

# Chapter 4.43: Print Examples of Delivery Note Formats

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## Overview

Within Route Manager, you have a function to create, print and send Delivery Notes. This is affectionately referred to as the 'Golden Telephone Button.' Not only is this a powerful function to allow you to run your business more efficiently, but you can also print a hard copy of the data you collect for your service or delivery people.

The purpose of this document is to document all print formats available to you with an example of each so you can decide which format or formats will work best for you.

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## Introduction

The following table gives you a quick summary of the format codes and a mini-description in the order of the dropdown on the delivery note.

Code	Descriptions
1S – 4S	Simple (smallest format)
1W -2W	Wide format – up to 2 per page
1F	Full page format
1N – 2N	Wide format without prices on the form
1G	Full Page printed without pricing
1X	Full Page expanded format for more products
1V	Full Page for service tickets

The following sections will give you more information on the details of the formats.

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## Make it easy with Local Settings

When you are on the delivery order screen, it will ask you for the "Number of Copies to Print." You can make this a default by going to the Local Settings and choosing a format as a default so that format will come automatically. A big time saver!

File > Local Settings > Reports > Phone Message Copies.  
Then, pick your setting from the list.

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## 1S – 4S Format - Simple

The 1S is the most compact format. It will print up to 4 documents per page and is in a very compact format. It is designed for simple deliveries with few products. You can choose to have from 1 – 4 forms printed on a sheet of paper.

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## 1W – 2W Format – Wide

One of the more popular formats is the Wide format. It can be printed in 1 or 2 forms per page. (If you ask for 1W, the bottom half of the form is left blank.) Usually this is a good blend for companies delivering from 1 – 8 goods per delivery. The 2W format is popular if you want to give your delivery (or service) person one form to take into the field and have a copy back at the office to use as a follow-up on the field worker.

There is ample space for notes, comments and other office provided documentation on the delivery. A total of 13 lines of products will be printed.

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## 1F Format – Full Page

If you find the 1W format too confining, then you may want to jump up to the 1F format. This prints a full page for the order. It has more room for products, messages, equipment services, etc.

Here, you can see up to 25 products displayed.

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## 1N – 2N Format – Wide without Prices

In some situations, you may want your order to go to the customer without any prices. The 1N (or 2N) format is just like the 1W format above, however there is no pricing on this format.

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## 1G Format – Full Page without Prices

Just like the 1W format above, there is a 1G format that does not print any prices on the delivery order. This can keep your pricing confidential to those receiving the order or who may sign off on it.

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## 1X Format – Full Page eXtra Long Format

The full page (1F) format has also been enhanced for product only delivery companies. This means there is no equipment (or service) information on the form and it is fully dedicated to as many products as will fit on the form. With this, you can include up to 38 products on the first page.

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## 1V Format – Service Ticket

The V format is primarily for Service Work Ticket. It has been designed to look like a service order. There is not only a fair amount of space dedicated for equipment to be serviced, but there is also space to include comments; a signature and other important equipment. If you have previous service history, it will also be shown for the serial numbers shown.

The form will still show up to 3 products to be given to the customer (in the lower right corner.)

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## Summary

You may choose to print or not print your orders as they come in. Depending on your level of automation, you may choose to forego printing on product orders, but print service tickets.

The choice is up to you and Route Manager lets you do it your way!

Finally, in the next section, you will see samples of all formats using the same data so you can see the results – no matter which format you would like to choose.

## Appendix – Sample Formats of Tickets

In this section, we have sample formats for all of the formats described in the main body previously.

*NOTE: From time-to-time, based on user feedback, you may see slight changes from the samples shown below.*

### 1S – 4S Format Sample

<u>Customer Service Request</u>		<u>Customer Service Request</u>	
<u>Customer Information</u>		<u>Customer Information</u>	
<b>Acct. No.</b> 102285	<b>Route/Stop</b> R012 / SPCL / #####	<b>Acct. No.</b> 102285	<b>Route/Stop</b> R012 / SPCL / #####
<b>Name</b> Ambien Development	<b>Driver</b> Byron Lee	<b>Name</b> Ambien Development	<b>Driver</b> Byron Lee
<b>Delivery</b> 147 South Broadway	<b>Date/Time</b>	<b>Delivery</b> 147 South Broadway	<b>Date/Time</b>
<b>Address</b> Turlock, CA 93711	10/10/2015 / 12:39	<b>Address</b> Turlock, CA 93711	10/10/2015 / 12:39
	<b>P.O.</b>		<b>P.O.</b>
<b>Phones</b> 209-431-7207 / 559-431-7207	<b>Contact</b>	<b>Phones</b> 209-431-7207 / 559-431-7207	<b>Contact</b>
<u>Request Information</u>		<u>Request Information</u>	
<b>Request</b>		<b>Request</b>	
<input checked="" type="checkbox"/> Needs AM Delivery		<input checked="" type="checkbox"/> Needs AM Delivery	
<input checked="" type="checkbox"/> Do Water Safety CK		<input checked="" type="checkbox"/> Do Water Safety CK	
<b>Message</b>		<b>Message</b>	
Drop off Product and also note Service Work to be done as well. Site Instructions: See: Reception first		Drop off Product and also note Service Work to be done as well. Site Instructions: See: Reception first	
<b>Entered by</b> ADM	<b>Sched. Route</b> R012	<b>Entered by</b> ADM	<b>Sched. Route</b> R012
<b>Promised Date</b> 10/12/2015	<b>Ticket No.</b> 1510100001	<b>Promised Date</b> 10/12/2015	<b>Ticket No.</b> 1510100001
<b>Follow-up Date</b> / /	<b>Not Completed</b>	<b>Follow-up Date</b> / /	<b>Not Completed</b>
<b>Map Code</b>		<b>Map Code</b>	
<b>Follow-up by</b> ADM		<b>Follow-up by</b> ADM	

# 1W – 2W Format Sample

<b>Account No.:</b> 102285		<b>DELIVERY ORDER #1510100001</b>		<b>Sched. Route:</b> R012				
<b>Created On:</b> 10/10/2015 @ 12:39		Route/stop: R012 / SPCL / #####		<b>Date Promised:</b> 10/12/2015				
		Created By: ADMIN						
<b>Delivery Information</b>								
Name	Ambien Development			P.O.				
Address	147 South Broadway							
City, State, ZIP	Turlock, CA 93711			<b>Reasons</b>				
Spoke With				Needs AM Delivery, Do Water Safety CK				
Phones	209-431-7207 / 559-431-7207							
<b>Pending Order</b>								
Prod	Description	Qty.	Price	Ext. Price	Gratis			
2834	TEA HERBAL ORANGE SP	3.00	4.450	13.35				
1000	5 Gallon Water	4.00	6.000	24.00				
9901	Trip Charge	1.00	1.000	1.00				
1945	K-CUP CP JET FUEL 24ct	2.00	18.500	37.00				
					Completed Date / /			
					Completed By			
					Reason			
<b>Equipment</b>								
Qty.	Serial Number	Action	Type	Style	Location	Freq. Code	Rate	Service/Fault
1	1711923852	Service	BUNN VP17 3	Bunn 190		Z ZZZZZ		FILTER SEMI
<b>Special Instructions</b>								
Drop off Product and also note Service Work to be done as well.								
Site Instructions: See: Reception first								



# 1N – 2N Format Sample

<b>Account No.:</b> 102285		<b>DELIVERY ORDER #1510100001</b>		<b>Sched. Route:</b> R012				
<b>Created On:</b> 10/10/2015 @ 12:39		Route/stop: R012 / SPCL / #####		<b>Date Promised:</b> 10/12/2015				
		Created By: ADMIN / For: BL						
<b>Delivery Information</b>								
Name	Ambien Development							
Address	147 South Broadway			P.O.				
City, State, ZIP	Turlock, CA 93711			<b>Reasons</b>				
Spoke With				Needs AM Delivery, Do Water Safety CK				
Phones	209-431-7207 / 559-431-7207							
<b>Pending Order</b>								
Prod	Description	Qty.	Gratis					
2834	TEA HERBAL ORANGE SP	3.00						
1000	5 Gallon Water	4.00						
9901	Trip Charge	1.00						
1945	K-CUP CP JET FUEL 24ct	2.00						
			Completed Date / /					
			Completed By					
			Reason					
<b>Equipment</b>								
Qty.	Serial Number	Action	Type	Style	Location	Freq. Code	Rate	Service/Fault
1	1711923852	Service	BUNN VP17 3	Bunn 190		Z ZZZZZ		FILTER SEMI
<b>Special Instructions</b>								
Drop off Product and also note Service Work to be done as well.								
Site Instructions: See: Reception first								







# 1V Format Sample

Account No.: 102285		<b>DELIVERY ORDER #1510100001</b>		Sched. Route: R012				
Created On: 10/10/2015 @ 12:39		Route/stop: R012 / SPCL / #####		Date Promised: 10/12/2015				
		Created By: ADMIN						
<b>Delivery Information</b>				<b>P.O.</b>				
Name	Ambien Development			Completed Date / /				
Address	147 South Broadway			Completed By				
City, State, ZIP	Turlock, CA 93711			Reason				
Spoke With								
Phones	209-431-7207 / 559-431-7207							
<b>Reasons</b>								
Needs AM Delivery, Do Water Safety CK								
<b>Service Call Message</b>			<b>Equipment</b>					
Drop off Product and also note Service Work to be done as well.			ID No. _____					
			ID No.2 _____					
			Type _____					
			Style _____					
			Model # _____					
			Customer Owned No _____					
			Under Warranty No _____					
			<b>Maintenance History</b>					
<b>Service Request</b>								
1 1711923852 Service BUNN VP17 3 FILTER SEMI								
			<b>Labor &amp; Mileage</b>					
			Date	Hours From	To	Total Hours	Labor Rate	Labor Charge
			Mileage			Mileage Rate	Mileage Charge	
			Total Labor Charge:			Total Mileage Charge:		
<b>Parts</b>								
Quantity	Part Number	Model Number	Description			Unit Price	Total Price	
<b>Maintenance Comments:</b>						<b>Parts Total</b>		
						<b>Labor Total</b>		
						<b>Mileage Misc.</b>		
						<b>Shipping</b>		
						<b>Tax</b>		
Terms <input type="checkbox"/> Net <input type="checkbox"/> COD <input type="checkbox"/> Tax <input type="checkbox"/> Tax Ex. # _____						<b>Total</b>		
<b>Employee ID</b> _____ <b>Date</b> _____ <b>Start Time</b> _____			<b>Service completed and parts received in good condition by</b>					
Received From Advantage Delivery, Inc.			Customer Signature _____					
Via As Listed Above			Print Name _____					
<input type="checkbox"/> Pick Up <input type="checkbox"/> Parts <input type="checkbox"/> New <input type="checkbox"/> Repaired								
<input type="checkbox"/> Delivery <input type="checkbox"/> Equipment <input type="checkbox"/> Rental <input type="checkbox"/> Scrap								
<input type="checkbox"/> Shipped <input type="checkbox"/> Other _____								
<b>Special Instructions</b>			<b>Pending Order</b>					
Site Instructions: See: Reception first			Prod	Description	Qty.	Price	Ext. Price	
			2834	TEA HERBAL ORANGE SP	3.00	4.450	13.35	
			1000	5 Gallon Water	4.00	6.000	24.00	
			9901	Trip Charge	1.00	1.000	1.00	

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