4.18 Using Route Manager in a Store

Introduction

Using Route Manager as part of your daily store routine will speed up the data entry process and help provide your customers with a rewarding experience during their visit. Using a single system for all of your point of sale needs will reduce tedious double entries and human error.

This document describes three different methods that you can use to incorporate the Route Manager program into your daily operations within your store:

► ***Using a handheld as a Store Route:*** This option can be used with a handheld prepared for your store that includes all of your customers and a cash account. You can use an existing extra handheld you have for your route drivers or purchase a new one for your store.

► ***Using a Scanner attached to a Workstation:*** Using a simple scanner attached to a workstation in your store allows your employees to scan the items your customer is purchasing right on the invoice entry screen.

► ***Using a separate Cash Register:*** A Point Of Sale register can be used that will provide you with a ledger at the end of each day that can be entered into Route Manager.

Each of these methods is covered within this document in the order listed.

Handheld 'Store' Route

Using a handheld that is prepared with an in-house 'Store' route is a convenient option that can be used in your store. You can simply create a route in Route Manager that contains all of your customers within the off-route list and create invoices or receive payments daily, as well as print receipts if you have an extra printer.

Here are the steps to follow to set up a handheld for your store:

1. Create a new *Handheld Class* tailored for the store.

2. Add a 'Store' employee as a <u>driver</u> within *Employee Setup*.

3. Create a new 'Store' route within the *Route Master* screen.

Each item listed is covered in detail within this section in the order listed.
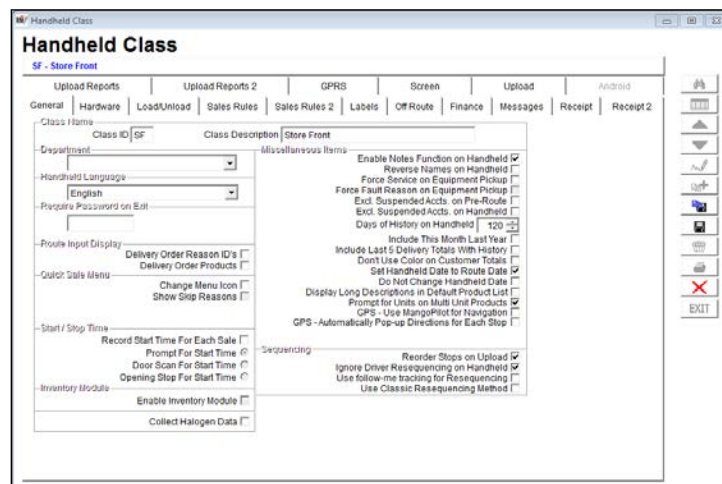
NOTE: It is not necessary to assign any customers to the 'Store' route.

New Handheld Class

A new *Handheld Class* should be added to the system since the handheld used in the store will not require morning loads and additional features that would only apply to a driver.

Navigate to *Lists > Routes > Handheld Class* and add a new class to Route Manager:

NOTE: You can elect to copy settings from an existing class when choosing the *Add* key.

Click through each tab and enable/disable the features that you would like to use within your store.

Here are some recommendations for each tab:

▶ *General:* Enable notes and include at least 30 days of history.

▶ *Hardware:* Select the handheld and printer that you will be using in the store.

▶ *Sales Rules:* Consider turning on price overrides and removing rentals if needed.

▶ *Off Route:* Since all of the customers will be serviced off-route, you should include all of the messages available, and set the off-route filter to '1' to include all accounts. Additionally, make sure that you have a *Cash Sale* account entered for walk-ins.
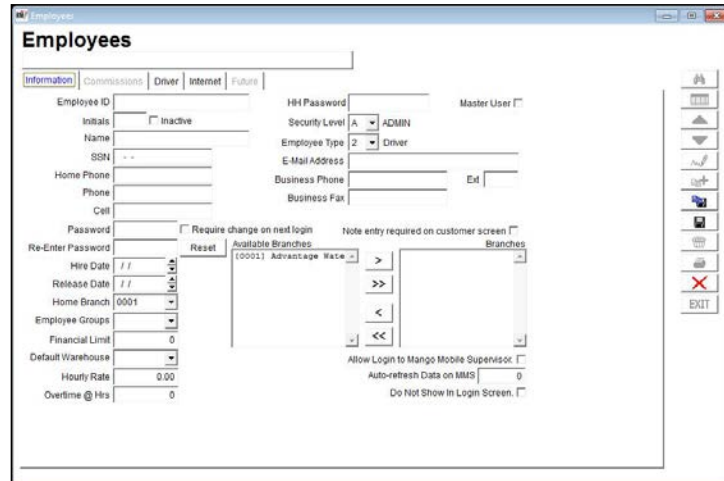
Ensure that you go through each tab to produce the desired results within your store.

Save your new class and continue.

New Employee

Create a new 'Store' employee in the system that will be used for all store sales on the handheld. This employee will need to be coded as a driver to ensure that it is available within the login screen of the handheld.
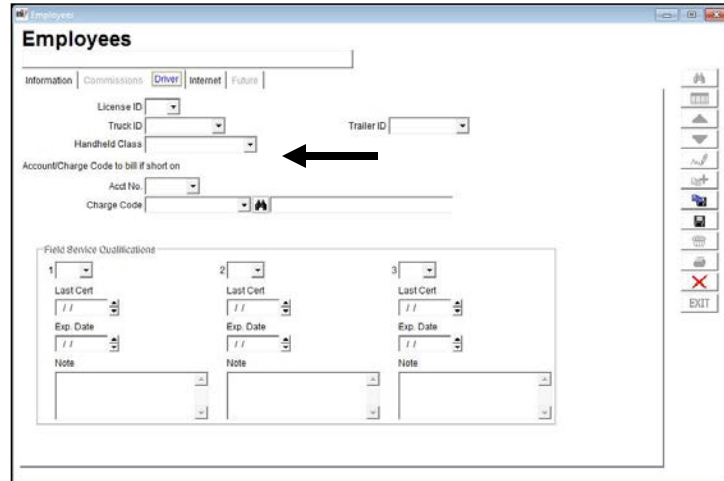
Navigate to *Lists > Employee Setup > Employees* and add the new employee to the system:

Assign the employee to the new *Handheld Class* (created in the previous section) on the *Driver* tab:
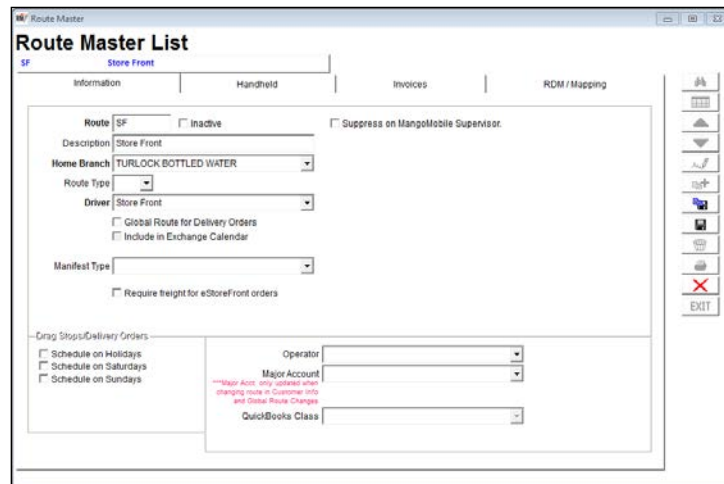
Save your new employee and continue to the next section.

New Route Master

A new 'Store' route will need to be added to the system in order for you to be able to process a *Morning/Afternoon Card* for the store each day.

Navigate to *Lists > Routes > Route Master* and add a new route to the system:
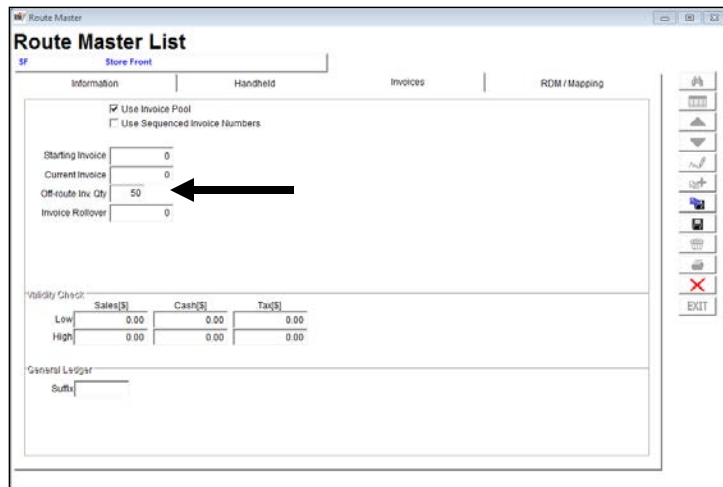
Assign the new 'Store' employee (created in the previous step) to the route within the *Driver* field:

Route	SF ☐ Inactive
Description	Store Front
Home Branch	TURLOCK BOTTLED WATER ▾
Route Type	▾
Driver	Store Front ◀ ▾

Ensure that you have an adequate number of invoices available for off-route invoices within the 'Off-Route Inv. Qty' field on the *Invoices* tab:

Route Master List

SF — Store Front

Information	Handheld	Invoices	RDM / Mapping

☑ Use Invoice Pool
☐ Use Sequenced Invoice Numbers

Starting Invoice	0
Current Invoice	0
Off-route Inv. Qty	50 ◀
Invoice Rollover	0

Validity Check

	Sales[$]	Cash[$]	Tax[$]
Low	0.00	0.00	0.00
High	0.00	0.00	0.00

General Ledger

Suffix [ ]

Save the new route and continue to the next section.

Daily Processing

The following steps will need to be followed each day to ensure that the handheld functions properly within your store and that you are updating the transactions properly:

1. Create a *Morning Card* for the 'Store' route.

2. Login to the handheld using the 'Store' employee from the login list.

3. Service your established accounts or walk-ins from the *Off-Route* menu of the handheld program.

4. Upload your transactions at the end of each day by performing an *Afternoon Card*.

Follow these simple steps daily to ensure a successful store experience.

Hand Scanner on a Workstation

This simple method employs a hand scanner that plugs directly into a USB port and essentially functions as a second keyboard on your workstation. All you have to do is point the scanner at a barcode, and it will automatically scan it into the invoice screen on the desktop.

Just complete the steps below and you can begin using a scanner in your store:

1. Purchase a handheld USB scanner. Refer to the *Scanner Options* section below or contact Advantage Route Systems for information on compatible options.

2. Add all of your product UPC code identification numbers to your items within Route Manager

3. Begin scanning your items in the store.

Scanner choices and the remaining items are covered below.

Scanner Options

Many different types of scanners will work with the Route Manager program. This includes multiple interface options such as USB or Bluetooth connections. While ARS has not tested many of the available options on the market, generally you can search for software or hardware that allows the scanner to function as a 'keyboard wedge' — this includes scanners that are wired and wireless.

Here is an example of a standard 'keyboard wedge' type USB scanner:
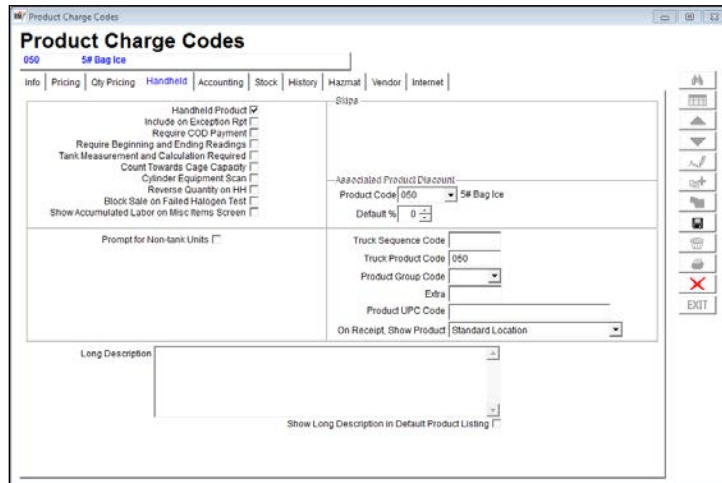
Once you have installed the scanner, all you have to do is point the scanner at a barcode, and it will automatically scan it into the invoice screen on the desktop.

Adding UPC Codes to Products

In order for your products to scan properly into the system, you will need to add each UPC code to the *Product Charge Code* file.
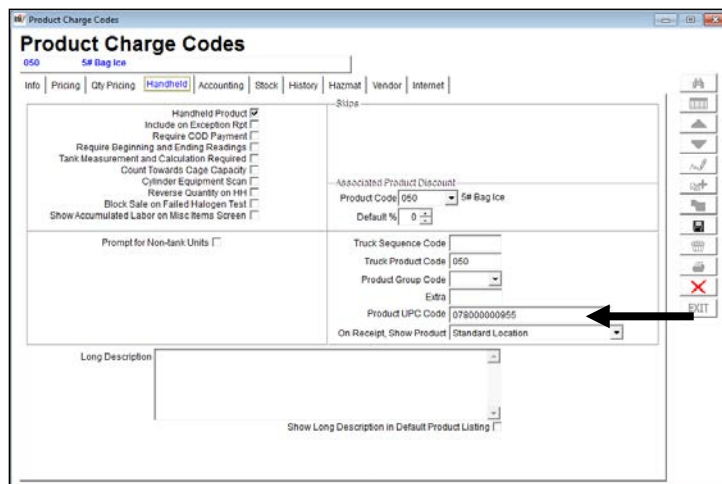
Navigate to *Lists > Product Codes > Product Charge Codes,* and click on the *Handheld* tab:

Enter the complete code within the 'Product UPC Code' field on the screen:

NOTE: Generally, bar codes are '12' characters in length. Be sure to include the smaller numbers shown at the beginning and end of the bar code to ensure proper operation.


NOTE: If you already have your scanner installed, you can mouse click into the *Product UPC Code* field and scan the UPC code from the product to automatically populate the correct code.

Scanning Items in your Store

You can scan an item a customer is purchasing from within the *Invoices and Adjustments* screen on the desktop.

Navigate to *Transactions > Invoices and Adjustments* and add a new transaction for a customer or cash account on the screen.

There are two scanning icons on the bottom of the invoice screen that can be selected (shown below):
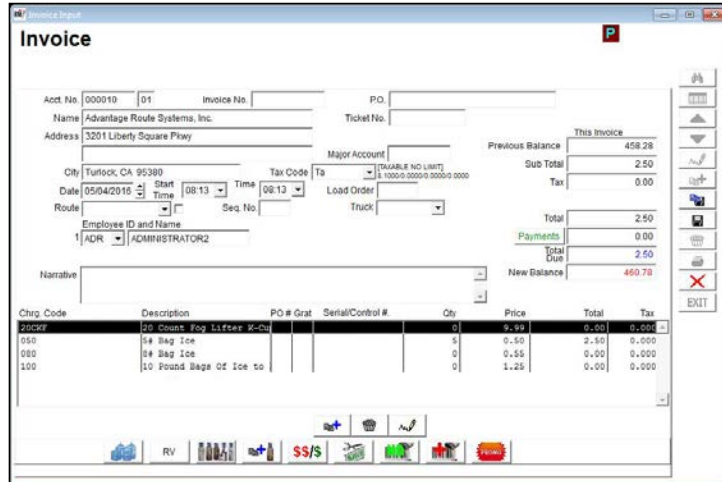
The ![button] button allows you to quickly scan items into the invoice with a default quantity of one, and the

![button] button prompts you to enter the quantity as each item is scanned.
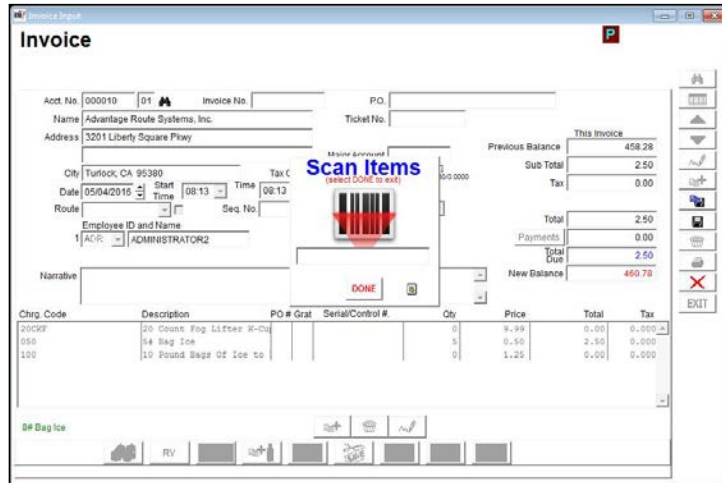
Selecting the button on the left will display the following dialog screen, letting you know that the system is waiting for you to scan an item:
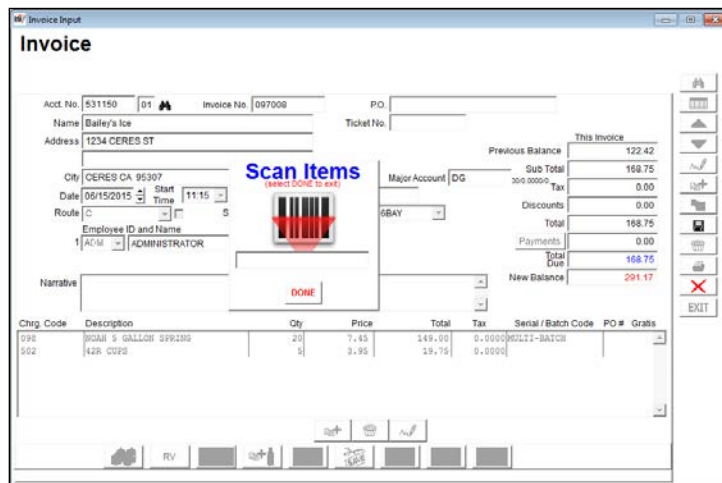

Scan the product by placing the red light of the scanner over the *UPC Code* on the item.

NOTE: There will be a blinking cursor within the *Scan Items* screen. Ensure that you mouse click into this field if you have shifted the focus to another screen prior to scanning.
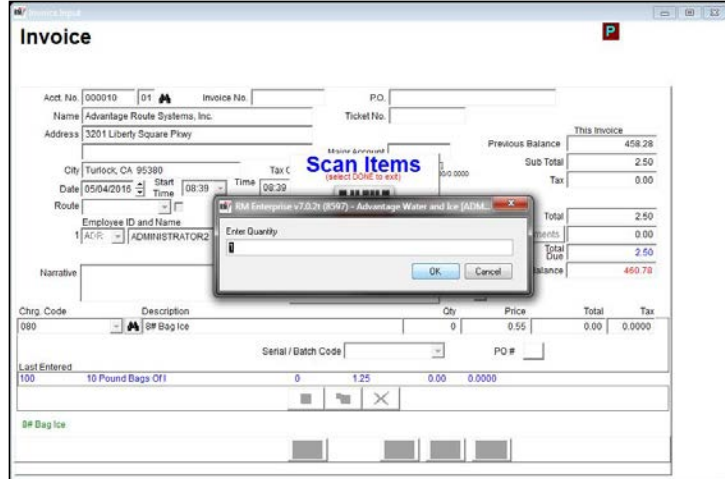
As each item is scanned, it is automatically added to the invoice screen behind the *Scan Items* window with a default quantity of one:

Once you have scanned all of the items on the current invoice, click the **DONE** key and **Save** the invoice:
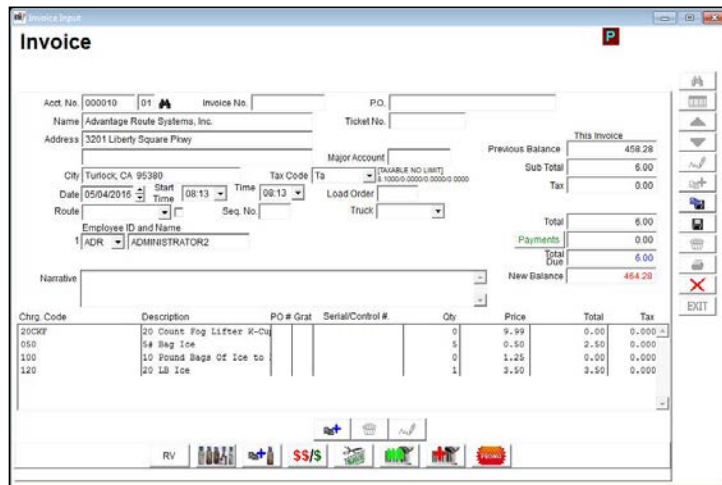
Selecting the scan button on the bottom right of the invoice will display an additional screen following a scan that allows you to enter the quantity prior to adding the item to the invoice:
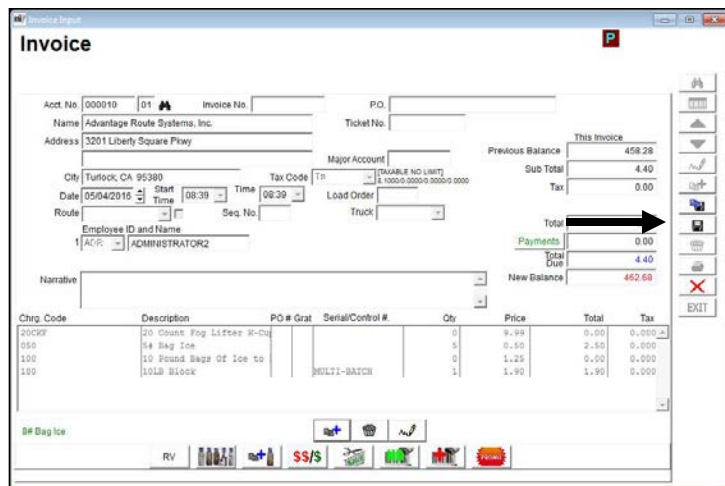
Enter the quantity and click **OK**. Scan all of the items needed and click the **DONE** key.

Save the invoice to complete the process. Additionally, you can print a copy of the invoice and give it to the customer by choosing the printer icon on the toolbar:

Here is an example of a full page receipt with a payment voucher:

Cash Register

Another option is to purchase and use a completely independent cash register in your store. This can satisfy legal requirements for a store where it accumulates totals, prints a receipt and properly calculates taxes on appropriate items. Most registers have a cash drawer to store the money you collect throughout the day.

Generally, if you go this route you have the ability to generate a daily summary (using the x, y or z keys) and from this final receipt, you can:

1. Balance out your drawer
2. View sales by product
3. View daily sales tax summaries
4. Have a list of charge sales

There may be additional functions available based on the register you purchased. Some registers allow you to create a summary transaction and then key the data into your Route Manager system as a single invoice using the grand total of all of the transactions. This can then be posted and will become a part of your daily sales totals.

Alternatively, you may even be able to connect your cash register directly into Route Manager and avoid keying in the invoice data. Presently, ARS does not have an interface for this type of arrangement, but it may be added in the future.

Summary

Using Route Manager as a part of your store process is encouraged so that you can use a single system to meet all of your point of sale requirements. It may help eliminate errors and keep your employees and customers informed on account related issues since they will have immediate access to the customer data using the handheld or scanning methods. If you have any questions regarding these options, please contact an Advantage Route Systems support technician to further assist you.