

# Chapter 4.43: Print Examples of Delivery Note Formats

#### **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.

#### 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.

#### 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.

#### 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.

#### 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.

#### 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.

#### 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.

#### 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.



# 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.

#### 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.)

#### **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

		rvice Reques	<u>t</u>			service Request r Information				
Phones Reques Needs	102285 Ambien Development 147 South Broadway Turlock, CA 93711 209-431-7207 / 559-431-7	Route/Stop Driver	Byron Lee  Date/Time  10/10/2015 / 12:39  P.O.	Acct. No. 102285 Route/Stop R012 / SPCL / Name Ambien Development Driver Byron Lee Delivery 147 South Broadway Date/Time Address Turlock, CA 93711 10/10/2015 / 12 P.O. Phones 209-431-7207 / 559-431-7207 Contact  Request Needs AM Delivery Do Water Safety CK						
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#### 1W - 2W Format Sample

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



## 1F Format Sample

Account No.: 102285 Created On: 10/10/2015 @ 12:39					VERY ORDE oute/stop: R01 Created By	2 / SPCL / ###	Sched. Route: R012 Date Promised: 10/12/2015			
Delivery In	nformatio									
Name		Ambien Developme	ent					P.O.		
Address		147 South Broadwa	ay				Reasons			
City, State,	ZIP	Turlock, CA 93711					Needs AM	I Delivery, Do	Water Safety C	K
Spoke With	h									
Phones		209-431-7207 / 559	9-431-720	)7						
Pending O	rder									
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				Total	75.35					
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#### 1N - 2N Format Sample

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



# 1G Format Sample

Account No.: 1022 Created On: 10/10/			DELIVERY ORDE						
Created Off. 10/10/	2010@12.39		Route/stop: R012		Dat	6   10111156U.   10/12/2015			
Delivery Information	on		Created By:	ADIVIN					
Name	Ambien Developme	nt			P.O.				
Address	147 South Broadwa	у			Reasons				
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City, State, ZIP	Turlock, CA 93711				I Sous , an Bonve	,, 20 114151 54151, 511			
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Site Instructions: 8	See: Reception first								



# 1X Format Sample

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	/ Information						
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Address	;	147 South Broadw	/ay				Reasons
City, Sta		Turlock, CA 9371	1				Needs AM Delivery, Do Water Safety CK
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				Tax	0.00		
				Total	75.35		]
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# **1V Format Sample**

Account No.: 102285		DELIVER	DELIVERY ORDER #1510100001				Sched. Route: R012			
Created On: 10/10/2015 @ 12:39			Route/s	Route/stop: R012 / SPCL /				Date Pr	omised: 10	0/12/2015
			C	reated	By: ADMI	IN				
Delivery In	<u>formation</u>									
Name		n Development						P.O.		
Address	147 S	outh Broadway				Com	pleted Date	/ /		
City State	ZID Turko	L CA 02711				Com	pleted By			
City, State,		k, CA 93711					,			
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Special Inst	tructions			Pend	ling Order					
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Site Instructio	ns: See: Receptio	n first		2834			RANGE SP	3.00		
				1000	5 Gallo	on Water		4.00		24.00
				9901	Trip C	harge		1.00	1.000	1.00



#### **End of Document**