

4.12 Weekly Standing Orders

Introduction

The *Weekly Standing Orders* option allows you to set up recurring product orders on each customer's account that will repeat from week to week. In addition, separate product orders can be established for each day, and adjustments can be easily made when needed.

Overview

To establish *Weekly Standing Orders* on a customer's account, you will need to modify the following areas of the program:

- ▶ **Branch Setup**
- ▶ **Customer Information**

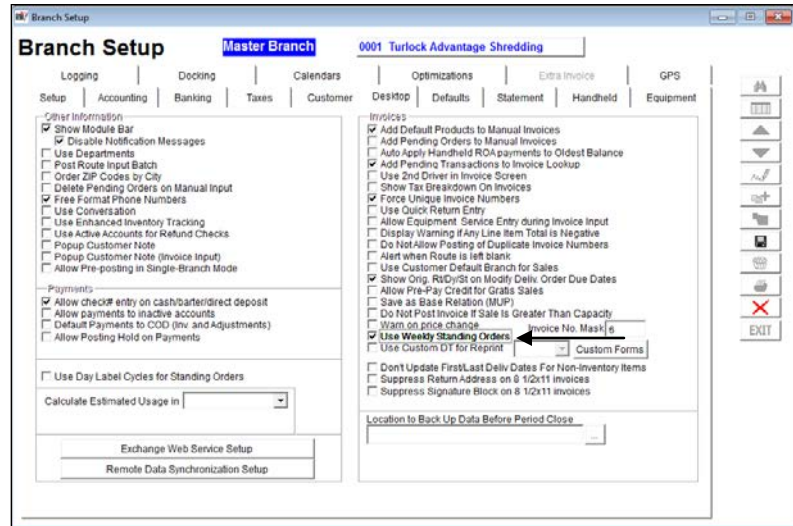
The next section will guide you through this process.

Desktop Setup

This section guides you through making minor changes to *Branch Setup* and *Customer Information*.

Branch Setup

Browse to *File > Branch Setup > Desktop* tab. Select the option 'Use Weekly Standing Orders'.

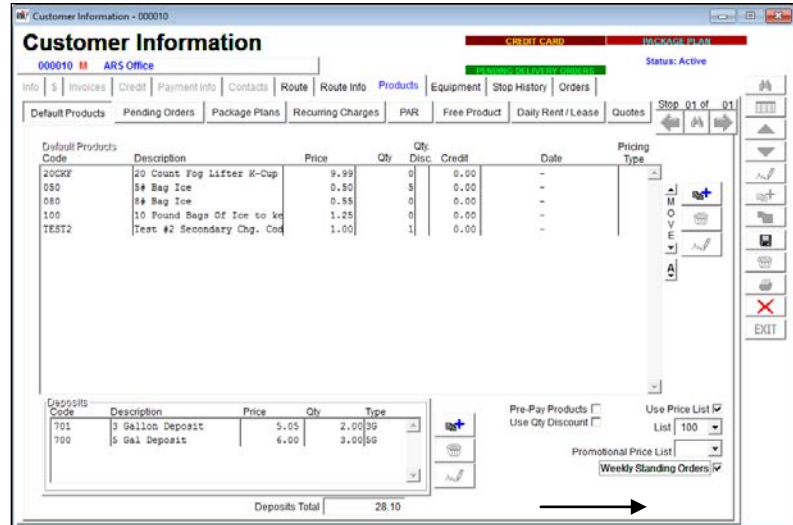


The screenshot shows the 'Branch Setup' window for '0001 Turlock Advantage Shredding'. The 'Desktop' tab is active. Under the 'Invoices' section, the checkbox for 'Use Weekly Standing Orders' is checked and pointed to by a black arrow. Other visible options include 'Show Module Bar', 'Add Default Products to Manual Invoices', 'Auto Apply Handheld ROA payments to Oldest Balance', 'Add Pending Orders to Manual Invoices', 'Add Pending Transactions to Invoice Lookup', 'Use 2nd Driver in Invoice Screen', 'Show Tax Breakdown on Invoices', 'Force Unique Invoice Numbers', 'Use Quick Return Entry', 'Allow Equipment Service Entry during Invoice Input', 'Display Warning if Any Line Item Total is Negative', 'Do Not Allow Posting of Duplicate Invoice Numbers', 'Alert when Route is left Blank', 'Use Customer Default Branch for Sales', 'Show Orig. RxDySt on Modify Deliv. Order Due Dates', 'Allow Pre-Pay Credit for Grabs Sales', 'Save as Base Relation (MUP)', 'Do Not Post Invoice if Sale is Greater Than Capacity', 'Warn on price change', 'Invoice No. Mask', 'Use Custom OI for Report', 'Custom Forms', 'Don't Update First/Last Deliv Dates For Non-Inventory Items', 'Suppress Return Address on 8 1/2x11 Invoices', and 'Suppress Signature Block on 8 1/2x11 Invoices'. There is also a 'Location to Back Up Data Before Period Close' field.

Save your changes and exit the screen.

Next, access any customer that will use the *Weekly Standing Orders* option within *Lists > Customer Information > Products*.

Choose the *Products* tab and select the option 'Weekly Standing Orders'.

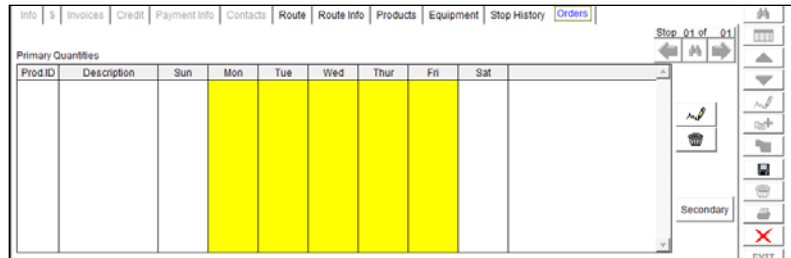


Add all of the products to the customer's default product section that you would like to use as part of any standing order.

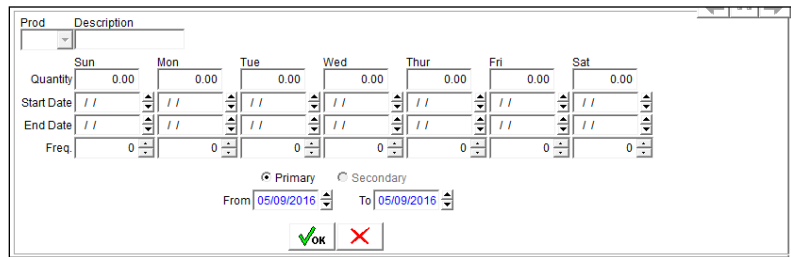
NOTE: With the *W.S. Orders* option enabled on the account, you will not be able to update quantities within the *Default Products* section. This will be controlled by the *Orders* tab discussed next.



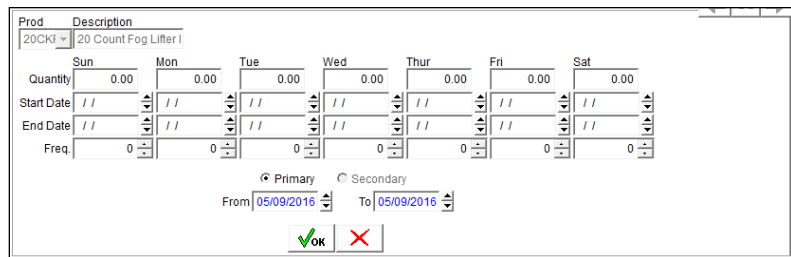
To establish the customer's standing orders, select the **Orders** tab. Each delivery day is highlighted in yellow on the screen (e.g., Monday, Wednesday, and Thursday below).



Double-click on a displayed item to modify the standing order for the product.



Enter the standing order quantity for each required day and click **OK**.



NOTE: You may want to enter a standing order for non-delivery days as well. This can be helpful if a customer requires a delivery on a day that is not scheduled frequently.

Repeat this process for each product required. Once complete, choose **Save** and follow the steps above for each customer that will use *Weekly Standing Orders*. Continue to the next section to learn the daily process for *Weekly Standing Orders*.

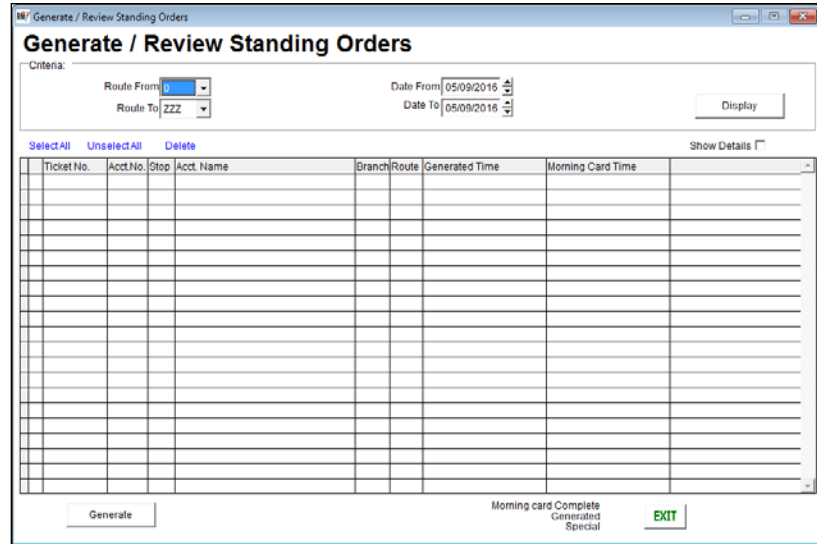
Daily Processing

After you have set up a few customers with standing orders, you will need to generate the orders each day prior to processing *Morning Cards*.

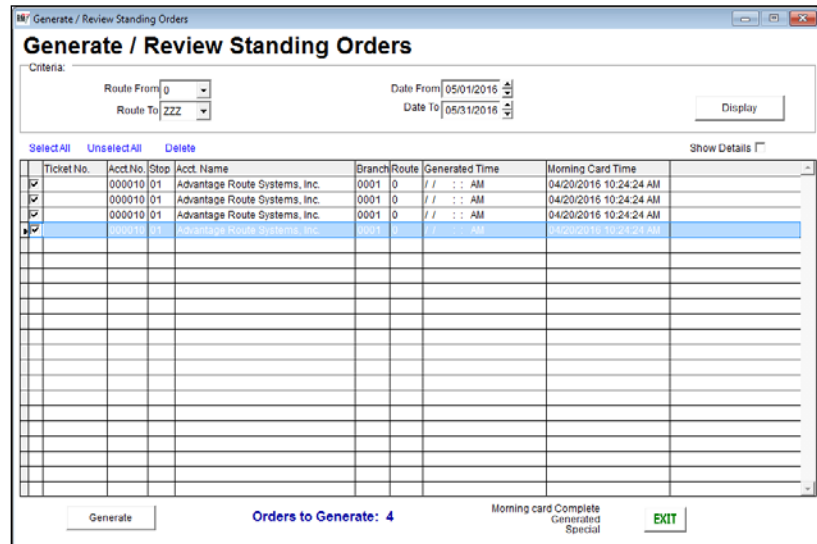
Navigate to *Route > Generate/Review Standing Orders*.

Advanced Communications Monitor <u>R</u> MLive
Generate/Review <u>S</u> tanding Orders <u>P</u> ick Processing ▶ Load <u>O</u> der Print Load Order
<u>M</u> orning Cards <u>A</u> fternoon <u>L</u> oad Data Card
Pre-Route Reports Driver's Manifest Route Planning Calendar Daily Route Activity Report
Print Route Tickets Print Load Sheet Route Pre-Sale
<u>C</u> ard Override Prepare <u>D</u> ata Card
<u>S</u> chedule ▶
<u>A</u> dvanced Mapping ▶
<u>U</u> tilities ▶ Screen Config ▶ Route Dispatch Manager (RDM)

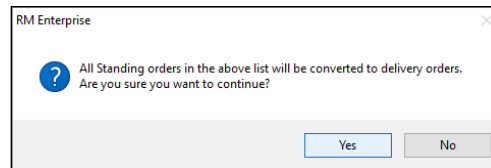
Enter the route and date range you would like to create orders for, and click **Display** to review the orders that will be generated.



Select the **Generate** option to create the **Delivery Orders**. For each order generated, the **Ticket No.** field will be populated on the screen.



The following dialog box will be displayed. Choose **Yes** to continue or **No** to cancel.



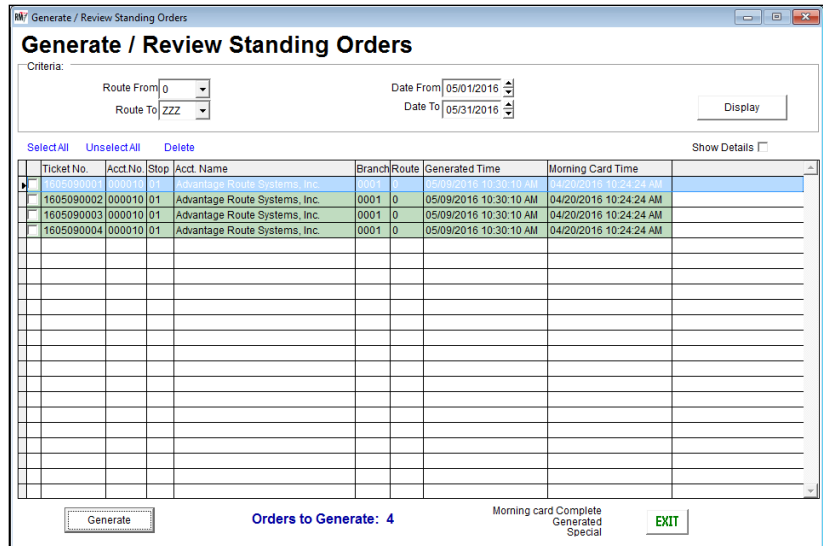
After you have generated the orders, you can select from the following options on the screen:

Select All: Choose this option to select all of the orders on the screen.

Unselect All: Choose this option to de-select all of the orders on the screen.

Delete: Select this option to delete any selected orders on the screen.

Show Details: This option will display the items generated on the selected orders.



Ticket No.	Acct No.	Stop	Acct. Name	Branch	Route	Generated Time	Morning Card Time
1605090001	000010	01	Advantage Route Systems, Inc.	0001	0	05/09/2016 10:30:10 AM	04/20/2016 10:24:24 AM
1605090002	000010	01	Advantage Route Systems, Inc.	0001	0	05/09/2016 10:30:10 AM	04/20/2016 10:24:24 AM
1605090003	000010	01	Advantage Route Systems, Inc.	0001	0	05/09/2016 10:30:10 AM	04/20/2016 10:24:24 AM
1605090004	000010	01	Advantage Route Systems, Inc.	0001	0	05/09/2016 10:30:10 AM	04/20/2016 10:24:24 AM

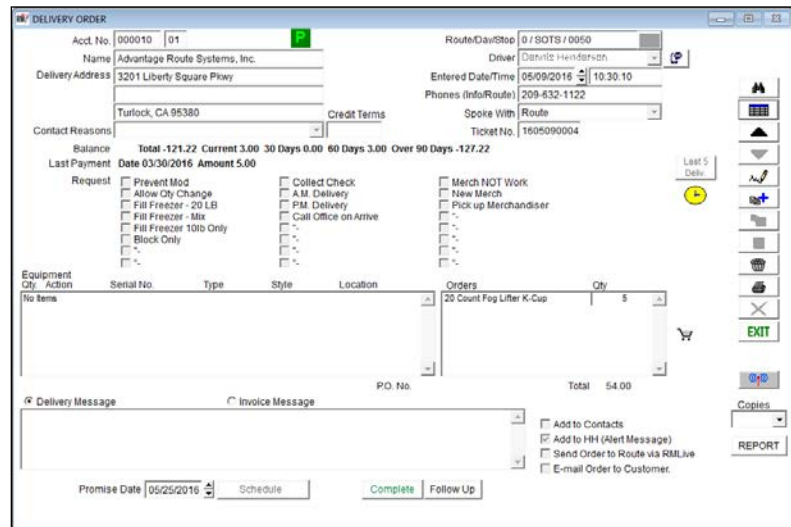
For reference, each record displayed after the *Generate* option has been selected will be color coordinated according to the legend on the bottom of the screen.

Light Purple: This customer's route has already been processed.

Light Grey: A *Delivery Order* has already been generated for this customer.

Yellow: A standard *Delivery Order* has been created on the route and date selected for this customer (not related to standing orders).

Once a *Delivery Order* has been created, it will be transferred to the handheld and expedited as normal.



Additional Features

This section addresses some additional features that you will need to know as you use the *Weekly Standing Orders* option.

Creating New Stops

As you create a new stop on each account, the *Weekly Standing Order* product details will automatically be populated on the new stop.

Delivery Order Flag

The *Delivery Order* flag is modified within *Customer Information* and *Route Pre-Sale* for accounts that are setup with *Weekly Standing Orders*:

PENDING DELIVERY ORDERS

Temporary Order Changes

Customers may need to temporarily make changes to their standing orders (e.g., holidays). In order to accommodate these types of requirements, a 'secondary' order can be created.

Primary Quantities								
Prod.ID	Description	Sun	Mon	Tue	Wed	Thur	Fri	Sat
20CKF	20 Count Fog Lifter K	0.00	0.00	0.00	5.00	0.00	0.00	0.00

Secondary

To modify an existing order, choose the **Secondary** button and double-click on the product within the *Default Products* section.

Primary Quantities								
Prod.ID	Description	Sun	Mon	Tue	Wed	Thur	Fri	Sat
204	5 Gal Spring Water							
20CKF	20 Count Fog Lifter K	0.00	0.00	0.00	5.00	0.00	0.00	0.00
350	Plastic Cups							

Secondary quantities								
Prod.ID	Description	Sun	Mon	Tue	Wed	Thur	Fri	Sat
20CKF	20 Count Fog Lifter K		1.00					

Enter the new quantity that you would like to deliver.
 In this example, the number of '5 Gallon Distilled'
 delivered on Monday has been changed to '1'.

Prod	Description	Sun	Mon	Tue	Wed	Thur	Fri	Sat
2005	5 Gal Spring Water	0.00	1.00	0.00	0.00	0.00	0.00	0.00
Quantity		0.00	1.00	0.00	0.00	0.00	0.00	0.00
Start Date		//	//	//	//	//	//	//
End Date		//	//	//	//	//	//	//
Freq.		0	0	0	0	0	0	0
		<input checked="" type="radio"/> Primary		<input type="radio"/> Secondary				
		From 05/23/2016		To 05/23/2016				
		<input checked="" type="button" value="OK"/>		<input type="button" value="X"/>				

Select the **Secondary** radio button.

Prod	Description	Sun	Mon	Tue	Wed	Thur	Fri	Sat
20CKJ	20 Count Fog Litter	0.00	1.00	0.00	5.00	0.00	0.00	0.00
Quantity		0.00	1.00	0.00	5.00	0.00	0.00	0.00
Start Date		//	//	//	//	//	//	//
End Date		//	//	//	//	//	//	//
Freq.		0	0	0	0	0	0	0
		<input type="radio"/> Primary		<input checked="" type="radio"/> Secondary				
		From 05/09/2016		To 05/09/2016				
		<input checked="" type="button" value="OK"/>		<input type="button" value="X"/>				

quantities Right Click to Delete

Enter the range of dates that you would like to include
 to obtain the new quantity.

Prod	Description	Sun	Mon	Tue	Wed	Thur	Fri	Sat
20CKJ	20 Count Fog Litter	0.00	0.00	0.00	5.00	0.00	0.00	0.00
Quantity		0.00	0.00	0.00	5.00	0.00	0.00	0.00
Start Date		//	//	//	//	//	//	//
End Date		//	//	//	//	//	//	//
Freq.		0	0	0	0	0	0	0
		<input type="radio"/> Primary		<input checked="" type="radio"/> Secondary				
		From 05/09/2016		To 06/30/2016				
		<input checked="" type="button" value="OK"/>		<input type="button" value="X"/>				

quantities Right Click to Delete

Click **OK** to complete the process. Repeat this step for
 each item required.

Once **Save** has been selected, the new secondary item(s) will be used for the date range entered.

Secondary quantities										Right Click to Delete
Prod.ID	Description	Sun	Mon	Tue	Wed	Thur	Fri	Sat	Dates	
20CKF	20 Count Fog Lifter K-		1.00							

NOTE: If you would like to delete any *Secondary* products, simply right-click on the item and choose Delete while in *Modify* mode.

The new quantities entered will be observed until the date range entered has been exceeded.

Summary

The *Weekly Standing Orders* option provides more flexibility with order processing. If you have any questions regarding this feature, please contact Advantage Route Systems.

Copyright © 1994-2016 by Advantage Route Systems,
Inc. All Rights Reserved.

Printed in the United States of America.

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

Warning

All information in this document and the on-line help system, as well as the software to which it pertains, is proprietary material of Advantage Route Systems, Inc. and is subject to a Route Manager license and non-disclosure agreement. Neither the software nor the documentation may be reproduced in any manner without the prior written permission of Advantage Route Systems, Inc.

Series 7: Version Date, May 18, 2016