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:

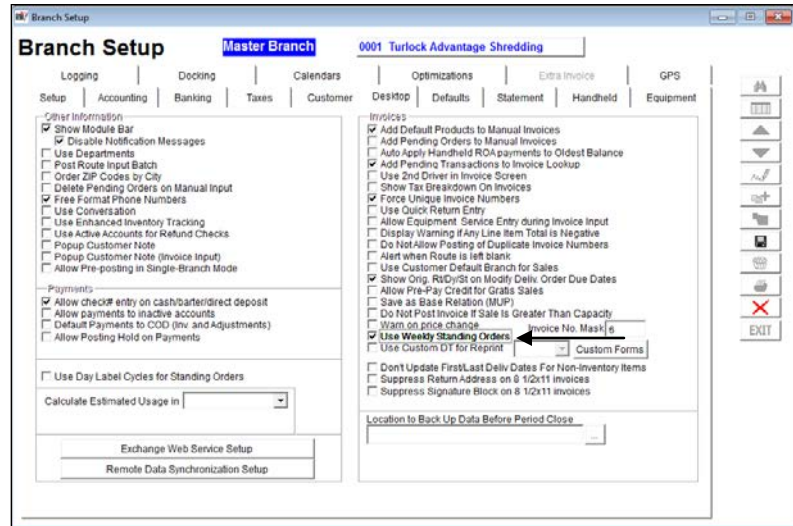▶ ***Branch Setup***

▶ ***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'.
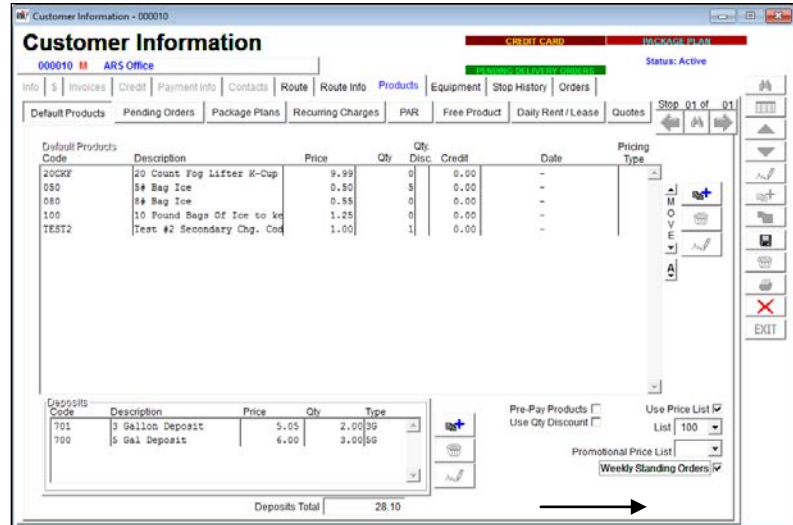

Save your changes and exit the screen.

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.
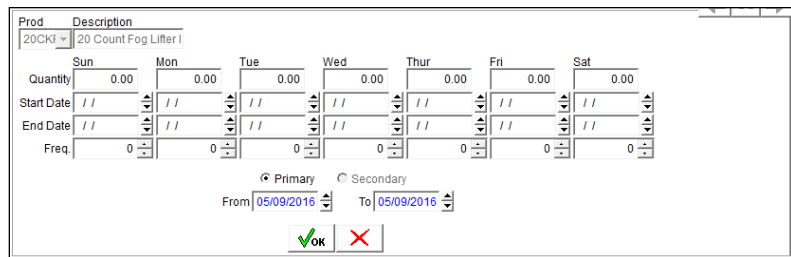
To establish the customer's standing orders, select the *Orders* tab. Each delivery day is highlighted in yellow on the screen (e.g., Monday, Wednesday, and Thursday below).
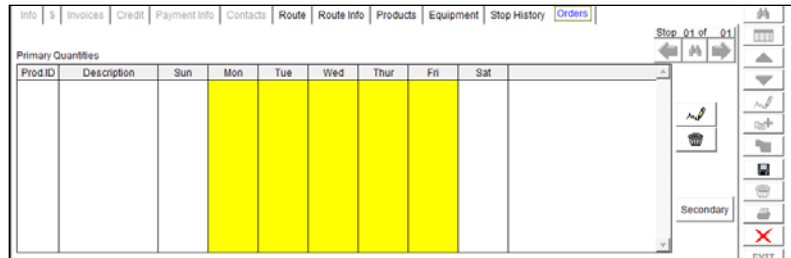
Double-click on a displayed item to modify the standing order for the product.
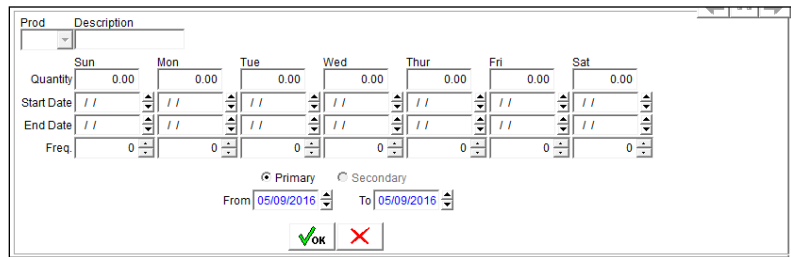
Enter the standing order quantity for each required day and click **OK** .

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 |
| RMLive |
| Generate/Review Standing Orders |
| Pick Processing ▸ |
| Load Order |
| Print Load Order |
| Morning Cards |
| Afternoon |
| Load Data Card |
| Pre-Route Reports |
| Driver's Manifest |
| Route Planning Calendar |
| Daily Route Activity Report |
| Print Route Tickets |
| Print Load Sheet |
| Route Pre-Sale |
| Card Override |
| Prepare Data Card |
| Schedule ▸ |
| Advanced Mapping ▸ |
| Utilities ▸ |
| 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.
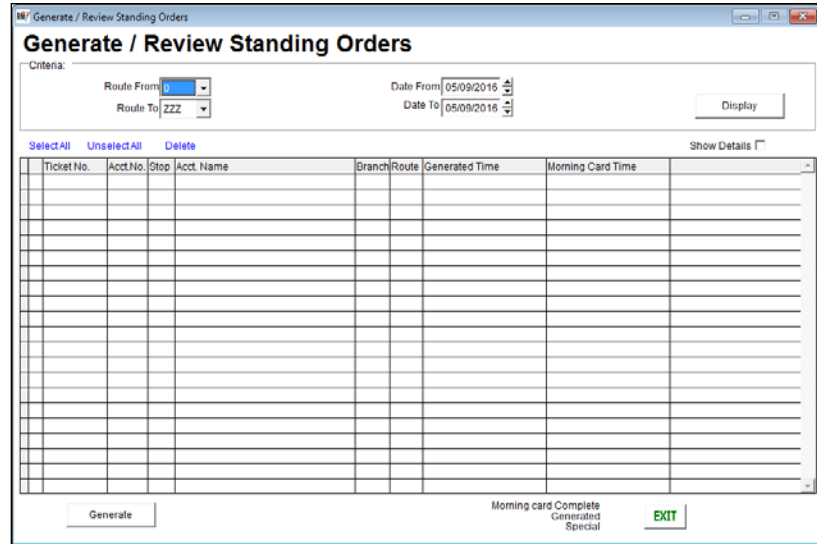
Select the *Generate* option to create the *Delivery Orders*. For each order generated, the *Ticket No.* field will be populated on the screen.
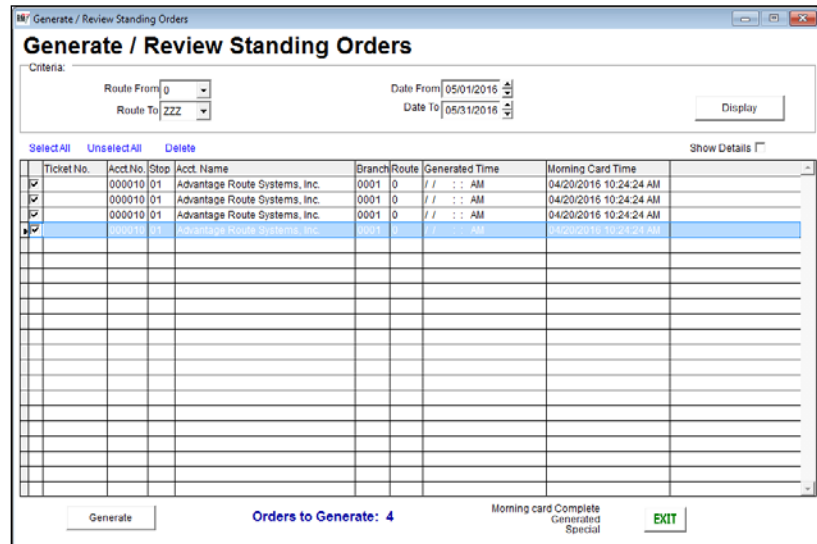
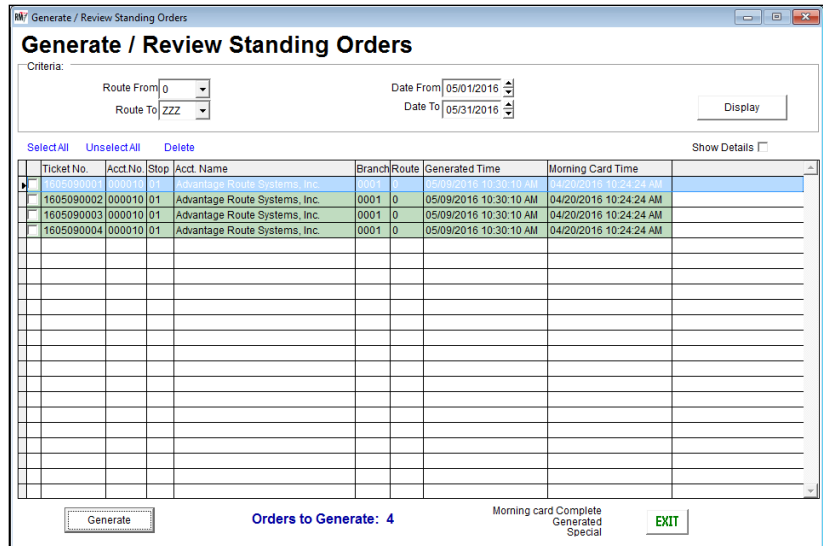The following dialog box will be displayed. Choose *Yes* to continue or *No* to cancel.
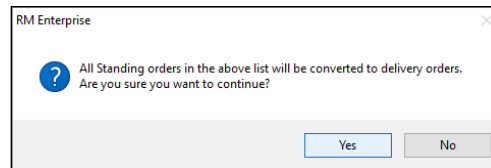
After you have generated the orders, you can select from the following options on the screen:

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.
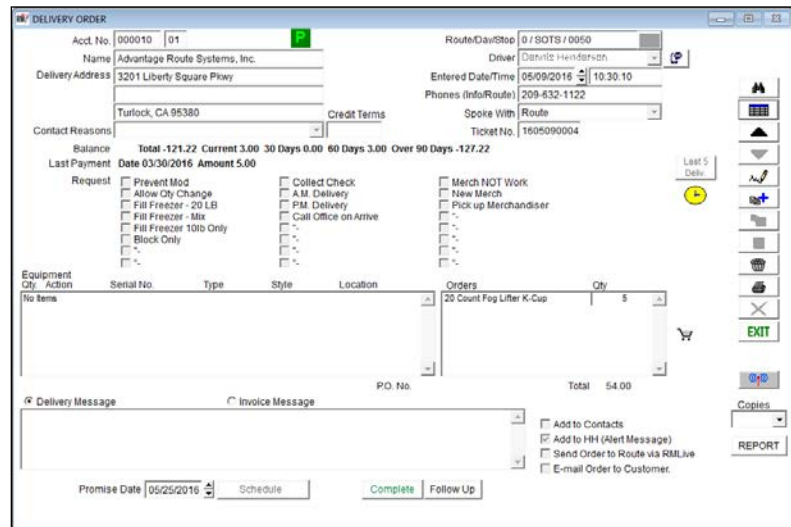

For reference, each record displayed after the *Generate* option has been selected will be color coordinated according to the legend on the bottom of the screen.

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*:

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.

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

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'.

Select the *Secondary* radio button.

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

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.

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

Secondary quantities — *Right Click to Delete*

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.

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