

Getting Started

RouteMaker Users Guide

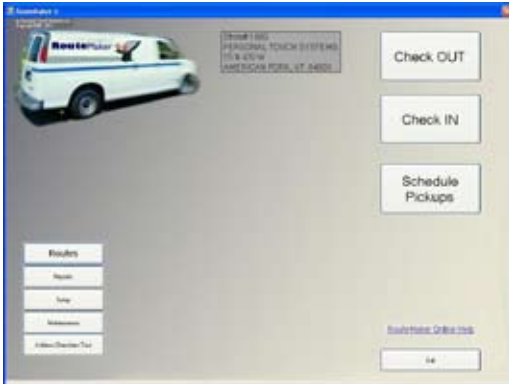


Fig. RouteMaker Main Screen

RouteMaker is an add-on option for ProfitMaker that helps you manage your Route business. It prints delivery Manifests for your drivers with turn by turn driving directions. The reports help you see where your drivers are spending their time and how long they are gone on a delivery. You can Check OUT orders and put them in your delivery van, and then Check then IN after delivery and have the orders put on your customers account automatically.

RouteMaker Requirements:

ProfitMaker version 6.2.0.2 or later.
Must have a 0000-PRS (ProfitMaker Route Single) or 0000-PRP (ProfitMaker Route Pro) licence.
Built in one-step credit card processing is REQUIRED.
TAG Support subscription is REQUIRED.
Internet Connection for Mapping

RouteMaker Startup:

When RouteMaker first starts it searches for the Manifest, ManifestDetail, Routes, Stops, Sub-stops, and Route Config database tables. If they don't exist it creates them automatically.

HOTEL ROUTE CUSTOMERS

Hotel Routes are different than RouteMaker Routes. Hotel Routes do not need RouteMaker and use the *RT* special operation. The Employer field in the Customer.db is used to save the Route int number. It is stored as ~1~ where 1 is the route #. Hotel Route Customers can use the Routes report option to print statements on the Blue Statements with the tear off payment stub available from Personal Touch Systems.

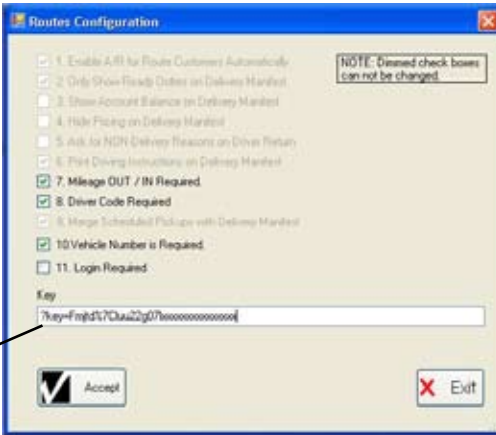
ROUTE FUNCTIONS

The basic operation of RouteMaker is to:

1. Setup Route Maker options
2. Add your Route(s) into RouteMaker (see Adding Routes)
3. Add Customers to the Route(s).
4. Add Orders into ProfitMaker for those Route Customers.
5. Check Out and deliver the garments.
6. Check In and post to customers account.
7. Send out Statements.
8. Receive Payment from customer.

RouteMaker Setup

There are just a few options to set to make your RouteMaker program work. Several options are shown "dimmed" and can not be changed at this time. The dimmed options are simply to let you know if the action is being performed or not.



7. Mileage In/Out Required. If checked, the driver must enter their In and Out mileage
8. Driver Code Required. If checked, the driver must enter their employee code.
10. Vehicle Number is Required. If checked, the driver must enter the vehicle number.

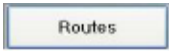
Key

RouteMaker uses mapping programs to calculate mileage and time between stops on your route. This is a key that defines you to the mapping programs. We will supply you with your key when you are ready to start using RouteMaker.

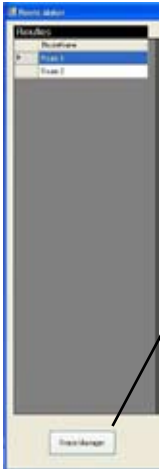
Click on the Accept button to save any changes you make.

Add a Route.

1. Use the “Routes” option from the Main Screen to build routes.



2. Click on the “Route Manager” button.



Routes List

Route Name:

Route To:

Route Rent Name:

Route Rent Desc:

Route Rent Addr1:

Route Rent Addr2:

Route Rent City:

Route Rent Phone:

Route Rent Email:

Ship Days:

Mon Everyday

Tue

Wed

Thu

Fri

Sat

Sun

Accept

3. You will see the “Route Maker” dialog.

A. Click on the **yellow +** button at top of screen to enter a new route name.

Route Name:

a. For example: Add a route named Route 1 that delivers on Monday

b. Also, you could have a route named “Hotel California” and it delivers every day.

B. **“Remit To:”** This will print at the top of the statements for anyone on this route. This allows it to be different from your store address if desired.

Edit an Existing Route.

1. Use the “Routes” option from the Main Screen.
2. Click on the “Route Manager” button.
3. You will see the “Route Manager” dialog and the navigation bar at the top.
4. Use the < > keys on the navigation bar to find the route.
5. Edit the fields in the route.
6. Click on the Accept button.

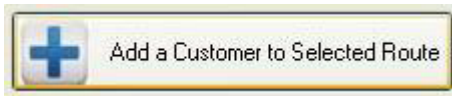
Delete an Existing Route.

1. Use the “Routes” option from the Main Screen.
2. Click on the “Route Manager” button.
3. You will see the “Route Manager” dialog and the navigation bar at the top.
4. Use the < > keys on the navigation bar to find the route.
5. Click on the **red X** button on the navigation bar to delete the Route.

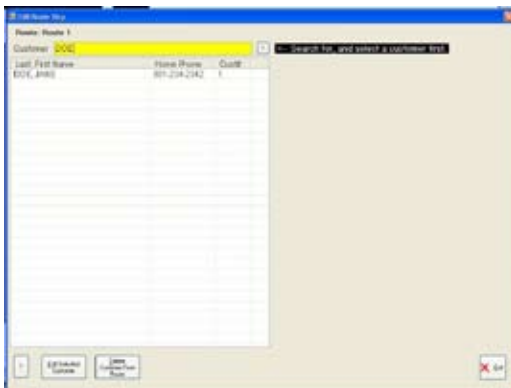
This does not delete the customer (or their Orders) that are on the deleted route.

Adding a customer to a route (via RouteMaker)

1. The customer has to be an existing customer added the normal way in ProfitMaker.
2. Select a ROUTE from the list of routes that you have already added.
3. From the “Routes” screen, click on the “Add a Customer to Selected Route”.



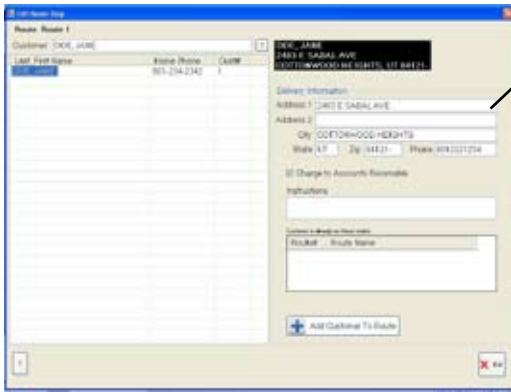
4. Select an existing customer from the Customer drop down list. You can find customers by typing a few letters of their last name, first name, or Customer number.



Users Guide

RouteMaker

- a. The customers "Delivery Address" will be filled in as the "Delivery Address".
If No Delivery Address, the customers home address is entered.
(the address can be changed)



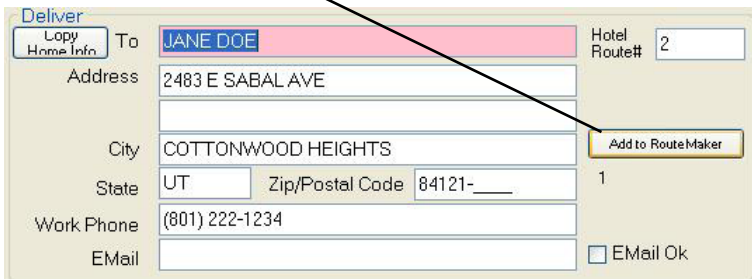
- 5. Any routes this customer is already on are shown in the list.
- 6. Click on the Add Customer To Route



NOTE: It is not optimal to add a customer to more than one route if Remit To addresses are used because the statements use the Route Remit To addresses. If multiple routes are used for a customer the first Route will be used as the Billing/Remit to addresses.

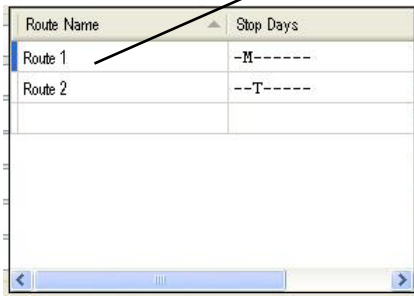
Adding a customer to a route (via ProfitMaker)

- 1. Add or Edit a customer in ProfitMakers Add/Edit customer.
- 2. In the Delivery fields area, enter the delivery address
(copy from home address if desired).
- 3. Click on the "Route Maker" button in the delivery area of the customer information.



- 4. You will see the list of Routes that exist.

Select a Route from the list by **double clicking** on it with your mouse.



5. Select

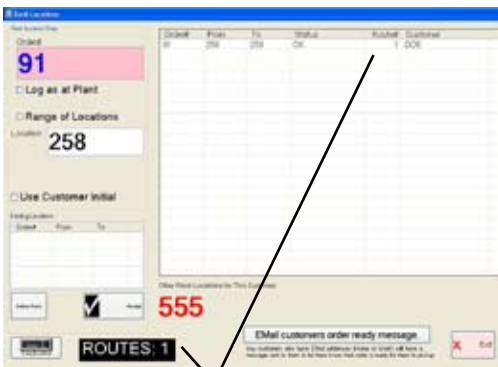
- YES** = to Confirm the adding of the customer to the route,
- No**=Return to list,
- Cancel** = exit the list.

6. After a customer is added to a route, use RouteMaker to edit, delete, or do other maintenance.

ORDER PROCESSING

During normal processing in the store, follow these steps.

1. Order Comes In.
 - A. Customer selected is on a Route.
 - B. Process new detailed order as you normally do in ProfitMaker.
 - C. Prints the "ROUTE#" in large letters on the TICKET. [Ticket]
2. After an order is processed, use the "Assign Location" function.



A. It will show the ROUTE Number on the Location Screen.

SINGLE BILLING RESPONSIBILITY, MULTIPLE CUSTOMERS

If multiple customers are billed to a single entity these are the steps needed during processing.

The following Scenarios assume you have defined a *RT* Item in your Dept12 Pricing. See the ProfitMaker Users Guide for directions if the *RT* Item is not there.

Senorio #1 - A Law Office pays the bill for mulitple partners. Discounts are included in the price.

1. A driver picks up orders for Jane Doe, James Hansen, and Frank Woo at the Hewes Law Offices.

This senerio usually doesn't require a Pickup to be scheduled because it is a normal stop. Hewes Law Offices pays the bill for drycleaning for their partners Jane, James, and Frank. Hewes Law Offices are on Route 1.

2. After arriving back at the plant, the driver (or other store employee) puts the orders into ProfitMaker as follows:

- A. Select "Hewes Law Offices" as the customer.
- B. Enter a Detailed ticket for on the Hewes Account for Jane Doe.

After entering all garments, click on the "Route Info" button, select the *RT* Item and enter "Jane Doe" as the customers name, "123" as their office number, and the Route is not needed because Hewes Law Offices is on Route 1 in ROute-Maker.

3. Add the other new Orders following Step 2 for James and Frank, making sure to enter the Route Information for each customer.

4. Assign locations as normal and the orders are ready for Route delivery.

5. Use the Check Out procedure in RouteMaker when it is time to deliver the cleaned garments.

Senorio #2 - A Hotel pays one bill for all guests. The guests get billed the full price, hotel gets a discount.

1. A driver picks up orders for Room 101, 103, 105 from Hotel California.

A. Hotel California is on the Hotels route which picks up everyday. Hotel California pays a discount amount for the bill for drycleaning for their guests.

2. After arriving back at the plant, the driver (or other employee) puts the orders into ProfitMaker as follow:

- A. Select "Hotel California" as the customer.
- B. Enter a Detailed ticket for John in room 101.

1. After entering all garments, click on the "Route Info" button, select the *RT* Item and enter "Jane Doe" as the customers name, "101" as their room number, and the Route# not needed.

- 3.Repeat Step 2 for room 103, and 105.
- 4.Rack and assign locations as normal and the orders are ready for Route delivery Check Out in RouteMaker.

Senerio #3 - The Police Dept. pays for cleaning of their officers uniforms.

1. Officers drop off their uniforms to be cleaned.
The Police Dept pays a discount amount for the bill for drycleaning for their officers.

2. Employee puts the orders into ProfitMaker as follow:

A. Select "Police Dept" as the customer which is on Route SERVICES and picks up Mon, Wed, Fri for example.

B. Enter a Detailed ticket for Officer James Smith, Badge 123.

1. After entering all garments, click on the "Route Info" button, select the *RT* Item and enter "James Smith" as the customers name, "123" as their room number, and the Route# is prefilled from the database.

4.Rack and assign locations as normal and the orders are ready for Route delivery Check Out in RouteMaker.

NOTE: If a discount is given to officers but they are not on a Delivery Route use normal discounted procedures.

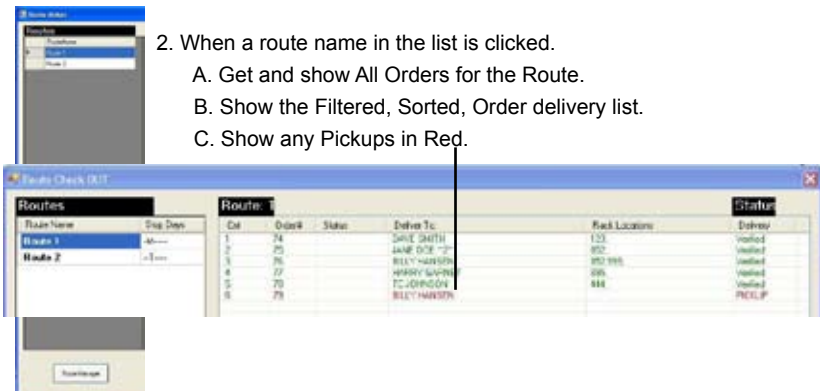
ROUTE CHECKOUT

When its time to run a route, the drycleaner will want to know which orders go into the van for delivery. They will use the Check OUT feature of RouteMaker to do that.



When you click on the RouteMaker Checkout button:

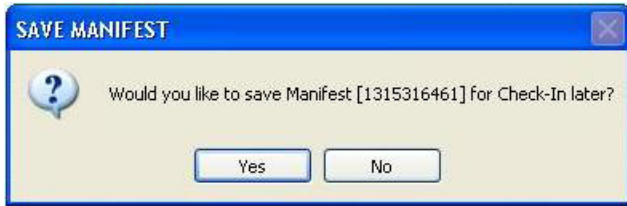
1. All Route Names are shown in the list.
2. When a route name in the list is clicked.
 - A. Get and show All Orders for the Route.
 - B. Show the Filtered, Sorted, Order delivery list.
 - C. Show any Pickups in Red.






3. Click on the "Print Manifest" button.
 - A. Prints a Manifest with all Stops listed.
 Prints Turn-by-Turn directions in optimized order if needed.

4 Save the Manifest for Check-In Later



5. Delivery driver uses the Manifest to load garments into his delivery van.
 - A. Scan each order at the "CheckOut" screen to make certain they get all orders.
 - B. Scanned orders will turn the check out line green.
 - C. Manually scan and check on the Manifest that the orders are in the van.
6. Delivery person follows the route manifest and turn-by-turn directions to deliver each order. The Manifest shows Order Numbers and Customer. The delivery driver can check mark the manifest for each order delivered.

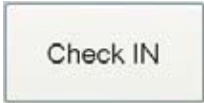
Delivery Manifest : 131549552		Order #02		08/21/11 02:23:48			
		PERSONAL TOUCH SYSTEMS		SCHEDULED			
8/24/2011 4s-8/24/2011		15 N 470 W		Page 1 of 1			
		AMERICAN FORK, UT 84002					
ROUTE: 1							
Stop	#Orders	WPCS	Customer Address	City	Contact	Phone#	\$ Due
	2	S	3403 S WINDERMERE CT	SOUTH JORDAN	JAMES CARROLL@p...	8	\$41.00
	3	S	2402 E SAGAL AVE	COTTONWOOD HEIGHTS	JANE DOE@p...	8012221234	\$29.00
1 Stop(s)						Total Due: 97001	

On return to plant after delivery, the driver uses the Route Check In operation.

ROUTE CHECKIN

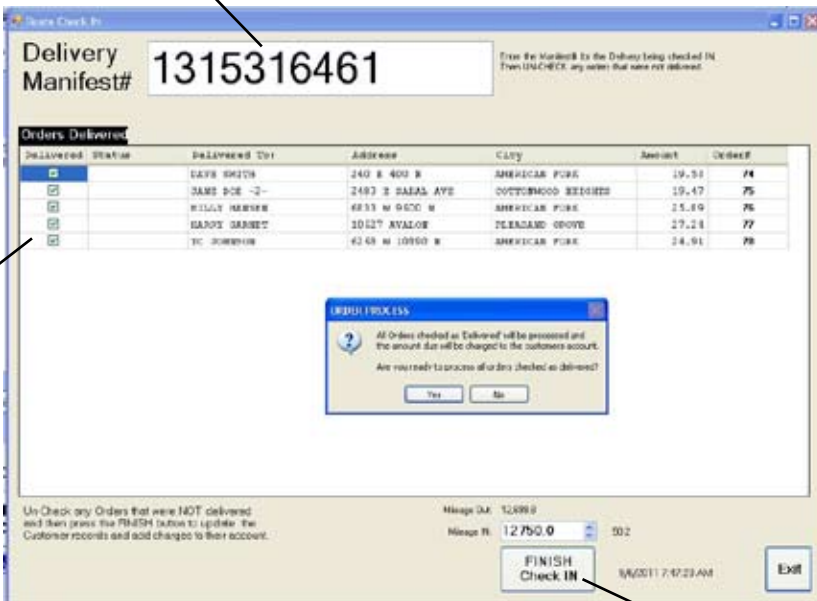
When the route is completed the driver returns with any garments that were not delivered. The Route Driver will want to CheckIN the Manifest and put any payments collected on the customers account or put the garments back in the to-be-delivered area.

1. Start the Check IN option from the RouteMaker main screen. [RouteCheckInBtn]



2. The Route Driver will enter the Manifest(s) that they went out with.

A. Enter the Manifest#.



B. All Orders that match the Manifest# are shown on the screen.

C. Uncheck any Orders that were **NOT** delivered.

D. Click on the FINISH - Check In button.

1. All checked orders are set as Picked Up/Sold and put On Account.
2. All un-checked orders are left alone and are still deliverable.

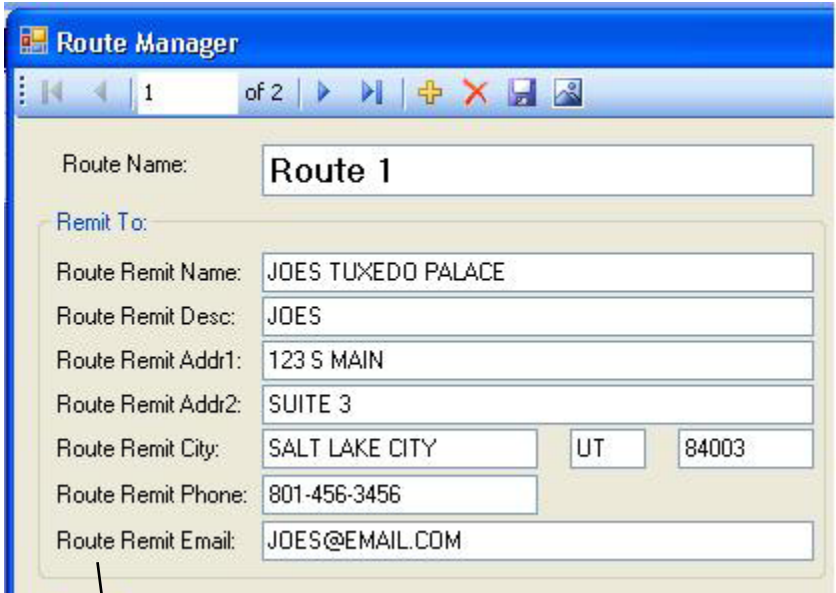
FINISH - PAYMENT PROCESSING

Orders are put On-Account, and saved for mailing statements later. All transactions are logged against the driver who logged in.

STATEMENT BILLING

When it is time to send out statements they are done a little differently than normal statements in ProfitMaker.

1. As each on-account Order is processed it will use the Route Information

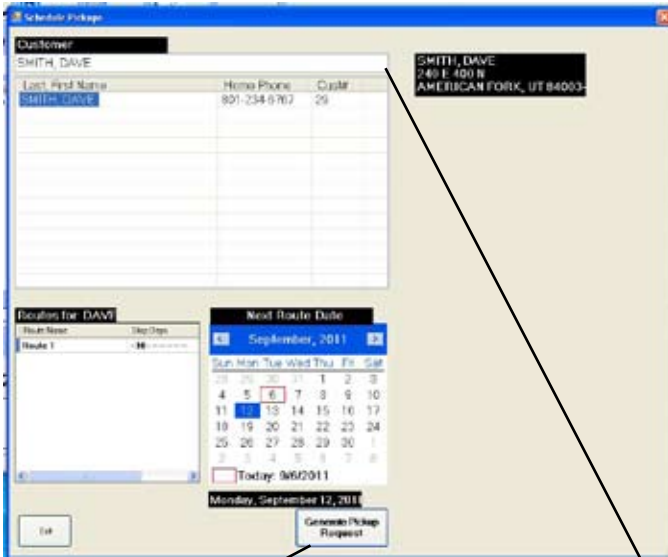


A. The Remit To Address: is printed on the statement which is normally the stores address but can be different if you set it for each route.

2. Payments are sent in and accepted thru the Payments area of Profitmaker as normal. Payments received from a Billing Responsibility party are credited to the actual delivery customer.

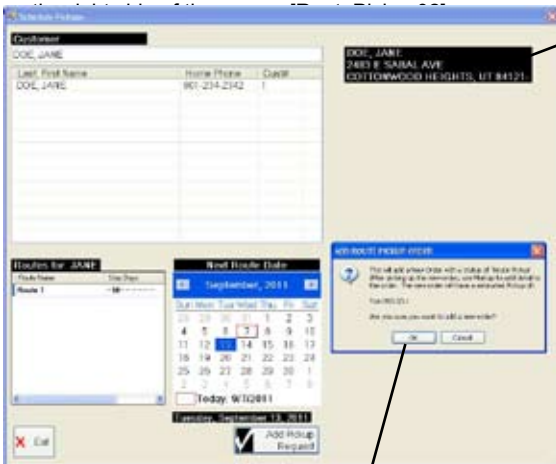
SCHEDULE PICKUPS

When customers call, or are normally scheduled for pickups, they are added to a ROUTE. When the route manifest is printed, any Pickups are merged into the manifest.



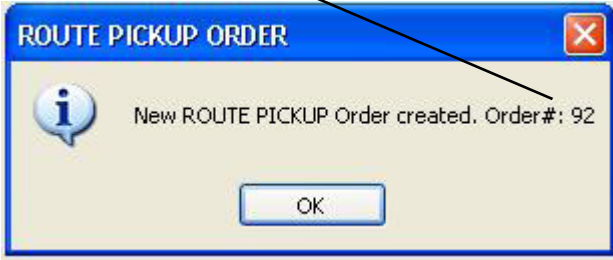
1. Click on the Schedule Pickup from the main RouteMaker screen.
2. Select the Customer needing a pickup in the Customer drop down list.

Note: Add a new customer if needed using ProfitMaker. Once the correct customer is selected, click on their name in the list and their address and delivery information will show



3. Confirm the pickup by click on the OK button.
2. A new Order is added much like a Quick Ticket but with a status or **RoutePickup**.

You can see the Order Number of the new order created for pickup.

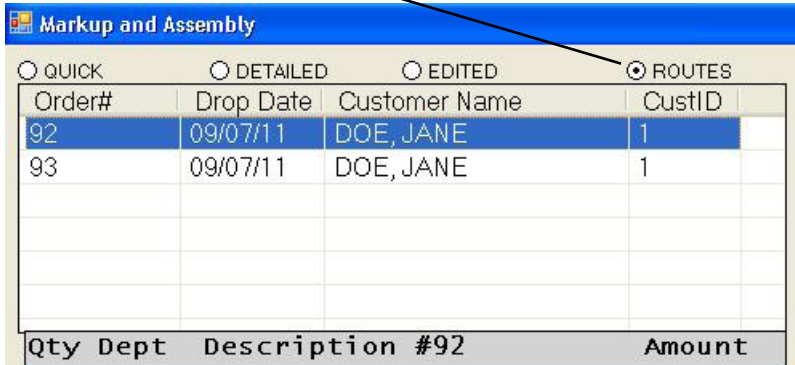


3. The closest day of week for the route the customer is on is selected in the date list.
4. Pickups are merged into the Delivery Route.

ROUTE PICKUPS CHECKIN

Orders to be picked up are assigned an Order# just like a Quick Ticket but have a status of "RoutePickup". These route pickups need to be detailed.

1. On the main ProfitMaker screen make sure **NO** customer is selected.
2. Click on the Markup/Edit button at the bottom of the main screen.
3. Click on the Route circle at the top of the screen. All RoutePickup orders are shown.



Select each order that needs to be detailed and marked up.

4. Process as normal from this point. When assembled, they will show on the customers route.

REPORTS

The Reports button from the main RouteMaker screen will show you the reports that are specific to RouteMaker.



A brief description of the reports are as follows:



1. **Routes List.** A list of all the routes you have defined.
2. **Stops List.** A list of all customers on all routes
3. **Open Manifests.** All open manifests that are checked out.
4. **Delivery Statistics.** Shows driver statistics for times out/in, mileage out/in.
5. **Statements.** Statements designed for Blue tear off stub form.
6. **Statements w/Details.** Statements with details.
7. **Reprint Manifest.** Lets you reprint a manifest.

Click on the button of the report you want to run. Some reports like Statements allow you to enter the beginning and ending date range and a Date Selection screen will appear for entry of the dates.

If you would like a different **Remit To:** address printed on the statement, simply select the Route # from the drop down list.

Reprint Manifest:

If you need to reprint a Manifest, simply enter the Manifest# in the entry box and click on the Reprint Manifest button.

Routes List Report:

A list of all of the Routes you have defined.

Routes List :		Store#: 1000	9/9/2011 7:50:54 AM
		PERSONAL TOUCH SYSTEMS	SERVERJames
		15 N 470 W	Page 1 of 1
6Sep2011 -to- 6Sep2011		AMERICAN FORK, UT 84003	
Route ID	Route Name	Stop Days	
1	Route 1	-M-----	
2	Route 2	--T-----	

Stops List Report

Shows each stop on each of your Routes.

Stops List :		Store#: 1000	9/9/2011 7:51:46 AM				
		PERSONAL TOUCH SYSTEMS	SERVERJames				
		15 N 470 W	Page 1 of 1				
6Sep2011 -to- 6Sep2011		AMERICAN FORK, UT 84003					
Route ID	Address 1	Address 2	City	ST	Zip	Phone	Email
1							
DOE, JANIE	2483 E SABAL AVE		COTTONWOOD HEIGHTS	UT	84121-	8012221234	
DAVE SMITH	240 E 400 N		AMERICAN FORK	UT	84003-	0	
BILLY HANSEN	6833 W 9600 N		AMERICAN FORK	UT	84003-	0	
HARRY GARNET	10627 AVALON		PLEASAND GROVE	UT	84062-	0	
TC JOHNSON	6268 W 10890 N		AMERICAN FORK	UT	84003-	0	

Open Manifests

Any Manifest that is currently active is shown. This is nice for letting you know what drivers are still out on deliveries.

Open Manifests		Store#: 1000	9/9/2011 7:52:14 AM						
		PERSONAL TOUCH SYSTEMS	SERVERJames						
		15 N 470 W	Page 1 of 1						
6Sep2011 -to- 6Sep2011		AMERICAN FORK, UT 84003							
Manifest#	Route ID	Checked Out	Driver#	Vehicle #	Mileage OUT	Calculated Time	Calculated Distance	Calculated Return	-Under/Over
1314710993	1	08/30/11 07:30 AM	0		12586.5	26.7	20.1	07:57 AM	10,074.6
1314896131	1	09/01/11 10:55 AM	3	125	12699.8	26.7	20.1	11:22 AM	6,990.0
1315316461	1	09/06/11 07:41 AM	0	125	12699.8	93.6	64.7	09:14 AM	-82.7

Earliest time of driver return.

How many miles the route covers

The Route#

The calculated time to cover the route (minutes)

Time the driver checked out

The Mileage on checkout

The Drivers Employee Number

The Vehicle# you assigned

Delivery Statistics Report

This will help you analyze how your drivers are doing. It will show the **calculated** time and mileage against the **actual** time and mileage and will show the **differences** between them.

Delivery Statistics		Store#: 1000		9/8/2011 7:52:41 AM									
		PERSONAL TOUCH SYSTEMS		SERVER:James									
		15 N 470 W		Page 1 of 1									
6Sep2011 -to- 6Sep2011		AMERICAN FORK, UT 84003											
Manifest#	Route ID	Checked Out	Checked In	Driver#	Vehicle #	Mileage OUT	Mileage IN	Actual Miles	Calc Miles	Miles Diff	Calculated Time	Actual Time	Time Diff
1314054989	1	08/24/11 09:00 AM	08/24/11 09:28 AM	0	125	12586.5	12699.8	113.3	36.0	77.3	54.4	28.6	-25.7

In the above report we can see that the driver traveled 113 miles of a calculated 36 miles for a difference of 77 miles.

Also, the minimum time calculated was 54 minutes but on took 28 minutes to complete. This suggests that a different employee is Checking In the route instead of the driver.

Statements

When your driver **Checks IN** their manifest, all orders that are checked as delivered are put on the customers account. When it is time to send out statements you can use the statements reports. You will be prompted to enter a date range which represents the Statement cutoff dates ie; Select Sept 1 to Sept 30 when you need to send the October billing statements on Oct 1st.

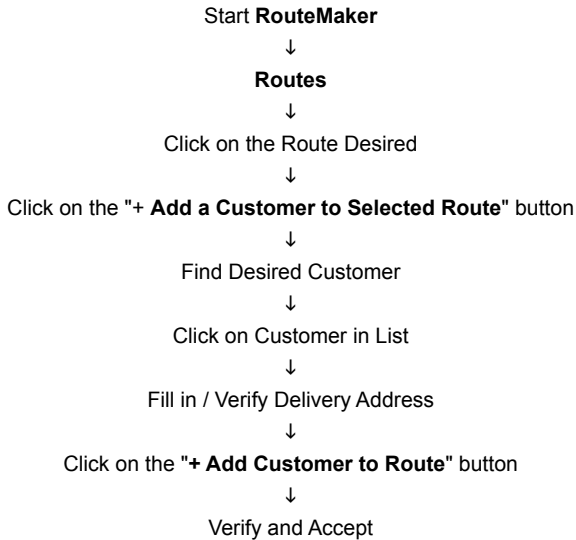
Remit to:				Statement		Return with Payment	
PERSONAL TOUCH SYSTEMS 15 N 470 W AMERICAN FORK, UT 84003				9/8/2011	12	9/8/2011	12
				09/08/2011	\$3.07	BUCKEYE DRY CLEANERS	
BUCKEYE DRY CLEANERS				9/8/2011	\$3.07	9/8/2011	
AMERICAN FORK, UT 84003-						\$3.07	
Order#	Order Date	Description / Customer	Amount	Order#	Amount		
		Blouse	5.99				
		Dress	11.20				
		Pants -Reg	5.88				
		10% Discount	-20.00				
38	6/20/2011		3.07	38	3.07		
			<u>3.07</u>		<u>3.07</u>		

You can order special Statements w/payment stub designed for this layout from Personal Touch Systems at 800-950-6767 or from our web site at www.ProfitMaker.com

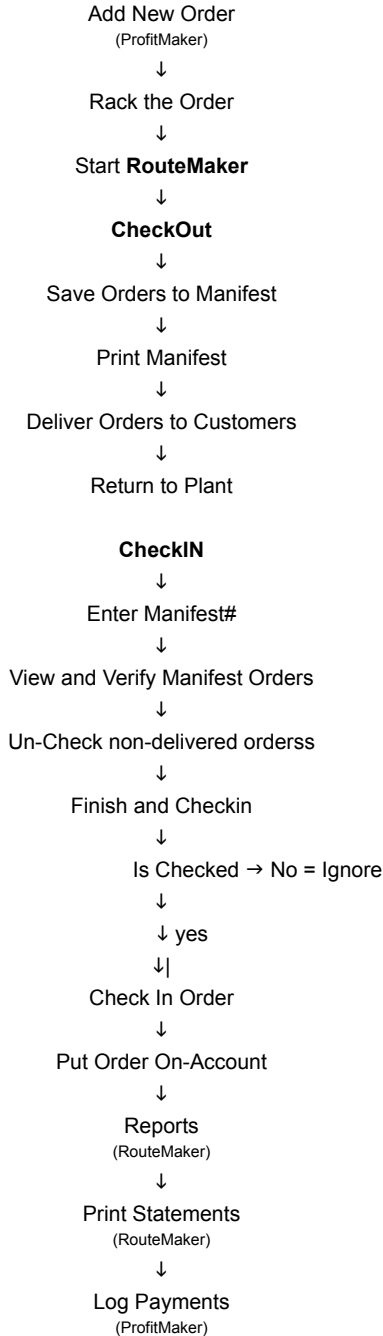
Program Flow - Setup Routes



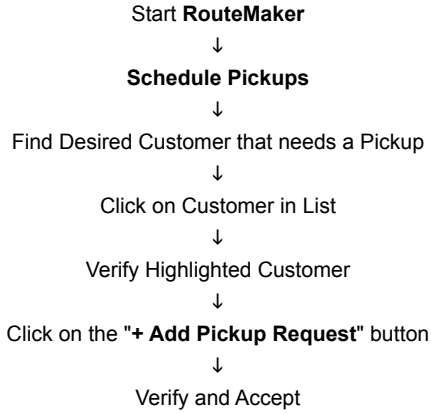
Program Flow - Add Stops (Customers) To Routes



Program Flow - Adding Orders That will be Delivered.



Program Flow - Schedule Pickups



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