



*Setting Up & Using  
RouteTrak Pro<sup>TM</sup>  
Proof of Delivery  
for DDMS*



May 2008 Item # H-ROUTE

# Contents

<b>About RouteTrak Pro .....</b>	<b>3</b>
<b>What You Need to Set Up .....</b>	<b>3</b>
Creating a Customer .....	4
Creating a Customer Using Text-Based Software .....	4
Sorting Deliveries (Optional) .....	5
Creating a Customer Using DDMS .....	6
Sorting Deliveries Using DDMS (Optional) .....	7
Setting Parameters .....	8
Setting Up the (L8) Screen .....	8
Setting Up the (L8R) Screen .....	9
<b>Using RouteTrak Pro .....</b>	<b>10</b>
Creating the Shipping Manifest .....	10
Entering Invoices Separately .....	10
Building Batch Manifests .....	12
Exporting a Manifest .....	14
Delivery Options .....	14
Setting Parameters .....	15
Making a Manifested Delivery .....	18
Making an Unmanifested Delivery .....	22
Making Desktop Deliveries .....	23
Grouping .....	24
End-of-Day .....	25
Importing a Manifest .....	26
<b>Using the RouteTrak Management Console .....</b>	<b>27</b>
Deliveries .....	27
To Be Delivered .....	28
United Manifest Update DDMS .....	30
Reports .....	31
Delivery Instructions .....	34

## About RouteTrak Pro

RouteTrak Pro is a proof-of-delivery system with UPS-style electronic signature capture. It helps you avoid missed or misrouted shipments and the resulting billing disputes. Delivery personnel can use the RouteTrak Pro handheld units to crosscheck delivery information, verify carton counts and capture electronic signatures. This gives you a permanent time- and date-stamped record of the delivery. It reduces or eliminates paper forms, manual data entry, hard-copy file archives, reshipments, late payments, route inefficiencies and hard-copy form retrieval.

RouteTrak Pro's Digital Signature Handheld Unit synchronizes your shipping manifests. Drivers can identify errors, shortages and overages at the point of delivery. RouteTrak Pro synchronizes with your customer order data, so drivers no longer need to file multipart forms.

Digital signatures and customer delivery data can be uploaded as soon as the drivers return. Your customer service agents can respond to customer delivery inquiries with confidence and indisputable proof of delivery.

With RouteTrak Pro's data analysis, you can be certain your drivers are productive and your routes are as efficient as possible.

## What You Need to Set Up

You must:

- Create a customer
- Set parameters.

## Creating a Customer

You must set up routes for each customer to whom you deliver, if they don't already have one assigned. You can do this using either the text-based software or using DDMS. You can also sort the deliveries on a route (optional).

### Creating a Customer Using Text-Based Software

- 1 In the (A) screen, type C in the Action field.
- 2 Retrieve the customer record.
- 3 Tab to the Route field. Enter the four-digit code of the route to which to assign this customer. See Figure 1.
- 4 Press Enter through the remaining fields in the screen.
- 5 Repeat these steps for each customer to whom you deliver.

**Figure 1: Assign the Route Code in the (A) Screen**

```

11:58:50                (A) CUSTOMER MASTER REV. (01/13/04)                02/17/04
ACTION [C] =====
  A=Add, C=Chg, D=Del, I=Inq, H=His, Q=Serv, S=Sale, T=Tax, R=Reindex, O=Other
===== Company Location [ 1] ===== S-H-I-P-P-I-N-G A-D-D-R-E-S-S ===
Acct #      278  Dept :                               Name :EMILY HAYWARD
Name :MEDITRUST                                     Suite :45437 SMITH ROAD
Suite :.                                           Addr. :
Addr. :197 FIRST AVE                               City :KELLER
City :WALTHAM                                     State :TX Zip #89765 [   ]
State :TX Zip #02194 [   ] Route :1111             Contact [EMILY           ]
Phone #617-433-6000 Sic :      Prepay ?           National Drop Ship Account Y/N ?Y
Status O/E :G Slsm # 272 Add.Slsm # 210 ----- ORDER ENTRY -----
Stat. Exempt [ ] Credit Limit $                    Taxable Y/N :Y Dist :4444 Remote ID :
Entry Date :06/29/89 Start Limit $                Status OE :G TM1 :   TM2 :S OE Exmp :
---- ADDITIONAL DEPT, NAME & CONTACT --- Catalog Price : Best Pricing :Y
Dept. [      ] Disc Type :S 15.0% Hold Type : #
Name [      ] Contracts [AA] [BB] [CC] [DD]
Contact [      ] Type ? Cost M/W/A/P/2-9 ?M Cost Plus if Net :
----- Fax Number # - - - - - Up List % Columns :N
[MONTHLY SUMMARY BILLING ACCOUNT ] P/O Required ? B/O ? Substitutes ?
[      ] Format: Pick : Invoice : Hold ?Y
[      ] Inv. Copies : Laundry List ID :
=====
    
```

## Sorting Deliveries (Optional)

You can sort the deliveries on a route. This is optional; it can make your drivers' jobs easier. However, if your drivers are well acquainted with their routes, sorting the deliveries for them may be unnecessary.

- 1 In the (AQ) screen, type **C** in the Action field.
- 2 Retrieve the customer record.
- 3 Tab to the Srt Order field in the Shipping Manifest record. See Figure 2. Specify the order in which the customer receives a delivery, in comparison to other customers on the same route.

ECi recommends that you assign sort numbers in multiples of 50; 100, 150, 200, and so on. This lets you easily add new customers to a route without changing everyone's sort number.

When you assign sort numbers to each customer on a route, you can automatically sort the invoices on a shipping manifest.

- 4 Press Enter through the remaining fields in the screen.
- 5 Repeat these steps for each customer to whom you deliver.




**Figure 2: Assign the Sort Order in the (AQ) Screen**

```

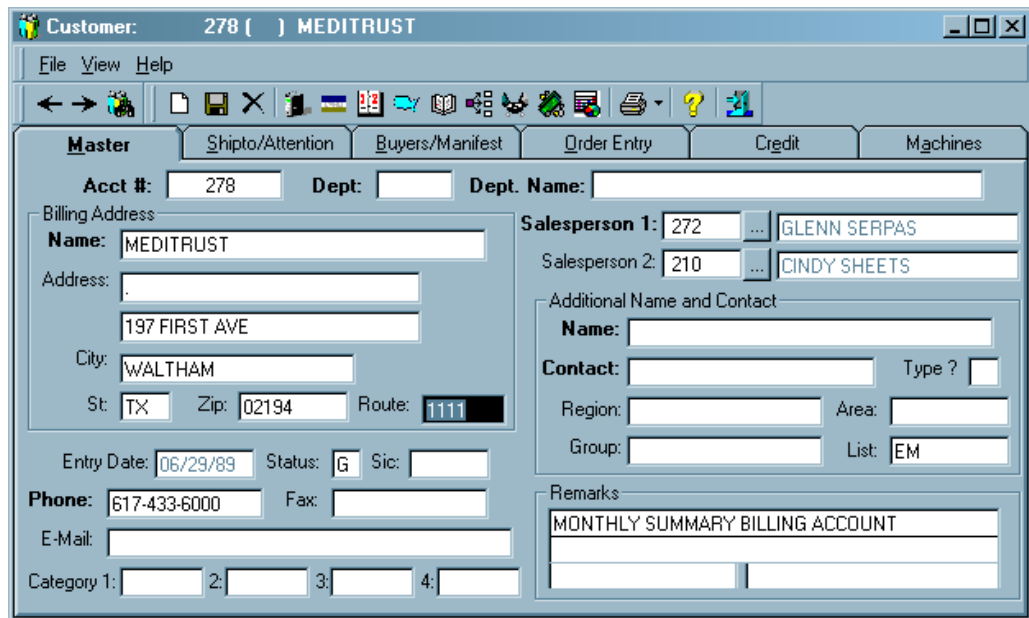
14:56:56          (AQ) CUSTOMER SERVICE QUALITY REV. (01/13/04)          02/17/04
=====
ACTION [C] ( C=Change, I=Inquire, H=History, S=Sales, B=Back TO A)
===== Company Location [ 1] ===== S-E-R-V-I-C-E Q-U-A-L-I-T-Y =====
Acct #          278 Dept :                               MTD      YTD      LAST
Name :MEDITRUST                                         Lines Ordered
Suite :.                                                Lines Filled
Addr. :197 FIRST AVE                                   Orders
City :WALTHAM                                           Lines/Order
State :TX Zip #02194 [  ] Route :11                     Dollars/Order
Phone #617-433-6000 Sic :      Prepay ?                Fill by Line      %      %      %
----- SUMMARY BILLING -----
Summary Freq.      Days (F. ,L. )                       Credit Lines
Last Date: / /      Next Date: / /                     Credit Orders
Last #             Curr. #                               Credit Dollars
Formats: Inv.:      Usage:                             Credit % Sales    % 00.0%    %
----- ADDITIONAL INFO -----
e-mail :
Region :           Area :                               Deliveries MTD      YTD      LST Y
Group :
Exp. Sales $      # of Emp. #                                           Srt Order: 100   Freight: Method:
Exp. Margin $     Exp. G.P. %                                           Del. Time : to : Days :
Category 1:      2:      3:      4:                                           P/O#
** ENTER DATA OR <?> FOR HELP !!
Instructions :
    
```

## Creating a Customer Using DDMS

In DDMS's Customer Master tab, create a customer.

- 1 Double-click . The Customer window opens, displaying the information for the last customer selected.
- 2 Click . The boxes in the window are cleared.
- 3 Click the Account # box and enter an account number for the customer.
- 4 In the Name box, enter a name for the customer.
- 5 Click the Route box and enter the four-digit code of the route to which to assign this customer. See Figure 3.
- 6 When you finish, click .
- 7 Repeat these steps for each customer to whom you deliver.

**Figure 3:**  
Assigning a  
Customer Route  
in DDMS



Customer: 278 ( ) MEDITRUST

File View Help

Master Shipto/Attention Buyers/Manifest Order Entry Credit Machines

Acct #: 278 Dept: Dept. Name:

Billing Address  
Name: MEDITRUST  
Address:  
197 FIRST AVE  
City: WALTHAM  
St: TX Zip: 02194 Route: 1111

Salesperson 1: 272 ... GLENN SERPAS  
Salesperson 2: 210 ... CINDY SHEETS

Additional Name and Contact  
Name:  
Contact: Type ?  
Region: Area:  
Group: List: EM

Entry Date: 06/29/89 Status: G Sic:  
Phone: 617-433-6000 Fax:  
E-Mail:  
Category 1: 2: 3: 4:

Remarks  
MONTHLY SUMMARY BILLING ACCOUNT


### Sorting Deliveries Using DDMS (Optional)

In DDMS's Customer Buyers/Manifest tab, establish a sort order for the customer.

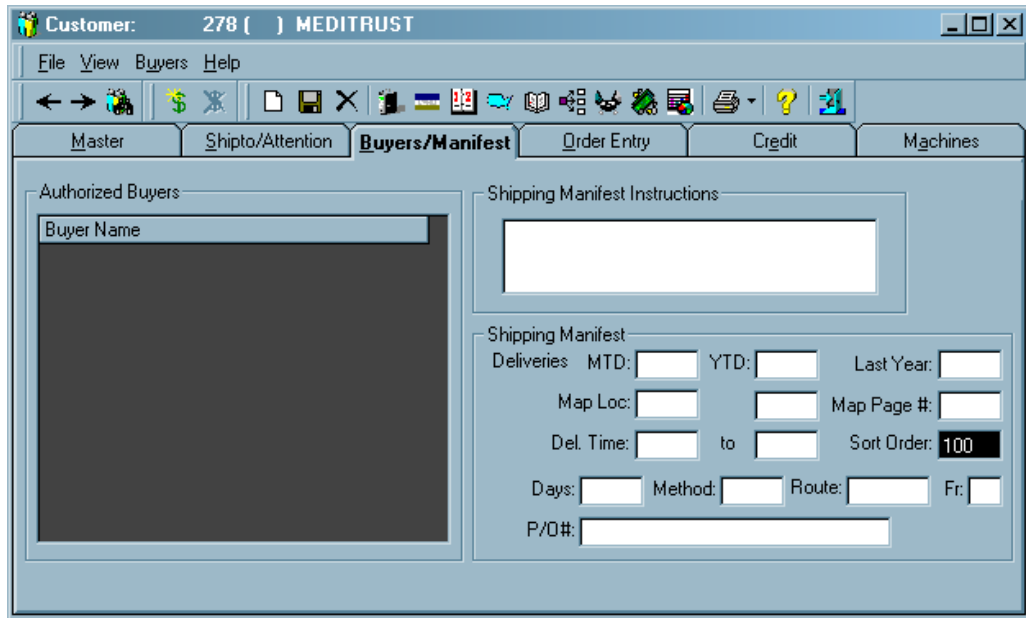
- 1 In the Customer Master tab, retrieve the customer.
- 2 Click the Buyers/Manifest tab.
- 3 Click the Sort Order box. Specify the order in which the customer receives a delivery, in comparison to other customers on the same route. See Figure 4.

ECi recommends that you assign sort numbers in multiples of 50; 100, 150, 200, and so on. This lets you easily add new customers to a route without changing everyone's sort number.

When you assign sort numbers to each customer on a route, you can automatically sort the invoices on a shipping manifest.

- 4 Click .
- 5 Repeat these steps for each customer to whom you deliver.

**Figure 4:**  
**Assigning a**  
**Customer Sort**  
**Order in DDMS**



## Setting Parameters

You must set up parameters in the (L8) Manifest and Route Parameters screen and the (L8R) Route Parameters screen. To access the parameters screens in

DDMS, double-click  then . Next, double-click Text Base

Parameters. The (L) Parameters screen opens. Enter your screen selection in the Selection Code field. For example, to open the (L8) screen, type **8**.

### Setting Up the (L8) Screen

*ECi recommends you set up a volume serial dedicated to your PSHIPI and PSHIPO files.*

*Steps 2 and 3 are optional.*

ECi recommends you create a volume serial dedicated to your RouteTrak Pro files. To find out about creating a volume serial, see About Volume Serials in your online help.

- 1 In the (L8) screen, type **C** in the Action field.
- 2 Tab to the Do Returning Release field. (This is an optional setting.) Type **Y** to manually execute the returning release. Type **N** to perform the returning release when you import the manifest PSHIPI file.
- 3 Tab to the Batch Add Bill Complete Orders field. (This is an optional setting.) Type **Y** to include bill-complete orders when you are building a batch manifest. Type **N** to exclude bill-complete invoices.
- 4 Tab to the Third Party Carrier Vol field. See Figure 5. Specify the volume serial where your PSHIPI and PSHIPO files will reside.

**Figure 5: The (L8) Screen**

```

12:08:54                (L8) Manifest & Route Parameters                02/17/04
=====
Action [C] (C=Change, I=Inquiry, P=Picking, R=Routes) G/L Location [ 1]
=====
Additional Journal Name [0200-S ] Vol. [HI??]
PASSWORDS : Release ?      Delete ?      Reindex ?      Purge ?
Next Manifest #           86                Do Returning Release Y/N ?Y
Maximum Number of Stops [ ]                Default to Carton or Envelope C/E ?E
Batch Add Bill Complete Orders Y/N ?      Third Party Carrier Vol. [TPC ]
Format Printer                Set Ctn From Third Party Carrier Y/N ?Y
Label [SM-LB1] [6]
Loading [MANIFL] [1]
Delivery [MANIFD] [1]
DEFAULT LIMITS
Loc # to #
Status : to :
Sic : to :
Route : to :
Sort : to :
PO #:
to #:
Default Order Date to Yesterday Y/N ?
=====
    
```

## Setting Up & Using RouteTrack Pro™ Proof of Delivery for DDMS

The PSHIPO file includes the invoice and delivery details. It is exported to the handheld unit before the driver departs. When the driver returns and replaces the handheld unit in the cradle, the delivery information is placed in the PSHIPI file. Your DDMS system is updated when the PSHIPI file is imported.

You must store these files in a valid DDMS volume serial on your system. This lets RouteTrak Pro read and update the files as needed. Enter the volume serial in this field, TPC, for example.

- 5 Tab to the Set Ctn From Third Part Carrier field. Type **Y** (recommended) to update your DDMS system's carton count with the driver's number of packages. Type **N** to enter the carton count when you create the manifest.
- 6 Press Enter, then Esc to save your changes.

### Setting Up the (L8R) Screen

You can set parameters for each route individually.

- 1 In the (L8R) screen, type **C** in the Action field.
- 2 Tab to the Route field. Enter the route number.
- 3 In the Route Desc field, you can enter a description to identify this route.
- 4 Tab to the When Releasing Manifest, Build Third Party External Source Table field. Type **Y**. See Figure 6.

---

**Note:** The other fields in the (L8R) screen are optional.

---

**Figure 6: The (L8R) Screen**

```
12:10:48 (L8R) Route Parameters 02/17/04
=====
Action [C] (C=Change, I=Inquiry) G/L Location [ 1] Route [11 ]
=====
Route Desc [SAME DAY DELIVERY ]
Driver [ ]

Delivery Days [ ]
Maximum Number of Stops [ ]

Last Manifest # 3295
When Releasing Manifest, Build Third Party External Source Table Y/N ?Y

Format Printer
Label [ ] [ ]
Loading [ ] [ ]
Delivery [ ] [ ]

Substitute List ID [111 ]
=====
```

- 5 Repeat these steps for each route using RouteTrak Pro.
- 6 When you finish, press Enter.

## Using RouteTrak Pro

Begin by entering, picking and staging orders. After printing the delivery invoices and organizing them by delivery route, do the following:

- 1 Create the Shipping Manifest in the (TS) Shipping Manifest screen.
- 2 Export the manifest.
- 3 Sync the handheld units. The delivery information is downloaded to each unit.
- 4 Deliver packages.
- 5 When the driver returns, re-cradle the handheld unit. The delivery information is uploaded from the unit.
- 6 Import the manifest.
- 7 Execute a returning release (if the Do Returning Release field in the (L8) screen is set to Y).

## Creating the Shipping Manifest

The Shipping Manifest is built in the (TS) screen. If you specified a sort code in the (AQ) screen (Sort Order box in the Customer Buyers/Manifest tab), you can build the manifest by entering the invoices individually or in a batch.

### Entering Invoices Separately

Entering individual invoices for the route lets drivers add tickets to manifests. It takes more time, but gives your driver more flexibility. The manifest prints the invoice numbers in sort order, according to the sort code you entered in the (AQ) screen (Sort Order box in the Customer Buyers/Manifest tab).

- 1 In the (TS) screen, type **A** in the Action field.
- 2 At the Append to Existing Manifest prompt, type **N**.
- 3 At the Manifest Creation Method prompt, type **B**.

---

**Note:** When the new manifest number appears in the Manifest field, write it down. You'll need it later.

---

- 4 In the Route field, assign a route code for this manifest. (The information for this route is set in the (L8R) screen.)
- 5 At the Correct Route prompt, type **Y**.
- 6 At the Print Shipping Labels When Adding prompt, type **N** to skip printing labels for each invoice added to the manifest.

---

*You can also build the shipping manifest manually in entry order, or build it using list entry in sort order. For instructions, see your online help.*

---

## Setting Up & Using RouteTrack Pro™ Proof of Delivery for DDMS

To print shipping labels for each invoice added to the manifest, type **Y**. At the Printer prompt, type **Y** to accept the displayed printer and format, or type **N** to change them.

- The cursor moves to the Invoice # field and the Enter Invoice Number message appears. The line number, 1 for example, displays in the field to the left of the Route field, and the route you assigned to this manifest displays in the Route field. Enter the number of the first invoice to place on the manifest. This can be done manually or by scanning the invoice if your format prints the invoice number as a bar code.
- At the Correct Ticket prompt, type **Y**.

**Note:** If the invoice is on another manifest, the Invoice Is On Manifest message appears. Press Esc to return to the Invoice # field.

If the route assigned to the ticket does not match the route for this manifest, the Invoice Route Does Not Match prompt appears. To not add this invoice to the specified route, type **N**. To add it, type **Y**. It is placed at the beginning of the manifest before those with sort codes.

- In the Ctn field, enter the number of cartons on the invoice and press Tab. If there are no cartons on this invoice, space through this field.
- In the Env field, enter the number of envelopes on the invoice and press Tab. If there are no envelopes on this invoice, press Tab to move past this field.
- In the Sort field, press Tab.

**Figure 7: The Manifest Summary Screen**

```
10:51:32 (TS) Shipping Manifest (01/14/04) 02/18/04
-----
Action ? [A] Entry Order File :P-MASTER
-----
Manifest # 87 Date :02/18/04 Invoice # 10057-0 Date :02/18/04
Name :ACME RUBBER Account # 936 Dept :
      6 POWERHOUSE ROAD Route :11 Map Loc : Page #
      SOUTH BOSTON MA 02127 Delivery Time # : to # : Days :
      617 268 1290 Sort :
Instructions :
-----
Route Sort Invoice # Ctn. Env. Route Sort Invoice # Ctn. Env.
-----
Manifest # 87 Date :02/18/04
Route :11 SAME DAY DELIVERY
Driver :
Delivery Days : Max Stops :
Last Manifest # 87
Totals : Stops [ 1] Ctns [ 1] Envs [ ]
Invoices [ 1] Credits [ ]
-----
Any Key to Continue
```

## Setting Up & Using RouteTrack Pro™ Proof of Delivery for DDMS

- 12 When you finish adding invoices, press Esc. The Manifest Summary screen opens. See Figure 7. It shows route information from the (L8R) screen, along with the total number of stops, cartons, envelopes, invoices, and credits to include on the manifest. To return to the action code field, press Enter.

### Building Batch Manifests

Building a manifest with batched invoices lets you create shipping manifests without manually entering invoices. This is faster than entering the invoices separately, but less flexible.

- 1 In the (TS) screen, type **A** in the Action field.
- 2 At the Append To Existing Manifest prompt, type **N**.
- 3 At the Manifest Creation Method prompt, type **D**.
- 4 At the Enter File To Create Manifest From prompt, type **1** if you haven't yet executed your (MA) day-end procedure. (This builds the manifest from invoices in the file P-MASTER.) If you have executed your day-end procedure, type **2**. (This builds the manifest from invoices in the file JOUR-S.)

**Figure 8: The Manifest Limiting Screen**

```
11:38:41 (TS) Shipping Manifest (01/14/04) 02/18/04
-----
Action ? [A] Batch File :P-MASTER
-----
Manifest # _____ Date :MM/DD/YY Invoice #.....- Date :././..
Name :..... Account #..... Dept :...
..... Route :... Map Loc :... Page #...
..... Delivery Time #..... to #..... Days :...
..... Sort :.....
Instructions :.....
-----
Route Sort Invoice # Ctn. Env. Route Sort Invoice # Ctn. Env.
-----
Loc #.. to #.. Order Packer :... to :...
Status :. to :. Order Date :././.. to #././..
Sic :... to :... Invoice #.....- to #.....-
Route :... to :... Vendor #..... to #.....
Sort :... to :... P/O #..... to #.....

Customer P/O #..... to #.....
P/O #..... to #.....

Enter Limits for Building Manifest
```

## Setting Up & Using RouteTrack Pro™ Proof of Delivery for DDMS

- 5 In the Manifest Limiting screen, you can limit the invoices included on the manifest. See Figure 8. To set limits, enter the beginning of the range in the first field, and enter the end of the range in the To field. To set no limits, press Enter. Without limits, however, the manifest includes all invoices except those that meet certain criteria. An invoice that meets any of the criteria below is **excluded** from the manifest:
  - Ticket is a credit
  - All routes are blank (CROUTE, C-MANIFEST, and C-MASTER)
  - Customer is a bill-complete (If the Batch Add Bill Complete Orders field in the (L8) screen is set to Y, these invoices are included.)
  - Ticket has a due date equal to or prior to the present
  - Ticket is on another manifest
  - Ticket does not have any shipped quantities.
- 6 At the End Of Batch Adding message, press Enter.

**Figure 9: Set the Release Field to Y.**

```

(TS) Shipping Manifest (MM/DD/YY)                                02/18/04
-----
Action ? [S]                                     Third Party                               File :P-MASTER
-----
Manifest #      87  Date :02/18/04  Invoice #.....-  Date :.././..
Name :.....
..... Route :.... Map Loc :.... Page #....
..... Delivery Time #..... to #..... Days :.....
..... Sort :.....
Instructions :.....
-----
Route  Sort  Invoice #  Ctn.  Env.      Route  Sort  Invoice #  Ctn.  Env.
-----
Manifest #      87  Date :02/18/04
Route :11  SAME DAY DELIVERY
Delivery :02/18/04  10:57  Release :
Driver :
Totals : Stops [ 1] Ctns [ 1] Envs [  ]
          Invoices [ 1] Credits [  ]
Release Y/N ?Y ( Set Invoice with Manifest Information )
Print Y/N ?N  Loading,Delivery,Both L/D/B ?D
          Loading Format [MANIFL] Printer [1]
          Delivery Format [MANIFD] Printer [1]
    
```

## Exporting a Manifest

Before the driver removes the handheld unit from the cradle, execute the Third Party Carrier (TS) [S] [E] Export function. This exports the manifest information to the handheld units.

- 1 In the (TS) screen, type **S** in the Action field.
- 2 At the Export/Import and Release prompt, type **E**.
- 3 In the Manifest field, enter the manifest number and press Enter.
- 4 In the Release field, type **Y**. See Figure 9.
- 5 In the Delivery field, press Enter.
- 6 In the Print field, type **Y** to print the manifest. Type **N** if you are not printing the manifest.
- 7 When you finish, press Esc.

## Delivery Options

The handheld unit is placed in the cradle to create an automatic sync. To prepare the handheld unit for the driver, remove the unit from the cradle and immediately place it back into the cradle to initiate the import sync. This brings all the orders, customers and delivery information over to the handheld units. Drivers make their deliveries and capture customer signatures and delivery information with the handheld units.

Figure 10:  
Delivery  
Manifest Screen

The screenshot shows a handheld device screen with the following content:





- Header: **Delivery Manifest** (Setup)
- Sub-header: ASC
- Table of delivery items:

LAMBDA OPTICAL	* 1
JAMISON & JAMISON	* 5
COMMUNITY CREDIT COU	* 1
DUE PROCESS GOLF & HO	* 2
STAVOLA	* 1
STAVOLA	C 1
NORWOOD AGENCY	* 4
OPTION CARE	* 1

At the bottom of the screen, there are two buttons: **Manual** and **Begin Delivery**.

## Setting Parameters

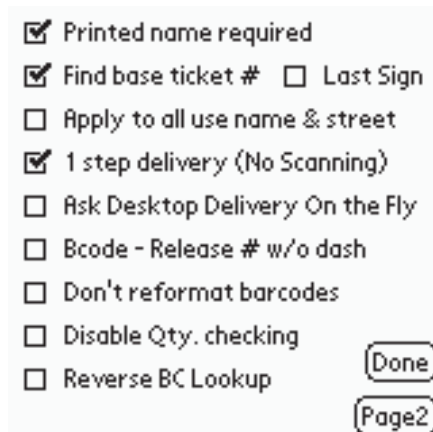
You can set several parameters to control your delivery process. To set parameters:

- 1 In the RouteTrak Main Menu, tap  then tap Start.
- 2 The Delivery Manifest window opens. See Figure 10.
- 3 Tap Setup.
- 4 In the Enter Password window, tap the password line.
- 5 Using the keyboard, enter your password.
  - To enter letters, tap . To capitalize a letter, tap Shift, then tap the letter.
  - To enter numbers, tap .
  - To use the international character set, tap .

When you finish, tap OK, then tap More.

- 6 In the Program Setup Page 1 and Page 2 windows, tap the features to enable. See Figure 11 and Figure 12.

**Figure 11: The Program Setup Page 1 Window**



## Setting Up & Using RouteTrack Pro™ Proof of Delivery for DDMS

- **Printed Name Required** requires you to enter a printed name after capturing the customer signature.
- **Find Base Ticket Number**
- **Espanol** makes Spanish the primary language of this handheld unit.
- **Apply to All Use Name & Street** attaches the signature and name to all companies with the identical name and street address when you check the Apply to All box in the Customer Signature window.
- **1 Step Delivery** eliminates package scanning. This speeds deliveries and is useful for training. However, it decreases error detection.
- **Ask Desktop Delivery on the Fly** lets you capture multiple signatures for multiple invoices to a single customer. After confirming delivery, tap OK to break apart the order and collect multiple signatures for multiple invoices. To group all the customer's orders for a single signature, tap Cancel.
- **Bcode - Release # w/o Dash** lets you delete the dash (-) from invoice numbers.
- **Don't Reformat Barcodes**
- **Disable Quantity Checking** eliminates checking the number of scanned packages against the manifest.

**Figure 12: The Program Setup Page 2 Window**

Enable Piece Counts

When committing piece counts:

Reset tickets with 0 pieces to Orig

Leave tickets with 0 pieces at 0

Don't show helper line

Helper line shows suite

Helper line shows street

Sort by:

Name     Sort Code

Leave "As Is"

COPAS Sequence

## Setting Up & Using RouteTrack Pro™ Proof of Delivery for DDMS

- **Enable Piece Counts** lets each driver keep an accurate piece count even if you don't update the carton count on your manifest. Otherwise, the carton count defaults to one.

Typically, all the deliveries for a given truck are pre-staged. The driver scans all the packages to build a piece count. Then he confirms the piece count for the truck. This overrides the manifested piece count as the number of items for which a customer signs.

When the Enable Piece Count feature is turned on, you can:

- **Reset Tickets with 0 Pieces to Original** returns all piece counts to the original number from the manifest.
- **Leave Tickets with 0 Pieces at 0**
- When enabled, the helper line appears in the Delivery Manifest window.
  - **Don't Show Helper Line** disables the helper line
  - **Helper Line Shows Suite** displays the suite number
  - **Helper Line Shows Street** displays the street address.
- You can sort the delivery manifest by:
  - **Name** arranges the list in alphabetical order by business name.
  - **Sort Code** lets you arrange the list using sort codes. The sort code is the DDMS sort code for shipping location.

Figure 13: The Customer Detail Menu




## Setting Up & Using RouteTrack Pro™ Proof of Delivery for DDMS

- **Leave As Is** arranges the list in the order the tickets were entered on the manifest.
- **COPAS sequence**

In the Delivery Manifest window, you can arrange the list in ascending or descending order. Tap Asc for ascending order. Tap Des to arrange the list in descending order.

- 7 When you finish setting parameters, tap Done.
- 8 In the Program Setup window, tap Done.

### Making a Manifested Delivery


- 1 In the RouteTrak Main Menu, tap  then tap Start.
- 2 The Delivery Manifest window opens. The delivery manifest has three columns. The first lists each customer to whom you are delivering. Tap the up and down arrows to scroll through the list.

The second column shows the delivery status. An asterisk (\*) indicates the delivery has not been made. The letter C indicates the delivery is COD. If a customer's status is blank, the package has been delivered.

The third column shows the number of packages to be delivered.

Double-tap any name on the delivery manifest to open the Customer Detail Menu. See Figure 13. The Customer Detail Menu shows contact information, delivery details and special instructions.

Figure 14: The Delivery Summary Window



Package #	Cust PO	# Ctns
1616836-1	40517	1
1616855-0	40518	6

WEST WARD PHARMACEUT Done

## Setting Up & Using RouteTrack Pro™ Proof of Delivery for DDMS

- Tap Contact Information to see the company name, address, contact name, phone number and number of packages on this manifest. When you finish, tap Done.
- Tap Delivery Details to see the package number, customer's P/O number and the number of cartons to deliver. See Figure 14. When you finish, tap Done.
- Tap Special Instructions to see the ticket number and special instructions, such as No Checks. When you finish, tap Done.

To exit the Customer Detail Menu, tap Return to Manifest Main.

- 3 In the Delivery Manifest window, tap a customer name to highlight it.
- 4 Tap Begin Delivery. If you enabled the One-Step Delivery parameter, go to **Step 6**.
- 5 In the Scan Packages window, scan or manually enter items in any order. See Figure 15.
  - To enter the information by scanning, use the handheld unit to scan each carton's barcode.
  - To manually enter the ticket number, tap Manual Entry. In the Manual Entry window, tap the Label Information line to open the keyboard. Enter the ticket number and tap Done.

The Number of Ctns field is updated as you scan cartons.

Figure 15: The Scan Packages Window

The screenshot shows a handheld device screen with the following content:

- Scan Packages** (Title bar)
- Please be sure to scan each package.  
Tap the 'Next' button when complete.
- LAMBDA OPTICAL
- Number of ctns: 1.....
- Buttons: Manual Entry, 0 of 1, <--Main, Next-->

## Setting Up & Using RouteTrack Pro™ Proof of Delivery for DDMS

The carton count is organized by invoice number, so you know which invoice was updated. However, if the invoice has multiple cartons associated with it, there is no way to identify which carton is missing.

An Info box warns you if you scan more packages or fewer packages than the manifest indicates. It also warns you if you deliver the wrong package to a customer. Tap Done in the Info box. A Confirm box lets you override the manifest or return to the Scan Packages window.

When you finish, tap Next.

- 6 The Customer Signature window opens. See Figure 16. The customer signs in the signature box. To attach this signature and printed name to all companies with an identical name, tap Apply to All. Use this feature when delivering all packages to a central location, such as a delivery dock.

---

**Note:** If you enabled the Apply To All Using Name and Street parameter in the Setup window, the signature and printed name apply to all customers with an identical company name *and* street address.

---

Figure 16: The Customer Signature Window

**Customer Signature**

**LAMBDA OPTICAL**

**Signing for 1 packages.**

Please sign below  Apply to all

Jane Smith

Print Name | .....

Cancel Done

## Setting Up & Using RouteTrack Pro™ Proof of Delivery for DDMS

7 Tap the Print Name line and enter the last name of the customer using the onscreen keyboard. See Figure 17. (This step is optional unless you enabled the Printed Name Required parameter.)

- To enter letters, tap **abc**. To capitalize a letter, tap Shift, then tap the letter.
- To enter numbers, tap **123**.
- To use the international character set, tap **Int'l**.

When you finish, tap Done.

8 To close the transaction, tap Done.

9 At the Are You Sure You Are Done prompt, tap OK. The transaction is dated, time-stamped and locked into the system. The handheld returns to the Delivery Manifest window.

Figure 17: The Customer Signature Keyboard



## Making an Unmanifested Delivery

If you have a package that either is not on the manifest or is not recorded on your unit, you can enter the delivery manually by making an unmanifested delivery.

To make an unmanifested delivery:


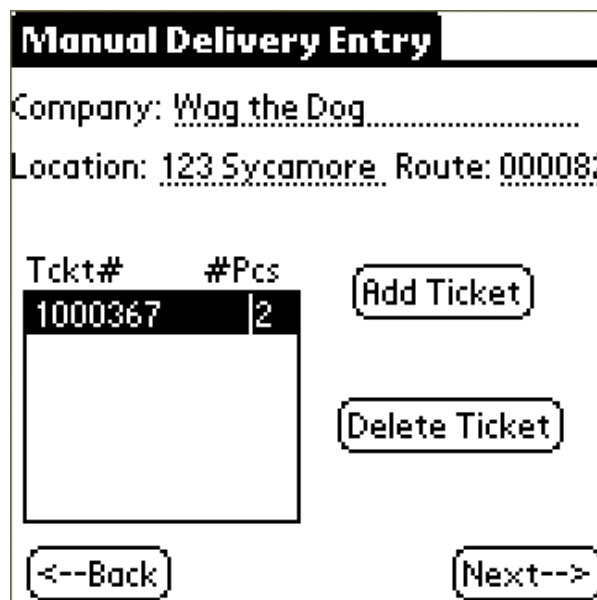
- 1 In the RouteTrak Main Menu, tap  then tap Start.
- 2 The Delivery Manifest window opens. Tap a customer name to highlight it.
- 3 Tap Manual to open the Manual Delivery Entry window. See Figure 18.
- 4 Tap the Company line to open the keyboard. Enter the company name and tap Done.
- 5 Tap the Location line to open the keyboard. Enter the location and tap Done.
- 6 Tap the Route line to open the keyboard. Enter the route and tap Done.
- 7 Tap Add Ticket.
- 8 Tap the Ticket # line to open the keyboard. Enter the ticket number and tap Done.
- 9 Tap the # Pieces line to open the keyboard. Enter the number of pieces and tap Done.
- 10 When you finish, tap Save.

Figure 18: The Manual Delivery Entry Window




Tckt#	#Pcs
1000367	2

## Setting Up & Using RouteTrack Pro™ Proof of Delivery for DDMS

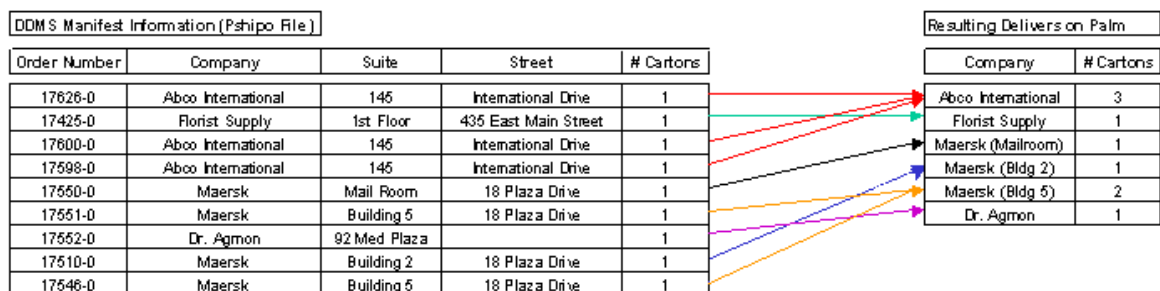
- 11 Tap Next.
- 12 The Customer Signature window opens. The customer signs in the signature box. To attach this signature to all packages for this delivery, tap Apply to All. Use this feature when delivering all packages to a central location, such as a delivery dock.
- 13 Tap the Print Name line and enter the last name of the customer using the onscreen keyboard. (This step is optional unless you enabled the Printed Name Required parameter.)
- 14 Tap Done.
- 15 To close the transaction, tap Done.
- 16 At the Are You Sure You Are Done prompt, tap OK. The transaction is dated, time-stamped and locked into the system. The handheld returns to the Delivery Manifest window.

### Making Desktop Deliveries

If the Desktop Delivery On the Fly parameter is enabled, each invoice on a customer's order requires a separate signature.

- 1 In the RouteTrak Main Menu, tap  then tap Start.
- 2 In the Delivery Manifest window, tap a customer name to highlight it.
- 3 Tap Begin Delivery.
- 4 At the Desktop Delivery query, tap Yes.
- 5 The Delivery Manifest window displays each invoice for this customer on its own line. Tap the first invoice to deliver.

**Figure 19:**  
Grouping by  
Address



## Setting Up & Using RouteTrack Pro™ Proof of Delivery for DDMS

- 6 In the Scan Packages window, scan the carton(s) for the invoice. When you finish, tap Next.
- 7 The Customer Signature window opens. The customer signs in the signature box.
- 8 Tap the Print Name line and enter the last name of the customer using the onscreen keyboard. When you finish, tap Done.
- 9 Repeat Steps 5 - 8 for each invoice. When you finish, tap Done to close the transaction.
- 10 At the Are You Sure You Are Done prompt, tap OK. The transaction is dated, time-stamped and locked into the system. The handheld returns to the Delivery Manifest window.

### Grouping

All RouteTrak Pro deliveries, including Desktop Delivery On the Fly, combine deliveries by receiving location. The Group By parameter is set in the syncddms.ini file.

When orders are grouped, their carton counts are added together and receipt is indicated by a single signature from the customer. You can group deliveries by address or by sort code. (Sort code is the DDMS sort code for the shipping location.)

- To group deliveries by address, set the Group By parameter to A. The result of grouping by address is shown in Figure 19. Records where the company, suite, and street match are grouped as one delivery. The carton counts are added together and only one signature is required.

**Figure 20:**  
Grouping by  
Sort Code

DDMS Manifest Information (Pshipo File)						Resulting Delivers on Palm	
Order Number	Company	Suite	Street	# Cartons	Sort Code	Company	# Cartons
17626-0	Abco International	145	International Drive	1	110	Abco International (110)	2
17425-0	Florist Supply	1st Floor	435 East Main Street	1	800001	Abco International (115)	1
17600-0	Abco International	145	International Drive	1	115	Abco International (120)	1
17598-0	Abco International	145	International Drive	1	120	Florist Supply (800001)	2
17550-0	Maersk	Mail Room	18 Plaza Drive	1	10	Maersk (10)	3
17551-0	Maersk	Building 5	18 Plaza Drive	1	10	Maersk (15)	1
17552-0	Dr. Agmon	92 Med Plaza		1	800002	Dr. Agmon (800002)	1
17510-0	Maersk	Building 2	18 Plaza Drive	1	15		
17546-0	Maersk	Building 5	18 Plaza Drive	1	10		
17423-0	Florist Supply	1st Floor	435 East Main Street	1	800001		
17633-0	Abco International	145	International Drive	1	110		

## Setting Up & Using RouteTrack Pro™ Proof of Delivery for DDMS

This can be problematic if you are not consistent in the way data is entered into your address fields. For example, sometimes departments are entered in the Suite field and sometimes they are entered in the Street field.

This is the simplest way to group records; however, it typically does not work for a large volume operation where consistent data entry can be a problem. It does work very well, however, for dealers who make limited desktop deliveries.

- To group deliveries by sort code, set the Group By parameter to S. This is a much more advanced way to group deliveries. Using sort codes, you can maintain complete control over delivery grouping. You can specify both desktop and dock delivery for the same company. The drawback is that it requires each multi-location customer to be set up with different sort codes. These sort codes must be updated regularly to ensure proper grouping. See Figure 20.

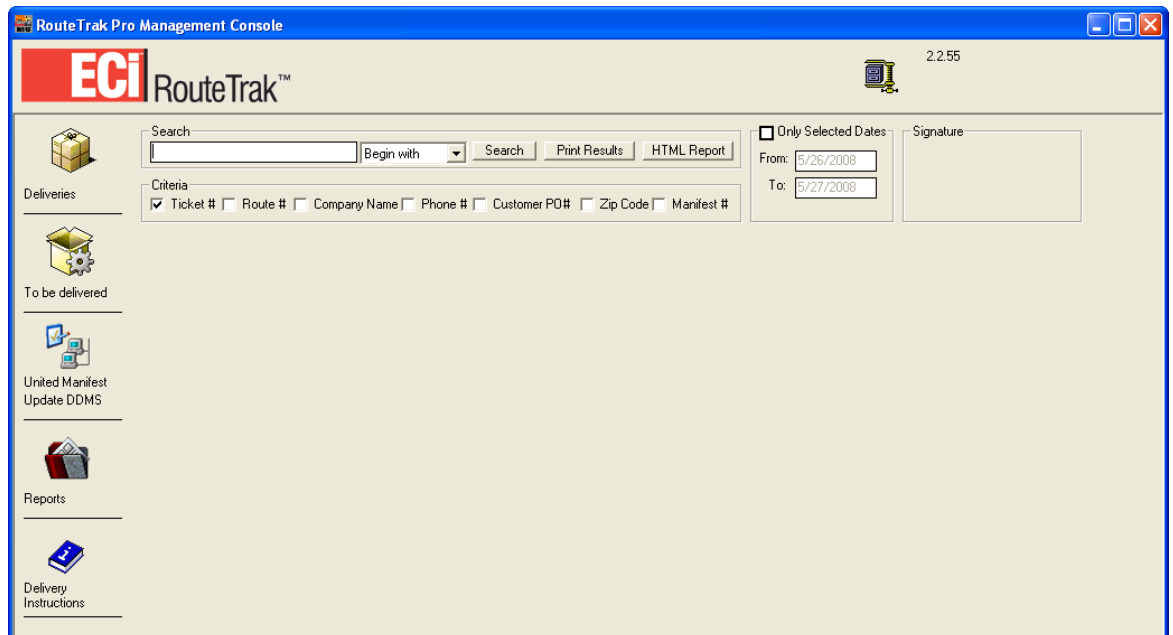
### End-of-Day

Upon returning, return the unit to the cradle. It syncs data back to the RouteTrak Pro Host computer. This creates the import file in DDMS, used for updating manifests and invoices. The sync is triggered by placing the unit into the cradle and the battery is charged overnight.

With incoming deliveries, the sync agent checks the software version and sends updates. It copies all signature bitmaps back and copies all delivery details back.

*The PSHIPO and PSHIPI files are purged during the daily [MA] procedure.*

**Figure 21:**  
RouteTrak  
Management  
Console  
Deliveries  
Window



## Importing a Manifest

After the deliveries are complete, the driver returns the handheld unit to the cradle to create an automatic sync. Use the Third Party Carrier (TS) [S] [I] Import function to import the delivery information into DDMS.

*The returning release is performed automatically when you import the PSHIPI file.*

All the delivery information also remains resident on the RouteTrak Pro host computer. In addition to accessing DDMS, you can access all the delivery information using the RouteTrak Management Console. See Figure 21.

To import the data from the handheld units:

- 1 In the (TS) screen, type **S** in the Action field.
- 2 At the Export/Import and Release prompt, type **I**.
- 3 In the Manifest field, enter the manifest number and press Enter.
- 4 At the Import Target File prompt, type **Y**. See Figure 22.
- 5 If there are any undelivered packages on the manifest, an Exceptions box appears. You can:
  - Type **Y** to release the manifest anyway.
  - Type **N** to print an Exceptions report. Use it to transfer the exceptions to a new manifest. Next, repeat **Steps 1 - 4**, and type **Y** in the Exceptions box to release the manifest.
- 6 When you finish, press Esc.

**Figure 22:**  
Uploading the  
PSHIPI File

```

(TS) Shipping Manifest (MM/DD/YY) 03/02/04
-----
Action ? [S] Import File :P-MASTER
-----
Manifest # 87 Date :02/18/04 Invoice #..... Date :././..
Name :..... Account #..... Dept :....
..... Route :.... Map Loc :.... Page #....
..... Delivery Time #..... to #..... Days :.....
..... Sort :.....
Instructions :.....
-----
Route Sort Invoice # Date Time Qty Received by
-----
Manifest # 87 Date :02/18/04
Route :11 SAME DAY DELIVERY
Delivery : / / : Release :/
Driver :
Totals : Stops [ 1] Ctns [ 1] Envs [ ]
Invoices [ 1] Credits [ ]
Release Y/N ?Y ( Set Invoice with Manifest Information )
Print Y/N ?N Loading,Delivery,Both L/D/B ?D
Loading Format [MANIFL] Printer [1]
Delivery Format [MANIFD] Printer [1]
Import Target File Y/N ?Y
    
```

## Using the RouteTrak Management Console

The Management Console lets you view and print delivery details, including the customer signature. You can print reports. You can compare the packages on the truck to those on your United Stationers manifest.

The Management Console window is divided into the following sections:

- Deliveries
- To Be Delivered
- United Manifest Update DDMS
- Reports
- Delivery Instructions

### Deliveries

Use the Deliveries function to view and print delivery details. You can define your search by criteria, by manifest date, or both. Or, use the criteria to arrange the order in which matches appear.

To view and/or print delivery details:

- 1 In the Management Console window, click



- 2 You can limit the search or order the results.

- 2.1 In the Fields box, click one of the following fields to limit the search or order the results:

- Ticket #
- Route #
- Company name
- Phone #
- Customer PO #
- Manifest #.

For example, to limit by zip code or arrange the deliveries in zip code order, click Zip Code.



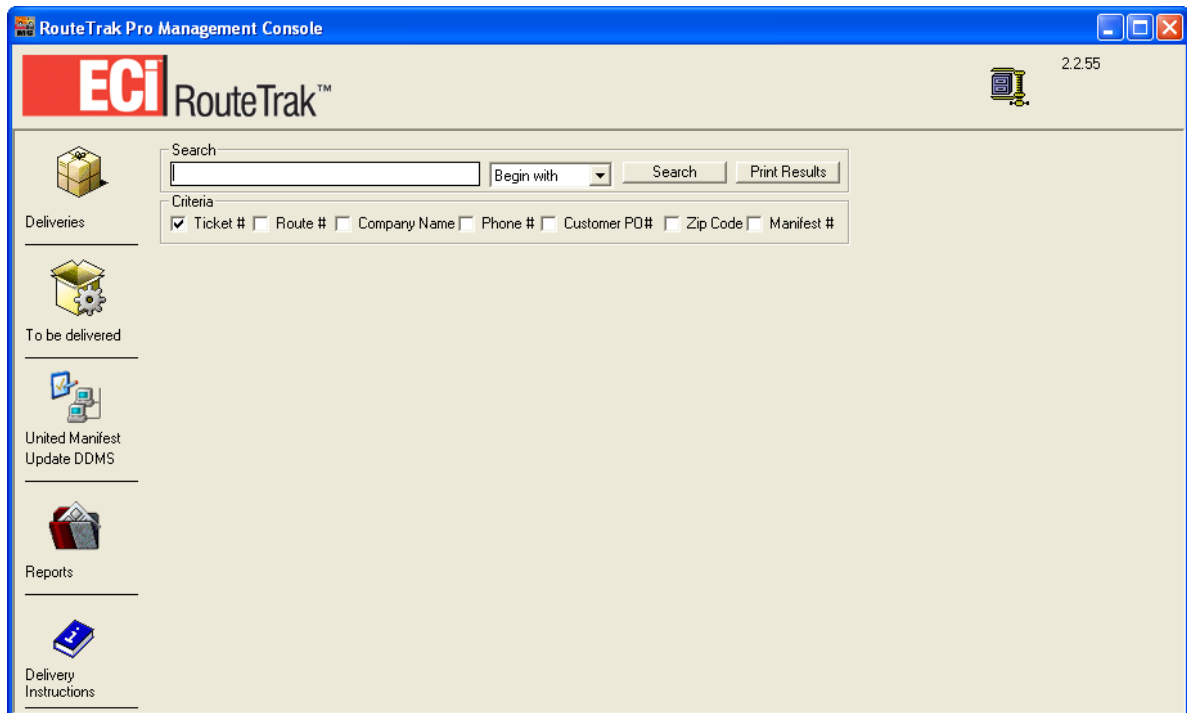
## Setting Up & Using RouteTrack Pro™ Proof of Delivery for DDMS

- Phone #
- Customer PO #
- Zip Code
- Manifest #.

For example, to limit by zip code, click Zip Code.

- 3 Click the Search box. Enter the value for which to search. For example, to find all deliveries to the 76179 zip code, type 76179 in the Search box. Use the drop down arrow to select how to search:
  - Begins With
  - Everywhere
  - Exact Match.
- 4 Click Search. All the manifests matching the limits you set are listed.
- 5 To print the pre-delivery manifest, click Print Results.

**Figure 23:**  
**RouteTrak**  
**Management**  
**Console To Be**  
**Delivered**  
**Window**



## United Manifest Update DDMS

Use this option to view and print United manifest details. You can define your search by field, manifest date, or both. Or, use the Fields tab to arrange the order in which matches appear.

To view and/or print United manifest details:

- 1 In the Management Console window, click .

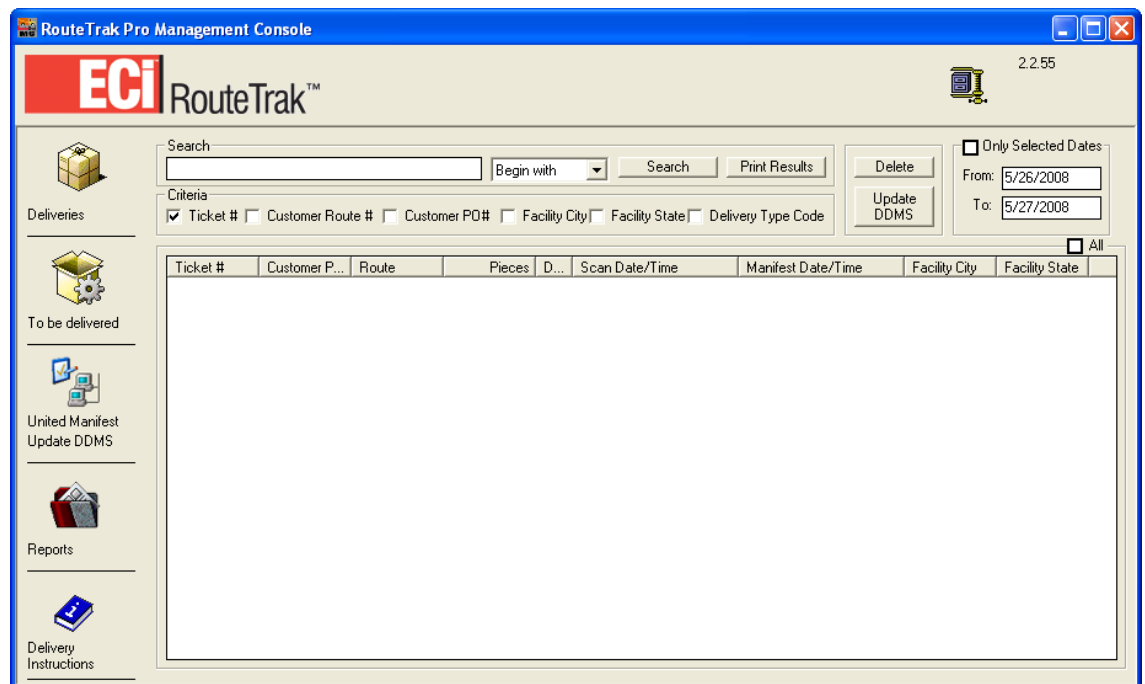
- 2 You can limit the search or order the results. See Figure 24.

**2.1** In the Criteria box, click one of the following fields to limit the search or order the results:

- Ticket #
- Customer route #
- Customer PO #
- Facility city
- Facility state
- Delivery type code.

For example, to limit by ticket number, click Ticket #.

**Figure 24:**  
RouteTrak  
Management  
Console United  
Manifest  
Update DDMS  
Window



## Setting Up & Using RouteTrack Pro™ Proof of Delivery for DDMS

- 2.2 To set a limit, click the Find box. Enter the value for which to search. For example, to find ticket 3152-0, type 3152-0 in the Find box.
- 3 You can also search by a range of manifest dates.
  - 3.1 Click the Date(s) tab.
  - 3.2 Click the Only Selected Manifest Dates box. You cannot limit by date unless this box is checked.
  - 3.3 In the From box, enter the beginning date.
  - 3.4 In the To box, enter the ending date.
- 4 Click Search. All the manifests matching the limits and/or dates you set are listed.
- 5 To print the list, click Print Results.

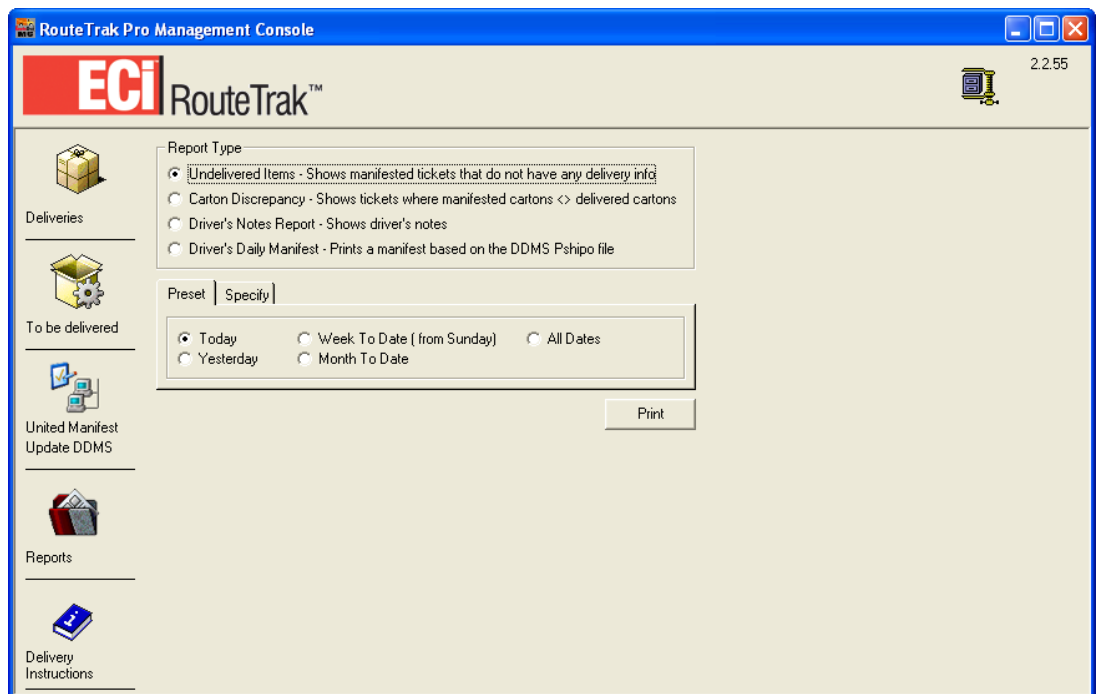
## Reports

Use the Report option to run a standard report. To run a report:

- 1 In the Management Console window, click .

- 2 Click the report to run. See Figure 25.

**Figure 25:**  
**RouteTrak**  
**Management**  
**Console Reports**  
**Window**



## Setting Up & Using RouteTrack Pro™ Proof of Delivery for DDMS

You can select:

- **Undelivered Items** to view manifested tickets without delivery information. It includes:
    - Ticket number
    - Manifest number
    - Route
    - Manifest date
    - Manifest piece count
    - Company.
  - **Carton Discrepancy** to view tickets where the manifested cartons do not match the delivered cartons. It includes:
    - Ticket number
    - Manifest number
    - Route
    - Manifest date
    - Manifest piece count
    - Delivered piece count
    - Company.
  - **Driver's Notes Report** shows the driver's notes for the manifest.
  - **Driver's Daily Manifest** is a manifest based on the DDMS PSHIPO file. It includes:
    - Route number
    - Deliver to
    - Contact
    - Phone
    - Manifest number
    - Ticket number
    - Number of pieces.
- 3 Use the Preset and Specify tabs to limit the information on the Undelivered Items or the Carton Discrepancy report.

## Setting Up & Using RouteTrack Pro™ Proof of Delivery for DDMS

The Preset tab lets you limit the report to:

- Today
- Yesterday
- Week-to-Date (from Sunday)
- Month-to-Date
- All Dates.

The Specify tab lets you limit the report to a range of dates.

- Enter the beginning date in the From box.
- Enter the ending date in the To box.

4 Click Print.

5 The report opens in a new window. See Figure 26. You can view, print or export the report.

- To print the report, click .

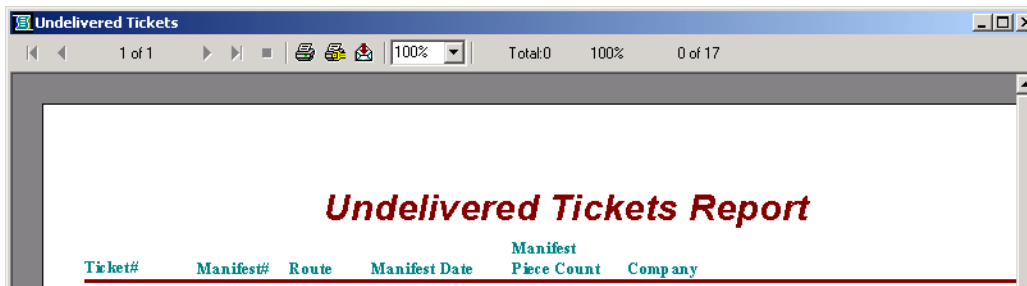
---

**Note:** Although you can print the Driver's Daily Manifest using RouteTrack Pro, it is more efficient to print the PSHIPO file through DDMS.

---

- To export the report, click . In the Export dialog box, specify the format and destination, then click OK.


**Figure 26: The Undelivered Tickets Report**



Ticket#	Manifest#	Route	Manifest Date	Manifest Piece Count	Company
---------	-----------	-------	---------------	----------------------	---------

## Delivery Instructions

Use this option to view special instructions for today's deliveries.

- 1 In the Management Console window, click .
- 2 You can view special instructions for a specific route(s) or for all routes. See Figure 27. To select a route, click  Only Selected Routes.
- 3 Enter the route to select.
- 4 Click Add/Delete to Add or Delete tickets.
- 5 Click Search Tickets.
- 6 To print the information, click Print Results.

**Figure 27: The RouteTrak Management Console Delivery Instructions Window**

