

Chapter 4.42: Servicing Multiple Stop Accounts on One Invoice

Overview

On your Android Handheld, you can now service a customer who has multiple stops under one invoice. This is helpful when you want to service a number of locations in a large building or campus setting. It will also allow you to have multiple-stops print on one invoice so you can give your customer a consolidated receipt of the work completed.

Who Could Use This

There are a number of industries that will find this functionality helpful. Some are:

1. Coffee Service
2. Water Treatment
3. Propane Delivery

Here are a few scenarios that will help determine if this feature could help you.

Coffee Service

Perhaps you have a large customer with several stops in a 7 story building. When you created the customer in Route Manager, you made 5 stops for them. Since each location has different products (and one of them you only service once a month), it was easier that way. However you have a little problem. On the 2nd floor is the purchasing department who has to sign off for what is delivered. They only want one invoice for all of the various locations combined.

With this feature, you can 'hold open' all of the tickets you are making deliveries to and then get one signature after you have finished the last stop.

Water Treatment

You go to a large manufacturing plant that uses hyper-purified water for their production. Each time you go to the plant, you service the filters of six separate buildings. They are created as six separate stops on the account as the filters are serviced at different times each year. The plant manager has requested that all work each time be given to him on a single ticket after the work is completed.

Propane Delivery

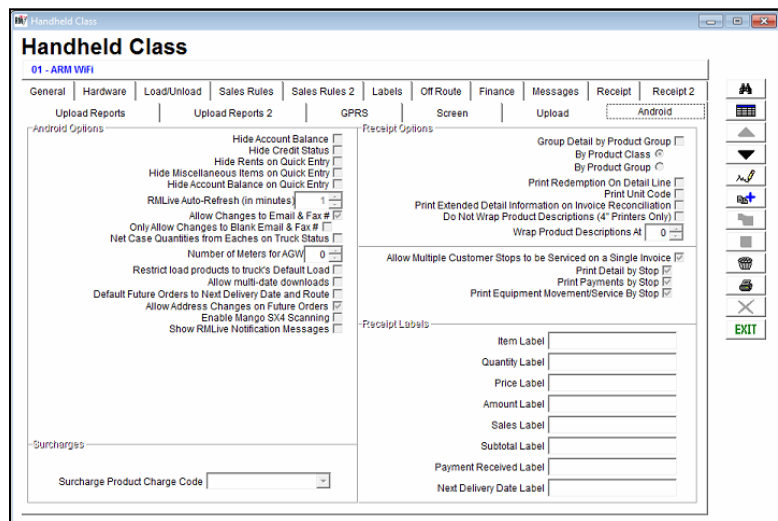
You have a trailer park that has 19 different units. After you fill the tanks, the property manager has requested that you provide a single invoice of all 19 locations on a single invoice instead of having to sign each of the 19 invoices.

Now that you have an idea on the way this feature can help, let's look at what is required to set it up!

Setup

In order to service multiple stops and have them print on one receipt, you must first go to your desktop and turn on the “Allow Multiple Customers Stops to be Serviced on a Single Invoice” option. You will find these settings located under *Lists > Routes > Handheld Class > Android Tab*. Make sure to enable this for all handheld classes which will be servicing multi-stops.

NOTE: This only works with Android devices and will not work with Windows Mobile/CE.



Handheld Class
01 - ARM WiFi

General | Hardware | Load/Unload | Sales Rules | Sales Rules 2 | Labels | Off Route | Finance | Messages | Receipt | Receipt 2

Upload Reports | Upload Reports 2 | GPRS | Screen | Upload | Android

Android Options

- Hide Account Balance
- Hide Credit Status
- Hide Rentals on Quick Entry
- Hide Miscellaneous Items on Quick Entry
- Hide Account Balance on Quick Entry
- RM Live Auto-Refresh (in minutes) 1
- Allow Changes to Email & Fax #
- Only Allow Changes to Blank Email & Fax #
- Net Case Quantities from Eaches on Truck Status
- Number of Meters for AGW 0
- Restrict load products to truck's Default Load
- Allow multi-date downloads
- Default Future Orders to Next Delivery Date and Route
- Allow Address Changes on Future Orders
- Enable Mango SX4 Scanning
- Show RMLive Notification Messages

Receipt Options

- Group Detail by Product Group
- By Product Class
- By Product Group
- Print Redemption on Detail Line
- Print Unit Code
- Print Extended Detail Information on Invoice Reconciliation
- Do Not Wrap Product Descriptions (4" Printers Only)
- Wrap Product Descriptions At 0
- Allow Multiple Customer Stops to be Serviced on a Single Invoice
- Print Detail by Stop
- Print Payments by Stop
- Print Equipment Movement/Service by Stop

Receipt Labels

- Item Label
- Quantity Label
- Price Label
- Amount Label
- Sales Label
- Subtotal Label
- Payment Received Label
- Next Delivery Date Label

Surcharges

Surcharge Product Charge Code

Fields:

Print Detail by Stop: This option will separate the product sold details on the invoice by each stop.

Print Payments by Stop: This option will separate the payments by each stop.

Print Equipment Movement/Service By Stop: This option will separate any equipment movements or services by stop.

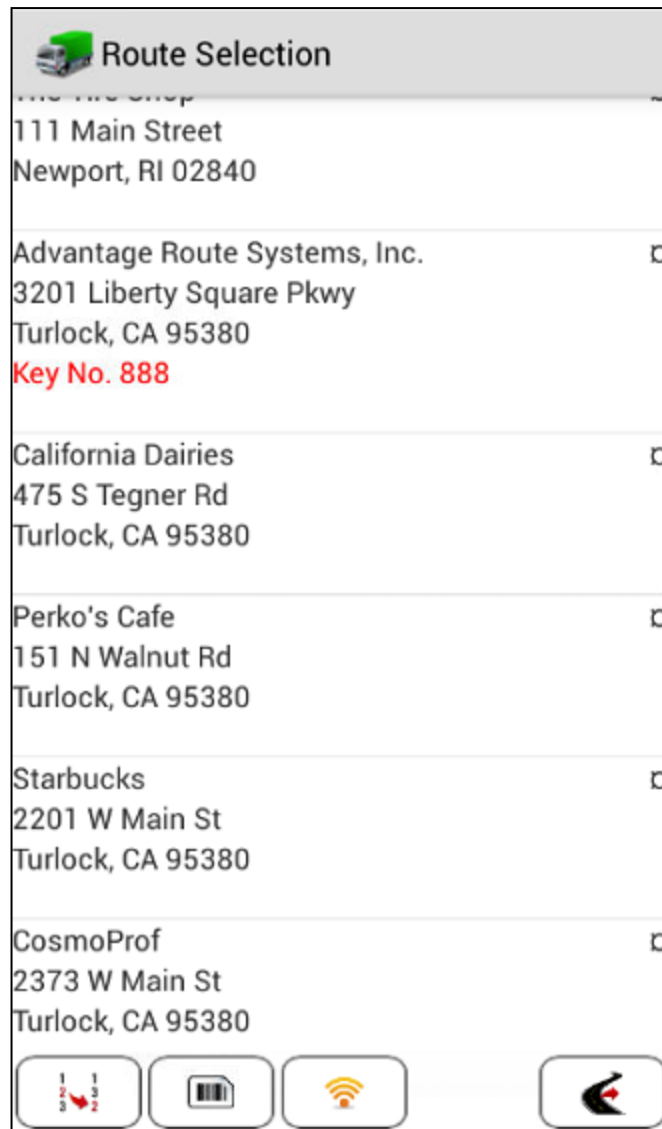


How to Service the Customer

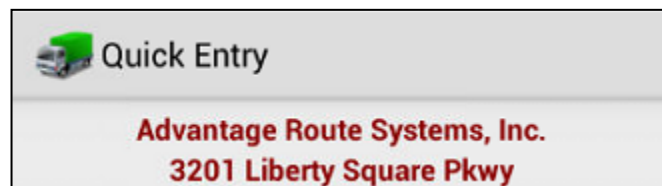
Most of the functionality for the driver is the same on the handheld. First, you will want to begin from the *Main Menu*. Find the customer the same way by going to the Route selection screen.



Once on the Route selection screen, you will view all of your stops for the current day. In our example below, we have three stops for “Advantage Route Systems, Inc”.

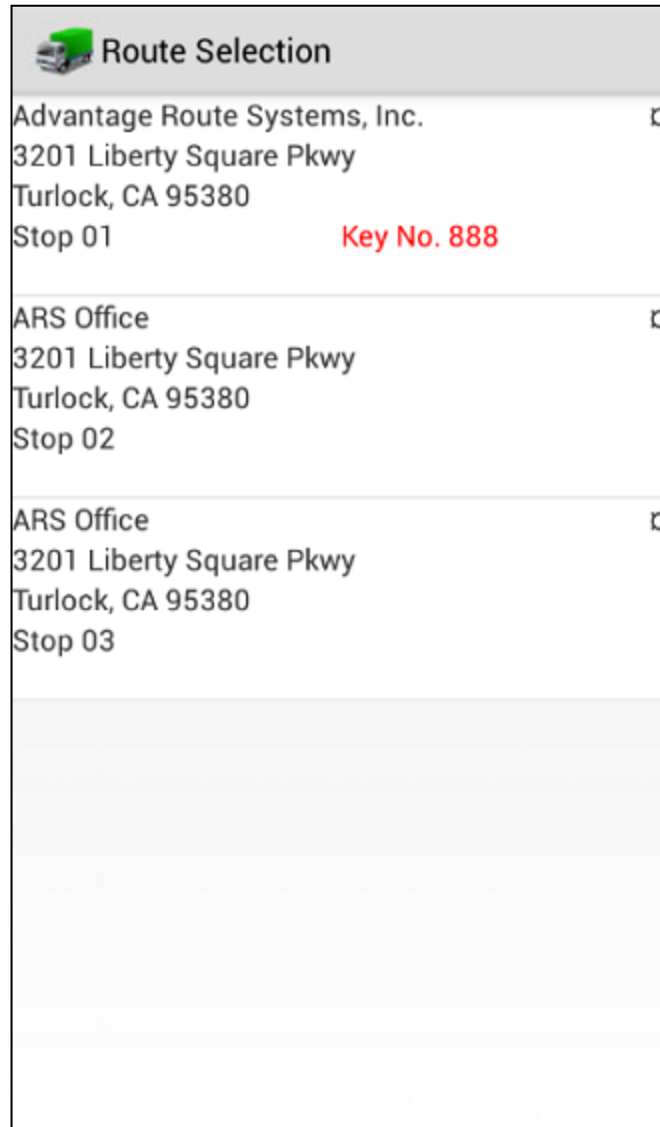


Once selecting this stop, you will notice this customer stands out with a red address at the top of their Quick Entry Screen. The red address means this is a multi-stop account.



Once you are done servicing the current stop, instead of selecting the green arrow to move ahead as you normally would, you are now going to select the red address at the top of the screen. This will save the

current sales you have and will open up the stop selection screen (shown below).



The screenshot shows a mobile application interface titled "Route Selection" with a green truck icon. It lists three stops for a customer, each with a checkbox on the right. The first stop is "Stop 01" with a red "Key No. 888" next to it. The second and third stops are "Stop 02" and "Stop 03" respectively. All stops have the same address: "3201 Liberty Square Pkwy, Turlock, CA 95380".

Stop	Address	Key No.
Stop 01	3201 Liberty Square Pkwy Turlock, CA 95380	888
Stop 02	3201 Liberty Square Pkwy Turlock, CA 95380	
Stop 03	3201 Liberty Square Pkwy Turlock, CA 95380	

NOTE: This screen will only show multi stops for this customer.

Select the stop in which you would like to service next, which will take you back to the *Quick Entry* screen with the products and details for this stop. If you need to service additional stops, do so by clicking on the red account name at the top and selecting the next stop. Once you are done servicing all of your multi-stops for the customer, select the green arrow to go to the Confirm Sales screen.

Select the shopping cart icon in the Confirm Sales screen to preview what your invoice will appear as before confirming the invoice.

NOTE: If you do not see the shopping cart icon, adjust the settings on the desktop under *Lists > Routes > Handheld Class > Sales Rules 2* tab.

See below for an example of the shopping cart preview with the option enabled to break down the product details.

Shopping Cart		
[Code]	Description	
Qty	Price	Amount
Stop 01: Advantage Route Systems, Inc.		
[20CKF]	20 Count Fog Lifter K-Cup [Tx]	
3 @	17.50	52.50
[050]	5# Bag Ice	
5 @	0.50	2.50
Stop 02: ARS Office		
[050]	5# Bag Ice	
5 @	0.63	3.15
Stop 03: ARS Office		
[080]	8# Bag Ice	
2.0 @	0.65	1.30
[050]	5# Bag Ice	
2 @	0.63	1.26
12345		0.00
Subtotal		60.71
Deposits		0.00
CRV		0.00
Sales Tax		4.25
Invoice Total		64.96
Payments		0.00

Once the driver is done reviewing the shopping cart, and confirms the sale, it will return you to the route selection screen as a normal completed invoice would. You will notice that both stops listed are now marked as serviced.

Skipping a Multi Stop Customer

If servicing a multi stop customer and a skip is needed on a stop, you must do this individually under its own invoice from the route selection screen. If you try to skip a customer through the multi-stop screen, it will give you the message shown below:

You cannot skip a multi-stop invoice. If you want to skip 1 or more of the stops, please SAVE or exit this invoice and skip each stop individually.

OK

Invoice

Here is a sample invoice showing multiple stops with the option enabled to break down the product details.

Advantage Ice 3201 Liberty Square Parkway Turlock CA 95380 www.AdvantageIce.com Phone 209-632 -1122			
Invoice 201754			
Fri, May 20 2016, 11:32am			
Driver: Dennis Henderson			
Rte-Day-Stop: 0-DAY-0050			
Account # 000010			
Advantage Route Systems, Inc.			
3201 LIBERTY SQUARE PKWY			
TURLOCK CA 95380 9665			
Item	Qty	Price	Amount
<hr/>			
Stop No. 01: Advantage Route Systems, Inc.			
20 Count Fog Lifter K-Cup [Tx]	3 @	17.50	52.50
5# Bag Ice	5 @	0.50	2.50
<hr style="border-top: 1px dashed black;"/>			
Stop No. 02: Advantage Route Systems, Inc.			
5# Bag Ice	5 @	0.63	3.15
<hr style="border-top: 1px dashed black;"/>			
Stop No. 03: Advantage Route Systems, Inc.			
8# Bag Ice	2.0 @	0.65	1.30
5# Bag Ice	2 @	0.63	1.26
<hr/>			
Sales			60.71
Subtotal			60.71
Sales Tax			4.25
(4.2525 TAXABLE)			
INVOICE TOTAL			64.96
Previous Balance			3.02
Account Balance			67.98
91-120 Dunning Message			
Next Delivery: 05/23/2016			

Things to Remember

Here are a few things to remember when using this functionality:

1. This function only works with Android handhelds.
2. Only stops serviced will appear on the handheld receipt.

3. You must have multiple stops for the same account. You cannot use this function if the account numbers are different.

Summary

The Multi-Stop function allows you to service several stops quickly and efficiently and combining the work done onto a single receipt. With just a little bit of set up, you are on your way.

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Series 7: Version Date, May 20, 2016