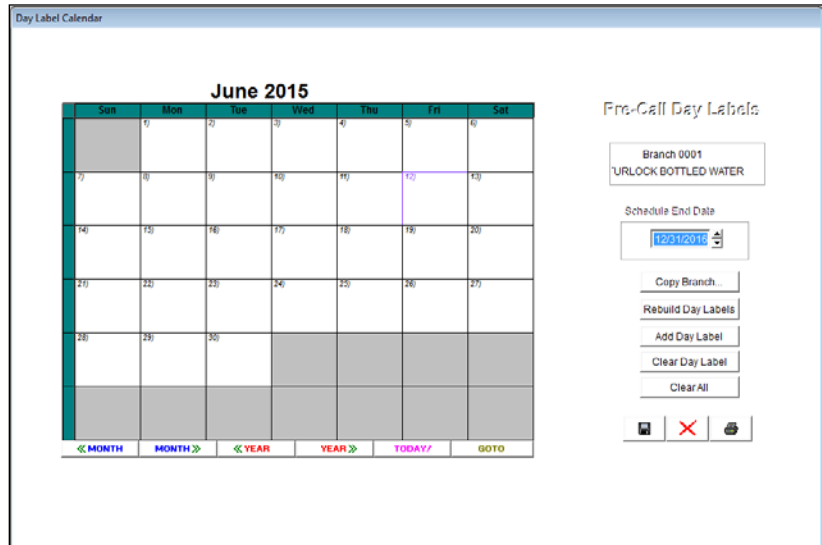
Navigate to *File > Branch Setup > Calendars*, and select the *Pre Call Calendar* option.



The following section will guide you through creating the *Pre-Call Calendar*.

The *Pre-Call Calendar* is used to create codes (day labels) that will determine each customer's pre-call schedule.

An example *Pre-Call Calendar* is shown below:



Fields:

Pre-Call Schedule End Date: This field determines the date the current route schedule will end. The date is typically extended for one year in advance.

Copy Branch: Select this option to copy the pre-call calendar from an alternate branch to the current branch.

Rebuild Day Labels: Choose this option to update the pre-call calendar. This is typically used when holiday changes have been made after the calendar has already been extended for the year.

Add Day Label: Choose this option to add a new *Day Label* to the system.

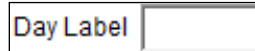
Clear Day Label: Choose this option to clear a single *Day Label* from the calendar.

Clear All: Choose this option to clear all *Day Labels* from the calendar.

Creating Pre-Call Day Labels

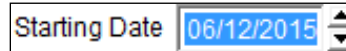
Follow the steps below to be guided through establishing a simple weekly *Pre-Call Day Label*.

1. Click on the *Add Day Label* option.
2. Enter *W01* as the *Day Label* in the *Add Day Label* dialog screen.



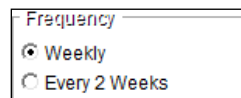
A screenshot of a text input field labeled "Day Label" with a cursor inside, ready for text entry.

3. Adjust the *Starting Date* to reflect the day you would like the *Pre-Call Day Label* to begin.



A screenshot of a date selection field labeled "Starting Date" showing the date "06/12/2015".

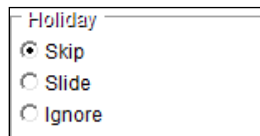
4. Under *Frequency*, select *Weekly*.



A screenshot of a "Frequency" dropdown menu with two options: "Weekly" (selected with a radio button) and "Every 2 Weeks" (unselected).

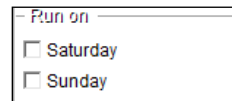
5. Under *Holiday*, select one of the following:
 - ▶ *Skip*: Will not schedule any pre-calls on that label.
 - ▶ *Slide*: Will slide all pre-calls on that label to the next day (slides all labels up a day).
 - ▶ *Ignore*: Will schedule the pre-calls on that label regardless of the holiday.

In this case, *Skip* is selected.



A screenshot of a "Holiday" dropdown menu with three options: "Skip" (selected with a radio button), "Slide" (unselected), and "Ignore" (unselected).

6. This company does not deliver on *Saturday* or *Sunday*. No boxes should be checked.



A screenshot of a "Run on" dropdown menu with two options: "Saturday" (unselected checkbox) and "Sunday" (unselected checkbox).

7. Select the *Save More* option on the bottom of the *Add Day Label* dialog screen.

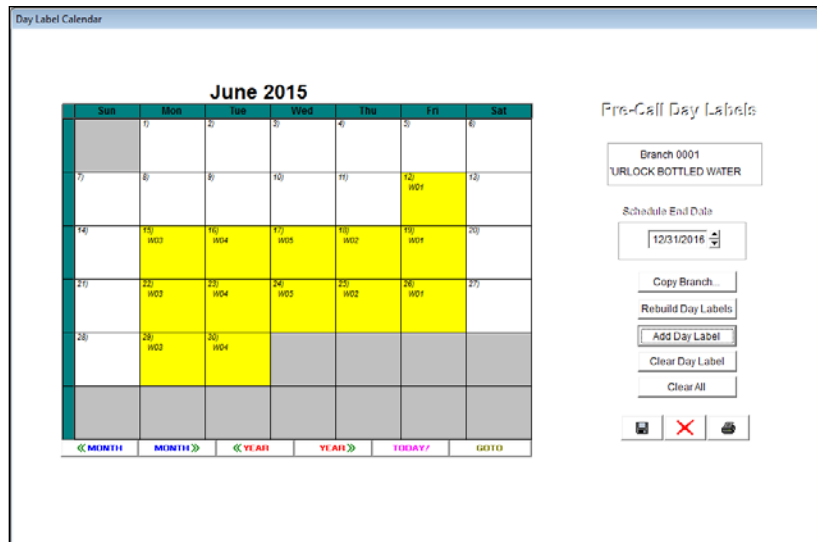


- Day Label *W01* is created and *W02* is now displayed. Continue to click *Save More* until you reach *W05*.

Day Label	W05	Starting Date	06/17/2015
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- Click on the *Save* button on the bottom of the *Add Day Label* dialog screen.

Now you should be able to view a standard weekly (*W01-05*) *Pre-Call Day Label Calendar*.



This calendar now reflects a series of labels that will be used when scheduling pre-calls for accounts that should be contacted *Weekly*.

Next, you will repeat these steps for each pre-call schedule needed. For example, here is the procedure you would follow when adding Pre-Call Day Labels for customers that will be contacted every two weeks:

- Click on the *Add Day Label* option.
- Enter *B01* as the *Day Label* in the *Add Day Label* dialog screen.
- Adjust the *Starting Date* to reflect the day you would like to schedule the label on (same as earlier).
- Under *Frequency*, select *Every Two Weeks*.
- Under *Holiday*, select *Skip*, *Slide*, or *Ignore*.
- Select the *Save More* option on the bottom of the *Add Day Label* dialog screen.
- Day Label *B01* will be created and *B02* is now displayed.
- Continue to click *Save More* until you reach *B10*.
- Click on the *Save* button on the bottom of the *Add Day Label* dialog screen.

Now you should be able to view the new labels created. This calendar reflects a series of labels that will be used when pre-calling both weekly (*W01-05*) and bi-weekly (*B01-10*) customers for delivery.

Day Label Calendar

June 2015

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)				

Pre-Call 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

Navigation: << MONTH MONTH >> << YEAR YEAR >> TODAY GOTO

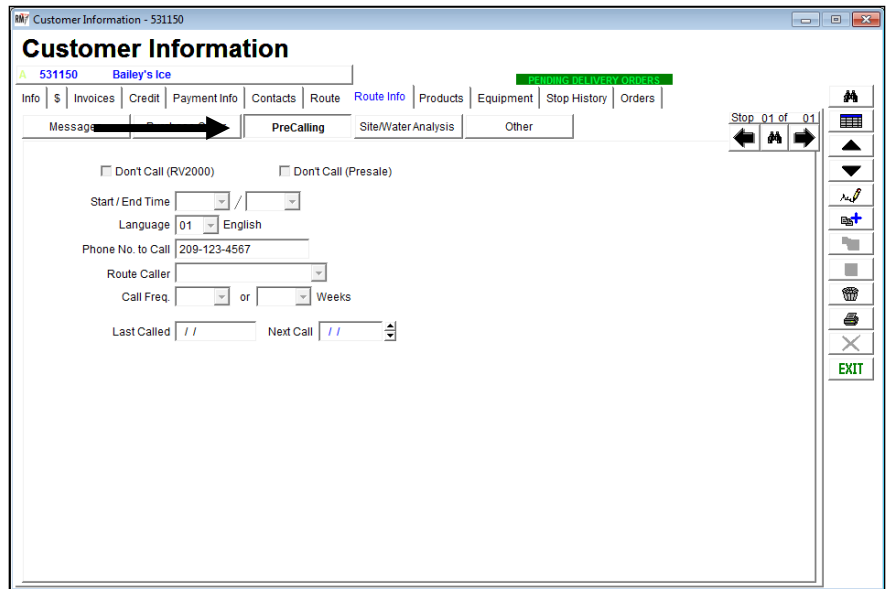
Repeat these steps for three week, monthly, or any other frequency that is needed.

Once you have established your *Pre-Call Calendar*, continue to the next section to learn how to assign a customer to one of the *Pre-Call Day Labels*.

Scheduling Pre-Calls

Each account contains pre-calling fields on the *Route* tab of *Customer Information*. By establishing the following criteria, you can begin using the *Advanced Pre-Calling* system.

Navigate to *Lists > Customer Information > Route Info*, and select the *PreCalling* option:



Customer Information - 531150

Customer Information

531150 Bailey's Ice

Info | \$ | Invoices | Credit | Payment Info | Contacts | Route | **Route Info** | Products | Equipment | Stop History | Orders

Message: [] PreCalling Site/Water Analysis Other

Stop 01 of 01

Don't Call (RV2000) Don't Call (Presale)

Start/End Time: [] / []

Language: 01 English

Phone No. to Call: 209-123-4567

Route Caller: []

Call Freq. [] or [] Weeks

Last Called: [] Next Call: []

EXIT

Delivery Contact Info:

Navigate to the *Route* Tab in *Customer Information* to enter the Delivery Contact info noted below.

Name: Enter a contact name in the *Delivery Contact Info* section. This will appear as the *Name* displayed in the *Pre-Sale* screen.

Phone: Enter a contact phone number in the *Phone* field found within the *Delivery Contact Info* section. This is the *Alternate Phone* number that will be used in the *Pre-Sale* screen.

E-mail: Enter an e-mail address in the *E-mail* field found within the *Delivery Contact Info* section. This is the e-mail address that will be used in the *Pre-Sale* screen.

Delivery Contact Info			
Delivery Phone	Ext	Fax	
209-892-2497		209-892-2719	
Delivery Work Phone	Ext	Cell	
- -		707-423-3954	
Name	Contact Phone		
JAMIE	209-620-9438		
E-Mail	Contact Via Freq.		
doconnell@advantagers.com	<input checked="" type="checkbox"/>		
Send Invoice Options			

PreCalling Contact Info:

Navigate to the PreCalling sub-tab on the Route Info tab in Customer Information, and enter the details noted below:

Phone No. to Call: Enter the customer's phone number in the *Phone No. to Call* field to be displayed as the *Phone No.* field in the *Pre-Sale* screen.

<input type="checkbox"/> Don't Call (RV2000)	<input type="checkbox"/> Don't Call (Presale)
Start / End Time	
Language	
Phone No. to Call	209-892-2497
Route Caller	
Call Freq.	or Weeks
Last Called	Next Call

Call Frequency:

The *Call Freq.* field found under the *Precalling* section of the *Route* tab will display all of the pre-call codes that you created earlier.

<input type="checkbox"/> Don't Call (RV2000)	<input type="checkbox"/> Don't Call (Presale)
Start / End Time	
Language	01 English
Phone No. to Call	209-123-4567
Route Caller	
Call Freq.	or Weeks
Last Called	Next Call

Simply choose the code you would like the customer to be assigned to, from the drop-down menu:

Don't Call (RV2000) Don't Call (Presale)

Start / End Time /

Language English

Phone No. to Call

Route Caller

Call Freq. or Weeks

Last Called	B-01	14	<input type="text" value="//"/>
	B-02	14	
	B-03	14	
	B-04	14	
	B-05	14	

NOTE: The *Weeks* field to the right of *Call Freq.* is used for fixed rotation pre-call scheduling (discussed in the previous section). You can ignore this field if you are using the *Call Freq.* option.

After you have selected a *Call Frequency Code*, the system will automatically populate the *Next Call* date based on the established *Pre-Call Calendar*.

Don't Call (RV2000) Don't Call (Presale)

Start / End Time /

Language English

Phone No. to Call

Route Caller

Call Freq. or Weeks

Last Called Next Call

Additional Fields:

In addition to the required fields already discussed, the following optional fields are available within the Pre-Sale screen.

Route Caller: If you would like to assign an employee to be in charge of all pre-calling on the current account, select a *Route Caller* from the drop-down list. Each *Route Caller* will be able to load only their assigned accounts within the *Route Pre-Sale* screen discussed later in this document.

<input type="checkbox"/> Don't Call (RV2000)	<input type="checkbox"/> Don't Call (Presale)
Start / End Time	[] / []
Language	01 English
Phone No. to Call	209-123-4567
Route Caller	[]
Call Freq.	ADMINISTRATOR ADM ARS ARS
Last Called	Brigid Jefferies BJ Chris Davis CD

Repeat the steps covered above on each route stop that is scheduled to receive a pre-call.

The next section guides you through the pre-call daily process.

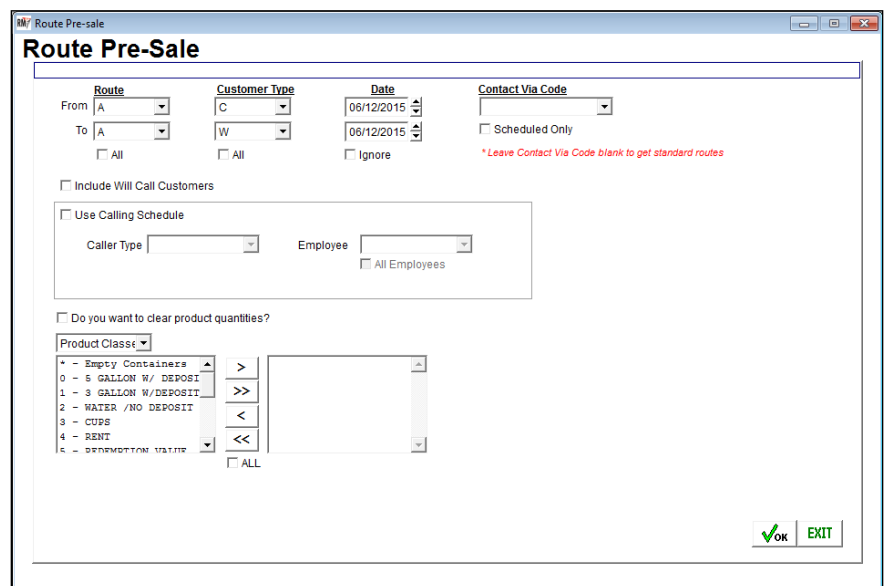
Daily Usage

The *Route Pre-Sale* option is designed for pre-calling your customers each day. This program allows you to load all the accounts on a single screen and ties multiple Route Manager scheduling features into one screen. It gives you a high degree of flexibility in calling selected customers each day. From one screen, you will be able to modify orders, schedule new deliveries, update driver notes, and much more. The *Route Pre-Sale* streamlines all of your pre-calling needs.

This section will guide you through the daily pre-calling process.

Loading the Pre-Sale List

Navigate to *Route > Route Pre-Sale*. The initial screen displayed allows you to enter criteria for the desired pre-calling data. Each item is defined below.



Route: The *Route* field allows you to select the range of routes that you would like to load on your *Pre-Sale* screen from the dropdown menu.

Customer Type: The *Customer Type* field allows you to select the range of account types you would like to load on your *Pre-Sale* screen from the dropdown menu.

NOTE: Select the 'All' field to load all of the *Routes* and *Customer Types*, if desired.

Date: Enter the range of pre-calling dates you would like to load on your *Pre-Sale* screen or double click to use the calendar selection method of input.

Ignore: Choosing this option will ignore all delivery dates and load all of the customers assigned to the selected *Route* and *Customer Type* fields.

Contact Via Code: Choose from the options below.

- ▶ *Automated Voice*
- ▶ *E-Mail*
- ▶ *Fax*
- ▶ *Route Voice*
- ▶ *SMS Messages*
- ▶ *Manual Telephone*

NOTE: If you do not select any *Contact Via* options, all of the customers will be displayed.

Scheduled Only: Click this option to only load customers assigned to the selected *Contact Via Code* that are scheduled for delivery.

Include Will Call Customers: Select this option to include customers marked as Will Call customers on their Route Tab.

Use Calling Schedule: Select this option to load customers set up for Advanced Pre-Calling.

Caller Type (Optional): Select the employee type that you would like to use for filtering data in the pre-sale list. Your options are:

- ▶ **Caller:** This employee field is available within the PreCalling section of the Route tab.
- ▶ **Sales Rep 1-3:** The *Sales Rep* fields are located on the Info tab of *Customer Information*.

Employee (Optional): Select the employee you would like to load pre-calling data for. Customers assigned to other employees will not be loaded unless you select the 'All Employees' option.

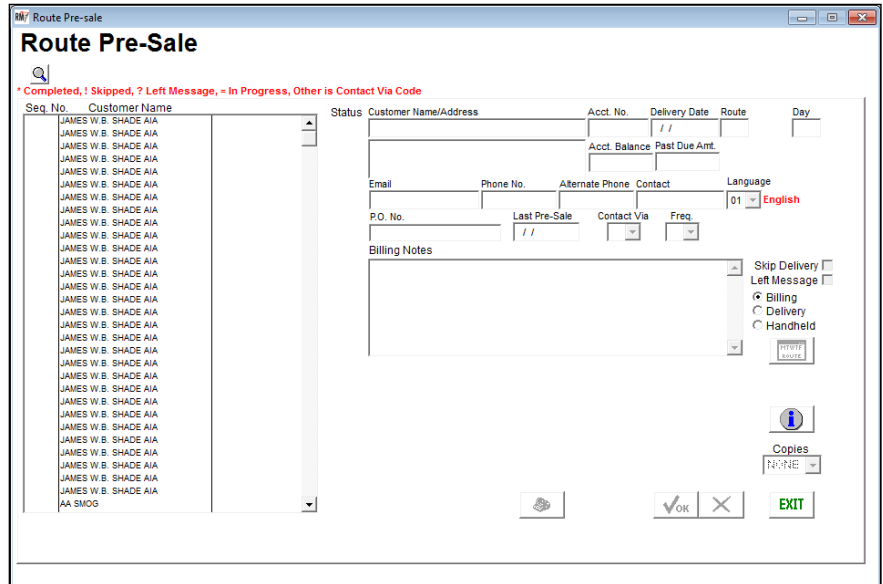
Do you want to clear product quantities? Select this box to change all quantities to '0' when loading *Default Products* on the *Pre-Sale* screen.

Product Classes / Product Codes: Select one of these options to determine the product filter criteria that will be used on the screen.

Products / Classes: Depending on the option above, add the *Product Classes* or *Product Codes* that you would like to include on the pre-sale screen by using the arrows on the screen (or choose 'All' box).

Pre-Calling Customers

After entering the desired criteria and clicking the 'OK' button, the *Pre-Sale* screen will appear. The *Pre-Sale* list includes all of the route stops that should be contacted.



The left side of the screen includes all of the customers that match the criteria selected on the previous screen. The following information is displayed for each account listed:

Seq. No.: The customer's route sequence number.

Customer Name: The customer's delivery name.

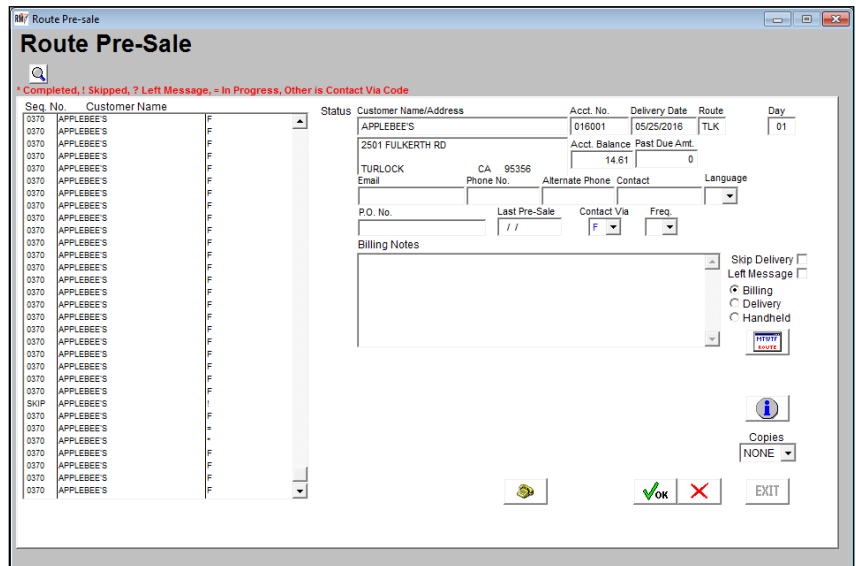
Status: This field provides you with the following codes regarding the customer's pre-call status:

- * **Completed Pre-Call**
- ! **Skipped Delivery**
- ? **Left Message**
- = **In progress**

SKIP	APPLEBEE'S	!
0370	APPLEBEE'S	F
0370	APPLEBEE'S	=
0370	APPLEBEE'S	*

NOTE: *Contact Via Codes* are displayed in this field as well, such as 'F' in the *Status* column above.

To take an order or edit any information, simply click on a customer's name. As the customer is selected, their account information will appear in the appropriate fields on the right of the screen. Each item is defined below.



Fields:

Customer Name/ Address: The name of the selected customer selected along with the current address of the selected customer (located in the box below the customer name).

Account Number: The account number of the selected customer.

Delivery Date: The delivery date of the selected customer.

Route: The route assigned to the current customer.

Day: The day label assigned to the customer.

Acct Balance: The customer's current account balance.

Past Due Amt: The customer's past due amount owed.

Email: The customer's Email address.

Phone: The primary contact phone number on the account pulled from the *Customer Information > Route Info > PreCalling > Phone No. to Call* field.

Alternate Phone: The alternate phone number on the account taken from the *Route tab > Delivery Contact Info > Contact Phone* field.

Contact: The primary contact on the account.

Language: The primary language assigned to the customer.

PO No: Enter the P.O. number associated with the delivery, if any or it may be automatically filled in if there is a P.O. number already associated with the account.

Last Pre-Sale: The last pre-sale completed on the account.

Contact Via: The primary contact method this customer prefers.

Freq: The frequency this customer prefers to be contacted.

NOTE: The previous two options are not used by *Advanced Pre-Calling* for call scheduling.

Skip Delivery: Select this option to manually skip the customer's delivery and remove the customer from the route for the delivery day.

Left Message: Select this option if you were not able to reach the customer and left a message.


Billing Notes / Alert Message: Enter any optional notes regarding the pre-call for the office (Billing) or the driver (Alert Message).

Example Billing Note:



The screenshot shows a text input field titled "Billing Notes" with a vertical scrollbar on the right. To the right of the field are three checkboxes: "Skip Delivery" (unchecked), "Left Message" (unchecked), and "Billing" (checked). Below these are two radio buttons: "Delivery" (selected) and "Handheld" (unselected). At the bottom right of the field is a small icon with the text "MTWTF" above "ROUTE".

Example Alert Message:

Alert Message	One Time Message	Skip Delivery <input type="checkbox"/>
Never park in front of the store! Ring bell and obtain access through the back.		Left Message <input type="checkbox"/>
		<input type="radio"/> Billing
		<input type="radio"/> Delivery
		<input checked="" type="radio"/> Handheld
		

NOTE: You can toggle between *Billing Notes*, *Delivery Order Message* or *Alert Message* and *One Time Message* by selecting either the *Billing*, *Delivery* or *Handheld* radio button on the right side of the screen.

Billing / Delivery/Handheld: Select an option to edit or input one of the following messages to the left of this option:

Billing: Select this option to update the *Billing Notes* on the account.

Delivery: Select this option to update the *Delivery Order Message* for this pre-sale order.

Handheld: Select this option to update the *Alert Message* or *One Time Message* for this stop.



Route Calendar: Select this option to view or edit the customer's current delivery schedule.



Customer Information: Select this button to view or edit the customer's account.



Deliver Order: Select this option to create a *Delivery Order* on the account.



OK: Select this option to save any changes made. You can then select another customer from the list.



Cancel: Cancels your current transactions so you can select another customer from the list.



Exit: Exits the *Pre-Sale* screen.

Summary

The *Advanced Pre-Calling* option enhances the standard pre-calling system in Route Manager with the tools and resources needed in industries that require a more robust pre-calling system. If there are additional features that you would like to see with the pre-calling program or you have further questions, please contact Advantage Route Systems.

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Advantage Route Systems, Inc.

3201 Liberty Square Parkway

Turlock, CA 95380 USA

Phone: 1.209.632.1122

Web Site: www.AdvantageRS.com

Email: info@AdvantageRS.com

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