

## 4.37 Setting up Gratis

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### Introduction

If you want a convenient system to keep track of products that you give away to your customers, you should take a look at setting up and using the Gratis functionality. This is a built-in function within Route Manager.

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### Overview

This document will describe how to set up the Gratis function. It will then show you how to use it on both the handheld and the desktop. There are several places this is used and it is a powerful tool to keep track of what you give away to your customers.

Finally, there are a couple of reports that can be used to see where your Gratis products are going to.

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### Setup

Setup requires several steps:

1. Setting up your gratis reasons. These are the “why” reasons and categories that you can view your reports by.
2. Indicating which products are eligible for gratis
3. If you are going to use Gratis when taking orders, you will need to change the security setting to allow your desktop users to do so.

Each of these steps are described in more detail in the following section.

## Setting up Gratis Reasons

To set up your Gratis Reasons, you will need to go to *Lists > Products Codes > Gratis Reason codes*.

As you come into the program, you will see a screen like this:



On this screen, you can enter all of the reasons why you give away product. Typical ones are:

- ▶ New Customer
- ▶ Samples
- ▶ Late Delivery
- ▶ Goodwill
- ▶ Charity
- ▶ Etc.

You can add to this list at any time.

## Marking products for Gratis

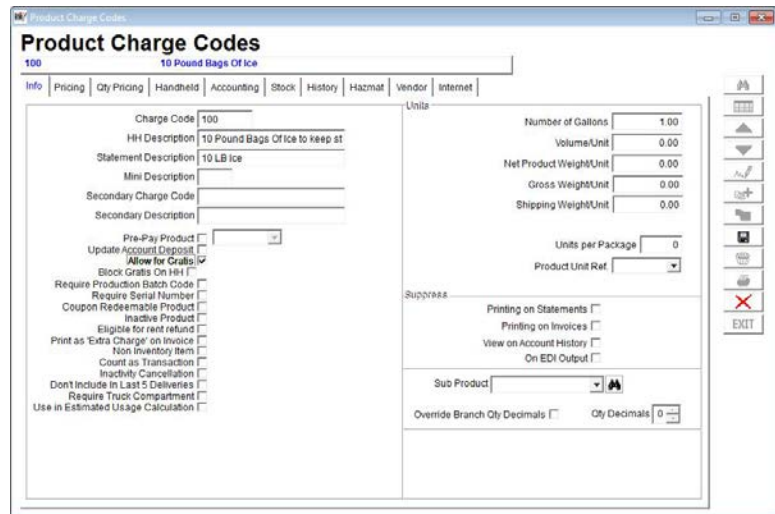
The next step is to mark all products that are eligible for free goods. For example, you may want to give the following away:

- ▶ Water
- ▶ Coffee
- ▶ Ice

But you most likely will not want to give away:

- ▶ Bank Charges
- ▶ Fixed Assets
- ▶ Etc.

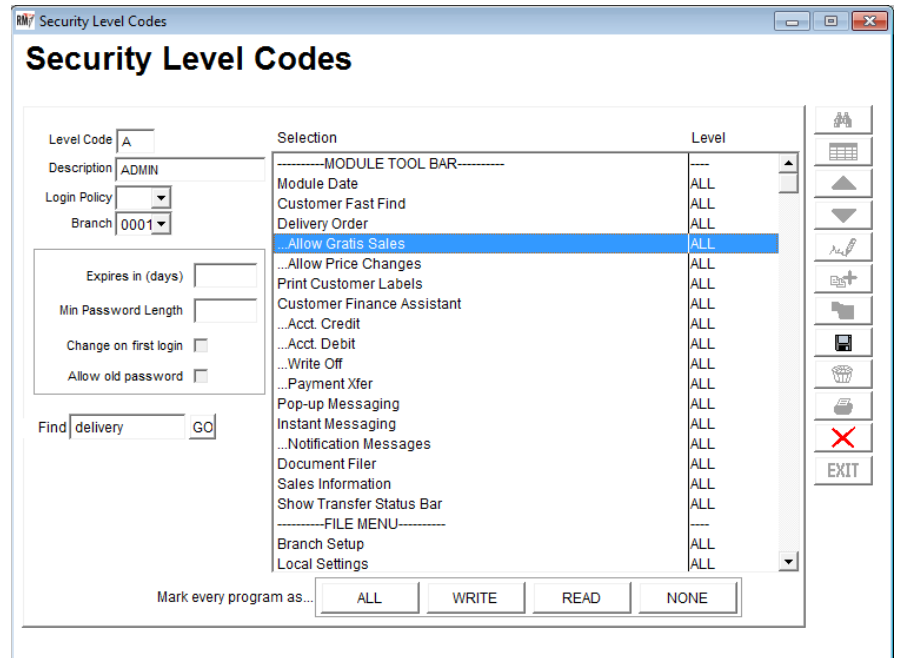
Use the screen on *Lists > Product Codes > Product Charge Codes* to check all products that you want eligible for Gratis. If this box is not checked, free product may not be given away with this code.



If you decide to allow a new product to be a free one, you can come back to each product and change this flag.

## Security Settings for Gratis

If you want to allow your desktop users to use the Gratis Codes when entering customer orders, you will also need to make sure that the security is turned on for this feature. Go to *Lists > Employee Setup > Security Level Codes* and locate *...Allow Gratis Sales*. An example is shown below to help you find it.



The Module Tool Bar security is set at the top of the list of Security Level codes.

## Using Gratis

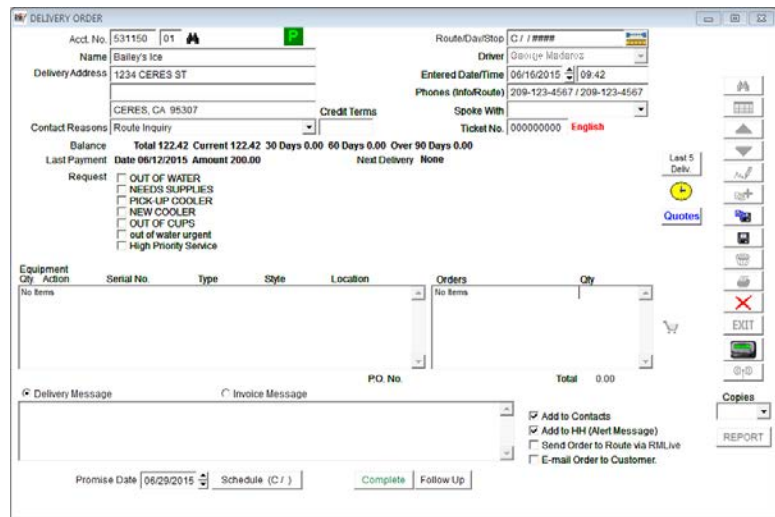
There are multiple places in the system where you can use the gratis function. These are:

1. Taking Orders
2. Entering invoices
3. On the handheld

More details follow in the area below.

## Taking orders

When you take an order on the desktop for a customer, you can enter any product that is to be given away at the time you take the order. This is done on the telephone order screen.



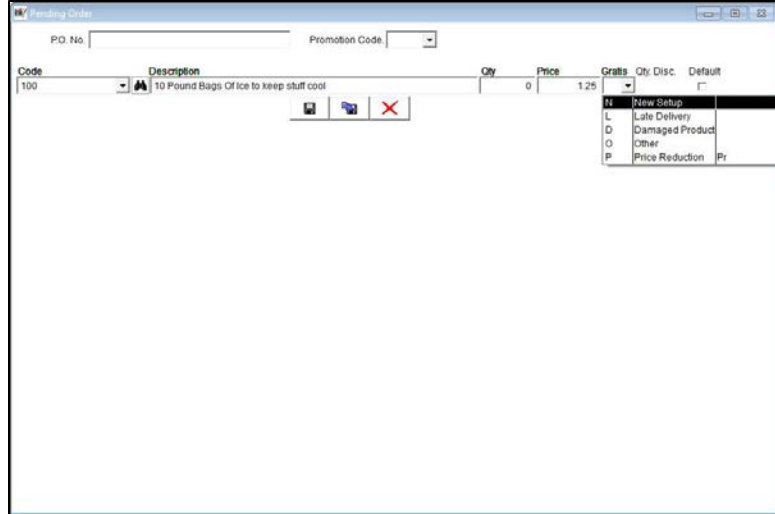
**DELIVERY ORDER**

Acct. No. 531150 01  
 Name Bailey's Ice  
 Delivery Address 1234 CERES ST  
 CERES, CA 95307  
 Contact Reasons Route Inquiry  
 Balance Total 122.42 Current 122.42 30 Days 0.00 60 Days 0.00 Over 90 Days 0.00  
 Last Payment Date 06/12/2015 Amount 200.00 Next Delivery None  
 Request  
 OUT OF WATER  
 NEEDS SUPPLIES  
 PICK-UP COOLER  
 NEW COOLER  
 OUT OF CUPS  
 out of water urgent  
 High Priority Service  
 Equipment  

City	Action	Serial No.	Type	Style	Location	Orders	City
No Items							

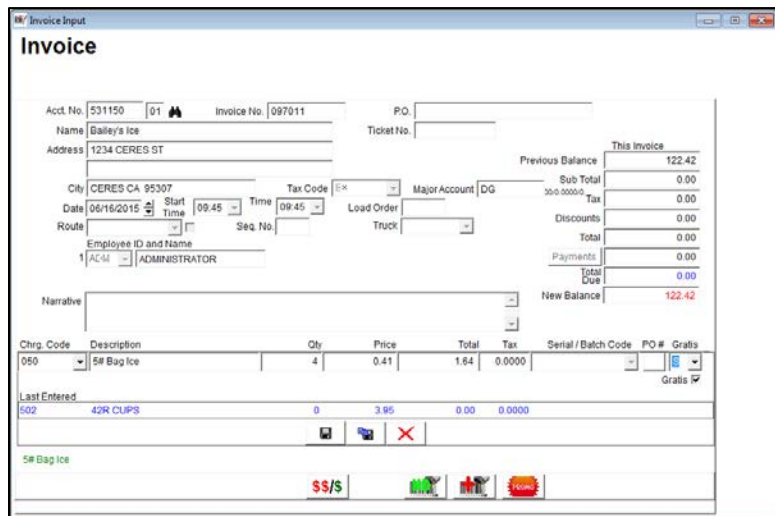
 Delivery Message  
 Invoice Message  
 PO No. Total 0.00  
 Promise Date 06/29/2015 Schedule (C / ) Complete Follow Up  
 Add to Contacts  
 Add to HH (Alert Message)  
 Send Order to Route via RMLive  
 E-mail Order to Customer

As you enter the detail line portion of the order entry screen, you will see a space for Gratis Reason. If you choose a reason, the price will still show the original price, however all further calculations will be done at 0.00 price.



## Entering invoices

You can also choose to give products away in the invoice entry screen. To do this, simply start an invoice. When you get to the line detail, you will enter your gratis information as you do the line detail.



**NOTE:** If the Gratis dropdown does not appear, generally that means that the product is not eligible to give away for free.

## On the handheld

Your delivery person can indicate if they are giving away free product to their customers. This section will describe the steps to do that.

On the handheld, when you are choosing a product, you have the opportunity to override the price. Pressing the displayed price will pop-up the following screen that allows you to adjust the price. Any product that you give away for free will appear on the Exceptions Report at the end of the day.



Miscellaneous Item Add

10 Pound Bags Of Ice to keep stuff cool

No PAR data

Quantity

Price 1.50

Total: 0.00

Gratis

1 2 3 -

4 5 6 ,

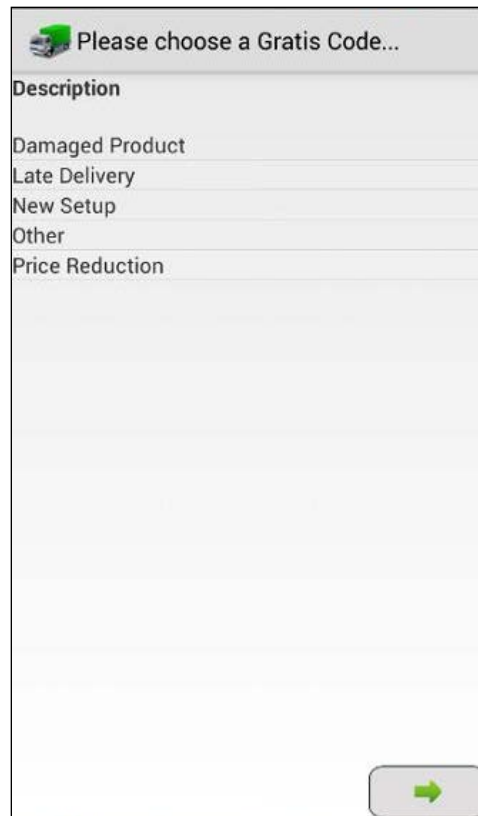
7 8 9 ←

0 . Save

By touching the word Gratis, you can now give the product away for free.

When you use this function, you will be required to enter a reason for the action — this list of reasons is set up ahead of time on the desktop.

These reasons are shown in a list like shown below:



Simply choose one of the descriptions shown and touch the green arrow.

A gratis code can be entered for any product that has been set up that way. If there are multiple products to be given away for free, then each one will need its own code.

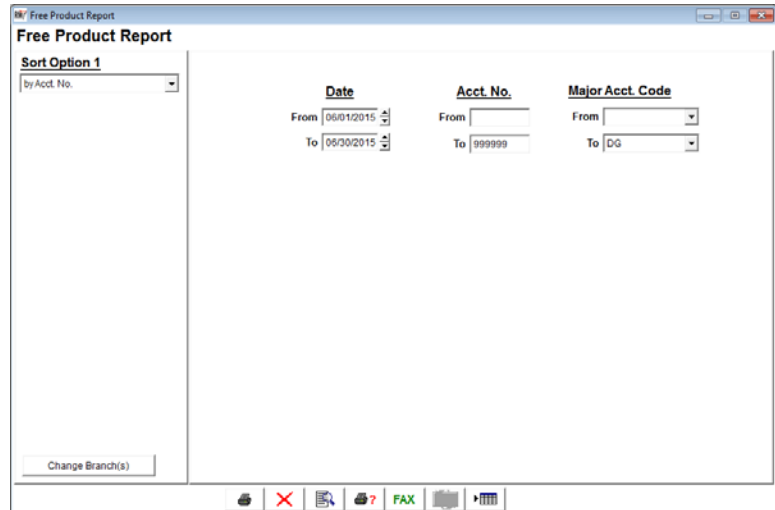
If you are delivering some product for free and charging for others of the same product code, then you will need to make line item entries - one for the free product and one for the charged one.

As a final note: you can enter gratis products on the handheld in either the quick Entry screen or on the Miscellaneous items. The functionality is the same.



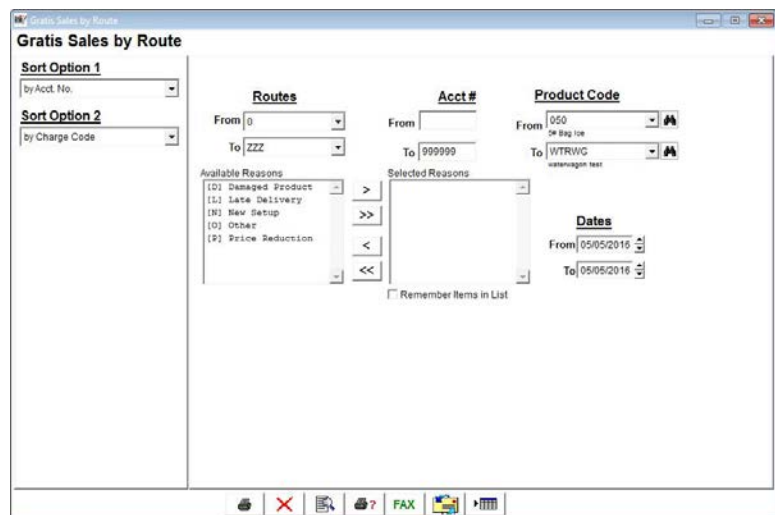
## Reporting

There are several reports associated with this function. Here is the most popular one called the Free Product Report. You can get to this by going to Reports > Management Reports > Free Product Report.



The screenshot shows the 'Free Product Report' window. It features a 'Sort Option 1' dropdown menu set to 'by Acct. No.'. Below this, there are three columns of filters: 'Date' with 'From' and 'To' date pickers (05/01/2015 and 05/30/2015), 'Acct. No.' with 'From' and 'To' text boxes (999999), and 'Major Acct. Code' with 'From' and 'To' dropdown menus (DG). A 'Change Branch(s)' button is located at the bottom left. The window has a standard Windows-style title bar and a toolbar at the bottom.

Another report you can generate allows you to narrow down the gratis sales by Route. Here is how you would find this report and the screen you would use to select the criteria: Reports > Route Reports > Sales > Gratis Sales by Route.



The screenshot shows the 'Gratis Sales by Route' window. It has two 'Sort Option' dropdowns: 'Sort Option 1' set to 'by Acct. No.' and 'Sort Option 2' set to 'by Charge Code'. The main area contains filters for 'Routes' (From: 0, To: ZZZ), 'Acct #' (From: , To: 999999), and 'Product Code' (From: 050, To: WTRWC). Below these are 'Available Reasons' and 'Selected Reasons' lists with navigation arrows. A 'Dates' section has 'From' and 'To' pickers (05/05/2016). A 'Remember Items in List' checkbox is at the bottom. The window includes a title bar and a toolbar.

## Summary

The Gratis function allows you a high degree of flexibility in tracking the products that you give away for free. Once it is set up, it is mostly automatic and you simply need to run reports to see what is happening in your company.

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Series 7: Version Date, May 5, 2016