Contents

Route Processing .................................................................................................................. 1
  Default Associations ........................................................................................................... 1
  Route Master ....................................................................................................................... 6
    Maintain Customer Ship-Tos and Stop Sequences .......................................................... 9
  Route Activity ..................................................................................................................... 11
    Route Activity Window Navigation .................................................................................. 12
    Route Stage ..................................................................................................................... 12
    Expected Order Activity Status ....................................................................................... 13
  Route Activity – Orders ...................................................................................................... 13
  Route Activity – Load ......................................................................................................... 14
  Route Activity – Departure/Ship ........................................................................................ 14
  Standard Ship Ordering ..................................................................................................... 15
  Direct Ship Ordering ......................................................................................................... 15
  Upper Portion Toolbar ....................................................................................................... 17
  Lower Portion Toolbar ....................................................................................................... 17

Route-Based Command Button Functions ......................................................................... 19

  Change Route .................................................................................................................... 20
  Transfer Route Content .................................................................................................... 21
    Route Selector Window and Toolbar ................................................................................ 22
  Stop Order Maintenance ..................................................................................................... 23
  Open Expected Customer Order ....................................................................................... 23
    Toolbar Buttons ............................................................................................................... 24
  Manual Picking ................................................................................................................ 24
  Auto-Allocate .................................................................................................................... 25
  Manual-Pick Direct-Ship ................................................................................................... 26
  Auto-Allocate Direct-Ship ................................................................................................. 26
  Unpick Route ..................................................................................................................... 27
  Ship Route ......................................................................................................................... 28
Print Shipping Documents ........................................................................................................28
Unship Route ...........................................................................................................................30
Invoice Route ..........................................................................................................................30
Reset Invoices for Route .........................................................................................................30
Order-Based Command Button Functions ............................................................................32
Change Route/Stop Assignment .............................................................................................33
Delete Route Assignment .........................................................................................................33
Shipping Panel ........................................................................................................................34
Adjust Quantity .........................................................................................................................34
Add Item to Shipped Order ....................................................................................................35
Order Level Route Maintenance ..............................................................................................37
   Toolbar Buttons ....................................................................................................................37
Delivery Date Entry ................................................................................................................38
Add Order to Unshipped Route ...............................................................................................40

About this Document

This manual serves as a high-level reference and user guide. Its purpose is to provide enough information about the Route Processing application so that you can get your job done. It does not include your company’s particular processes and procedures. Therefore, some features and functions may not pertain to your operating environment.

The intended audience is logistics staff, including order entry and warehouse personnel with beginning to intermediate knowledge of the Dairy & Food Tracker software. Experience in a distribution logistics role within the dairy or food manufacturing business sector is also helpful.
## Revision History

<table>
<thead>
<tr>
<th>Version</th>
<th>Date</th>
<th>Author(s)</th>
<th>Sections/Content Changed</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td>4/3/2014</td>
<td>Carrie A. Stowe</td>
<td>First version</td>
</tr>
<tr>
<td>1.1</td>
<td>5/13/2014</td>
<td>Carrie A. Stowe</td>
<td><strong>Route Master</strong> section, edited for clarity: &quot;If it is not selected, then the default route record will not be available for others to edit.&quot; Removed optional qualifier from procedure step &quot;(Optional) Select a day of the week from each of the drop-down lists for...&quot;</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td><strong>Route Activity - Load</strong> section: replaced screenshot to reflect a more accurate example</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td><strong>Upper Portion Toolbar</strong> and <strong>Change Route</strong> sections: Changed change route info button description changed to affect route stage &quot;planned&quot; only</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td><strong>Upper Portion Toolbar</strong> and <strong>Print Shipping Documents</strong> sections: Corrected &quot;proforma&quot; spelling</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td><strong>Invoice Route</strong> section: Changed verbiage to reflect that report lists orders for which invoices were not created.</td>
</tr>
</tbody>
</table>
Route Processing

Route Processing is an application comprised of three functions:

- **Default Associations** – provides a way to associate daily routes with customer shipping information.
- **Route Master** – used to define the daily, default routes associated with customer ship-to and stop-sequence records.
- **Route Activity** – used by various personnel to monitor route activity and add orders for particular customers in familiar routes.

**NOTE**
The Dairy & Food Tracker software is highly-customized. Functions and features described in this document may not apply to your system, depending on its configuration and specific security settings/user permissions. If you are unable to perform a step or steps as described, please see your onsite system administrator for assistance.

The Route Processing application itself is a part of the Dairy & Food Tracker Distribution Module. In addition, Route Processing is closely tied to Customer Master and Order Processing information.

Given these relationships, prerequisite data must be entered before using the Route Processing application. Therefore, the following assumptions are made:

- Default Routes for a customer’s ShipTo details are already set up, with the understanding that there can be multiple routes and route patterns that differ by day of the week.
  
  These are set up via *Distribution > Master Files > Customer Master*. For more information about Customer Master File setup, see the *Distribution User Manual*.

- A Route has already been selected for a given order.
  
  This is set up via *Distribution > Order Processing > Maintain Orders*. For more information about maintaining order information, see the *Distribution User Manual*.

**Default Associations**

This function provides a way to associate daily routes with customer shipping information. Because route data is associated with Customer Ship-To records, you may often hear or read the term Ship-To or Customer Ship-To. Each customer ship-to record has its own default, associated route(s).

When something is associated with or defined by default, it means the values do not typically change. For instance, you can know with certainty that routes beginning in the 300 series go out on Wednesdays because your supervisor has defined the routes to be numbered this way by default. Thus, to change a default setting is to create an *ad hoc* association in order to accommodate an unplanned situation.
The primary method for creating default associations is through the Customer Master File, by entering Ship-To location details via the Default Routes tab. But the alternate method described below can be faster and easier if your job is dedicated to logistics. In either case, if you are shipping product to any of your customers, each customer record should contain default (shipping) route details/associations.

### Distribution > Route Processing > Default Associations

1. Expand the Distribution module’s tree view, then locate and double-click the **Default Associations** function from the Route Processing application menu.

   ![Distribution Tree View](image)

   - Double-click to access the Default Associations function

   This opens the Edit Default Routes window, which you can use for two purposes:
   - To quickly view the default route setup of an existing Customer Ship-To.
   - To apply changes from a copy of one Customer Ship-to to another.

2. To quickly view the default route setup of an existing Customer Ship-To, enter a customer and select one of the customer’s ship-to records from the drop-down list.
Route data for the selected Ship-To is immediately pulled from the Customer Master File and displayed in the lower portion of the window:

3. To create default routes for a new customer, you can copy routes from an existing customer with similar routes. Start by using the top portion of the window.

What you are doing is:

a) working with the Customer Ship-To at the top,

b) with the intention of selecting a similar Customer Ship-To from which to copy default route information;

c) at which point, you can change the displayed route information of the similar Ship-To,

d) and Apply changes to the selected Customer Ship-To at the top.

The time-saving task of using a similar customer’s route data to help complete route data for another (or new) customer has been built in for you.
4. To complete customer fields, you can either enter the customer name directly or use the Lookup button to open a customer selection window (shown below).

![Customer Selection Window]

Type the customer name or code (or portion of either) into the Customer field and click **Position (1)**. When the desired Customer record is positioned at the top of the list, **highlight it (2)** and then click **Select (3)** to enter it directly into the Customer field of the parent window—you can do this for both customer fields.

5. Make sure you have selected the correct **Ship-To** locations for each customer.

6. With both customer records selected, click **Fill From**.

This populates the bottom portion of the window with default route data from the similar-selected customer.

**NOTE**

If a day of the week does not display default route data, it simply means there is nothing defined for that day.

7. Make changes as needed to displayed route data and click **Apply** to commit modifications to the selected Customer Ship-To record at the top of the window.
BEST PRACTICE

If you make changes to routes and ship-to records, ensure your company's naming conventions are followed. These conventions should be laid out in advance and allow room for ad hoc situations. For instance, don’t name your records so tightly that you cannot insert an ad hoc record in between a 100 and 200 series.

If the changes you are applying are in conflict with a route record as it is set up in the Route Master, the system displays a message similar to that shown below. Simply confirm by clicking Yes, or cancel the operation by clicking No. If you are unsure of how to answer, stop what you are doing and consult your onsite system administrator.
The following table explains more about the functionality of this window’s buttons:

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Lookup" /></td>
<td>This Lookup button for customer records accesses a customer-selection window, which can permit access to the Customer Master File function if your system permissions allow it.</td>
</tr>
<tr>
<td><img src="image" alt="Fill From" /></td>
<td>Populates the bottom portion of the window with default route data from the similar-selected Customer Ship-To record.</td>
</tr>
<tr>
<td><img src="image" alt="Refresh" /></td>
<td>Refreshes all the window’s data from the database, displaying the most current information in the system.</td>
</tr>
<tr>
<td><img src="image" alt="Clear" /></td>
<td>This button reverts data entry back to the original state after using either the Clear Stops or Clear All buttons. Remember you must still click <strong>Apply</strong> to commit any changes to the system.</td>
</tr>
<tr>
<td><img src="image" alt="Clear All" /></td>
<td>Resets all Route selections and Stop Sequence entries to zero. Remember you must still click <strong>Apply</strong> to commit any changes to the system.</td>
</tr>
<tr>
<td><img src="image" alt="Route" /></td>
<td>This Lookup button in the Route column accesses the <strong>Route Master</strong> function, where you can make additional changes if needed. This may or may not be available based upon your system permissions.</td>
</tr>
<tr>
<td>Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday</td>
<td>Each Day of the Week acts as a button that clears all data entered in the selected row for that day. Remember to click <strong>Apply</strong> to commit any changes to the system.</td>
</tr>
</tbody>
</table>

**Route Master**

The Route Master function is used to define daily, default routes associated with customer ship-to and stop-sequence records. While this master file can be accessed and modified from other locations in the system, the master is always considered the parent record. Best practice is to create and modify master information about routes here rather than via other system avenues. Master files are typically maintained by an onsite system administrator.

Commands used on this window are Apply, New, Delete, and Refresh, and Continue New. Toolbar buttons are for refreshing data, copying records, and for accessing records for a selected route.

<table>
<thead>
<tr>
<th>Command / Toolbar Button</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Apply</strong></td>
<td>Saves a new master route record or the changes you have made to an existing one.</td>
</tr>
<tr>
<td>Command / Toolbar Button</td>
<td>Function</td>
</tr>
<tr>
<td>--------------------------</td>
<td>----------</td>
</tr>
<tr>
<td>New</td>
<td>Clears all fields to allow entry of new records.</td>
</tr>
<tr>
<td>Delete</td>
<td>Deletes the selected record.</td>
</tr>
<tr>
<td>Refresh</td>
<td>Refresh the window to display the data currently stored in the system.</td>
</tr>
<tr>
<td>Continue new</td>
<td>Check box that allows you to add multiple new records without having to refresh the window or continually click New to enter a new record, thereby expediting your data entry tasks.</td>
</tr>
<tr>
<td></td>
<td>Refresh the window to display the data currently stored in the system.</td>
</tr>
<tr>
<td></td>
<td>Copies selected data to ease your data entry tasks: Select a record that contains data similar to a new record you must enter, such that all the fields are pre-filled with the selected record’s information. Click this toolbar button to copy the data. Edit the necessary fields to create your new record, such as the Item Number/Name or Product. Click Apply to save your new record.</td>
</tr>
<tr>
<td></td>
<td>Click this toolbar button to access customer ship-to and stop-sequence records for a selected route. (See “Maintain Customer Ship-Tos and Stop Sequences” on page 9 for more information.)</td>
</tr>
</tbody>
</table>

**Distribution > Route Processing > Route Master**

Expand the Distribution module’s tree view, then locate and double-click the **Route Master** function from the Route Processing application menu.

The Edit Routes window is displayed. An example is shown below for master route record, 130 – JANESVILLE.
1. To enter a new master default route, click **New** so that you have blank fields to work with; and select the **Continue new** check box if you are entering multiple, new master routes.

2. Use your company’s standard naming conventions to name the **Route ID**.

   ![NOTE]
   Once you name a new route and click Apply, you cannot change the Route ID. Nor can other users change it via other system avenues. To change it, you must first delete the record and enter a new one with a new Route ID. The system provides a message if a Route ID already exists.

3. Enter a **Description** for the route and the shipping **Capacity** (in pounds).

4. To allow others to make changes to this record, select the **Allow New Activity** check box. (If not selected, then the default route is not available for use.)

5. Select a day of the week from each of the drop-down lists for:
   - **Order Day of the Week** – the day that customer orders are taken for this route.
   - **Load Day of the Week** – the day that orders are loaded into the truck for this route.
   - **Ship Day of the Week** – the day that orders are shipped out for this route.
   - **Delivery Day of the Week** – the day that orders are delivered for this route.

   These days are used in other areas of the system, including the **Route Activity** function.

6. Click **Apply** when finished.
To copy or delete a default route, use the window's command buttons. Note that if you try to delete a route with which there are Default Associations, the system alerts you with a message similar to that shown below. Confirm the deletion by clicking Yes, or cancel the operation by clicking No.

![Image of route deletion confirmation window]

**Maintain Customer Ship-Tos and Stop Sequences**

If the Route Master allows new activity, the CS button on the toolbar of the Edit Routes window provides access to Customer Ship-To and Stop-Sequence records for a selected master route:

![Image of Edit Routes window with CS button highlighted]

When this toolbar button is used, Customer Ship-To records for the selected master route are displayed.
Note there can be multiple routes and route patterns that differ by day of the week. The window shown below provides a good snapshot of which customers are associated with a route:

While you can make changes to a customer’s ship-to record here, know that you are modifying a master route associated with a master customer file (Distribution > Master Files > Customer Master). Remember that the master is always considered the parent record, and that master files are typically maintained by an onsite system administrator.

Note you can access a customer selection window using the Lookup button at the bottom of the window. To complete Customer fields, you can either enter the customer name directly or use this Lookup button to open a customer selection window (shown below).
Type the customer name or code (or portion of either) into the Customer field and click **Position** (1). When the desired Customer record is positioned at the top of the list, **highlight it** (2) and then click **Select** (3) to enter it directly into the Customer field of the parent window.

**Route Activity**

The Route Activity function centers around two pieces of essential information: the **From-To Date Range** and the Date Range **Type** – both at the top of the window.

The type of date range you select from the drop-down list at the top of the window determines the appearance of your workspace—commands you can perform, kinds of records visible to you, and so on. Date Range Types are as follows:

- **Departure/Ship** – Provides a snapshot of scheduled routes by Departure Date (default setting).
- **Order** – Provides a snapshot of expected orders for all routes on a selected day or days.
- **Load** – Provides a snapshot of planned routes by Load Date.

**NOTE**: Whenever you change the date range or type, be sure to click the Refresh button on the upper toolbar to refresh the window.
Route Activity Window Navigation

The Route Activity window is also divided into two main portions: the upper portion and the lower portion. The lower portion of the window displays order data pertaining to a selected route from the upper portion.

Each portion of the Route Activity window has their own set of toolbar buttons, described in the Upper Portion Toolbar and Lower Portion Toolbar sections below. These toolbars provide ways to quickly access other, related functions—as opposed to exiting Route Activity and entering or modifying route/customer/ship-to data via originating functions.

Route Stage

The Route Stage column tells you in which stage the route is, currently:

- **Blank** – There are no orders or loads associated with the route and date range, but route activity is expected (nothing more). The route is not active.
- **Planned** – The selected route has orders associated with it. It is anticipated that this route is on schedule with shipments. The route is waiting and ready to be loaded.
- **Shipped** – Trucks have been loaded and the route is on schedule with shipments.
- **Invoiced** – The route and its planned shipments have been invoiced; the route has been settled; a final invoice has been generated for all orders on the route. See the Distribution User Manual for additional information about invoicing functions.
- **Completed** – The route has been picked, shipped, invoiced, and posted.
**Expected Order Activity Status**

The Expected Order Activity Status column tells you what kind of activity is associated with the route:

- **Open** means that the route is open for business but no order activity has yet been scheduled.
- **Closed** means the route has been satisfied with order activity. No further action is required.
- **N/A** means the route/departure date combination does not call for expected activity or that the route is ad hoc. As long as the route is not closed, you can assign activity to it.

The status helps you quickly see which customers are expected to place an order on a route. See “Open Expected Customer Order” on page 23 for more information.

**Route Activity – Orders**

The example shown below suggests how a user placing orders might view the Route Activity window. Note the Order Date column in the left-most position. (Remember you can change a column’s size and position by clicking and dragging.)

Just looking at this window, an order taker can see which companies should be called to see if they want to place an order. Or the order taker might want to flag certain customer orders as not having an order to put on the route. Or the order taker may want to notify the warehouse of something unique, or start preparing paperwork for the warehouse, and so on. An order taker can even add
orders via functions on the Route Activity window if desired, provided system permissions are set correctly.

See “Open Expected Customer Order” on page 23 for more information.

**Route Activity – Load**

The example shown below suggests how a warehouse loader might view the Route Activity window. Note the Load Date column in the left-most position.

**Route Activity – Departure/Ship**

The example shown below suggests how a logistics manager might view the Route Activity window to make decisions about combining orders onto one route, or separating them into different routes,
or adding a route, and so on. Note the Departure Date column in the left-most position (date is based on **Route Master** settings for order/load day and ship day).

**Standard Ship Ordering**

Standard ship ordering is used when product is in inventory. The standard shipping process includes adding an order, picking — manual or auto allocate, printing pick ticket (if required by the system), shipping, and invoicing. See the **Distribution User Manual** for additional information.

**Direct Ship Ordering**

Direct ship ordering is used when product has not been entered into inventory but is available for shipping. Direct Ship Ordering includes adding an order, Shipping, picking — direct ship, and invoicing. See the **Distribution User Manual** for additional information.

**Upper Portion Toolbar**

<table>
<thead>
<tr>
<th>Toolbar Button</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Refreshes the window's listed/displayed data. Remember to click this button after you change a date range or type.</td>
</tr>
<tr>
<td><img src="icon" alt="icon" /></td>
<td>Changes a selected route's departure/completion information (for all orders on the route). Departure date/time can only be changed while a route's stage is “Planned.” This is typically used for adjustments to a route on a one-time basis; it does not change Route Master settings. See “Change Route” on page 20 for more information.</td>
</tr>
<tr>
<td>Toolbar Button</td>
<td>Function</td>
</tr>
<tr>
<td>----------------</td>
<td>----------</td>
</tr>
</tbody>
</table>
| T | Transfers the entire unshipped content of a selected route to another route.  
   *See “Transfer Route Content” on page 21 for more information.* |
| S | Changes the route’s stop sequence.  
   *See “Stop Order Maintenance” on page 23 for more information.* |
| E | Opens a list of customers who are expected to place an order for the given route.  
   *See “Open Expected Customer Order” on page 23 for more information.* |
| Use this button to manually pick stock for the customer order that is on the selected route—as opposed to auto-allocating* stock.  
*This button will not allow you to pick stock for routes that has already shipped.*  
*Auto-allocate means that the system picks the inventory from stock based on inventory relief settings configured by your onsite system administrator.  
See “Manual Picking” on page 24 for more information.* |
| A | Allows you to auto-allocate* inventory for an unshipped route.  
*This button will not allow you to pick stock for routes that has already shipped.*  
*Auto-allocate means the system picks the inventory from stock based on inventory relief settings configured by your onsite system administrator.  
See “Auto-Allocate” on page 25 for more information.* |
| D | Allows you to manually pick* stock for a route that has already shipped.  
*Manually picking means you pick out the stock for the order, rather than using the system to auto-allocate it.  
See “Manual-Pick Direct-Ship” on page 26 for more information.* |
| AD | Allows you to auto-allocate* stock for a route that has already shipped.  
*Auto-allocate means the system picks the inventory from stock based on inventory relief settings configured by your onsite system administrator.  
See “Auto-Allocate Direct-Ship” on page 26 for more information.* |
| Unpicks all orders on a selected route. To unpick a route, it must first be “unshipped.”  
See “Unpick Route” on page 27 for more information.* |
| Ships the route after selecting a shipping warehouse.  
See “Ship Route” on page 28 for more information.* |
| Prints shipping documents (bill of lading or manifest).  
*This does NOT print the proforma invoice.*  
See “Print Shipping Documents” on page 28 for more information.* |
| When a route is flagged as shipped, this un-ships the route and returns the route to its previous state.  
This is the only way to change a route’s details once it has shipped.  
See “Unship Route” on page 30 for more information.* |
| Indicates a route settlement and flags a route as invoiced (route and invoice are finalized). The invoice is then available via the Distribution module.  
You cannot make any additional modifications to the route data after you click this button.  
See “Invoice Route” on page 30 for more information.* |
| This Reset Invoices button cancels invoicing operations for the selected route.  
See “Reset Invoices for Route” on page 30 for more information.* |
Lower Portion Toolbar

These command buttons effect a selected order or order items in the lower portion of the Route Activity window.

<table>
<thead>
<tr>
<th>Toolbar Button</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Refresh" /></td>
<td>Refreshes the window's listed/displayed data. Remember to click this button after you change a date range or type.</td>
</tr>
<tr>
<td><img src="image" alt="Change Route/Stop Assignment" /></td>
<td>Changes route and stop assignment information for a selected order item. See “Change Route/Stop Assignment” on page 33 for more information.</td>
</tr>
<tr>
<td><img src="image" alt="Delete" /></td>
<td>Deletes a selected item from a route assignment. Note there is no delete confirmation—when you delete it, you delete it! You can always put the item back on a route, however. See “Delete Route Assignment” on page 33 for more information.</td>
</tr>
<tr>
<td><img src="image" alt="Order Shipping Information" /></td>
<td>Opens the Order Shipping Information window, from which you can make manual adjustments to inventory, ship an item, make notes regarding an order, modify shipping charges, and do on. See “Shipping Panel” on page 34 for more information.</td>
</tr>
<tr>
<td><img src="image" alt="Adjust Quantity" /></td>
<td>Changes the quantity of a selected item on an order that has and shipped. This command cannot be used if the item has already been picked. See “Adjust Quantity” on page 34 for more information.</td>
</tr>
<tr>
<td><img src="image" alt="Add Item to Shipped Order" /></td>
<td>Adds an item to a selected order that has been flagged as shipped by the system. See “Add Item to Shipped Order” on page 35 for more information.</td>
</tr>
<tr>
<td><img src="image" alt="Maintain Orders" /></td>
<td>Opens the Maintain Orders window. See the Distribution User Manual for more information about maintaining orders. See “Order Level Route Maintenance” on page 37 for more information.</td>
</tr>
<tr>
<td><img src="image" alt="Delivery Date Entry" /></td>
<td>This button works with your actual-delivery-date price setting. That is, if your system is set up to price items based on actual delivery dates, then you must use this button to specify the actual delivery date of the order. Where applicable, the system provides a message that you need to re-price according to actual delivery date. See “Delivery Date Entry” on page 38 for more information.</td>
</tr>
<tr>
<td><img src="image" alt="Add New Order" /></td>
<td>Adds a new order to an unshipped route. See “Add Order to Unshipped Route” on page 40 for more information.</td>
</tr>
</tbody>
</table>

The fields to the right of the toolbar operate as follows:

- **Order Number** – Enter a desired number in this field and click Refresh to sort orders equal to or greater than your entry.
  For instance, if you type 300 in the Order Number field and click Refresh, the window re-displays order numbers that are equal to or greater than 300.

- **Capacity Lbs.** – This field displays the total from weights entered in Route Master records for each route.
- **Route Weight Lbs.** – This field displays the running total of Estimated Net Weight of orders on a route.
- **Balance Lbs.** – This field displays the difference between Route Weight Lbs. and Capacity Lbs.
Route-Based Command Button Functions

The functions described below are accessed via the command buttons on the Upper Portion Toolbar.
Change Route

The Change Route window is accessed via the Change Route Info button on the Upper Portion Toolbar. Through this window, you can change route departure dates/times and completion dates/times.

**NOTE**
Departure date/time can only be changed while a route’s stage is Planned. See “Route Stage” on page 12 for more information about route stages.

Enter exact Departure/Completion dates and times as desired and click OK. Close the window when finished.
Transfer Route Content

The Transfer Route Content window is accessed via the “T” button on the Upper Portion Toolbar. Through this window, you can transfer the entire unshipped content of a selected route to another route.

Enter a new Route **Departure Date** if applicable and select a new **Route**, then click **OK**. The system returns a confirmation message; click **OK** to confirm.

The Route Selector button is used to access the Route Selector window (see section below).
**Route Selector Window and Toolbar**

The Route Selector window is accessed via a number of parent windows within the Route Activity application as well as other places in the Distribution module. This window only lists ad hoc routes or routes for which new activity is allowed.

![Route Selector Window](image)

Toolbar buttons work with a selected Route ID:

<table>
<thead>
<tr>
<th>Toolbar Button</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Refresh" /></td>
<td>Refreshes the window’s listed/displayed data. Remember to click this button after you add or change a record.</td>
</tr>
<tr>
<td><img src="image" alt="Lookup" /></td>
<td>Use this Lookup button to access the Route Master.</td>
</tr>
<tr>
<td><img src="image" alt="Sort" /></td>
<td>Allows you to create and name an Ad Hoc Route Route. When you add an ad hoc route, it is listed in the Description column of the upper portion of the Route Activity window.</td>
</tr>
<tr>
<td><img src="image" alt="Go" /></td>
<td>Use this button to sort records. For instance if you type 300 in the Position by Route ID field and click the Go button, the window re-displays route IDs that are equal to or greater than 300.</td>
</tr>
<tr>
<td><img src="image" alt="Select" /></td>
<td>Use this button to enter the selected (highlighted) route ID into the Route field of the parent window.</td>
</tr>
</tbody>
</table>
Stop Order Maintenance

The Stop Order Maintenance window is accessed via the “S” button on the Upper Portion Toolbar. Through this window, you can alter the load and stop sequences of customer orders on the route.

Click directly on a field and type the new stop or load sequence number as desired. Click OK and close the window when finished.

Open Expected Customer Order

To review expected orders for the day and route you selected, either double-click on a route or select (highlight) a route and click the Open Expected Ship-Tos button from the Upper Portion Toolbar.

If you change the search criteria, be sure to click the Refresh button on the toolbar to refresh the listed information. Other toolbar buttons work in conjunction with a selected customer ship-to record.

As orders are placed, this “expected” list grows smaller as orders move from an expected status to a “planned” status.
If the route has default associations, then several different customer ship-to records may be listed (in the window shown below). If the route does not have default associations, then no customer ship-to information is listed.

**Toolbar Buttons**

Most toolbar buttons work with a selected ship-to record.

<table>
<thead>
<tr>
<th>Toolbar Button</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Refresh" /></td>
<td>refreshes the window's listed/displayed data. Remember to click this button after you change the date range or type.</td>
</tr>
<tr>
<td><img src="image" alt="View Only" /></td>
<td>opens a view-only window showing unshipped orders for the selected ship-to.</td>
</tr>
<tr>
<td><img src="image" alt="New Order" /></td>
<td>allows you to enter a new order for the selected customer ship-to.</td>
</tr>
<tr>
<td><img src="image" alt="No Order" /></td>
<td>toggles the No Order checkbox. When the check box is selected, it signifies that there is no order for the customer ship-to.</td>
</tr>
</tbody>
</table>

**Manual Picking**

To manually pick stock for an order on a (unshipped) route, select (highlight) a route and then click the Manual Picking button from the **Upper Portion Toolbar**.
This opens the Manual Picking Selection window as shown below:

Select an order and again click the Manual Picking button to pick stock for it. See the *Distribution User Manual* for more information about picking stock for an order.

**Auto-Allocate**

- **Auto-Allocate** means you are automatically allocating stock from inventory for an order or orders, rather than manually picking it yourself.

To automatically allocate inventory for an (unshipped) route, select (highlight) a route and click the Auto Allocate button from the *Upper Portion Toolbar*.

Auto-allocate means you are telling the system to automatically pick available inventory from stock for all orders on the selected route. If there isn’t enough stock available, the order and items that were not able to be auto-allocated are displayed in a report that runs immediately after the system attempts the auto-allocation. This means it’s possible some portions of some orders are left unallocated or partially allocated, and you will need to handle this per department policies at your company.
Manual-Pick Direct-Ship

- **Manual-Pick** means you are manually picking out stock for an order or orders, rather than using the system to auto-allocate it.
- **Direct-Ship** means you are flagging an order or orders as shipped, although you haven’t yet picked or allocated any inventory yet. The system flags the route as shipped.

To manually pick inventory, select (highlight) a route and click the Direct-Ship Manual-Pick button from the [Upper Portion Toolbar](#).

![Manual pick stock for the selected order below](image)

Select an order and click the Manual Picking button to pick stock for it. See the *Distribution User Manual* for more information about manually picking stock for an order.

Auto-Allocate Direct-Ship

- **Auto-Allocate** means you are automatically allocating stock from inventory for an order or orders, rather than manually picking it yourself.
- **Direct-Ship** means you are flagging an order or orders as shipped, although you haven’t yet picked or allocated any inventory yet. The system flags the route as shipped.

To automatically allocate inventory for all orders on a route, select (highlight) the route and click the Direct-Ship Auto-Allocate button from the [Upper Portion Toolbar](#).
A report runs immediately afterward to show you any items that may have not auto-allocated. In the sample shown below, you can see that no stock was available for a shredded cheddar item on order no. 140320003:

Auto-allocate means you are telling the system to automatically pick available inventory from stock for all orders on the selected route. If there isn’t enough stock available, the order and items that were not able to be auto-allocated are displayed in a report that runs immediately after the system attempts the auto-allocation. This means it’s possible some portions of some orders are left unallocated or partially allocated, and you will need to handle this per your department policies at your company.

**Unpick Route**

To move stock from all picked/allocated orders on a route back to inventory, select (highlight) the route and click the Unpick button from the Upper Portion Toolbar. This only works for routes that have not yet shipped. If you want to unpick stock for a route after the route has shipped, you have to unship it first.

An **Unpick Route Error Report** runs immediately afterwards to provide you with a status as needed:
Ship Route

To ship all orders on a route, select (highlight) the route and click the Ship Route button from the Upper Portion Toolbar.

A Shipping by Route Error Report runs immediately afterwards to provide you with a status as needed (sample shown below).

Print Shipping Documents

To print a route’s shipping documents, select (highlight) the route and click the Print Documents button from the Upper Portion Toolbar.

This prints out only the manifests and bills of lading for each order; it does not print a proforma invoice.
Sample manifest:

```
<table>
<thead>
<tr>
<th>P/R Date</th>
<th>Item Description</th>
<th>GTIN</th>
<th>Qty Shipped</th>
<th>Weight Shipped</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Whole Milk - Gallon 1Per</td>
<td></td>
<td>1.0000</td>
<td>8.6000</td>
</tr>
</tbody>
</table>
```

Sample Bill of Lading:

```
<table>
<thead>
<tr>
<th>Qty Shipped</th>
<th>Order U/M</th>
<th>Item Description / Notes</th>
<th>GTIN</th>
<th>Ctns.</th>
<th>Weight Shipped</th>
</tr>
</thead>
<tbody>
<tr>
<td>200.0000</td>
<td>0012</td>
<td>LCL Butter</td>
<td></td>
<td></td>
<td>1000000.0000</td>
</tr>
<tr>
<td>40.0000</td>
<td>121/1</td>
<td>0083CH12/1</td>
<td></td>
<td>40.0000</td>
<td>480.0000</td>
</tr>
</tbody>
</table>
```

Keep refrigerated below 40 degrees Fahrenheit!

Seal Number(s): ________________________________

We have put a temperature recorder in the trailer to ensure freshness. The recorder ID is ____________. If you receive, please contact us at 262-723-5726.
**Unship Route**

To unship all orders on a route, select (highlight) the route and click the Unship Route button from the **Upper Portion Toolbar**. This returns the route to its previous state and is the only way to change a route’s details once it has shipped.

An **Unship by Route Error Report** runs immediately afterwards to provide you with a status as needed.

**Invoice Route**

To invoice all orders for a route, select (highlight) the route and click the Invoice Route button from the **Upper Portion Toolbar**. The system sees this as a route settlement and then flags the selected route as invoiced. The Distribution module’s Invoicing functions can then be used to maintain the invoice(s). See the *Distribution User Manual* for additional information.

You cannot make any additional modifications to the route data after you click this button. Also, you cannot use this button for a route that has unpicked orders.

An **Invoicing by Route Error Report** runs immediately afterwards to provide you with a status as needed:

![Invoice Report](image)

The above example report lists orders that could not be invoiced.

**Reset Invoices for Route**

To reset invoices for all orders on a route, select (highlight) the route and click the Reset Invoices button from the **Upper Portion Toolbar**.

This cancels a route’s invoice(s) so you can undo things like shipping or picking. To use this command, the **Route stage** must be flagged as “Invoiced.”

A **Reset Invoices by Route Error Report** runs immediately afterwards to provide you with a status as needed.
In the above sample, two orders are listed: these are the route’s orders that could not be reset because they had not yet been invoiced.

In the above sample, the report states that an invoice for an order has already posted and therefore cannot be reset.
Order-Based Command Button Functions

The functions described below are accessed via the command buttons on the **Lower Portion Toolbar**.
Change Route/Stop Assignment

To change a route and/or stop assignment for a selected item, select (highlight) the order item from the lower portion window and click the Change Route/Stop button from the Lower Portion Toolbar.

The only portion of the window that is available for editing is the bottom, where you can alter the Route and Stop Sequence (not the Departure Date). Click OK to save any changes.

Click the Route Selector button to open the Route Selector window. See “Route Selector Window and Toolbar” on page 22 for more detail.

Delete Route Assignment

To delete a selected item from its assigned route, select (highlight) the order item from the lower portion window and click the Delete Route Assignment button from the Lower Portion Toolbar.

CAUTION: There is no delete confirmation message; the route assignment is simply deleted.
Shipping Panel

To open the Order Shipping Information window, select (highlight) the order from the lower portion window and click the Shipping Panel button from the Lower Portion Toolbar.

From the Shipping Panel Information window, you can make manual adjustments to inventory, ship an item, make notes regarding an order, modify shipping charges, and do on. For more information about this window, see the Distribution User Manual.

Adjust Quantity

To modify the quantity or units of a shipped item, select (highlight) the item from the lower portion window and click the Adjust Quantity button from the Lower Portion Toolbar.

![Change Shipped Quantity](image)

Enter the changed Quantity/Units and click OK. Remember to click Refresh to see your changes listed in the lower portion of the Route Activity window.

This command cannot be used if the item has already been picked.
Add Item to Shipped Order

1. To add an item to an order that has shipped, select (highlight) the order from the lower portion window and click the Add Item button from the Lower Portion Toolbar.

2. Click the Item Lookup button to open the Distribution Selector window.
The Lookup button accesses an item maintenance window (only if you are a system administrator).

- Type the item name or code (or portion of either) into the Item field and click the Position button to move the item to the top of the displayed list.

OR

- Click the Select button while an item is selected (highlighted in the list) to enter it directly into the Item field of the parent window.

3. Enter the **Ordered Quantity** for the item you are adding.

4. Click **Add** to add the item + quantity.

5. When finished, click **Exit** to close the window.
Order Level Route Maintenance

To maintain routes at an order level, select (highlight) the order from the lower portion window and click the Maintain Order button from the Lower Portion Toolbar.

Toolbar Buttons

Toolbar buttons work with a selected order from the Maintain Orders window. The Order Number field next to the toolbar is used to enter an order number or to display the number of a selected order from the display list.

<table>
<thead>
<tr>
<th>Toolbar Button</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Refresh icon]</td>
<td>Refreshes the window's listed/displayed data. Remember to click this button after you add or change records.</td>
</tr>
<tr>
<td>![Cancel icon]</td>
<td>Cancels the selected order. You are prompted with a Reason Selector window, after which the order is deleted from the route. You need to assign the order to another route to reverse this.</td>
</tr>
<tr>
<td>![Detailed info icon]</td>
<td>Opens more detailed information for the selected order. See the “Maintain Orders” section of the Distribution User Manual for more information.</td>
</tr>
<tr>
<td>![Inquiry icon]</td>
<td>Opens the Order Inquiry window for the selected order. See the “Maintain Orders” section of the Distribution User Manual for more information.</td>
</tr>
<tr>
<td>![Promotions icon]</td>
<td>Opens the Maintain Promotions window, where you can apply the details of a special promotion for the order. See the “Maintain Orders” section of the Distribution User Manual for more information.</td>
</tr>
<tr>
<td>Toolbar Button</td>
<td>Function</td>
</tr>
<tr>
<td>----------------</td>
<td>----------</td>
</tr>
<tr>
<td><img src="image" alt="Maintain Notes" /></td>
<td>Opens the Maintain Order Notes window, where you can add notes about the selected order. See the “Maintain Orders” section of the Distribution User Manual for more information.</td>
</tr>
<tr>
<td><img src="image" alt="Order Level Route Assignment" /></td>
<td>Opens the Order Level Route Assignment window, where you can change route assignment of the selected order. Select a different Route from the drop-down list or click the Route Selector button to use the Route Selector window, and then click OK.</td>
</tr>
<tr>
<td><img src="image" alt="Release Order" /></td>
<td>This button releases a selected “on hold” order. If an order has an old order date or a price discrepancy, the order can be automatically be put on hold and prevented from being picked, shipped, or invoiced until you have a chance to review and modify the order. (Criteria for putting an order on automatic-hold are defined via commands in the EDI and Distribution modules.)</td>
</tr>
<tr>
<td><img src="image" alt="Maintain Items" /></td>
<td>Opens the Maintain Order Items window, where you can add or modify items on the selected order. See the “Maintain Orders” section of the Distribution User Manual for more information.</td>
</tr>
</tbody>
</table>

## Delivery Date Entry

The Delivery Date Entry button works with your actual-delivery-date price setting. That is, if your system is set up to price items based on actual delivery dates, then you must use this button to specify the actual delivery date of the order.

Where applicable, the system provides a message that you need to re-price according to actual delivery date.

1. To add or modify an Actual Delivery Date for an order, select (highlight) the order from the lower portion window and click the Delivery Date Entry button from the Lower Portion Toolbar.
2. Enter the **Order Number** for which you want to specify an **Actual Delivery Date** and the date, and then click **Confirm**.

The Item Delivery Dates window displays, listing all items on the order so that you can confirm actual delivery dates for all items:
3. Verify that dates are reflected as desired and click **Confirm**.

4. Close all windows when finished.

**Add Order to Unshipped Route**

This command button allows you to quickly add new orders to a route.

1. To add an order to a route that has not yet shipped, click the Add Order button from the **Lower Portion Toolbar**.

![Add Order to Route](image)

2. Click the Item Lookup button to open the Customer Selector window.

![Select Customer](image)
• The Lookup button accesses the Customer Master window, which is typically used only by an onsite system administrator.

• Type the customer name or code (or portion of either) into the Customer field and click the Position button to move the item to the top of the displayed list.

OR

• Click the Select button while a customer record is selected (highlighted in the list) to enter it directly into the Item field of the parent window.

3. Select a customer **Ship-To** record from the drop-down list and click the Add an Order button.

4. Proceed adding an order as usual via the Order Entry windows. See the “Add an Order” section of the *Distribution User Manual* for more information.