Route Manager *Advanced*™

Handheld User Guide

For Android™ Handhelds and Tablets

Advantage Route Systems, Inc.
We deliver, so you can!

Series 6.1.5

Windows XP/Vista/7/8

Advantage Route Systems, Inc. Proprietary

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Chapter 1 – Getting Started

Introduction

The purpose of this manual is to familiarize you with your new Android handheld computer and the software that you will run on it. It describes the operation of the *Route Manager Android* software on the handheld, and making the most efficient use of it in the field. Since the software can be customized to meet the demands of many companies, this manual has been written as a general guide to highlight some of the most common functions. For information on additional handheld computer functions, please refer to the *Handheld Class* section of the *Getting Started Guide* or *User Guide: A*, available at www.ARS247.com.

How does it compare to my Windows handheld?

If you have previously used the RMA or RM2000 software on a Windows Mobile device, you will find many similarities. The general layout of the program is nearly identical. You will find a couple of differences. These are due to the following:

The Android operating system is a little different than Windows Mobile. Several differences are discussed in the next section below.

You do have some enhancements that were made due to new tools available with Androids. For example:

- Using Google maps, you will have a 'Take Me There' button with built in maps for most of the world. Not only will this show you where your destination is, but also provide turn-by-turn directions for your service or delivery person. For this to work, you will need a live data connection (GPRS or Wi-Fi) at all times.

- You also have built-in scanning. While the quality and ease of scanning varies from device to device, it is certainly good for occasional scans (less than 10 per day). Scanning utilizes the built-in camera on your handheld.

- You have voice recognition built into your Android. That means that you can talk to it and will translate your sounds into text. This can be used to take notes while at a stop.

- You will find that since most Android handhelds are newer, they have faster processors so everything you do will go quicker.

- You will find printing to be much faster than with Windows Mobile.

Some notable things that are different on your Android

There are a few distinct differences you will find on your Android handheld. There are several things controlled by the operating system that you will need to learn and deal with on this device:

1. For example, there is usually a button that will take you back to the main menu – no matter where you are or in any program. This is generally referred to as the "Home" button. On some devices even the symbol is a house.

2. As you go to the main program, normally the program you just exited from is still running. Sometimes it gets confusing about where you are and what you are doing.

3. Most screens do not have an EXIT key on them. Instead, as part of the Android system, there is a 'soft' button that looks like this: that will take you out of the current screen and return you to the previous one. This is generally referred to as the "Back" button. On many handhelds you will find this at the bottom of your handheld. Sometimes it is invisible, but it is there! Once you learn where it is on your device, just touch that area of the screen – even if it is not visible.

Getting started

In Chapter 3, we will help you set up your Android device so it can be used with the RMA software. There, you will go through the needed steps of installation and testing the product.

It is different than Windows Mobile, so read this chapter carefully before you start to install the software.

Hardware

The handheld computer technology you will be using is made up of several hardware items that work together to help you operate efficiently. This section will introduce you to the hardware components.

Handhelds

Advantage Route Systems presently offers software for a variety of Android devices. This includes hardware from vendors such as Samsung, HTC and others that are using Android OS version 4.0 or later. In addition, you can use any screen size from 3 inches to 12 inches. This works for either a small PDA or a tablet computer.

If you want to connect your data live to your office computers, you will need a data plan from a wireless carrier such as ATT, Verizon, Sprint, T-Mobile, etc. In addition, you will need the RMLive software to transfer new orders to your handhelds.

These handheld computers are lightweight, durable, and designed for route accounting applications. The large screens facilitate accessibility to valuable route information.

Printers

Printers allow you to leave receipts with your customers. Several different types of printers can be used with your handhelds. Most are separate units that "talk" to the handheld via an Infrared or Bluetooth wireless connection. They are made by several manufacturers including: Advantage BT4, Advantage PTB-3, O'Neil, and others. The printers come in a variety of widths from 60 – 114 mm (2.25" to over 4").

If you need a printer, you can find them quickly here at: https://www.pda4usa.com/printers/mango-bt-4.html

Truck Charger

Many manufacturers have an auto charger that can be optionally used while on route. They simple plug into your cigarette lighter and you have an unlimited power source!

However, there are several ways to keep your handheld computer charged and ready. Generally, rechargeable batteries used in the unit will operate for approximately ten hours. Check with the manufacturer of your handheld computer for other options on extending battery life.

https://www.pda4usa.com/accessories/chargers/car-chargers.html

Protecting your unit

If you have purchased a consumer product, these devices tend to be more fragile. To help them hold up to day-to-day rigors of route delivery, you may want to purchase an optional case for them.

AC Charger

Most handheld computers come with an AC adapter-charging unit. Charging the unit is usually done in the evening when you return from your route so you can always have a freshly charged battery the next morning. We recommended charging your handheld each night for optimal performance.

https://www.pda4usa.com/accessories/holsters/chargers/home-chargers.html

Holster

Investing in one of the carrying cases on the market can go a long way in preventing damage to your handheld computer and printer. https://www.pda4usa.com/accessories/holsters.html

Paper Rolls

To print a receipt, your printer will need special thermal paper, this paper can be plain white or special ordered with printed message or logo options. It is important for each driver to have a spare roll of paper while on route. Paper rolls should be kept dry, clean and cool at all times.

https://www.pda4usa.com/paper.html

Stylus

The ARS stylus is the best tool to use on the handheld touch screen. This special stylus has a soft tip that works with most Android screens. You should never use anything other than a stylus to move around the screen on the handheld, to protect the touch screen.

https://www.pda4usa.com/accessories/stylus/stylus-pen-combo-soft.html

TouchSafe™

Under normal use, the touch screen of any handheld computer will receive scratches and may even pick up a few nicks. Such marks will first appear in areas frequently touched on the screen. To prevent unnecessary abuse, ARS recommends using TouchSafe™, this is a product that overlays and protects the touch screen. TouchSafe™ comes precut and is made of an extremely clear plastic. The adhesive, found along the top and the bottom edges, will hold the plastic firmly in place and will not damage the screen.

https://www.pda4usa.com/accessories/screen-protectors.html

Where do I get one of these?

If you like the idea of an Android device, you may want to know the best place to get one! There are literally billions of them in the world – on every continent.

Most likely, the best place to start is with one of the major cell phone carriers like Verizon, AT&T, T-Mobile, Digicel, Virgin, etc.

If you do not want a cellular data plan, then call us at Advantage Route Systems. From time-to-time we have devices that we can recommend.

Be sure that you get a device that has Android Version 4.1 or later (Jelly Bean). Our software will not run on older phones, but will run on newer ones (Kit-Kat, for example).

There are hundreds of manufacturers of these devices, but you may want to stay with Samsung, HTC or other major suppliers.

NOTE: The Route Manager software will not work on an iPhone or iPad (nor an iPod).

Summary

Your new Android device will make a fantastic work companion! Now, in a single device you can have a:

- Phone
- Messaging system (email)
- Handheld for route operations
- Maps
- And even more tools.

All of this at a cost you would not believe. Finally, someone has put it all together in a perfect package!

Be sure you have all of the tools you need to start making deliveries on route! If you find yourself coming up short, then look at our web site to purchase all the items you need.

www.PDA4USA.com

Chapter 2 – Using the Handheld

Introduction

This chapter is designed to familiarize you with your new handheld computer and some of the most common features that you should be aware of. You will find it helpful if you read this chapter before you go out on route so you will be ready.

Your Handheld Computer

The handheld computer used with Route Manager is a portable, Android based computer system, designed for field data collection. Depending on the device you purchased, it may be durable or it may be a consumer model that is designed for less abusive conditions. Proper treatment of the equipment will extend its life and help avoid maintenance costs.

Touch Screen

While the handheld's glass touch screen is strong, it is still vulnerable to damage. The following activities can lead to costly repair: dropping or banging the screen on hard objects; scratching the screen with a sharp object; using a dirty screen; and picking up nicks through normal wear and tear.

We recommend these preventative measures to protect your touch screen:

- Carry the handheld in a holster or protective case.
- Use only a touch screen stylus on the screen. Even a fingernail can scratch the screen.
- Keep the screen clean by wiping it daily with a soft, damp cloth.
- Use TouchSafe to extend the life of the screen. This clear plastic safety cover is affordable and easy to install.
- Avoid excessive pressure when using the screen.

Handheld Case

The handheld has a durable plastic case that should last many years under normal conditions. The case is moisture resistant, but not waterproof. Do not use the computer in heavy rain without a protective cover. Use a zipper-type sandwich bag to keep the unit from getting wet if you have to. Keeping the unit in a holster will provide additional protection.

Do not apply excessive pressure to the case and avoid sitting or leaning on it.

Battery Pack

Most handhelds operate on a rechargeable battery pack.

Charging Batteries

To charge the handheld, plug an A/C adapter into the unit or place the handheld in its docking cradle. It is important to recharge your batteries each night. Generally, your battery will last from 4 – 12 hours depending on the options you are using. For example, using GPRS (cellular data) and GPS, along with Bluetooth will shorten the operating time of your handheld. You may want to consider a heavy duty battery or a car charger to give you the duration of activity that you will need.

Power Switch

The power switch is generally found on the face or side of the unit. Depending on the device's display settings, most units will shut down the backlight automatically after several minutes of non-usage. Your back lighting options can generally be changed under the Android 'Settings' area.

Using the Backlight

The backlight option is normally on when you turn on the handheld. On most units, you can turn the backlight on or off by pressing one of the physical buttons on the device.

To change the backlight settings on most handhelds, locate the Settings area on your device, then navigate to the "Display" option generally located under the Device section. From here, you can adjust the screen brightness, Sleep Time, etc.

Inserting a Card

To insert a memory card into the handheld computer:

- Locate the opening for the storage card. This opening may be located on the top, side, or underneath a protective door or part of the case. Sometimes it takes a little ingenuity to figure out how to remove the back case. Do be careful so you do not damage the case.

- The card only slides in one way. It should fit easily into the opening and may be spring-loaded.

- Do not force the card into the slot.

NOTE: Not all devices are capable of accepting external Memory Cards. Refer to the original manufacturer's documentation for more information.

Removing the Memory Card

To remove a memory card from the handheld computer, you may need to push in slightly to release it.

NOTE: Refer to the original manufacturer's documentation if you are experiencing problems with any of these procedures.

Notes on Operation

To obtain the maximum life and performance from your handheld unit:

- Do not expose the handheld to extreme temperatures.

- For instance, avoid leaving the computer on the dash of your truck during the summer, or in direct sunlight. The intense heat can cause temporary failure of the system and reduce battery life.

- Avoid exposing the unit to severe cold. For temperature specifications, refer to the manual included with your unit.

- Avoid using the handheld in dusty environments.

- Do not drop the unit or subject it to a severe shock.

- If water gets on the handheld, wipe it off using a soft absorbent cloth as soon as possible.

Summary

Now that you understand the basics of your Android device, you are ready to get started by installing the software on the device and begin using it. In the next chapter, you will find information on the installation, set up and configuration of you system so you can start making deliveries and get familiar with your handheld!

Chapter 3 - Server Setup and Android Software Install

The initial install on your device will utilize a built-in web server included with the Advanced Communications feature in Route Manager. You will need to make a few configuration adjustments before installing the software on your unit. These instructions may vary slightly depending on the Operating System you are using.

Configuring Your Server

This section will guide you through configuring a server running *Windows Server 2008*. As mentioned previously, you may have slight variations in the locations of options displayed if you are running a different operating system such as Server 2003 or Server 2012.

Administrative Access

Prior to starting any of the procedures within this guide you will need full administrative access to the server. This will allow you to make any necessary changes without problems. Consult with your IT department or ARS if needed.

Advanced Communication Configuration

NOTE: This section may be skipped if you choose to use the Installation Instructions discussed further below from our SH003 server.

First you must enable the *Installation Web Server* within Advanced Communications. Locate the **AdvCommsConfiguration.exe** file within your Route Manager folder. Usually, on your server, you will find Route Manager in the c:\RMA or d:\RMA folder.

Once you find the file on your server, double click on it to open the Configuration Screen.

Note: Please refer to the Advanced Communications Manual for directions on setting up any of the Advanced Communications features if it is not setup already.

While in the Advanced Communications Config screen, locate the *Android* tab at the top. See Figure 3 1 below.

Figure 3 1

You will need to define a Port for the Web Server to listen to. This port will be utilized later in this process, so make note of it.

We suggest using Port 40002.

Figure 3 2

Note: The Use Authentication feature is not currently completed in this version of the Android Software

Select the OK button on the bottom of the screen to Save the changes.

Configuring the Firewall

Generally there will be at least one firewall running on the server and it will need to be edited to allow the *Installation Web Server* to communicate with the handhelds.

The standard Windows Firewall can be accessed by going to Administrative Tools > Windows Firewall with Advanced Security (or similar):
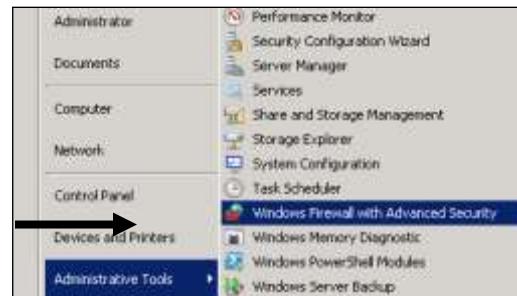
Figure 3 3

Select *Inbound Rules* and click the **New Rule** option to configure port access:
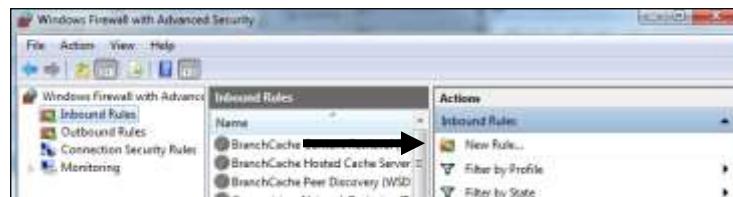
Figure 3 4

Select **Port** within the *Rule Type* screen:
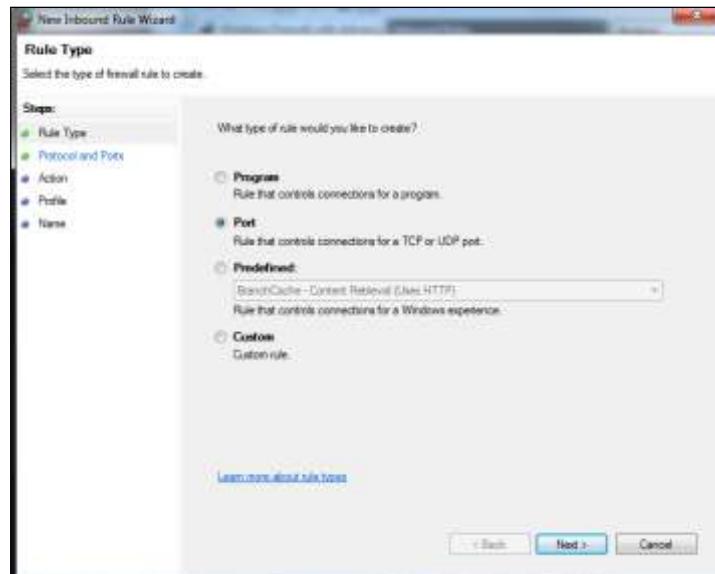
Figure 3 5

Click **Next**.

Select **TCP** and enter the port number that the *Installation Web Server* will use to communicate with the handhelds (40002):
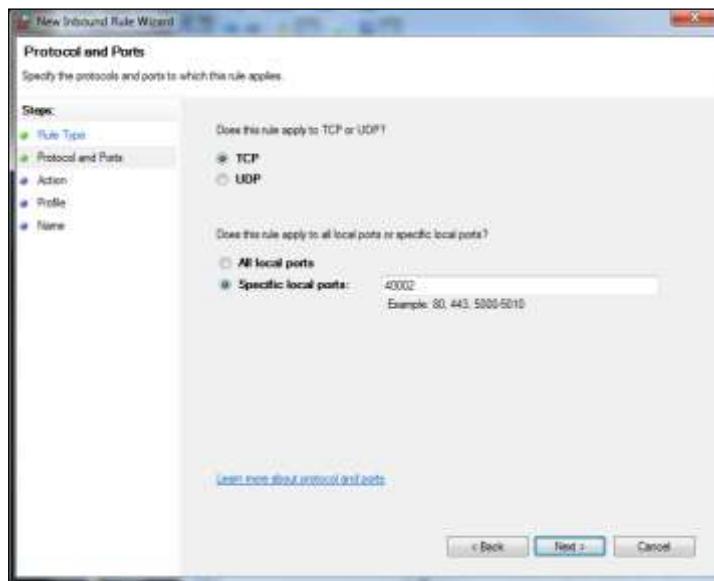

Figure 3 6

Click **Next**.

Select *Allow the Connection*:
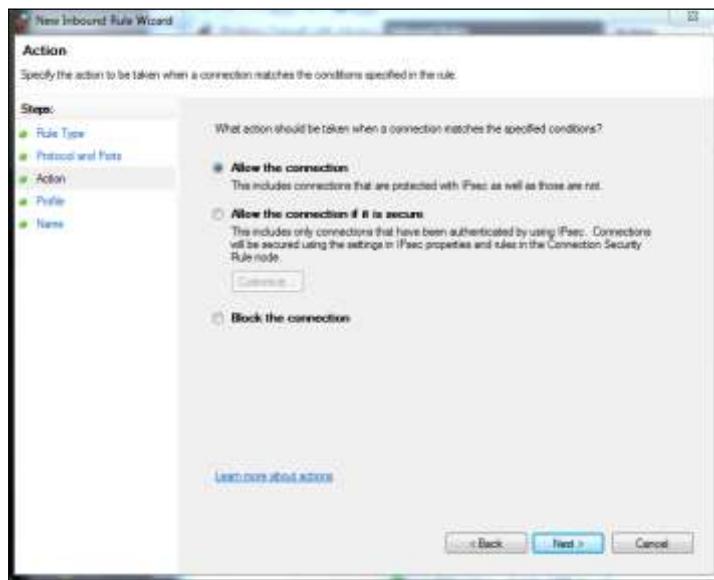
Figure 3 7

Select the types of connections that will be allowed. Typically, you will leave all of the options selected:
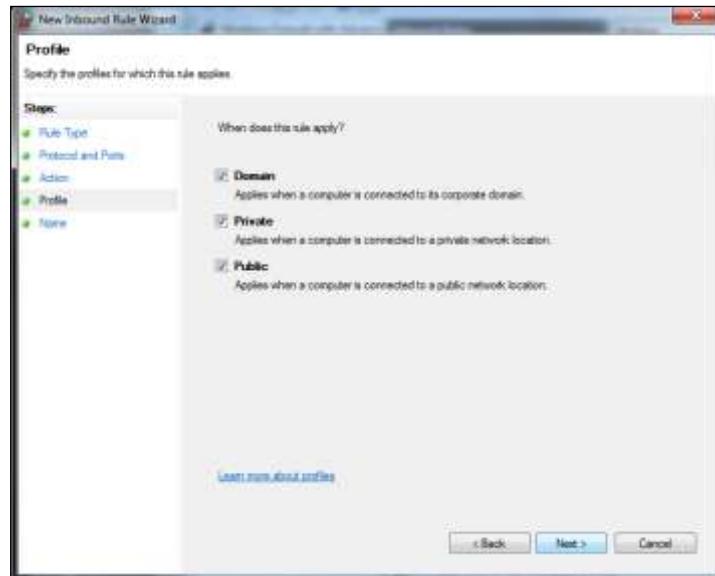
Figure 3 8

Click **Next**.

Last, give the new rule a name that will identify it as an RMA related service:
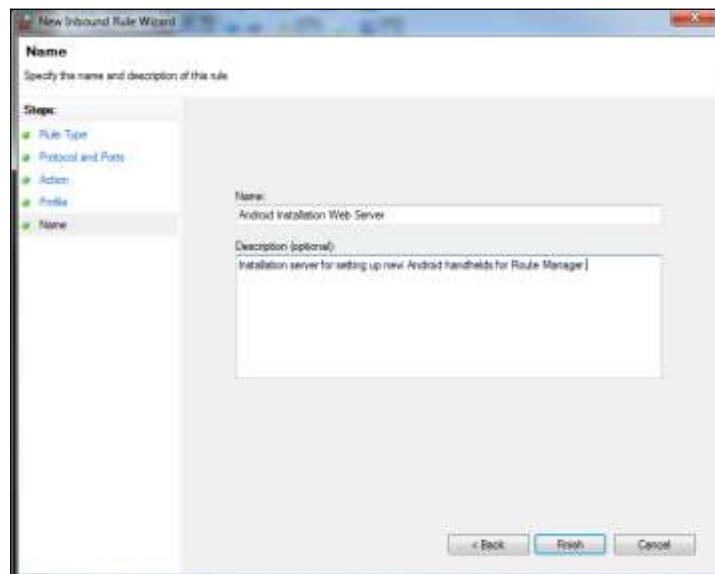

Figure 3 9

Click **Finish**.

Restarting the Service

After you have installed the Route Manager update you will be able to view the service running by going to Start >Run and typing in 'services.msc':


Figure 3 10

Click **Enter** on your keyboard to open the *Services* screen.

Look for 'ARS.AdvComms' and select it with your mouse. On the right hand side of the screen choose the "Restart" option. This will then use the new adjustments made in the Advanced Communications Configuration screen.

Figure 3 11

Open Port on Firewall (Optional)

If you have Remote Drivers outside of the internal Wireless Network you will need to configure your Router to allow the 40002 port to be forwarded to your Server where the Advanced Communications service is running. Please refer to your Router's documentation or the Advanced Communications manual for more information on Port Forwarding.

Program Installation on the Android Device

The first time you use the Android device you will need to install the Route Manager Android Program on it. The following instructions will guide you through this process. The following instructions are based on a Samsung Galaxy S4 device and may vary slightly with the device you use for the installation.

To continue beyond this point, please ensure your *Advanced Communications Service* is properly configured (Refer to the Advanced Communications Manual for more help) and that your device is connected via *Wi-Fi* to your network's Wireless Access Point.

Allowing installs outside of the Play Store

Since you are downloading this from Route Manager's own Internal Server, you will need to make an adjustment in the device's Security Settings.

First, locate the *Settings* application on your device. You can generally get to this from the Notifications Pull down menu or the list of all Apps. From the *Notifications* menu, click the *Gear* icon in the upper right corner of the screen:
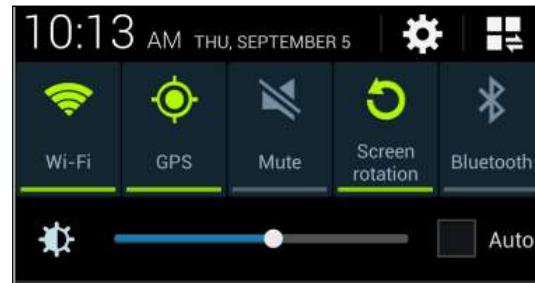
Figure 3 12

Next, tap on the *More* tab. This is located in the top right hand corner of the screen.
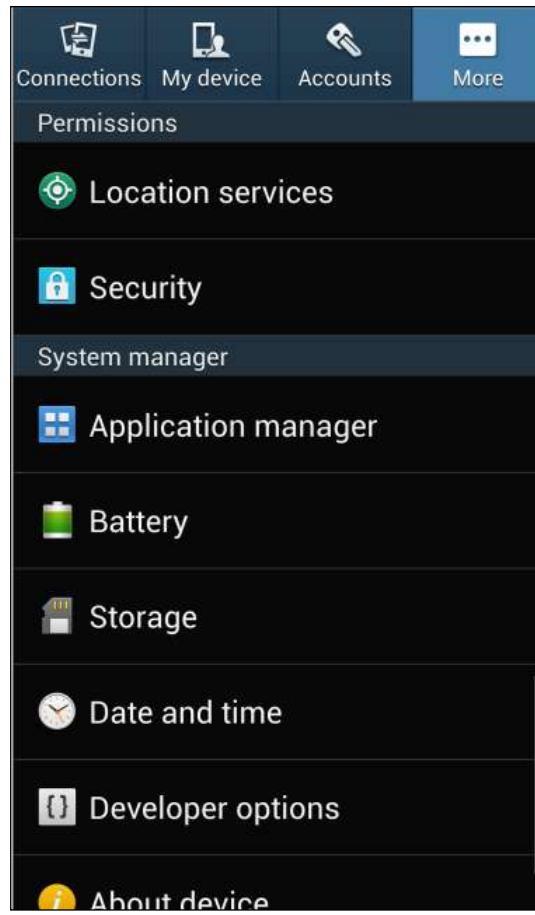
Figure 3 13

Now, select the *Security* option located on the screen. Then, scroll down and locate the *Unknown Sources* checkbox.
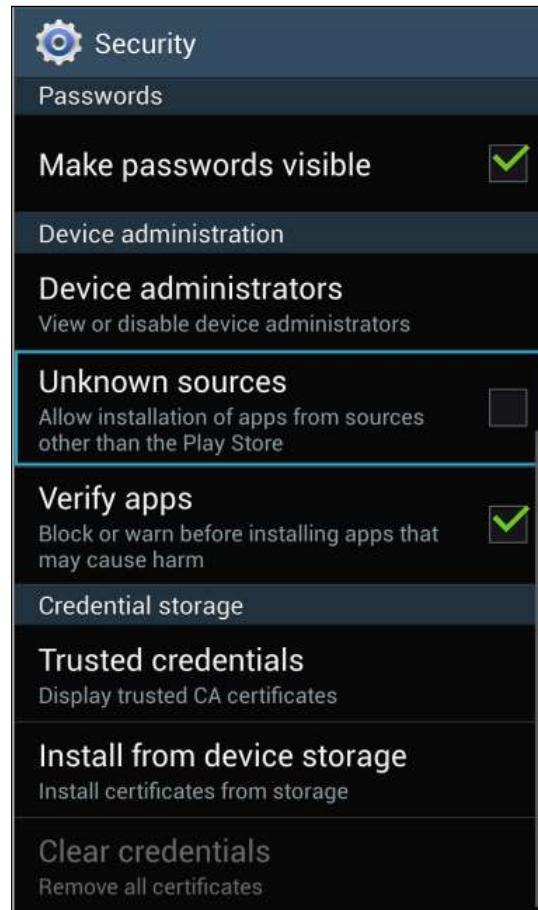
Figure 3 14

Tap the box on the right to place a checkmark in the Unknown Sources option, which will enable this feature and display the following warning.

Figure 3 15

Select the *OK* button to continue. Then you may exit the *Security Settings* by pressing the *Home* key on your device.

Downloading the Application

First, you will need to locate the Internet Browser on your device. See Figure 3 16 with the black arrow pointing to *Internet*.
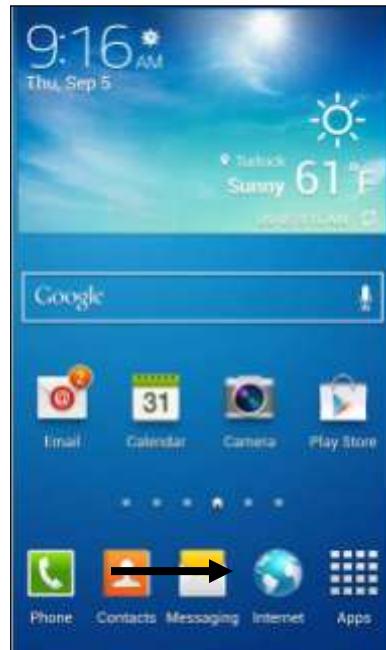
Figure 3 16

Once your browser has opened, you want to tap in the Address Bar at the top of the screen so you can input a new website address for the *Installation Web Server*.

Figure 3 17

Next, enter the following address into the Address bar:

SH003.ARS247.com:46001

Figure 3 18

After typing in the address, select the *GO* button on the keyboard.

You should receive a notification on the bottom of the screen that the Download has started as shown in Figure 3 19.

Figure 3 19

Next, open the *Notifications* screen by swiping DOWN from the top of the device.

Notice under the *Notifications* section that *MangoMobile-Aligned.apk* has been downloaded.

Figure 3 20

Next, tap on the MangoMobile-Aligned.apk notification to start the installation process.

NOTE: If you are prompted with the following security message, you will need to go to *Appendix A* and *Allow Installs Outside the Play Store* section below. See Figure 3.21.

Figure 3 21

The first screen of the installation process will inform you what Privacy settings and Device settings the application will have access to. Select the *Next* button to continue.
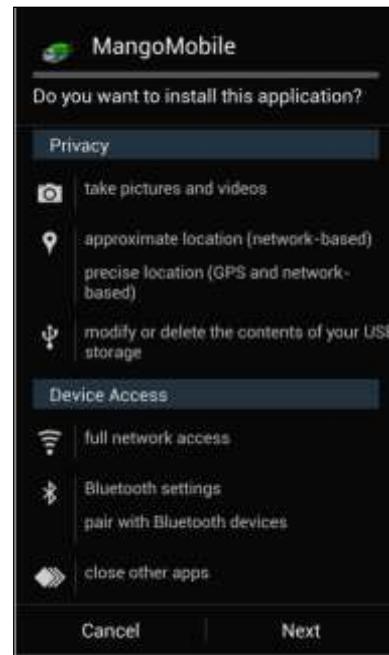
Figure 3 22

Once you have approved the Privacy and Device Access requirements, select the *Install* button located on the lower right corner.
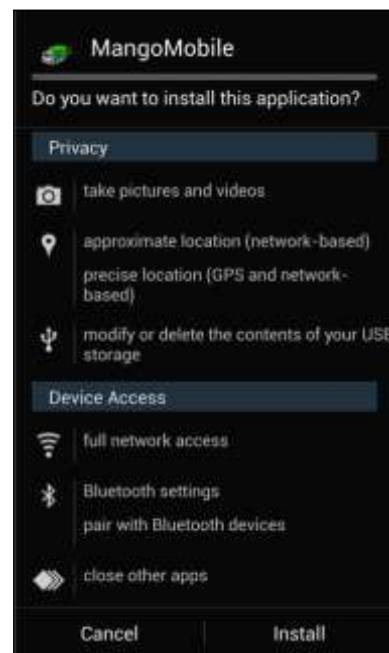
Figure 3 23

The device will now begin the Installation process:
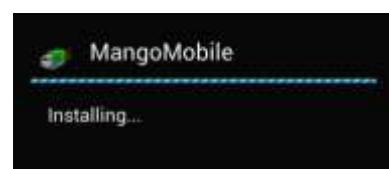
Figure 3 24

Once completed, you will be prompted with the following screen. Select *Open* to open the application.

Figure 3 25

Since this is a fresh installation, you will be prompted first to let you know what your device does not have any route information on it.

Downloading the First Route

After installing the application, you must first download a route to the device. Select the *Yes* button to continue to the Transfer Parameters screen.
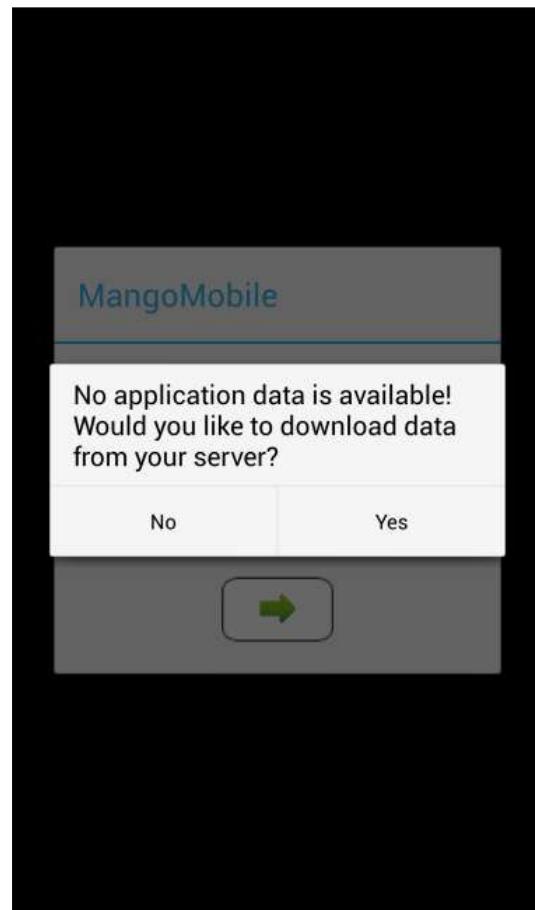
Figure 3 26

On the Transfer Parameters screen, you will enter the Advanced Communications Server address as defined in Route Manager under *List, Routes, Handheld Class, GPRS tab*.

Figure 3 27

After the settings have been entered, select the *Done* or *Save Settings* button on the keyboard.
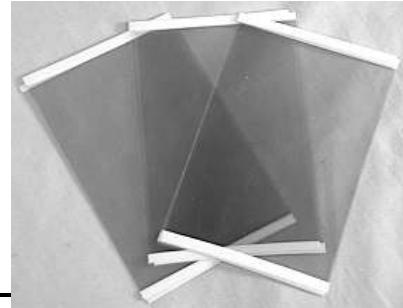
Figure 3 28

Next, the *Transfer* screen will appear. Select the *Change Route* button so that you may define which Route you would like to download:

Figure 3 29

In this example, you will use Route 1 to download to your device. After typing in the Route, select the *Done* key on the keyboard to continue.
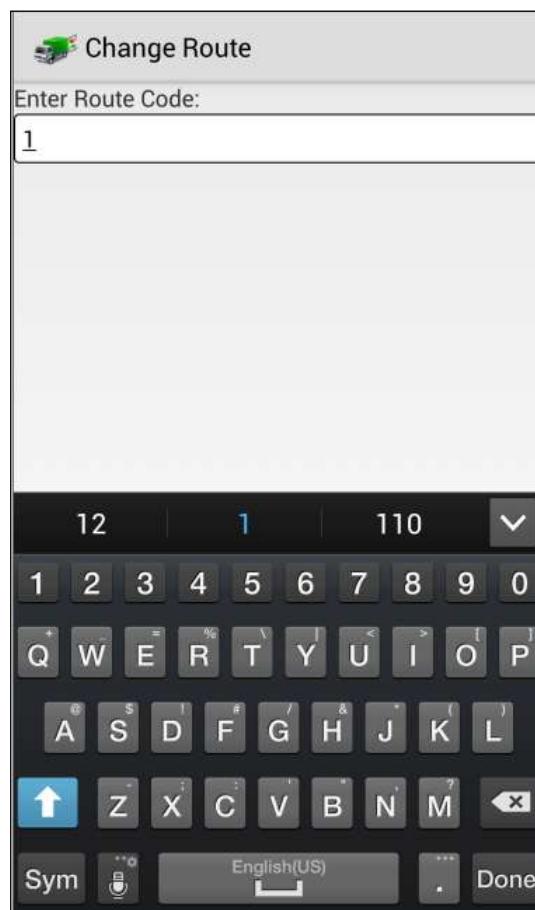
Figure 3 30

That will then close this screen.

Back on the *Transfer* screen, select the *Begin Transfer* button to request the route be made by the Advanced Communications server and be sent down to your handheld.
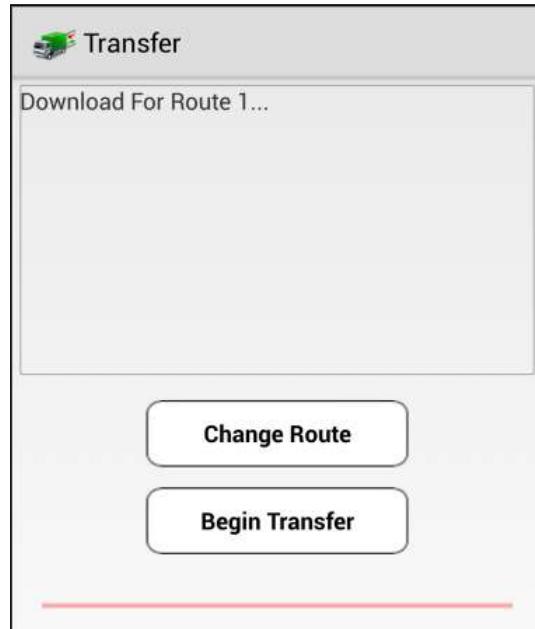
Figure 3 31

You will see the status of the transfer in the transfer box.
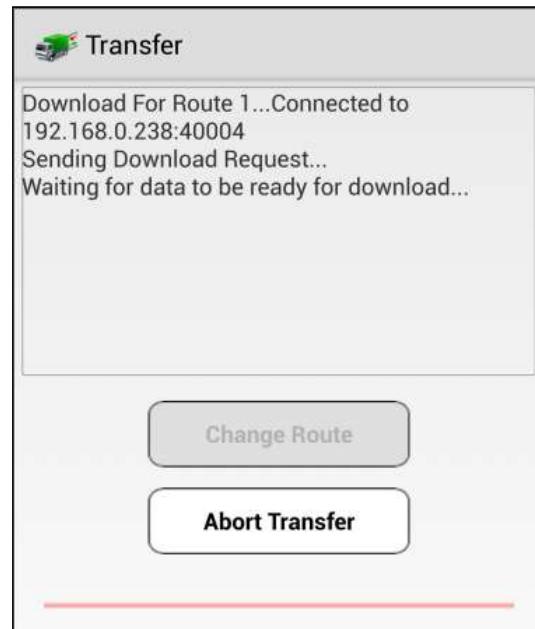
Figure 3 32

Once completed, you should be taken to the *Login* screen for the Route you chose.

Figure 3 33

This completes the install of the Route Manager Android Application.

Summary

With the installation complete, you are now ready to start using the software. You will have a route on the handheld that you can play with. If you upload your practice data, be sure to erase it on your desktop.

If you need any help during the installation, please contact your ARS Support professionals who will assist you in getting started. You can reach them at: Support@AdvantageRS.com

Chapter 4 – Handheld Software

Introduction

This chapter will help you successfully operate your handheld device. The order of the material shows what your route drivers would follow in a normal daily process. The various screens will display what the drivers should see on the handheld as they load their trucks, do their stops and complete their day end reports.

Restarting the Handheld Computer

If the handheld computer freezes or becomes locked on a screen, you may need to restart your handheld computer. A restart will vary by make/model of the device. Generally, you can hold down the Power button for a few seconds to pop up the Power Options. You may need to refer to your devices Owner's Manual for more information about this procedure.

Soft Reset: Allows you to reset your handheld if the unit is stuck on a screen.

Hard Reset: Allows you to reset the handheld back to the manufacturer's specifications (removes programs, data, etc.).

Refer to your original handheld's documentation for details on how to perform a *Soft Reset*.

If you continue to have problems it may be necessary to perform a *Hard Reset* which will also be listed in your handheld's documentation.

NOTE: A *Hard Reset* may cause loss of Sales and other important Data! Only do this if you are sure there is nothing valuable on the device.

Starting RMA

The first time you launch RMA, a Driver Login screen similar to the following will appear:

Before accessing the *Main Menu* screen, you will be prompted to log in:

Figure 4 1

Name: The name of the driver assigned to this route will appear in this field by default. To select a different driver, tap on the arrow next to the driver's name and select the correct driver from the available list.

Password: Use the on-screen keyboard to enter the password. For security purposes, as you type your password, the digits will appear as asterisks on the screen.

If a mistake is made, press the backspace key on your keyboard. Tap the **Green Arrow on the screen or the Login/Done key on the keyboard** to log in. If you were not assigned a password, simply press the **Login** button to continue.

If you have not entered the correct password, an error message will appear:
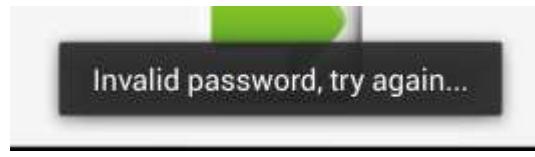
Figure 4 2

Passwords are assigned by your administrator on the desktop. Assign a password under *Lists>Employee Setup> Employees*, on the *Information* tab.

Main Menu Screen

The *Main Menu* screen provides access to all of the features within the handheld program. As you complete each function, you will return to this menu to make another selection.

Figure 4 3

There are nine options available on this screen. Each button will be explained in detail throughout this chapter.

1. Route Input	2. Truck Status	3. Truck Load/Unload
4. Sales Notes	5. Route Sequence	6. Mapping Functions
7. Future	8. Utilities	9. Exit Program

1. Route Input

The most extensive area of the system is accessed through the *Route Input* key. This feature allows you to:

- Sell items to customers.
- Look at the customer's stop information; including, bottles on hand, date started, etc.
- Review a customer's purchasing history.
- Delivery to off-route customers.
- Give a reason for not making a delivery.
- Receive payments from your customers.
- Perform other helpful operations and functions; such as, collect credit card authorization information.

Stop Selection Screen

After pressing the *Route Input* key on the *Main Menu*, the *Stop Selection* screen will appear.
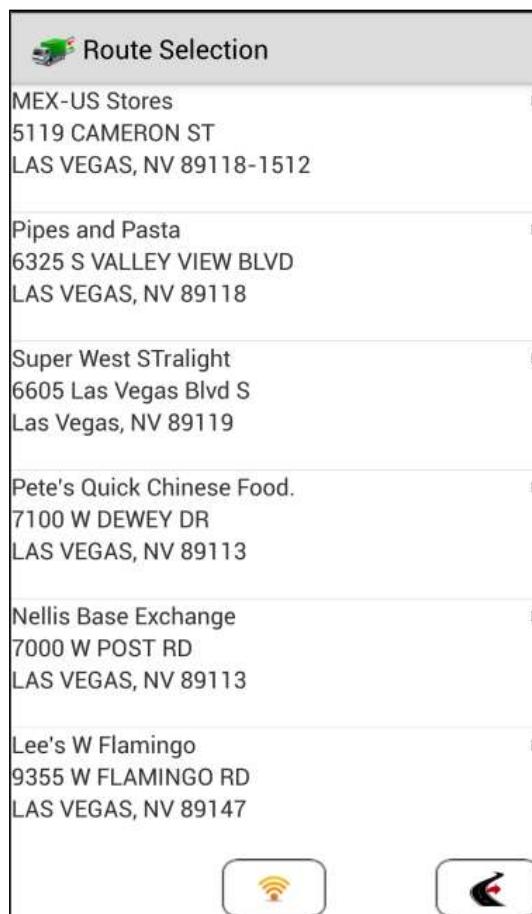
Figure 4 4

This screen allows you to:

- Choose an on-route customer to service.
- Service an off-route customer.
- Sync RMLive (Optional Module)

Each option is described below.

On-Route Customers

If you touch and hold your stylus over a name for about 2 seconds, complete address information will appear on the screen (below).

Figure 4 5

A small asterisk on the far right side of the account denotes that this customer normally needs a receipt when making a delivery. Do not leave your printer in the vehicle when servicing this type of account.

Figure 4 6

To return to the Main Menu at any time, tap the **"Back"** button on your device.
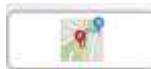
Alert/One Time Messages

If you select a customer with an *Alert* or *One Time* (valid during the dates of your delivery) message, a screen similar to the following will appear:

Figure 4 7

This screen allows you to:

Take Me There: Select this option to transfer the customers address over to your Android Navigation software for Turn-by-Turn directions.

Continue: Proceed to the Quick Entry screen to input sales information.

Load Verification

If you select a customer and the option 'Load Verification Required' has been enabled on the desktop, you will be forced to complete a *Morning Load* process before you can continue. This option is covered in detail later in this manual.
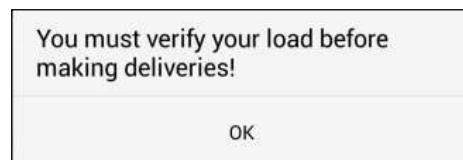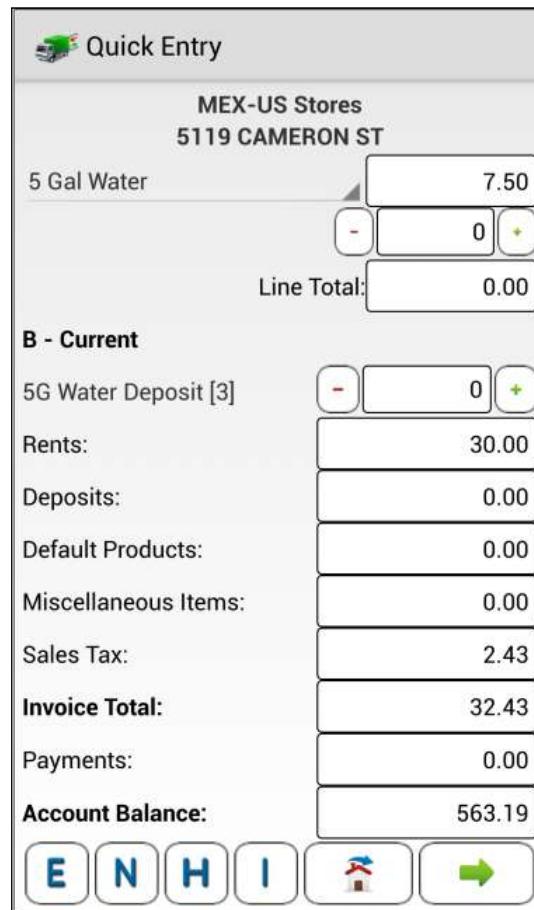
Figure 4 8

Quick Entry Screen

The *Quick Entry* screen is displayed after you tap on any customer on the *Route Input* screen.

This screen has many "hot areas," or keys. When these keys are touched, a pop-up screen will appear. Within this section, all "hot areas" will be identified with an asterisk (*) following each title.

Figure 4 9

Customer Name/Address

The customer's name and address is displayed at the top of the screen. This helps you to identify the location where the delivery should take place.

Default Products

The *Default Products* section allows for quick access to products that the customer purchases on a regular basis.

Figure 4 10

The *Default Products* section is composed of four different areas:

- Default Product List
- Price Field
- *Quantity Field*
- *Line Total*

Default Product List *

From the drop-down list, you can access a list of items purchased by customers on a regular basis. This list contains all of the products set up for the customer on the desktop under the *Products* tab of *Customer Information*.

Default Products Price*

The default price for each item is listed next to the product description. The price can be changed if the 'Allow Price Overrides' option is selected on the desktop.

NOTE: To enable price overrides go to *Lists>Routes>Handheld Class*, on the *Sales Rules* tab choose the option 'Allow Price Overrides.'

Pressing the displayed price will pop-up the following screen that allows you to adjust the price. Any price changes will appear on the *Exception Report* at day-end.

Figure 4 11

Gratis Key

The *Gratis* key allows you to give away products to your customers at no charge. 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.
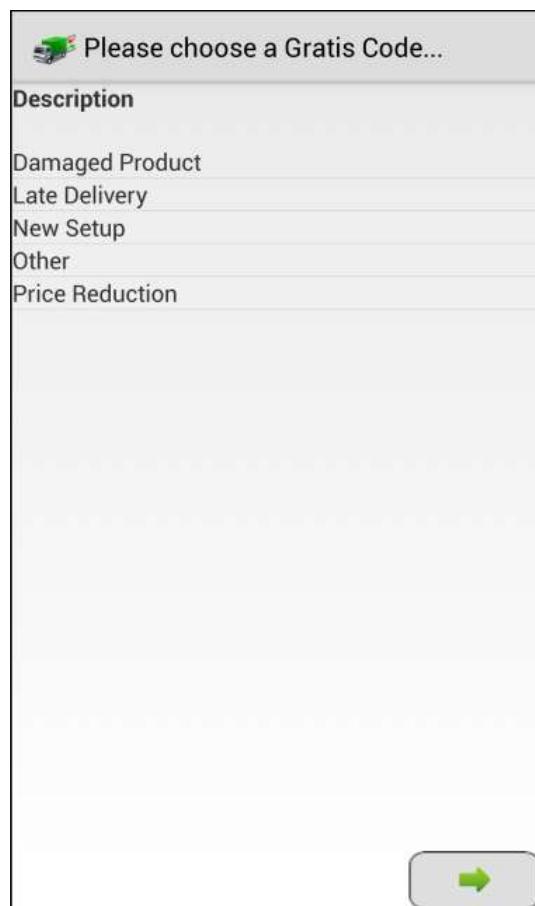
Figure 4 12

NOTE: Gratis will only be available on products that have the option 'Allow for Gratis' enabled under *Lists>Product Codes>Product Charge Codes*, on the *Info* tab.

At the end of the day, all *Gratis* activity will appear on the *Exception Report within your Route Manger Desktop*.

Default Quantity*

For each product, the default number of units is displayed below the price. To increase the number of products to be delivered, press the top arrow until the correct quantity is displayed to the left of the spinner. To reduce the quantity sold, press the down arrow of the spinner until the correct amount is displayed.

For small quantities the spinner is a fast and easy way to enter a quantity. When selling large quantities, the keypad shown can be used. To access the keypad, tap on the *Quantity* field.
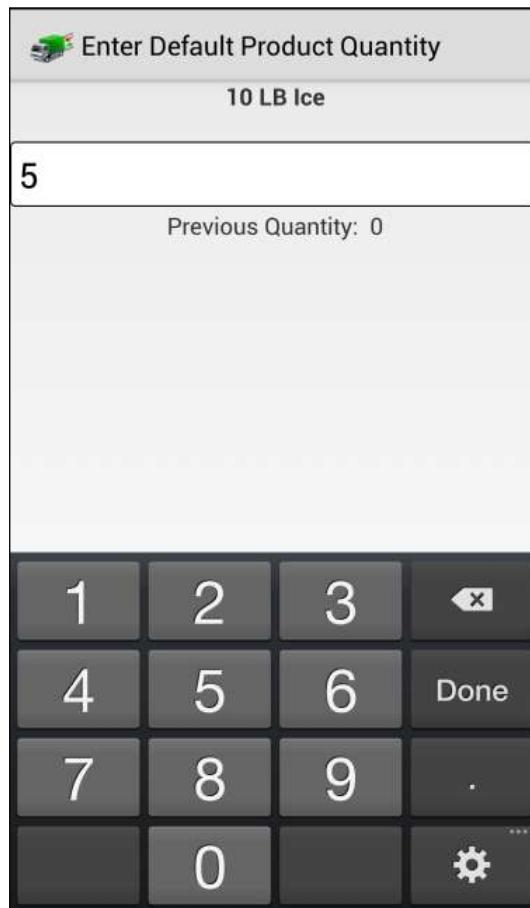
Figure 4 13

After entering the desired quantity, press the green arrow key to return to the *Quick Entry* screen.

Line Total

The *Line Total* in Figure 4-14 displays the total dollar amount of the sale for each product. This is the quantity multiplied by the price.

Figure 4 14

Account Status (Current, COD, Past Due or Hold Service)*

Pressing on the Account Status will access extended customer account information similar to that displayed in Figure 4-15 below.

Delivery Tab

The *Delivery* tab contains 'Product on Hand' information, as well as delivery contact and phone number info.

Figure 4 15

NOTE: The *Shopping Cart* option allows you to print a preliminary receipt for the customer prior to saving the invoice — this can be helpful for customers that request a print-out before making a payment or accepting the goods.

Billing Tab

This area provides customer specific information. This section is read only and cannot be modified. The *Billing* tab contains the account number, balances, and dunning message options.

Figure 4 16

Open Invoices Tab

The *Invoices* tab displays all of the open items on the customer's account. This information can be viewed and printed, if necessary.

Figure 4 17

NOTE: *Open Invoices* are not displayed on the handheld by default. To enable this feature, select 'Send Open Invoice Detail to Handheld' under *Lists > Routes > Handheld Class*, on the *Finance* tab.

Stats Tab

The *Stats* tab contains water analysis information available under *Customer Information > Route*, on the *Site Stats* tab. This will be available in a future release.

Bottle Return Title*

By touching this area, you may toggle between the established bottle return labels. If five-gallon bottles are being displayed and three-gallon bottles are being returned, tap on the words: *5 GAL returned*. This will display the description of the alternate bottle returned.

NOTE: The descriptions mentioned may not match what you have in your system. If there is only one bottle type defined, the spinner label function will be disabled. These labels are established in your desktop software under Lists > *Products* > *Deposit Types*.

Bottle Return Quantity*

As with default product quantities, you can use the spinner's up and down arrows to increase or decrease the quantities or you may also enter a quantity using a keypad.

For an even exchange, the number displayed in the box to the left of the spinner needs to be the same as the number of bottles being delivered.

If the number of bottles being delivered exceeds the number of empty bottles returned by the customer, then the system will automatically bill the customer for the difference. If the number of empty bottles picked up exceeds the number of bottles delivered the system will automatically credit the customer for the additional empty bottles.

To enter a large number for bottles returned, touch the quantity field to bring up the keypad, as shown in figure 3-18.
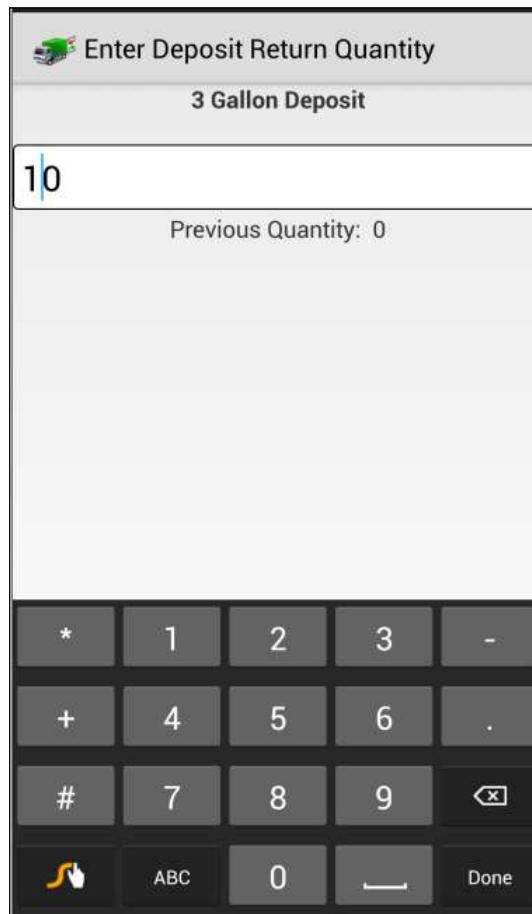
Figure 3-18. Enter Quantity

When you have entered the correct quantity, press the green arrow key to continue. The (-) key can also be used if a negative entry needs to be entered.

*Rent**

The rent line displays the rent amount due for the current customer. Handheld generated rents are automatically added on the first delivery of the month. Even when a customer is skipped, the system still generates the rent charge unless the charge is manually removed.

NOTE: Check the *Statement Billed* option within each piece of equipment to generate rent on the desktop. If the above option is left blank the rent will be charged via handheld invoices.

At times it may be necessary to remove a rent charge, i.e. when skipping a customer. To accomplish this, tap the RENT label and the Rent screen will display all rent charges assigned to this customer. Select the rent charge that needs to be removed and touch the REMOVE RENTS button at the left bottom corner.

When a rent is removed, it will automatically appear again on the customer's next delivery until the charge has been completed for the billing period.

NOTE: To allow drivers to remove rental charges, the option *Allow Rent Charges to be Removed* must be checked under *Lists, Routes, Handheld Class* on the *Sales Rules* tab.

Deposits Line Total

The *Deposits* line shows the total *Bottle Return* amount. This is calculated by multiplying the bottle quantity by the *Bottle Deposit* price for each bottle deposit type. This is a grand total of all bottle deposits being charged to this customer.

Deposits:	-50.00

Miscellaneous Items*

The MISC ITEMS key is used to sell a customer additional products not available on the Default Products list. You can sell almost any items included in your company's inventory - except for deposits and Redemption value items.

Note: Only products marked as Handheld Products will be available.

Figure 4 18

To add products, choose the ADD button.

A new window with a list of available products will appear - similar to Figure 4-19.

Code	Description	Price
050	5# Bag Ice	0.41
080	8# Bag Ice	0.65
100	10 LB Ice	1.50
120	20 LB Ice	3.50
130	Snow Ice	3.00
140	Refreshe Premiun Beverage Ice	0.00
150	7lb Bag Ice	0.00
160	4-7# Bags Ice	0.00
170	5-7 lbs Bags	0.00
175	6-7# Bags	0.00
180	10LB Block	1.90
190	40# Ice	4.50
200	300 Block	40.00
205	5 Gal Water	6.50
210	16oz Bottle Water Case	5.50
215	1 Gal Water 3 ct	0.00
217	6 One gal water	0.00

Figure 4 19

You can also search for items in the list by selecting the *Search* button on the bottom of the screen.

You will be able to search by Product ID or Description.
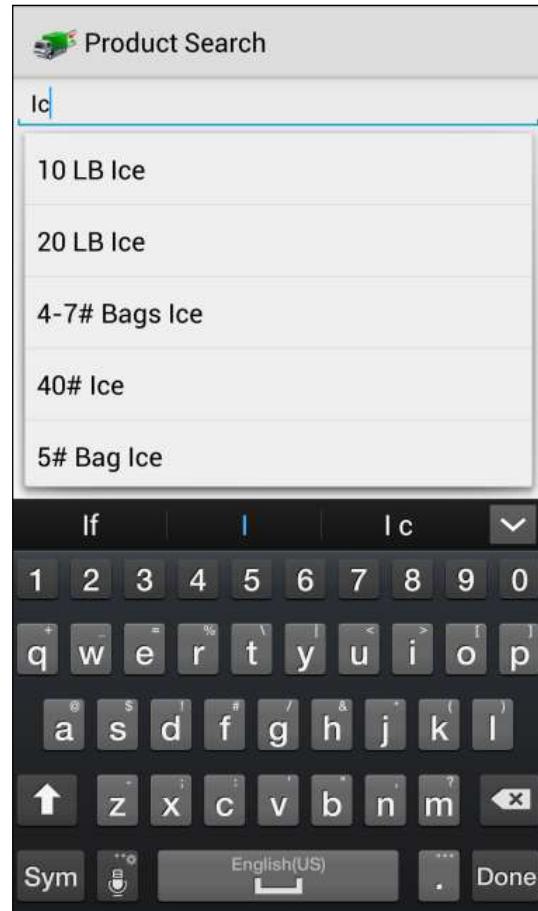
Figure 4 20

To sell an item, select it from the list and a keypad window will appear for you to enter the quantity and price information (as shown in Figure 4-21).

Figure 4 21

To enter a quantity, press the Quantity box and use the keypad to enter the correct number of units. By default the system will determine the correct price. If there is a need to modify the price, tap on the Price box and use the keypad to enter the correct amount. To continue the process of adding this product, choose the Save or Save More button.

As with any other keypad you can use the backspace key to erase entries, and the *Back* button to cancel out of the screen.

The system will take you back to the Add item screen to add additional items.

Invoice Total

The *Invoice Total* is for *Default Products, Rents, Deposits, Misc. Items* and *Sales Tax* combined. This is updated each time any item is changed on the Quick Entry screen.
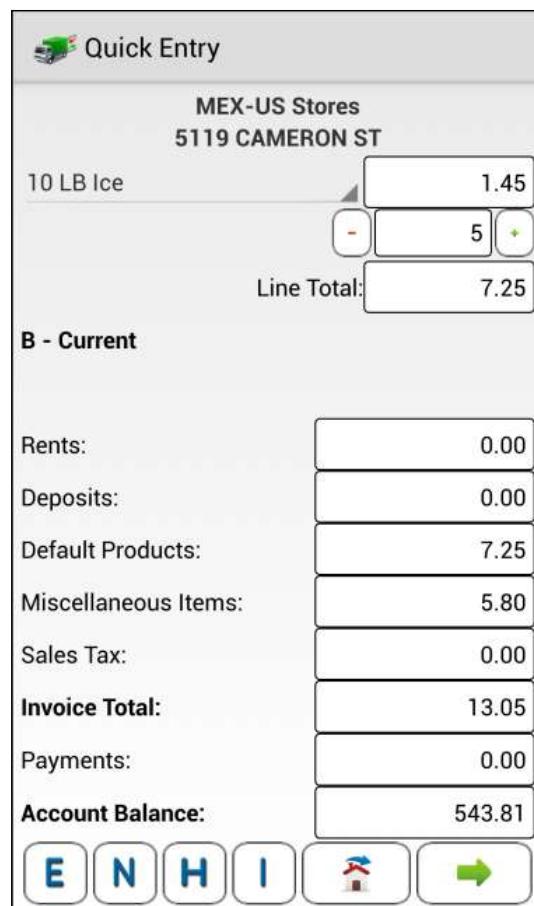
Figure 4 22

Payments *

While on route, you may receive payments for a delivery or for an existing balance. To receive a payment on the Quick Entry screen, press the *Payment Received* label or amount and the screen shown in Figure 4-23 will appear.
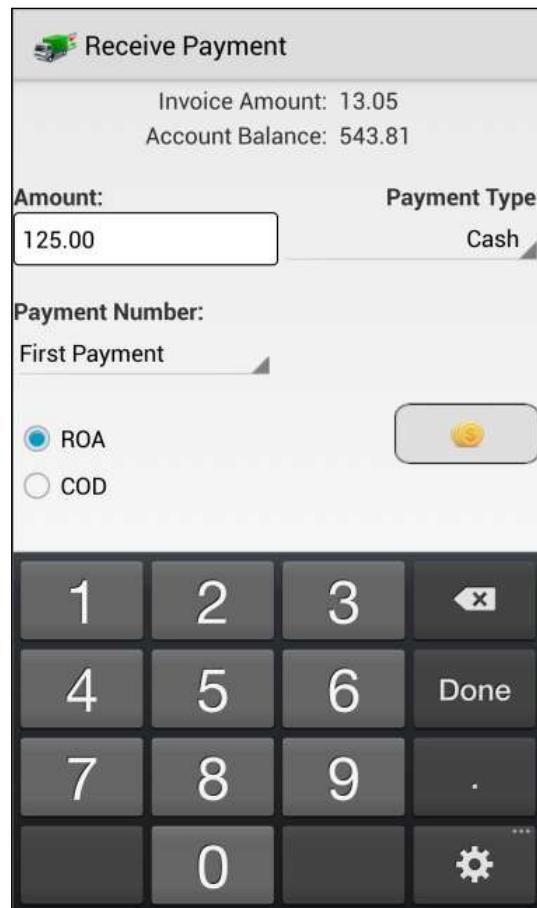
Figure 4 23

RMA accepts cash, checks, credit cards and coupons as payments methods. Aside from accepting different types of payments, up to 3 distinct payments can be entered on a single invoice.

You can also specify if this payment is designated to payoff this invoice directly by choosing Cash On Delivery (COD). If the payment received will be applied against the account's total balance or previous transactions, this is referred to as Received On Account (ROA).

Amount: Enter the payment amount.

NOTE: Select the *Invoice Amount* or *Account Balance* on the top of the payment screen to select those amounts automatically.

Payment

Payment: Select whether the payment entered is your *First, Second, or Third Payment*. RMA will allow you to have up to three different payments. Each payment can be of a different type: cash, check, etc.

ROA: Select RECEIVED ON ACCOUNT (ROA) if this payment is going towards previous invoices. If you prefer *ROA* as the default, check *Default Payment Type to ROA* on the desktop under *Lists > Routes > Handheld Class > Sales Rules*.

COD: Select CASH ON DELIVERY (COD) if this payment is being applied to the invoice that is being created on the handheld. The COD in this area will allow you to continue even though the invoice has not been paid in full. If the payment for this invoice is more than the invoice amount, the excess will need to be applied to another invoice after the data has been uploaded.

Account Balance

Once the *Quick Entry* screen is complete, you will receive an accurate *Account Balance* (as long as everything was posted to this customer's account before the data was transferred to the handheld during the data load from host.

This section describes the row of keys at the bottom of the Quick Entry screen.

E *Change Equipment*

You will find the EQUIPMENT key at the bottom of the screen represented by an E on the *Quick Entry* screen. This will allow you to view, deliver, service, or pick up a piece of equipment from a customer's location.

NOTE: Before equipment can be installed, equipment must be loaded on the truck. If this is not done, you will only be able to view or pick up equipment from a location. Refer to *Load/Unload Truck* for further information.

Swap Equipment

The driver can first select an already installed piece of equiment, then choose the swap button to exchange the selected equipment with a piece of equipment from the truck.

Add Equipment

By selecting the Add Equipment button, the driver will be able to choose from the list of available equipment on the truck and add it to this account.

Remove Equipment

To remove a piece of equipment from an account, select the item to be removed then tap the Remove Equipment button.

[N] *Sales Notes*

The *Sales Notes* feature, shown in Figure 4-24, allows the route driver to create and save a note on the handheld and later transfer it to the desktop. Enable this option under *Lists, Routes, Handheld Class*, on the *General* tab.
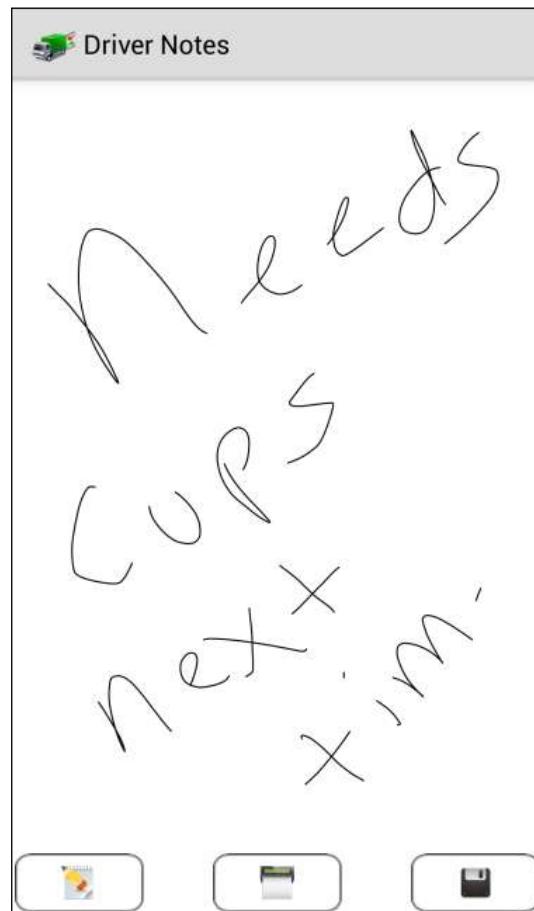
Figure 4 24

This screen is used to generate a note or reminder about the customer being serviced. Typically, there are three main reasons to write notes.

1. Generate a reminder for the route driver. "Bring two cases of 1.5 liter on next delivery".

2. Generate a note to the customer. "Account needs payment before next delivery".

3. Create a message to office staff. "Change phone number to 555-1873".

Use the stylus to write a message within the box on the screen. If you make a mistake, press the CLEAR key to re-start the process. To print the note, press the PRINT key and a copy of the screen will print immediately. The printout includes the customer's name, account number, stop number, etc.

Press the SAVE key, to have the note written onto the storage card for transfer to the desktop at day-end. A copy of the note will not print to the printer.

To exit without saving changes, press the *Back button* and you will return to the *Quick Entry* screen.

NOTE: When the card is uploaded, *Sales Notes* are stored within each customer's *Contacts* tab on the desktop under *Lists*, *Customer Info.*

H History

The HISTORY key represented by an H, allows you to view a recent history of a customer's purchases. Depending on your implementation, the history may include the following:

- Sales made on previous visits.
- Payments made before today's delivery.
- Adjustments made to the account.
- Reasons for not taking deliveries on previous visits.

This data is accumulated on both the desktop and the handheld. The number of days shown on the handheld is adjustable and is set in *Lists, Routes, Handheld Class,* on the *General* tab.

The *Sales History* screen is shown in Figure 4-25.

Figure 4 25

If necessary, scroll up and down through the history by using the scroll bar.

After viewing or printing the history, press the *Back* button to return to the *Quick Entry* screen.

I *Instructions*

The INSTRUCTIONS key, as shown in Figure 4-26, displays *Alert Messages*, *One Time Messages, Driving Site-Instructions*, and *Driver Directions*. These messages can be helpful tools to remind you of important matters.

Figure 4 26

Each of these messages is entered and maintained on the *Desktop* under *Lists, Customer Information,* on the *Route* tab.

Skip

The SKIP key allows you to skip a stop and keep a record of the reason the stop was skipped. The *Skip Reason* screen is displayed below in Figure 4-27.

Code	Description	Drag
900	Closed	
905	No Money	
910	Out of Ice	
915	Not Needed	
990	Other	
195	No Items Needed	
920	Refused Order	
410	Equipment Repair	

Figure 4 27

A skip reason followed by an * in the Drag Column means a customer will be dragged to the next delivery day. In order to set up a skip reason marked to drag, *Drag Code* needs to be checked under *Lists, Product Codes, Handheld* tab before the *Morning Card* is loaded into the handheld computer.

All skip reasons appear on this list from *Product Charge Codes* that have a *Product Class* of "9".

NOTE: When a customer is skipped, the default products are ignored but rent will still show as being charged. Rent can be removed. Refer to the rent options detailed earlier in this chapter.

➡️ *Save*

The SAVE key allows you to save accumulated information for this invoice. You must press this key before finishing the invoice. If you want to leave this stop without saving the data, press the *Back* button.

Confirm Sale

After pressing the SAVE or the SKIP key on the previous screen, the *Confirm Sale* screen shown in Figure 4-28 will appear. The purpose of this screen is to finish the invoice and permit you to confirm or make changes to the invoice being created.

If you would like to change the configuration of this screen to only show buttons used by your delivery people you may do so. These are defined on the Route Manager in *List, Routes, Handheld Class* and located on the *Screen Rules 2* tab.

Figure 4 28

Default settings for the *Confirm Sale* screen are set for each customer on the desktop under *Lists, Customer Information, Route* tab, *Handheld Options*. The defaults include; Suppress Balance, Signature Required, Remittance Stub, Suppress Prices on Invoice, Group Area Code, and Invoice Copies.

All options available on the *Confirm Sale* screen are explained below.

 Shopping Cart

The SHOPPING CART screen shows a list of all items sold to this customer on this invoice. It can be reviewed for accuracy before printing the invoice. Likewise, if there are mistakes, you can return to the invoice and add or delete products if you need to.

Figure 4 29

To change any information on this screen, you must modify the invoice through the *Quick Entry* screen. To return to the *Quick Entry* screen, press the *Back* button (to exit the shopping cart) and then the *Back* button again. The customer's original invoice will appear allowing you to modify the invoice.

 Purchase Order

This option allows the driver to enter a one time Purchase Order to be printed on the receipt.

 Camera

This option allows the driver to take a picture utilizing the built-in camera and store the picture on the user's account (on the desktop) for future review.

Mileage

This option allows the driver to capture the truck mileage at each stop. This can be an optional feature or be turned on in *Handheld Class* to force it on each stop.

Ticket Number

This option allows the driver to manually enter a Delivery Order Ticket Number so the order is closed with this invoice. This is useful for when an order is given to a driver while out on route and the driver services the account using the Off Route list.
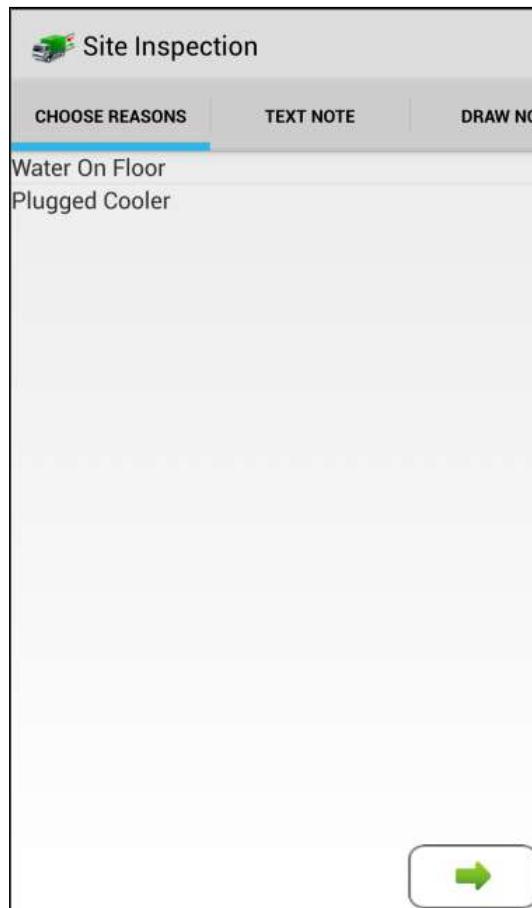
Capture GPS Location Button

This option allows the driver to capture this stops GPS coordinates and store the coordinates on the customer's account for future use.

Site Inspection

This option allows the driver to enter a Site Inspection reason on the handheld for displays, equipment, etc. These items can be setup under *Lists, Routes, Site Inspection Reasons*.

or Signature Required

Initially, this button will be displayed as either GREEN for *Signature Required* or RED for *Signature Not Required,* depending on the desktop setting. If you decide at the time of delivery that a customer should sign for a product they are receiving but their account does not require a signature, press this key until SIGNATURE REQUIRED is displayed. You can then capture the customer's signature. You may also touch the screen to remove the signature requirement for this delivery (if allowed in Handheld Class).

 Meter

Coming Soon.

 PAR

Coming Soon.
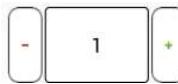
 Payment Discount

Coming Soon.

Next

The PROCEED key allows you to go on to print an invoice, capture a signature, or return to the *Stop Selection* screen. The output will vary based on the options chosen.

Number of Copies to Print

The SPINNER key allows you choose from "0" to "9" invoice copies to print. You may also select "Receipt," which will print one invoice with no pricing information so it can be used as a delivery ticket. The default number of copies from *Customer Information* is automatically included so you know what is normally required for this customer. To change the number of invoices to be printed, press the spinner arrows until the desired number appears.

NOTE: Changing the number of invoice copies to print has no effect on the permanent customer information located on the desktop. If the number in the spinner window needs to be permanently changed, make a note to your office personnel.

Capture Signature

When a customer's signature is required, the following screen, as shown in Figure 4-30, will appear so you can capture the signature after you press the PROCEED key.

Figure 4 30

Have the customer sign in the box shown above. Anything written outside the box will not be captured. Have the customer hold the handheld computer so they can read *Please Sign Above* in the right direction. This is intentional so that the customer can easily sign the screen without touching buttons on the device. If the customer makes a mistake and needs to sign again, press the CLEAR key.

NOTE: Signature options are available within each account on the *Route* tab, under *Handheld Options*. Global signature options are found under *Lists, Routes, Handheld Class,* on the *Sales Rules* tab.

Save

Selecting this key will print the number of invoices specified in the *Number of copies to print* field on the *Confirm Sales* screen.

Print a receipt

During the printing process, your Android device will look for a Bluetooth printer to connect to. If it has not been paired previously, then you will see a dialogue box like this, which displays previously paired devices and new (unpaired) devices within Bluetooth range:

Bluetooth Devices		
Paired Devices		
AB-330M	00:1F:B7:07:11:4E	1f00
XML8150	00:00:00:00:B0:2C	240408
New Devices		
Receipt Printer	00:17:AC:11:98:69	40680
AB-330M	00:1F:B7:07:11:4E	1f00
	00:23:4D:EA:6C:15	1f00
DWK-RED	00:22:5F:0B:19:C2	3e010c
	00:26:5D:85:B7:26	5a0204
WOOSIM	00:15:0E:E0:C3:63	40680
AB-330M	00:1F:B7:04:EC:42	1f00

Figure 4 31

Simply select your printer from either list to proceed.

Otherwise, If you have previously paired your device, then your receipt will print immediately.

If Bluetooth is Disabled, you will receive a box such as this:

Bluetooth is currently disabled. Press 'Ok' to go to Bluetooth Settings. Once Bluetooth has been enabled, press the BACK button to return to Route Manager and choose a printer.

Ok
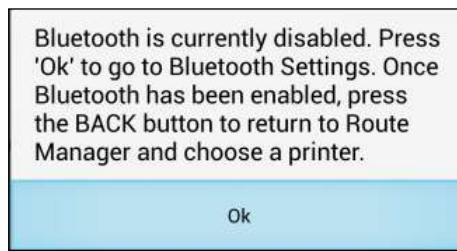
Figure 4 32

Select the OK button to be taken to the Bluetooth Settings screen on the device. Then turn on Bluetooth.

Once on, select the *Back* button to return back to Route Manager.

Figure 4 33

Once back in Route Manager, you will be presented with the Bluetooth Devices screen previously mentioned above.

After an invoice is printed, a box appears allowing you to reprint the receipt if necessary. You may select YES to reprint the receipt as many times as needed, or NO to return to the *Stop Selection* screen.

In addition, should you want to stop the printing of the receipt, you can do so by touching cancel on your screen.

A sample of the printed receipt is shown in Figure 4-34.

Advantage
ICE

3201 Liberty Square Parkway
Turlock CA 95380
www.AdvantageIce.com
Phone 209-632 -122

Invoice # 134948
Tue, Sep 10 2013, 11:03AM
Driver: Vince
Rte-Day-Stop: 1-W05-0010

Account # 000589
MEX-US Stores
5119 CAMERON ST
LAS VEGAS NV 891181512
702-876-8082

Item	Qty Price	Amount
10 LB Ice	50 @ 1.45	72.50
20 LB Ice	10 @ 1.45	14.50
10LB Block	2 @ 1.45	2.90
Sales		89.90
Subtotal		89.90
Sales Tax		0.00
INVOICE TOTAL		**89.90**
Previous Balance		530.76
	(Ck #2544)89.90	

Account Balance   530.76

Last Amount Paid: 500.00 (7/6/2013)
Customer Aging:

Current	:	0.00
31 - 60	:	0.00
61 - 90	:	-389.25
91 - 120	:	0.00
121 - 150	:	0.00
150+	:	920.01

Received By:

Joe Sample

Mex-US, we truly appreciate your business!

Next Delivery: 9/12/2013
Thank your for choosing Advantage Ice

Figure 4 34

If no invoice copies need to be printed, press the Continue key to return to the *Stop Selection* screen.

This completes the normal procedure the driver will follow for making a delivery. The following sections of this chapter describe other functions that can be performed on the handheld.

RMLive Force Sync (Optional Module)

RMLive relies on the *Advanced Communications Module* which will allow the system to use General Packet Radio Service (GPRS) transfer methods or an available Wi-Fi hotspot from your driver's device in the field to transfer data to-and-from the desktop. This allows the driver to instantly download *Delivery Orders*, messages and upload completed invoices while out on route.

Please contact our sales team for more information about this optional module.

Off-Route

Press the OFF-ROUTE key to sell products to a customer who is not on your regular delivery today. The *Off-Route* screen, shown in Figure 4-35, will appear:

Figure 4 35

Each of these options is described in detail.

Name

The following screen shown in Figure 4-36 appears when you press the NAME key:
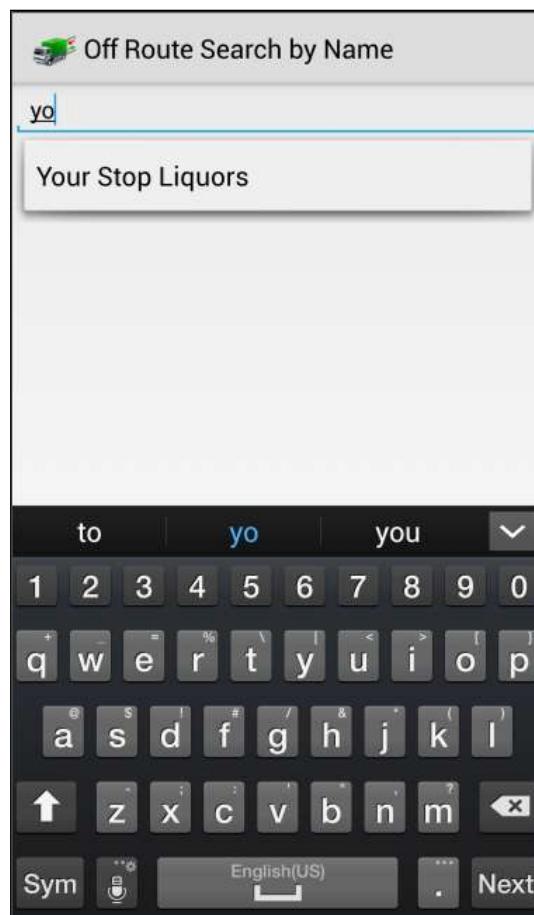
Figure 4 36

Enter a few characters of the customer name and the system will automatically pre-populate the list below with matches. Simply select your match from the list OR press the *Search* key on the keyboard to search for all matches.

Try to key in as many letters as possible to narrow the search if you have a large customer base.


YOSEMITE CHIROPRACTIC
154 S YOSEMITE BLVD. [SUITE C]
OAKDALE, CA 95361

YOSEMITE LAND BANK
345 W LAS PALMAS AVE.
PATTERSON, CA 95363

YOSEMITE SELF STORE CYPRESS
117 CREEKWOOD DR.
MODESTO, CA 95357
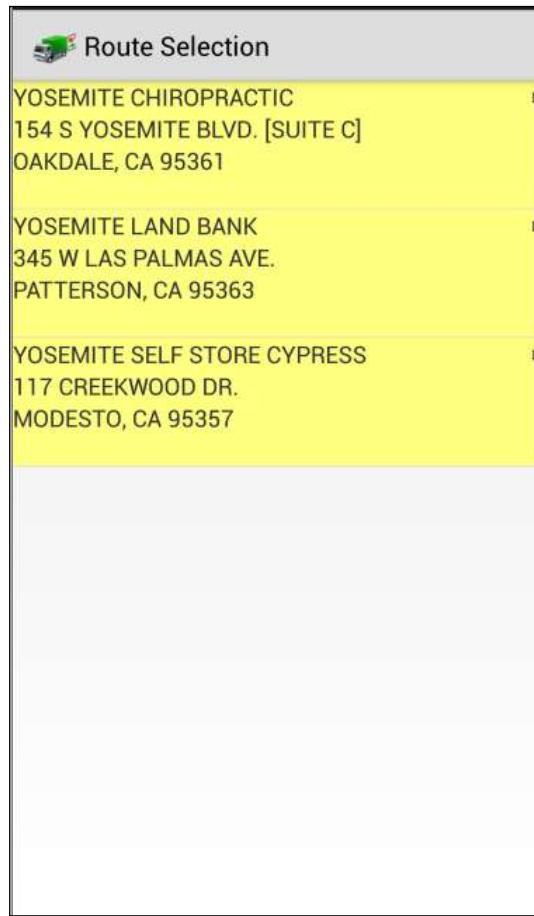
Figure 4 37

A list of customers will appear. In order to find the customer you are looking for, use the scroll bar on the right side of the screen. Choose the customer you wish to service.

Account

The ACCOUNT key will display the same type of screen as the NAME key. This screen allows you to enter the exact account number for the customer you wish to service. If you enter an invalid account number, the screen will display an error message and then prompt you to enter another account number.

City

The CITY key will display the same type of screen as the NAME key. This screen allows you to enter the City for the customer you wish to service. This will allow you to visit other customers in the nearby area where you may be doing deliveries today.

Cash Customer

The CASH CUSTOMER key allows you to make a sale to a person who does not have an account with your company. This option is

useful if someone approaches you while on route and offers to pay cash for a product.

NOTE: Prior to using the 'Cash Customer' options account information MUST be established under *Lists, Routes, Handheld Class,* on the *Off Route* tab.

New Customer

The NEW CUSTOMER key allows you to enter a new customer from the handheld.

Reprint Order

Selecting the *Reprint Order* key will display all invoices created for off-route customers, as shown in Figure 4-38:
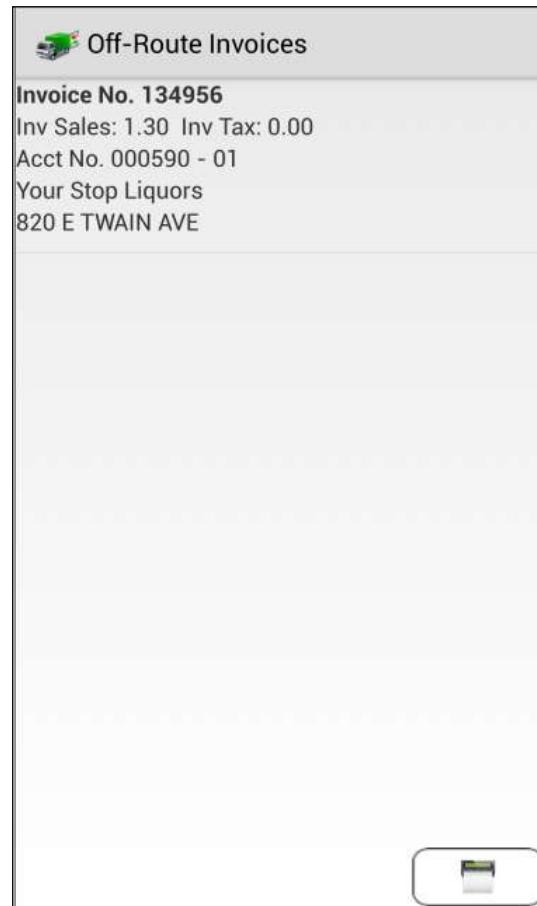
Figure 4 38 Reprint Order

To reprint any of these invoices, select the invoice and press the PRINT key.

When you return to the *Stop Selection* screen, a different color band will appear over the customer's name as shown in Figure 4-39. These are defined in *Handheld Class, Screen* tab. This indicates that the customer has been serviced.

Route Selection

MEX-US Stores
5119 CAMERON ST
LAS VEGAS, NV 89118-1512

Pipes and Pasta
6325 S VALLEY VIEW BLVD
LAS VEGAS, NV 89118

Super West STralight
6605 Las Vegas Blvd S
Las Vegas, NV 89119

Pete's Quick Chinese Food.
7100 W DEWEY DR
LAS VEGAS, NV 89113

Nellis Base Exchange
7000 W POST RD
LAS VEGAS, NV 89113

Lee's W Flamingo
9355 W FLAMINGO RD
LAS VEGAS, NV 89147

Figure 4 39

If you attempt to service a customer that has been serviced, the following message will appear:
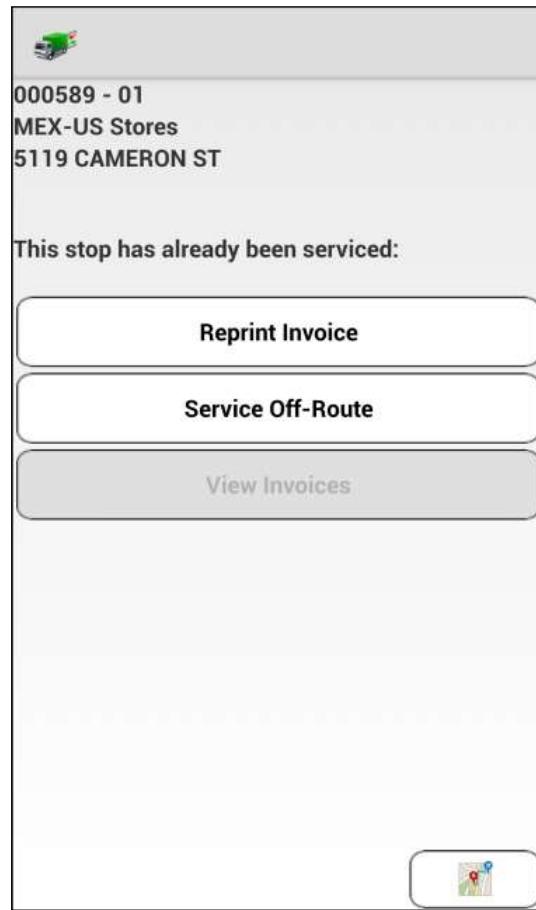
Figure 4 40

Reprint Order: Select this key to reprint the customer's invoice.

Service as Off-Route: Select this key to create an additional invoice on the stop.

View Invoices: Select this key to view or print a detailed listing of all invoice activity on the account for the route day. This will be available in a future version.

Take Me There: Use this option to navigate to the customer's address using the Navigation app on your Android device.

2. Truck Status

The *Truck Status* screen allows you to access a current list of all products on the truck without having to manually inspect the vehicle. When a product is sold, the quantity sold is automatically decreased from the truck inventory, so an accurate count is maintained by the system.

Each product is listed in the order that it was input from the host computer. Products are sorted either by code or alphabetically by product name, along with the quantity of remaining product.

The following is the *Truck Status* screen.

Figure 4 41

Information on this screen is "view only," meaning that you cannot modify, delete, or add to this information. If there is more information than can be displayed on the screen, you can scroll up and down to view that information.

Print: Select this key to print a listing of the information displayed.

3. Load / Unload Truck

The *Load/Unload Truck function,* as shown in Figure 4-42, allows you to carefully track inventory:

As it is added to or removed from the truck

At the beginning and the end of the day.

To track inventory, the driver loads the truck in the morning before leaving on route and checks in the load upon returning to the office or warehouse. The software will lead you through this process. The general process is to start at the top of the screen and work down through the items displayed.

Figure 4 42

Each *LOAD/UNLOAD Truck* key is described in detail within this section.

Morning Load

Morning Load allows you to count the product on the truck each day before going on route. Choose whether one or two people are required to check out the vehicle. This setting is in the *Load Verification Required* field on the desktop under *Lists, Routes, Handheld Class, on the Load/Unload* tab. If verification is required, you will see the following as shown in Figure 4-43.

Figure 4 43

When *Load Verification Required* is not checked, the *Morning Load* screen is not required to be completed. It will show the LOAD TRUCK key in place of DRIVER LOAD and CHECKER LOAD as shown above.

Driver Load/Load Truck

After selecting the *Driver Load* or *Load Truck* option, another Login screen will appear. This is to prevent changes being made without proper authorization. The driver will be asked to choose a bay. Within each bay, the driver enters the products with the quantities of stock for that bay. The information can then be printed to confirm the load is correct in each bay.

The following section explains in detail what to do to enter the product in each bay of your truck.

Bays on a Truck 1 - 12

This system uses a consistent interface to handle the entry of product on the truck. The *Choose Bay* screen, as shown in Figure 4-44, shows a sample truck with one bay. Each truck can be assigned a different number of bays under *Lists, Truck Information, Truck Class*.
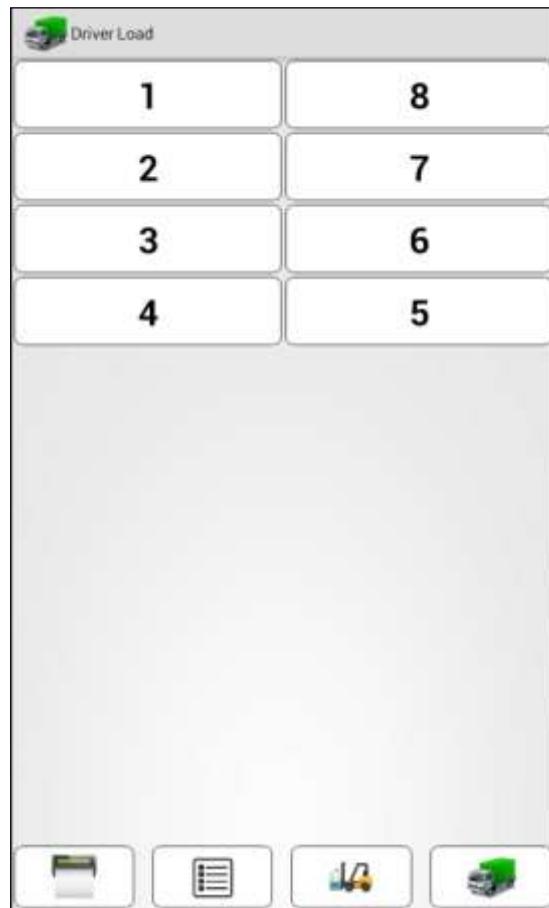
Figure 4 44

After you select a bay, a product list is displayed (shown in Figure 4.45).

Code	Description	Qty
	Product List for Bay 1	
180	10LB Block	10
120	20 LB Ice	75
100	10 LB Ice	100
200	300 Block	0
220	BT 10# Dry Ice	0
225	Dry Ice Pellet	0
190	40# Ice	0
205	5 Gal Water	0
140	Refreshe Premiun Beverage Ice	0
150	7lb Bag Ice	0
210	16oz Bottle Water Case	0
050	5# Bag Ice	0
080	8# Bag Ice	0
130	Snow Ice	0
226	Dry Ice Rice	0
170	5-7 lbs Bags	0
250	Donation	0
215	1 Gal Water 3 ct	0
160	4-7# Bags Ice	0

Figure 4 45Product List

After selecting an item, a keypad will let you enter the quantity for the selected product. Press the *Done* key and you will have the option to select another product.

Complete this process for all bays.

Figure 4 46 Enter Quantity

Each bay can be independently loaded, or you can group all products into the first bay. Generally, it is easier to check inventory if each bay is counted individually.

Another option is to enter an item according to its product code. Make sure the toggle key at the bottom of the *Choose Bay* screen displays the CODE icon instead of the LIST icon when you select a bay. When the *Product Code* entry screen appears, enter the product's ID code and press OK. Enter the quantity for the selected product and press OK. You will be returned to the *Product Code* screen to enter another product. When all the products have been entered, press the EXIT key to return to the *Choose Bay* screen.

Enter Product via the List Screen

Enter Product via the Charge Code

![Truck icon] ***Truck Info***

The TRUCK key enables you to change the truck number, enter the beginning mileage of your vehicle, and change the control number for your load. This information is transferred back to the host computer when your information is uploaded. Figure 4-47 shows the *Truck Info* screen:

Figure 4 47 Truck Info

Truck ID

The TRUCK ID button will display a screen allowing the user to select a different truck from the list of trucks. This list was previously set up on the desktop under *Lists, Truck Information, Trucks.*

Beginning Miles

Press the BEGINNING MILES button to display a screen keypad to enter the truck's odometer reading before starting your route. This is important for maintenance documents and other records.

Select the *Back* button on your device to return back to the Bay Listing Screen.

Print

The PRINT key, prompts you to print a listing of all the products loaded onto your truck, as shown in Figure 4-48.

Print All Bays?	
No	Yes
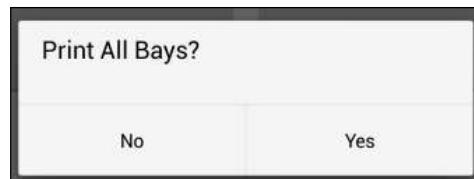
Figure 4 48 Print All Bays?

To print a list of all products in each of the truck bays, press the YES key. To exit without printing, press the NO key.

Exit

To exit the screen, select the *Back* button on your device. This returns you to the *Driver Load* screen or *Morning Load* screen.

Checker Load

After the *Driver Load* option is complete, the *Checker Load* must be complete. This verification by a second employee is required before departing to service the customers on route (if selected).

The process for completing this option is the same as the *Driver Load/Load Truck* option. However, routes cannot be serviced if the *Driver Load* products and quantities do not match the *Checker Load* products and quantities.

Vehicle Inspection

Vehicle Condition Inspection is a module that is used on the handheld by pressing the VEHICLE INSPECTION key. To use this function, a list must be set up on the desktop under *Lists, Truck Information, Vehicle Condition Inspection*. This module helps determine the roadworthiness of the truck, identifies problems that are to be fixed, and assists in general truck management. Displayed below is a partial checklist of what a driver would normally see on the checklist.

Depending on the type of input required, the driver will:

- *Check off items*
- *Select the correct value from a list*
- *Input a value*
- *Enter a description*

NOTE: Vehicle Inspection may be a required item before you can Verify/Confirm you Load. This is defined in Handheld Class > Load/Unload tab.

Verify Load/Confirm Load

The *Verify Load/Confirm Load* process will take a few moments as the computer compares the load specifications of the driver with those of the checker. If the *Load Truck* option was used, the CONFIRM LOAD key will simply print a *Check Out Statement.*

If the *Driver Load/Checker Load* was used, then the VERIFY LOAD key will compare the two loads. A *Load Verification Error* screen will appear if the two loads do not match.
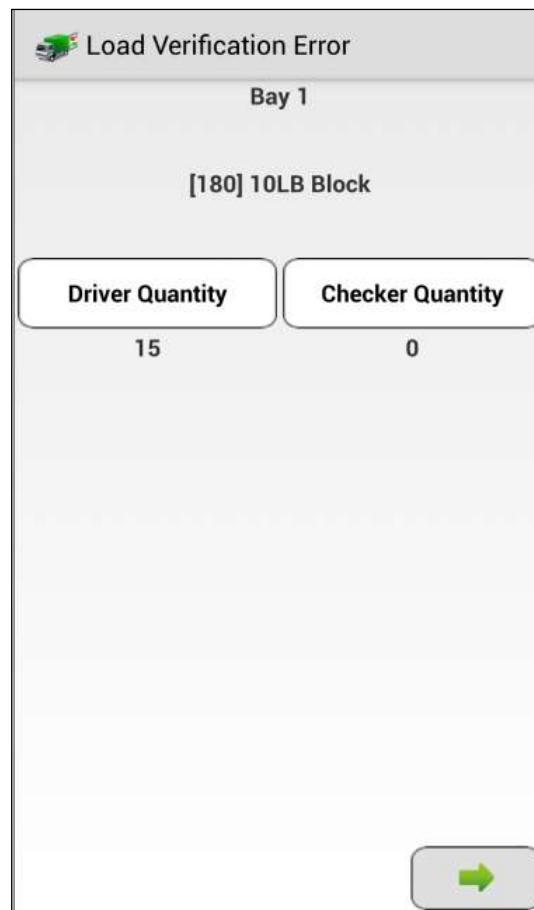
Figure 4 49 Load Verification Error

To adjust the errors, press either the DRIVER QTY key or the CHECKER QTY key. After selecting one of these keys, either the driver or the checker will be prompted to re-enter their password. The *Enter Quantity* screen will appear. Enter the correct amount of product for the code, and press the CONTINUE key -which will only be available if the two values match. Repeat this process until all of the errors are corrected and the load counts match.

The final step is to capture a signature, first from the *Driver* and then from the *Checker*. After both signatures are saved, a *Checkout* box will pop up as shown in Figure 4-50.
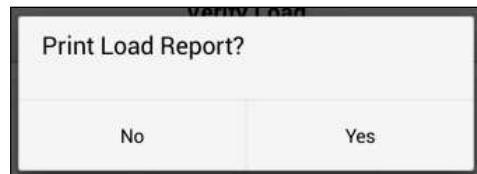
Figure 4 50 Print Load Report?

Press the YES key to print out your report. Both the *Verify Load* and the *Confirm Load* reports are the same report, as shown in Figure 4-51 below. This is the Check Out Statement.


Check Out Statement

Bay 01:		
100	10 LB Ice	100
120	20 LB Ice	50
200	300 Block	2
220	BT 10# Dry Ice	10
150	7lb Bag Ice	800

```
Driver : Vince Martin
Route     : 1
Truck     : 54
Start Mile: 12587
Date      : 09/10/2013
Time      : 11:02:24
```

Figure 4 51

After the report prints, you will be returned to the *Morning Load* screen.

Afternoon Unload

The *Afternoon Unload* screen shown here in Figure 4-52, is used to complete the driver's day end procedures. Displayed below is the A*fternoon Unload* screen followed by detailed information for each of the listed keys.

Figure 4 52

 Driver Unload

To unload the truck, simply select a bay. Choose the product to unload, enter the quantity, and press the OK key. Repeat this step until all bays have been counted. Press the EXIT key to return to the *Afternoon Unload* screen.

 Checker Unload

Similar to the Morning Load, the checker will need to enter the unloaded values off the truck as well.

Confirm Unload/ Verify Load

The Confirm Unload/Verify Load key allows the *Check-In Statement* report to be printed. This report shows what was checked off the truck.

Driver Close Out Report

The *Driver Close Out* report shown in Figure 4-53, has been designed to help the driver reconcile cash, checks, and products at the end of the day. This can then be included in the check-in paperwork. It will also indicate to the driver if the re-load in and load out matches up with the product sold. The following is a sample of the *Driver Close Out* report.

Figure 4 53 Driver Close-Out Report

You may also print a list of the products sold today on route. Figure 4-54 shows a sample of the *Product Sold* report:

Variance Report

	Chkd Out	Chkd In	Prod Used	Prod Sold	Prod Var
[100] 10 LB Ice	100				
[120] 20 LB Ice	50	50	50	50	0
[180] 10LB Block	0	40	10	10	0
[200] 300 Block	2	0	0	2	-2
[220] BT 10# Dry Ice	10	1	1	0	1
[150] 7lb Bag Ice	800	9	1	0	1
		800	0	0	0

Driver : Vince Martin
Route : 1
Truck : 54
Date : 09/10/2013
Time : 11:06:08

Beginning Mileage : 12587
Ending Mileage : 12674
Starting Invoice : 134956
Ending Invoice : 134955

Total Sales	:	89.90	1
Total Credits	:	0.00	0
Total Skips	:	0.00	11
Total Tax	:	0.00	--
Total	:	89.90	12
Total Charges	:	0.00	1

Figure 4 54 Products Sold Report

NOTE: This report shows reconciliation between product checked-out and product returned and verifies the sales recorded from the invoices or tickets. It is important to refer to the product remaining on each report. It should always be zero if the load balances with product sold.

Invoice Reconciliation

The *Invoice Reconciliation* option allows you to view and print a detailed listing of all invoice activity for the route day.

Skip Remaining Stops

The *Skip Remaining Stops* key allows you to select a *Skip Reason* that will be applied to all of the remaining stops on route that were not serviced.
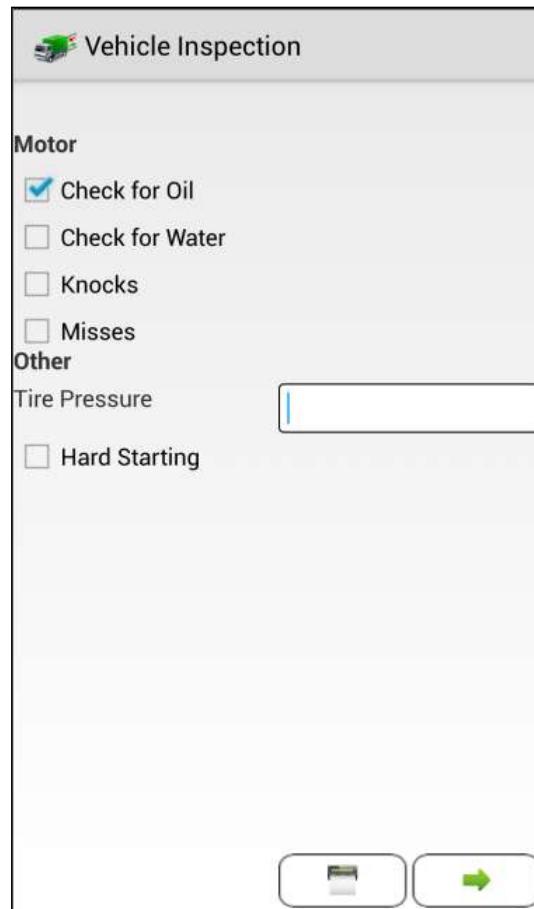

Figure 4 55 Skip Remaining Stops

Choose a skip reason and press the **Continue** button to complete the process.

Vehicle Inspection

Vehicle Condition Inspection is a module that is used on the handheld by pressing the VEHICLE INSPECTION key. To use this function, a list must be set up on the desktop under *Lists, Truck Information, Vehicle Condition Inspection*. This module helps determine the roadworthiness of the truck, identifies problems that are to be fixed, and assists in general truck management. Displayed below is a partial checklist of what a driver would normally see on the checklist.

Depending on the type of input required, the driver will:

- ***Check off items***
- ***Select the correct value from a list***
- ***Input a value***
- ***Enter a description***

NOTE: Vehicle Inspection may be a required item before you can Verify/Confirm you Un-Load. This is defined in Handheld Class > Load/Unload tab.

Transfer Options

The TRANSFER Options key allows data to be transferred from the handheld to the desktop computer via a cable, modem, or wireless transfer. An example of the transfer screen is shown in Figure 4-56:
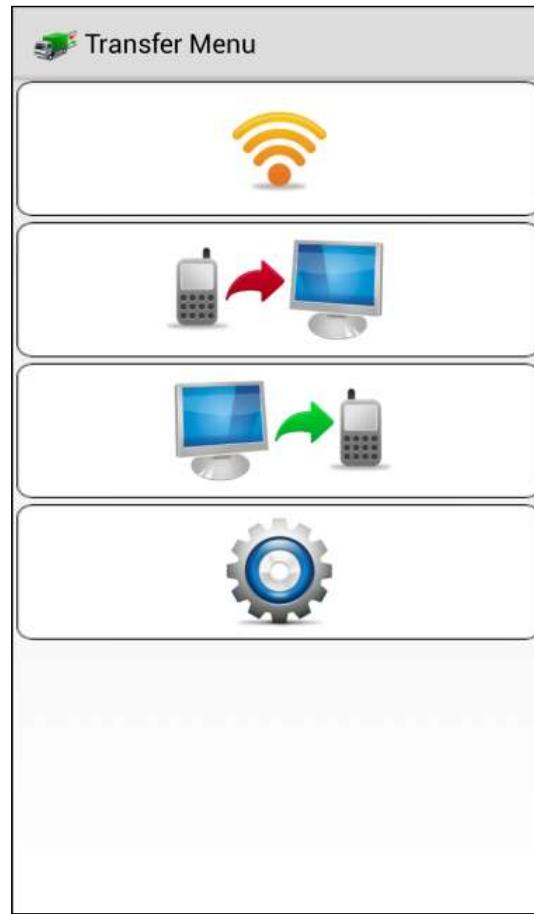
Figure 4 56 Remote Transfer Menu

Upload and Download

The UPLOAD AND DOWNLOAD key transfers the data collected and will pull data for tomorrow's route back to the handheld. This is a typical routine done on a daily basis when transferring through a cable or modem.

After pressing this key, the *Upload and Download* screen appears as shown in Figure 4-57.

Figure 4 57

From this screen, you have the following four options:

1. View the Screen,
2. Toggle the Server IP address,
3. Press to Begin Transfer,
4. Exit.

Viewing the Screen: You may see the process of the data transfer as it takes place. The screen shows the percent of information transferred and estimates the time until the transfer is completed.

Toggle the Server IP Address: Tap the Server IP: field to toggle between the Server IP Address and Alternate Server IP Address stored in Transfer Parameters/Handheld Class, GPRS tab.

Press to Begin Transfer: To begin your data transfer, press the PRESS TO BEGIN TRANSFER key. Be sure the handheld is properly docked, if necessary

Back* button:*** This will exit the transfer screen and return you to the *Remote Transfer* Menu.

Upload Transaction

If you find it necessary to only do a data upload for your transactions today and do not want to bring over stops for tomorrow, choose this option. The information is processed in a similar way as described in the previous section. An *Upload Transactions Menu* appears and allows the driver to select which days' transactions to upload to the desktop computer. Generally, the UPLOAD TODAY'S TRANSACTION key is used. However, you can choose one of the 5 previous upload attempts from the list. The window is shown in Figure 4-58:

Figure 4 58

After selecting the date you want to upload, the handheld will proceed to the next screen as shown in Figure 4-59:
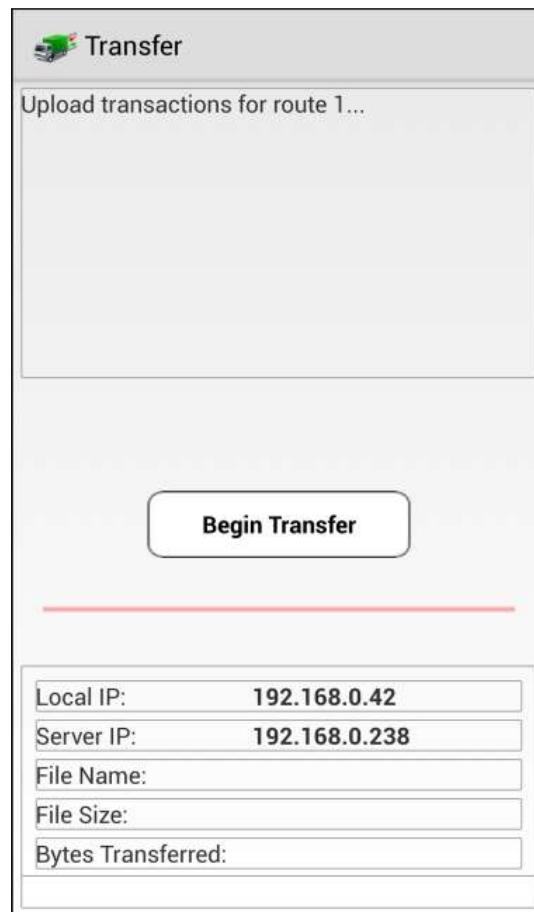
Figure 4 59 Upload Data

Press the *Begin Transfer* key to start the transmission of data to and from the desktop. The progress of the transfer is shown near the bottom of the screen. It is important to not turn off your unit until the transfer is complete.

Download Next Route

If you find it necessary to download a route to a handheld after you have completed an upload, then you will want to use the DOWN LOAD NEXT ROUTE key.

Figure 4 60 Download Data

Change Route: Press this button to change to a different route or choose a specific date and route to download. Enter the Route you would like to download in the *Enter Route Code* field and if necessary, check the box next to *Change Download Date* and choose an override date. This will force the desktop to send down this specific Route/Date combination.
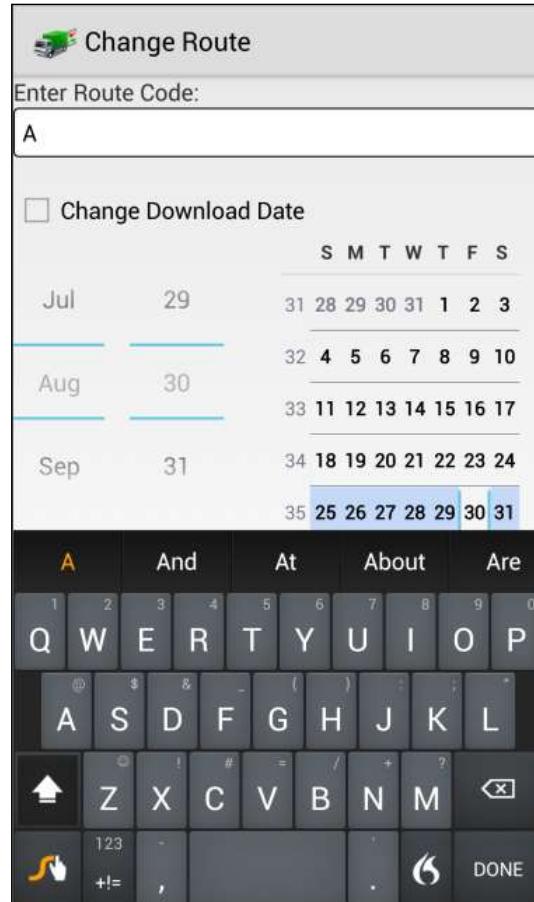
Figure 4 61

Begin Transfer: To begin your data transfer using the existing route or the route and/or date specified in the Change Route screen previously. Press the PRESS TO BEGIN TRANSFER key.

⚙️ Transfer Parameters

When transferring data from the handheld to the desktop, it is important to have the proper settings in place. These settings are established under *File, Routes, Handheld Class, GPRS tab*.
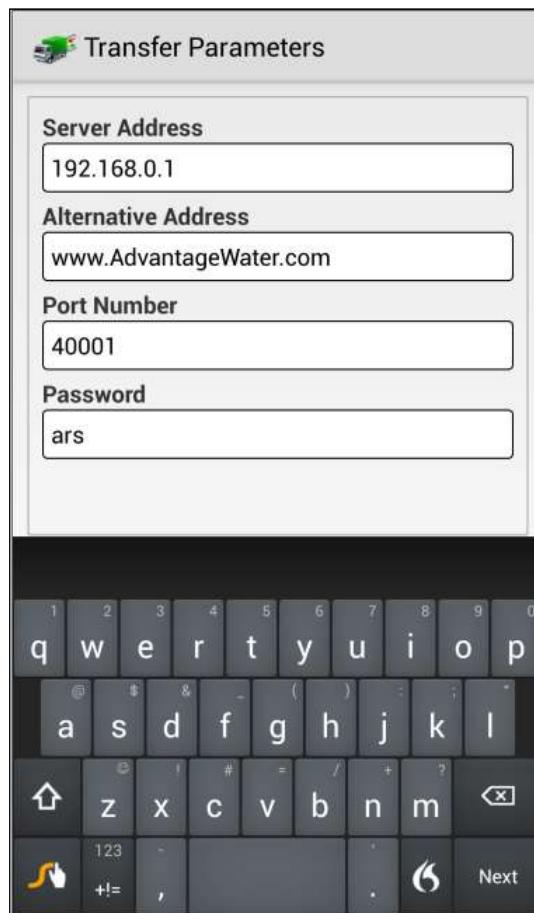
Figure 4 62 Handheld Transfer Properties

NOTE: Normally, you will not need to change these settings.

Server Address: The primary Advanced Communication servers transfer address.

Alternative Address: Enter the secondary transfer address. This is helpful for when drivers are outside the office and occasionally need to transfer or vice versa - depending on which is more common for them.

Port Number: Enter the Advanced Communications Port Number (Default is 40001).

Password: Enter the Advanced Communications Password.

4. Sales Notes

The *Sales Notes* screen, shown in Figure 4-63, allows notes to be written and printed in your own handwriting.


Figure 4 63 Sales Notes

Using the stylus, you can write a message within the bordered area of the screen. Do not use a pen and do not press the screen in two places at once or it will suppress the screen's ability to capture what is being written.

After the note has been written, you are given four options:

- Exit
- Clear
- Print - If you print a note, it is automatically saved.
- Save

Choose an option.

Figure 4-64, is a copy of a printed NOTE:
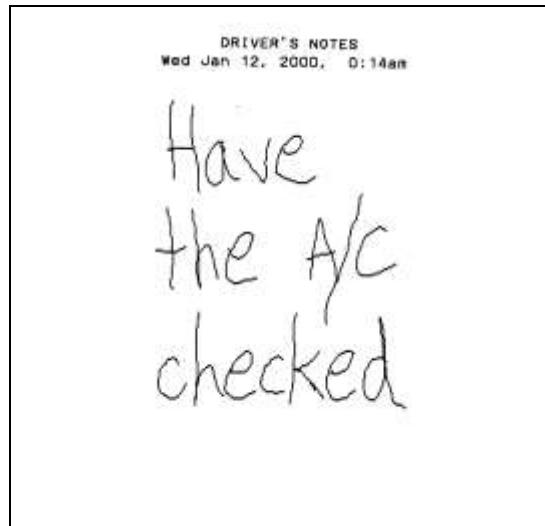
Figure 4 64 Printed Note

These notes can be printed on the desktop system during the afternoon transfer function ONLY.
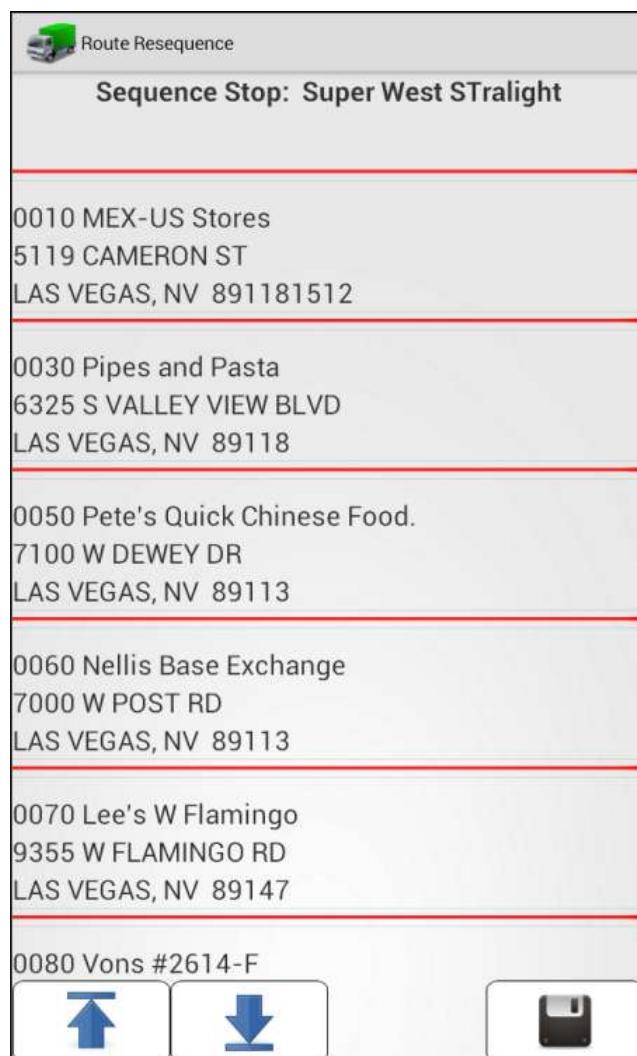
NOTE: Typically, the area is used for driver notes, not for customer information. Customer notes are entered from the customer's *Quick Entry* screen. When the customer notes are uploaded, they are stored in the customer's account.

5. Resequence Route

Route Resequence on the Android may slightly differ than what was found on the other Windows Handhelds due to the technology used to communicate with the touch screens.

With that being said, on the Android the first thing you do in the Route Resequence screen is to tap on the account you wish you move. You'll notice the screen refresh with the account now removed, you'll also notice on this screen a Red Line between each account and then the Up and Down arrows on the bottom left (which your already familiar with). To move a stop in-between two other stops, you simply tap the Red Line that separates the two stops that you want the stop to be in-between.
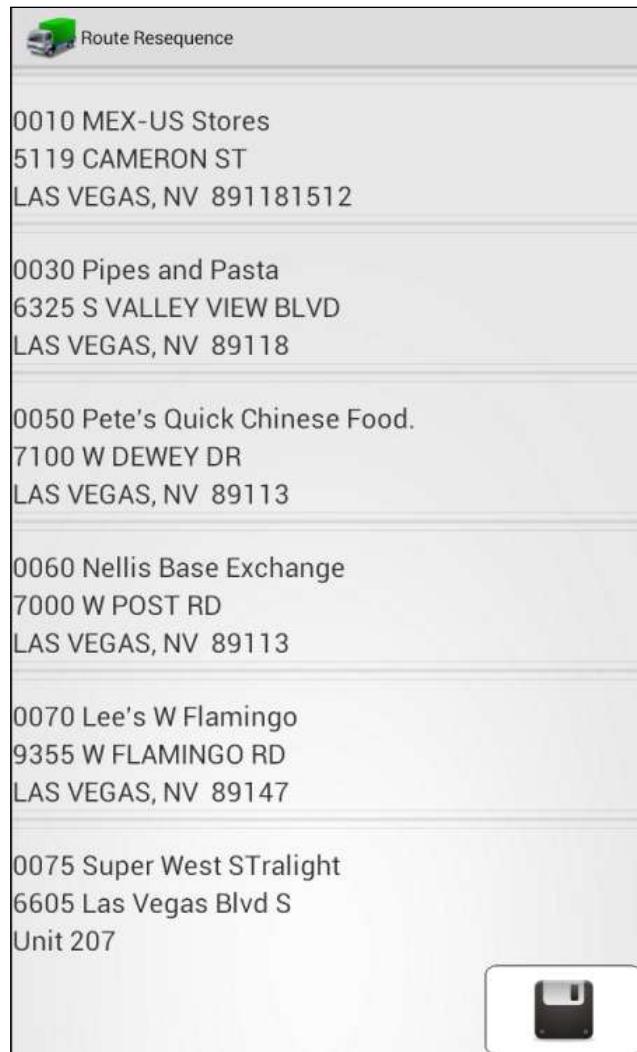
You will then be prompted with entering a sequence number for the newly placed stop. By default, it will automatically give you a sequence number in the middle of the two stops chosen.

Select the *Done* key to save the changes to this stop. Repeat for each stop that needs to be resequenced.

Once complete, select the *Save* button in the lower right corner to save the Route Resequence changes. You should now see these changes from within the Route Listing screen.

Route Resequence

0010 MEX-US Stores
5119 CAMERON ST
LAS VEGAS, NV 891181512

0030 Pipes and Pasta
6325 S VALLEY VIEW BLVD
LAS VEGAS, NV 89118

0050 Pete's Quick Chinese Food.
7100 W DEWEY DR
LAS VEGAS, NV 89113

0060 Nellis Base Exchange
7000 W POST RD
LAS VEGAS, NV 89113

0070 Lee's W Flamingo
9355 W FLAMINGO RD
LAS VEGAS, NV 89147

0075 Super West STralight
6605 Las Vegas Blvd S
Unit 207

6. Mapping Button

This button is used to integrate your handheld software to Google maps.

7. Future

8. Utilities

Overview

This screen in Figure 4-65 displays diagnostic information for your reference. For example, our technical support team may ask you for the version number from this screen. In addition, there is useful information about the type of computer you are using and the amount of remaining battery electrical charge in both the primary and backup batteries.

Scroll through the list to view all of the items that are available to you. To return to the *Main Menu,* press the EXIT key.
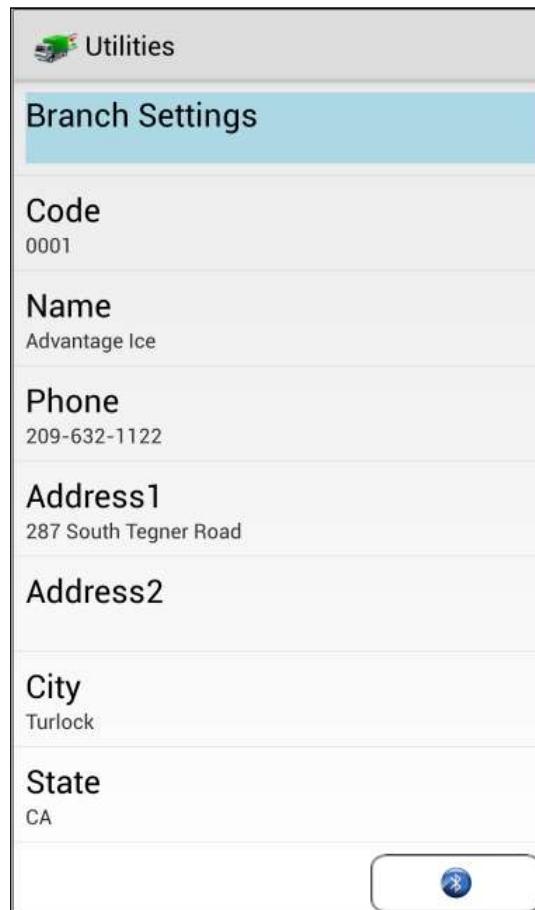
Figure 4 65 Utilities

9. Exit Program

Overview

During the day (between distant stops or at lunch) and particularly at the end of the day, you may wish to turn the computer off. When you select the EXIT key, you will be returned to the Login screen. Select the *Back* button on your device to continue exiting the program.

Chapter 5 – Other Handheld Features

Introduction

Your handheld is capable of running many other software packages besides Route Manager. Some of the standard features of this computer are included in this section.

The first few headings describe standard features that are available. Options can be purchased that provide even more versatility. These options are generally quite inexpensive and greatly increase the functionality of your computer.

Built in Appointment Book and Calendar

Included on the handheld is a basic computer appointment book/calendar. This can be "hot-synced" with a desktop system or it can be used as a stand-alone package on the handheld. There is no tie-in between the route accounting package and the appointment book. However, you can toggle between the two applications when you need to use both. The handheld helps you keep appointments, has a full calendar and even an alarm clock. Since it comes with the unit at no charge, it is a great value!

Contact Database

Another free item that comes with the handheld operating system is a contact database. Use this program to enter the names, addresses and phone numbers of the people you most often call. Like the appointment calendar, this is a standard feature of the program.

Voice Notes

Integrated within the handheld operating system is the ability to record and play back voice messages. This means you can invoke the recorder, make a verbal message to yourself, and save it. The message(s) can be played back at any time. Voice Messages can also be transferred back to the desktop.

Task List

A complete task list can be maintained on your handheld. This will help you make note of important things that need to be done.

Mapping

An easy way to go to your destination navigation software on your Android device. This ties into Google Maps.

Printer

To maximize the life of your printer, follow the precautions in this section:

1. Do not drop the printer or subject it to severe shocks.

2. Avoid using the printer in dusty environments.

3. Do not operate the printer close to a television, radio, or other equipment producing a strong magnetic field.

4. If water gets on the printer, wipe it off with a soft cloth as soon as possible.

5. Always use the specified roll paper.

6. If the temperature of the printing head is below its specifications, an error results and the printer is set off-line. This is not a malfunction; just wait until the printer head temperature returns to normal.

7. Avoid storing the printer in vehicles or near heating equipment.

8. Be careful with the paper roll holder on the printer. If you drop the printer on the holder, the holder may break.

9. These instructions apply to all printers used with the RMADVANCED system. Because of a variety of different printers, you should also read the manual that comes with your printer.

Paper

There are a variety of paper types available for the printer. The most common is a fiber-based thermal paper (like fax machine paper.) ARS recommends using only this paper. Other paper can damage the print head and may void the warranty. Others have been approved, including two-part receipts. (We do not recommend these. A better copy is obtained in less time by printing more than one of the original copies).

In addition to using various paper types, receipts can be custom-printed on the front and/or back for a variety of applications. If you would like a custom receipt paper, call Advantage Route Systems.

Glossary

Appendix A – Setting Up the Handheld Receipt

Introduction

Before you print out a receipt for your customer, you must first format the receipt. A small investment of time to plan, input, and test the format will ensure that it meets your needs.

The receipt consists of three parts: the header, the body, and the trailer. In the header and the trailer, you may print up to ten lines of text in a variety of styles. You may not change the body of the receipt, which is set by Advantage Route Systems. However, you may select certain items to be printed or suppressed.

Setting up the Receipt

While you may enter text into the header and trailer of the receipt, you must use the prescribed format. This information can be setup under Lists, Routes, Handheld Class, on the Messages tab. Each line in the header and trailer must begin with a single byte "location identifier" followed by a "style identifier", followed by up to 72 bytes of text. Here is a typical example of two header records.

> Justify: C Font: F - Advantage Water Company
>
> Justify: C Font: A - 1214 Williams Street

The first character of the string is the location identifier. Use one of the following valid characters:

> **C** – Centers the text on the receipt between the left and right borders.
>
> **L** – Prints the text starting in the leftmost column of the receipt.
>
> **R** – Aligns all of the text so that it is flush right.
>
> **I** – Creates an image file (see the section below on creating graphic images).

The second character of the string is the style identifier (except in "I" files). This alpha character corresponds with the chart below to determine the font for this line. Only one font can be used on a given line. The fonts shown on the last page of this section are available with the various printers available from Advantage Route Systems.

Once you have entered your "identifiers", you may type any text you wish. Remember that the printers can only print a fixed number of characters per line, so refer to the table below to determine the maximum number of characters you may use.

WARNING! Do not exceed the maximum per line.

If you want a blank line on your receipt, the line should start by justifying it to the left (L) and then use a font size to correspond with the height of the blank space you want.

Fonts for PTB-3 Printer

www.EngineeringBooksPdf.com

Fonts for Advantage BT4

Print Test
Printer = WOOSIM

Font A, 69 Chars
123456789012345678901234567890123456789012345678901234567890123456789

Font B, 69 Chars
123456789012345678901234567890123456789012345678901234567890123456789

Font C, 69 Chars
123456789012345678901234567890123456789012345678901234567890123456789

Font D, 69 Chars
123456789012345678901234567890123456789012345678901234567890123456789

Font E, 34 Chars
1234567890123456789012345678901234

Font F, 34 Chars
1234567890123456789012345678901234

Font G, 34 Chars
1234567890123456789012345678901234

Font H, 34 Chars
1234567890123456789012345678901234

Font I, 69 Chars
123456789012345678901234567890123456789012345678901234567890123456789

Font J, 69 Chars
123456789012345678901234567890123456789012345678901234567890123456789

Font K, 69 Chars
123456789012345678901234567890123456789012345678901234567890123456789

Font L, 69 Chars
123456789012345678901234567890123456789012345678901234567890123456789

Font M, 34 Chars
1234567890123456789012345678901234

Font N, 34 Chars
1234567890123456789012345678901234

Font O, 34 Chars
1234567890123456789012345678901234

Font P, 34 Chars
1234567890123456789012345678901234

Graphic Images

Using Graphic Images on your Receipt

You may print a bitmap image on the receipt by using the IF (Image File) identifier at the beginning of a header or trailer line. This special image must first be created and then saved as a Bitmap (BMP) file. The file can only be back and white and must not contain any gray scale images.

The size that the image can be depends on the type of printer you have. Generally, you will want an image of about 600 X 200 (pixels) for your logo. The software will scale the image to fit, so you may want to try a couple of size to be sure it looks correct on your receipt.
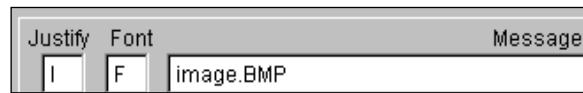
NOTE: If you want to center your picture on the receipt, then you must center it in your drawing when you create it.
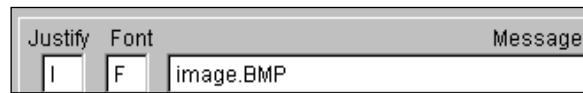
You must save the .BMP file under the RMADVANCED > HANDHELDS > DATA folder.

Creating Graphic Images for Your Receipt

In order for the handheld to be able to display a graphic image on your printer, you must follow these steps:

1. Scan or draw a bitmap image and copy it to your Windows Clipboard.
2. Set your Windows Paint parameters to the proper width for the printers. Your image should conform to the suggestions on the previous page.
3. Insert your image into Paint or any graphics program.
4. Save as a .BMP file in the *RMADVANCED, Handheld, Data* directory.
5. In RMADVANCED, go to Lists, Routes, Handheld Class.
6. Go to the *Messages* Tab.
7. Place an "I" in the Justify Column.
8. Enter an "F" in the Font Column
9. Input the name of the graphic file that you wish to use on the receipt.

Justify	Font	Message
I	F	image.BMP

10.
11. Download the next route or do a Morning Card.
12. Print a sample receipt to see if it is acceptable.
13. Repeat the preceding steps until you have the desired results.

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