

## 4.36 Setting up Auto Sending an Invoice after Delivery

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### Introduction

Often times a customer would prefer to have a copy of their invoice sent to them right after their delivery either by email or fax. This is a standard feature of the Route Manager software and only requires a couple of setup steps to do.

We will be utilizing our *Customer Message Centre* system for these notifications. Please refer to the *Customer Message Centre* documentation on how to get started with this module or contact Advantage Route Systems for more information.

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### Overview

This feature will automatically send an invoice (Handheld PDF Copy) to each customer after the invoice has been uploaded to the desktop system or after posting (depending on settings chosen) using the Customer Message Centre. If you are using the RMLive module along with the option to send after delivery, the invoice will be sent right after delivery (assuming the handheld was able to upload the invoice). If you are not using RMLive but still using the option to send after delivery, then the invoices will be sent once the Afternoon Upload has been completed.

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**Note:** Email Invoice notifications are included for free within the Customer Message Centre system. However, faxes will use a Point for each page sent.

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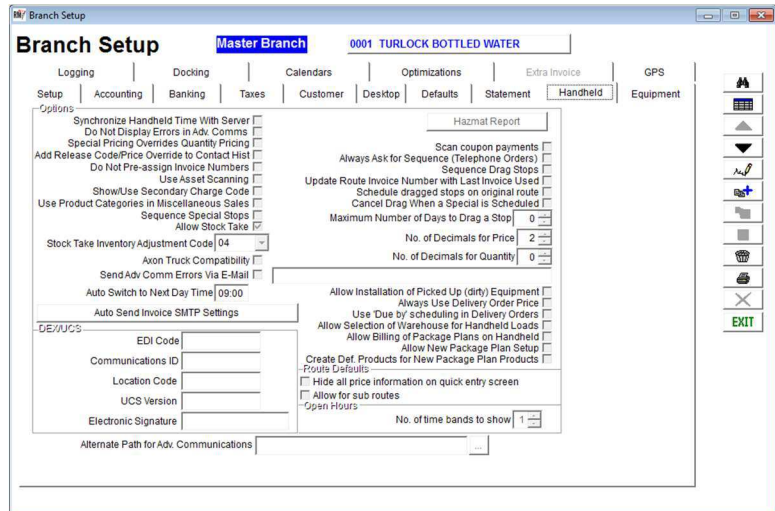
### Setup

Setup will use the Customer Message Centre to send out the invoice copies during upload or posting (depending on your settings). All you really need to do is define the Reply To address, add a custom Subject Line or Body (not required), and enable it on a per-customer basis.

## Settings

In order for Route Manager to email an invoice copy, it must have a *Reply To* address established. You can also choose when to send the invoice copy (after upload = default, or during Posting), as well as customize the email that is sent out to the customers.

You will find these settings within the *Handheld* tab, located under *File > Branch Setup*. You will find a button labeled *Auto Send Invoice SMTP Settings* in the middle/left of the screen.



**Branch Setup** Master Branch 0001 TURLOCK BOTTLED WATER

Logging | Docking | Calendars | Optimizations | Extra Invoice | GPS  
 Setup | Accounting | Banking | Taxes | Customer | Desktop | Defaults | Statement | Handheld | Equipment

**Options**

Synchronize Handheld Time With Server ☐  
 Do Not Display Errors in Adv. Comms ☐  
 Special Pricing Overrides Quantity Pricing ☐  
 Add Release Code/Price Override to Contact Hist ☐  
 Do Not Pre-assign Invoice Numbers ☐  
 Use Asset Scanning ☐  
 Show/Use Secondary Charge Code ☐  
 Use Product Categories in Miscellaneous Sales ☐  
 Sequence Special Stops ☐  
 Allow Stock Take ☐  
 Stock Take Inventory Adjustment Code 04  
 Axon Truck Compatibility ☐  
 Send Adv Comm Errors Via E-Mail ☐  
 Auto Switch to Next Day Time 09:00  
 Auto Send Invoice SMTP Settings

**DE/UCS**

EDI Code  
 Communications ID  
 Location Code  
 UCS Version  
 Electronic Signature  
 Alternate Path for Adv. Communications

**Hazmat Report**

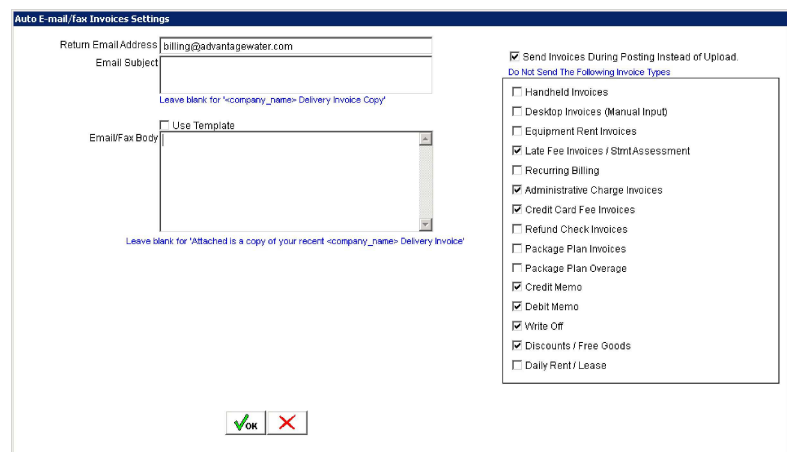
Scan coupon payments ☐  
 Always Ask for Sequence (Telephone Orders) ☐  
 Sequence Drag Stops ☐  
 Update Route Invoice Number with Last Invoice Used ☐  
 Schedule dragged stops on original route ☐  
 Cancel Drag When a Special is Scheduled ☐  
 Maximum Number of Days to Drag a Stop 0  
 No. of Decimals for Price 2  
 No. of Decimals for Quantity 0

Allow installation of Picked Up (dirty) Equipment ☐  
 Always Use Delivery Order Price ☐  
 Use 'Due by' scheduling in Delivery Orders ☐  
 Allow Selection of Warehouse for Handheld Loads ☐  
 Allow Billing of Package Plans on Handheld ☐  
 Allow New Package Plan Setup ☐  
 Create Def. Products for New Package Plan Products ☐  
 Routes Defaults ☐  
 Hide all price information on quick entry screen ☐  
 Allow for sub routes ☐  
 Open Hours ☐  
 No. of time bands to show 1

EXIT

Select the *Modify* button on the right hand side of the screen, then the *Auto Send Invoice SMTP Settings* button to open the configuration screen.

Next, you will need to fill in the information into the fields below.



**Auto E-mail/Fax Invoices Settings**

Return Email Address billing@advantagewater.com  
 Email Subject  
 Leave blank for '<company\_name> Delivery Invoice Copy'

Email/Fax Body  
☐ Use Template  
 Leave blank for 'Attached is a copy of your recent <company\_name> Delivery Invoice'

☒ Send Invoices During Posting Instead of Upload.  
 Do Not Send the Following Invoice Types

☐ Handheld Invoices  
☐ Desktop Invoices (Manual Input)  
☐ Equipment Rent Invoices  
☒ Late Fee Invoices / StmtAssessment  
☐ Recurring Billing  
☒ Administrative Charge Invoices  
☒ Credit Card Fee Invoices  
☐ Refund Check Invoices  
☐ Package Plan Invoices  
☐ Package Plan Overage  
☒ Credit Memo  
☒ Debit Memo  
☒ Write Off  
☒ Discounts / Free Goods  
☐ Daily Rent / Lease

OK X

### **Send Invoices During Posting Instead of Upload:**

Choose this option if you would rather have the invoices sent to the customers upon posting them as opposed to right after they are uploaded by the driver. This gives you a chance to make any

corrections to the invoice before the copy is sent to the customer. However, this may also mean that if a change was made and the customer was given a physical invoice at the time of delivery, they would not match due to the changes made.

**Return E-Mail Address (Required):** This is the “From” address that will appear on the email address and if the customer Replies to the email, it will be sent here.

**Email Subject:** Enter a custom email subject line (Not Required).

**Note:** Leaving this field blank will default the Subject to your Company Name + “Delivery Invoice Copy”.

**Example:** “Advantage Water Delivery Invoice Copy”.

**Email Body:** Enter a custom HTML formatted email body (Not Required).

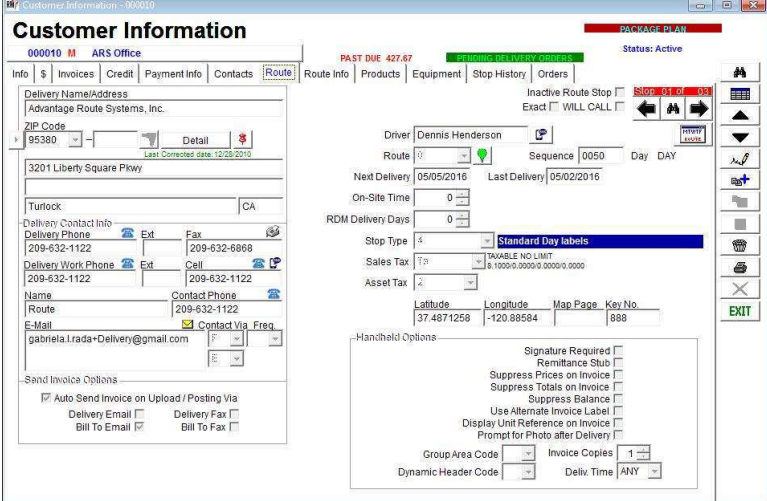
**Note:** Leaving this field blank will default the body of the email to your “Attached is a copy of your recent (Company Name) Invoice.”. **Example:** “Attached is a copy of your recent Advantage Water Delivery Invoice”.

Once completed, select the *OK* button to continue. Then choose the *Save* button on the *Handheld* tab to save the settings.

## Customer Settings

Each customer has their own settings to enable this feature, as well as the choice to send it to the Delivery email address, Billing email address, Delivery Fax Number and/or Billing Fax Number. The driver can also establish these settings from the handheld. That will be discussed in more detail later.

You will find the configuration options on the *Route* tab from within the *Lists > Customer Information* menu item. On the route tab, you will find *Handheld Options* toward the bottom of the screen.



**Customer Information**  
000010 M ARS Office  
PAST DUE 427.67  
Status: Active

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

Delivery Name/Address  
Advantage Route Systems, Inc.  
ZIP Code 95380  
3201 Liberty Square Pkwy  
Turlock, CA

Delivery Contact Info  
Delivery Phone 209-632-1122  
Delivery Work Phone 209-632-1122  
Name gabriela.lrada+Delivery@gmail.com  
Contact Phone 209-632-1122  
E-Mail Contact Via Freq

Send Invoice Options  
☒ Auto Send Invoice on Upload / Posting Via  
Delivery Email ☐ Delivery Fax ☐  
Bill To Email ☐ Bill To Fax ☐

Driver Dennis Henderson  
Route 05/05/2016 Sequence 0050 Day DAY  
Next Delivery 05/05/2016 Last Delivery 05/02/2016  
On-Site Time 0  
RDM Delivery Days 0  
Stop Type 4 Standard Day Labels  
Sales Tax TAXABLE NO LIMIT  
Asset Tax 2  
Latitude 37.4871258 Longitude -120.88584 Map Page Key No 888

Handheld Options  
Signature Required ☐  
Remittance Stub ☐  
Suppress Prices on Invoice ☐  
Suppress Totals on Invoice ☐  
Suppress Balance ☐  
Use Alternate Invoice Label ☐  
Display Unit Reference on Invoice ☐  
Prompt for Photo after Delivery ☐  
Group Area Code Invoice Copies 1  
Dynamic Header Code Deliv. Time ANY

If you would like to activate this feature on an account, select the checkbox next to the *Auto Send Invoice on Upload* feature. Then choose where to send the invoice copies:

- Delivery Email (Email field on Route tab)
- Bill To Email (Email field on Info tab)
- Delivery Fax (Fax Number field on Route tab)
- Bill To Fax (Fax Number field on Info tab)

**NOTE:** You must have an address/fax number on file for the chosen delivery method(s). It will warn you if you do not.

## Setup for Faxing

Faxing invoices utilizes our *Customer Message Centre* system. Please refer to the *Customer Message Centre* documentation on how to get started with this module or contact Advantage Route Systems for more information. Once credits have been purchased for Customer Message Centre, there is no further setup required to utilize the Send Invoice after Delivery feature.

## Handheld Features

Utilizing the Android handheld, the driver can also set up a customer to use this feature, modify their contact (email or fax) information and choose to send them invoice copies after every delivery or just after this one time. You can also limit how much the driver can do. Simply let them pick whether or

not to send the invoice, allow them to setup a new account, or modify the existing contact information.

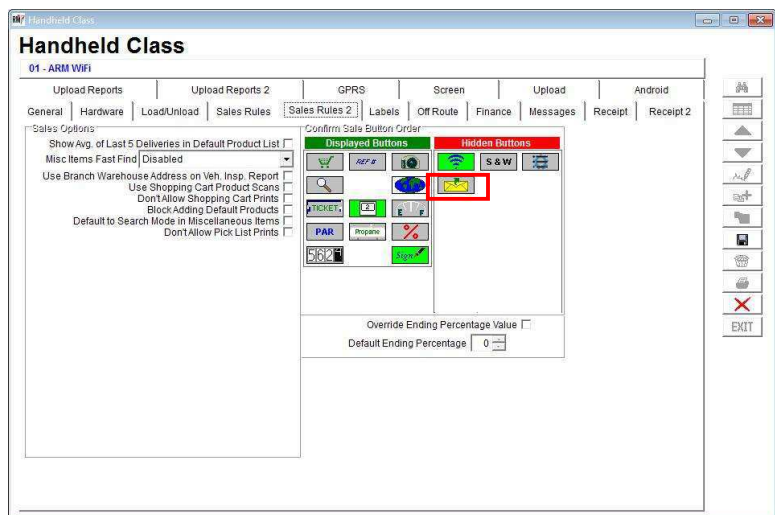
## Handheld Setup

To enable the driver to make these adjustments from the handheld, you will first need to follow these instructions.

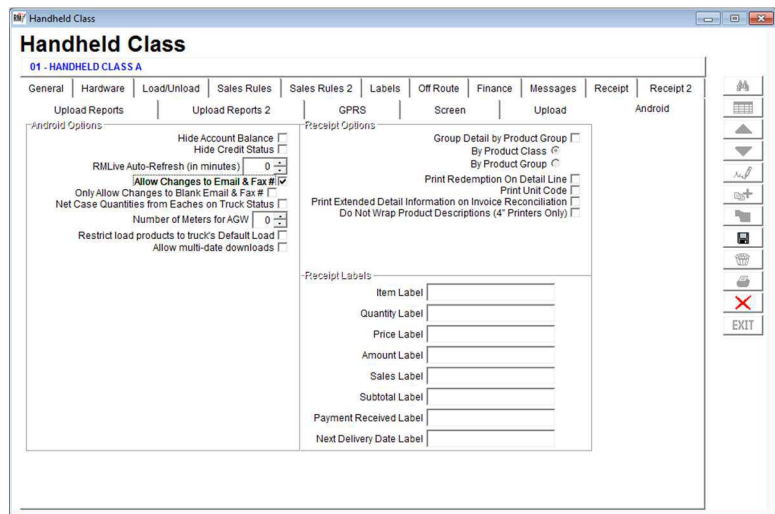
### Enable Send Invoice After Delivery Button

Go to *Lists > Routes > Handheld Class* on the *Sales Rules 2* tab for a new button that is part of the *Confirm Sale* screen options.

Modify the screen and then locate the *Send Invoice After Delivery* button under the *Hidden Buttons* section, as shown below:



Left click and drag the new button over to the Displayed Buttons side of the screen:

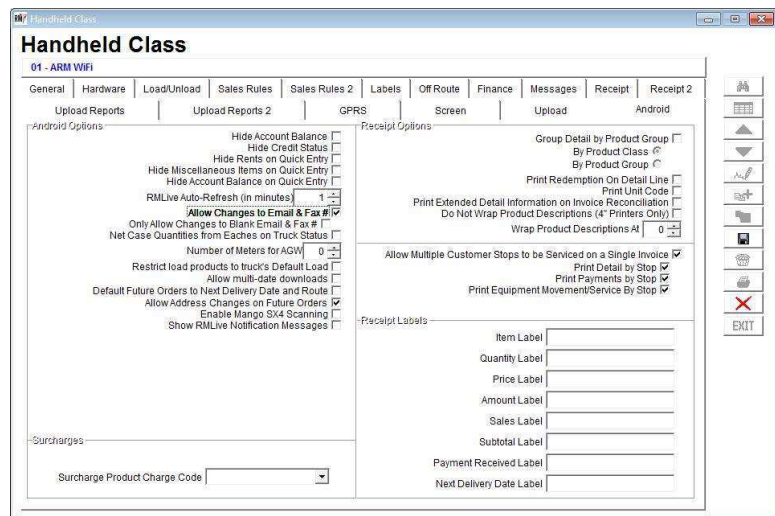


Save the changes to the screen and repeat for any additional Handheld Classes. Simply doing this step will allow the driver to choose to send an invoice *Now* or *Always* on any account in the handheld. They will not be able to update any of the contact information on the account.

### ***Allow Driver to Update Contact Info***

If you would like the driver to be able to update the contact information for the notifications, navigate to *Lists > Routes > Handheld Class* on the *Android* tab.

Once on the *Android* tab, locate the *Allow Changes to Email & Fax #* features, as shown in the screenshot below:



Select the *Allow Changes to Email & Fax* box to allow the driver to update the Email and Fax numbers on any account on the handheld. These changes will be uploaded and the customer's account in *Customer Information > Info* tab and *Route* tab will be updated.

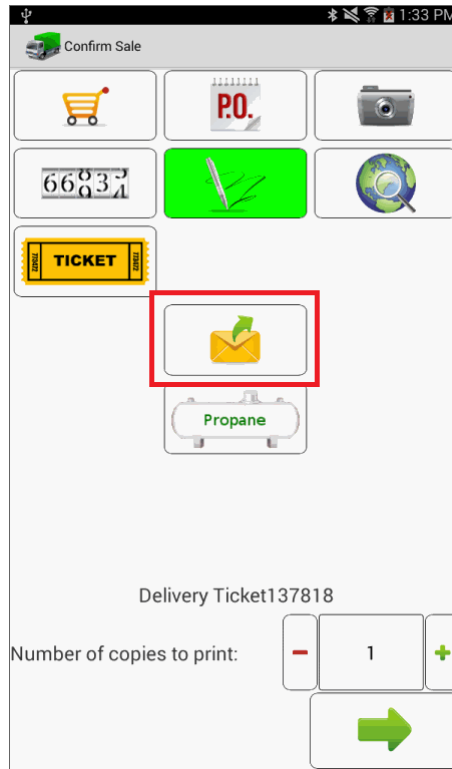
If you would like to limit the driver to only add contact information for customer accounts that do not already have an Email or Fax number, select the *Only Allow Changes to Blank Email & Fax #* checkbox.

## **Using the Handheld**

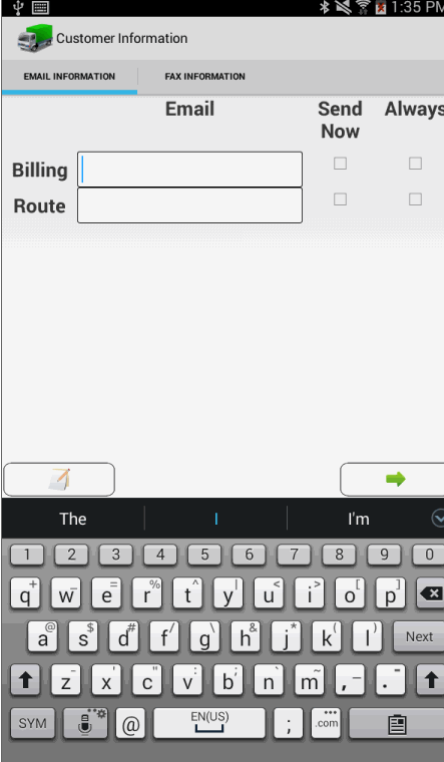
The following section will walk through what a driver will see on his handheld.

First, the driver will service the stop just as they always have. Once on the *Confirm Sale* screen, the driver can select the *Send Invoice After Delivery*

button to open the screens that allow them to use the feature on the fly.



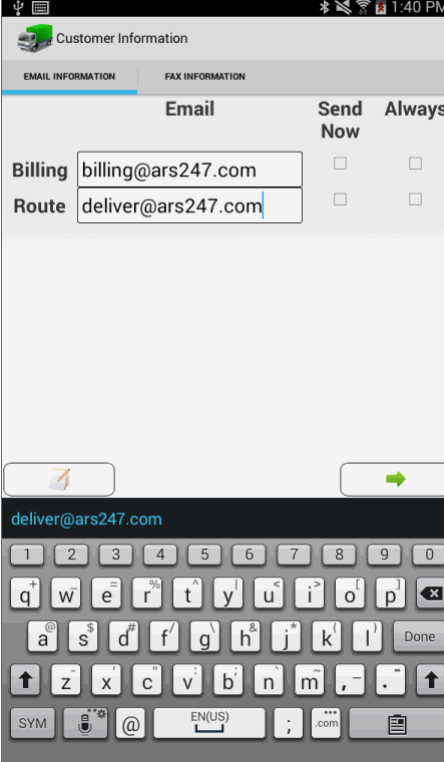
The next screen will display the accounts Email Notification information, as well as their *Send Invoice After Delivery* checkboxes established on the Route Tab in customer information (if any). In the example account below, they have no email address entered on the desktop for the Contact Email Address on the Info tab (as noted by the blank entry for Billing) or a Contact Email Address from the Route tab (as noted by the blank entry for Route). Also notice none of the checkboxes are selected on the right. So we are able to tell this account was not previously setup on the desktop to receive any notifications.



	Email	Send Now	Always
Billing	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
Route	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>

If the driver is allowed to make changes on the handheld (as discussed previously by enabling the feature on the Android tab in Handheld Class), they can update the email addresses from here. Simply tap the field and enter the address. Again, these changes will update the Desktop tabs accordingly.





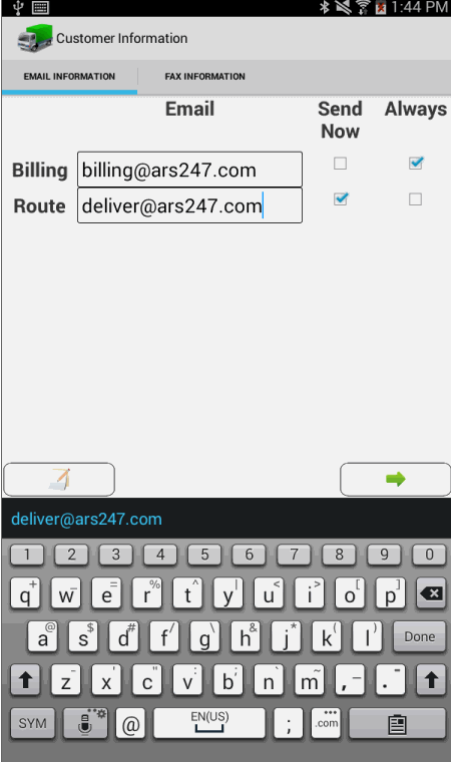
Customer Information

EMAIL INFORMATION FAX INFORMATION

	Email	Send Now	Always
Billing	billing@ars247.com	<input type="checkbox"/>	<input type="checkbox"/>
Route	deliver@ars247.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>

deliver@ars247.com

Next, the driver may choose to send an invoice copy *Now* or *Always* by selecting the appropriate box next to the email address that should receive it. If the driver chooses the *Send Now* checkbox, as soon as this invoice is uploaded a copy will be sent to the email address showing on the screen. Future deliveries will NOT be automatically sent to the account. If the driver chooses the *Always* option, then this invoice will be sent upon upload AND the system will automatically send all future invoices to this account (The system will check the box on the *Route Tab* in *Customer Information* for *Send Invoice After Delivery* feature as previously discussed in the Customer Settings section above). In this example, we are sending the invoice just this one time to the Route email address, but also we will always send it to the billing address.



Customer Information

EMAIL INFORMATION FAX INFORMATION

Email Send Now Always

Billing billing@ars247.com ☐ ☒

Route deliver@ars247.com ☒ ☐

deliver@ars247.com

If the customer would like to receive a Fax of the invoice, the driver can choose the Fax Information tab at the top of the screen, and update the account information exactly the same way:



Customer Information

EMAIL INFORMATION FAX INFORMATION

Fax # Send Now Always

Billing 209-632-6868 ☐ ☒

Route ☐ ☐

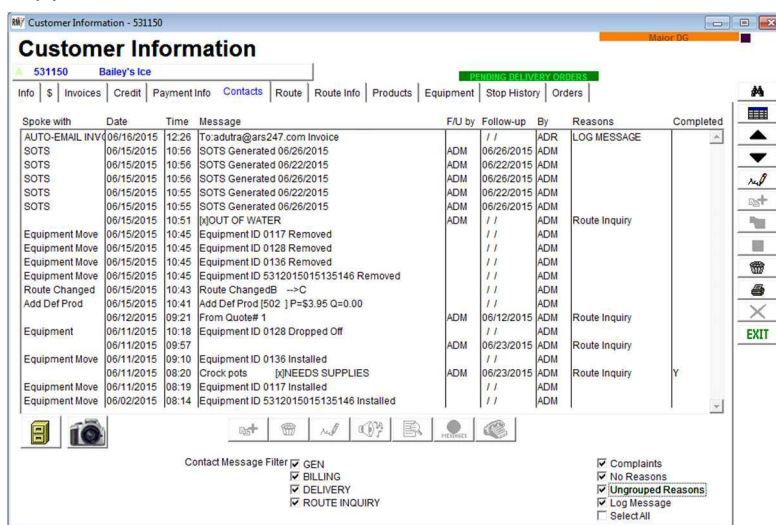
Once the driver has finished, he simply needs to select the *Green Arrow* in the bottom right corner of the screen to save all the changes, and complete the invoice as normal.

Once the invoice is uploaded, the system will review the settings the driver chose and determine when the invoice should be delivered and the method (email or fax) to be used.

**NOTE:** If the Desktop was set up to send invoices upon upload (meaning the *Send During Posting* option was NOT selected in the Settings screen in Branch Setup) both *Send Now* and *Always* options will send the invoice immediately upon upload. However, if the system was setup to send during Posting, the Send Now option will override that setting and send it immediately upon upload, whereas the Always option will send it during posting.

## Contact Message Logging

Whenever an invoice is sent out, there will be a *Log Message* entry made on the customers *Contacts* tab as shown below. Go to *Lists > Customer Information > Contacts* tab where you can toggle the Log Messages on/off by selecting or deselecting the *Log Message* checkbox at the bottom of the screen. We can see in the example below a log entry for the email that was sent as well as the Fax copy that was sent.



Spoke with	Date	Time	Message	F/U by	Follow-up	By	Reasons	Completed
AUTO-EMAIL INV	06/15/2015	12:26	To:adutra@ars247.com Invoice	ADM	06/26/2015	ADM	LOG MESSAGE	
SOTS	06/15/2015	10:56	SOTS Generated 06/26/2015	ADM	06/22/2015	ADM		
SOTS	06/15/2015	10:56	SOTS Generated 06/22/2015	ADM	06/26/2015	ADM		
SOTS	06/15/2015	10:56	SOTS Generated 06/26/2015	ADM	06/22/2015	ADM		
SOTS	06/15/2015	10:55	SOTS Generated 06/22/2015	ADM	06/26/2015	ADM		
SOTS	06/15/2015	10:55	SOTS Generated 06/26/2015	ADM	06/26/2015	ADM		
	06/15/2015	10:51	W/OUT OF WATER	ADM	06/26/2015	ADM	Route Inquiry	
Equipment Move	06/15/2015	10:45	Equipment ID 0117 Removed	ADM	06/26/2015	ADM		
Equipment Move	06/15/2015	10:45	Equipment ID 0128 Removed	ADM	06/26/2015	ADM		
Equipment Move	06/15/2015	10:45	Equipment ID 0136 Removed	ADM	06/26/2015	ADM		
Equipment Move	06/15/2015	10:45	Equipment ID 5312015015135146 Removed	ADM	06/26/2015	ADM		
Route Changed	06/15/2015	10:43	Route ChangedB →C	ADM	06/26/2015	ADM		
Add Def Prod	06/15/2015	10:41	Add Def Prod [502 ]P=\$3.95 Q=0.00	ADM	06/26/2015	ADM		
Equipment	06/12/2015	09:21	From Quote# 1	ADM	06/12/2015	ADM	Route Inquiry	
Equipment	06/11/2015	10:18	Equipment ID 0128 Dropped Off	ADM	06/23/2015	ADM	Route Inquiry	
Equipment Move	06/11/2015	09:57	Equipment ID 0136 Installed	ADM	06/23/2015	ADM	Route Inquiry	Y
Equipment Move	06/11/2015	08:20	Crock pots WNEEDS SUPPLIES	ADM	06/23/2015	ADM		
Equipment Move	06/11/2015	08:19	Equipment ID 0117 Installed	ADM	06/23/2015	ADM		
Equipment Move	06/02/2015	08:14	Equipment ID 5312015015135146 Installed	ADM	06/23/2015	ADM		

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## Summary

Email has become a common place for communication and fax is still used by some companies. This feature will allow you to take advantage of these communication tools and send invoices right after they are uploaded from the handheld or posted to the account. Utilizing this feature will increase your communication with the customer. It may also lessen the amount of paper invoices printed on site.

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Series 7: Version Date, May 5, 2016