



WorkAbout Route™ for MAS 90®

Operators Guide

Blytheco LLC The Premier Sage Software Business Partner

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Introduction

Note: WorkAbout Route for MAS 90 helps you to make sure your drivers have what they need when they need it – both items and information. It also helps you to move the right information at the right time into and out of your MAS 90 accounting package.

Scanco's MAS 90® implementation of ASC Route™ makes it easy for you to use ASC Route and WorkAbout Route™ with your MAS 90 accounting package. ASC Route helps you to track warehouse inventory, to get the right goods onto the right trucks for the right drivers, and to make sure the drivers have all the information they need to run their routes. WorkAbout Route runs on the handheld computers **Error! Bookmark not defined.** (HHCs) and provides the route delivery and remote sales order entry functions.

As an integral part of the Workabout Route for MAS 90 accounting solution, ASC Route helps you store, track, and manage all of your Areas and Routes. It provides you with an efficient means of controlling and managing customer, item, order, and other account data transferred between your PC and each handheld computer (HHC) unit. ASC Route also makes it easy for you to generate order reports, usage reports, over/short reports, etc. ASC Route can even do custom reports!

ASC Route also includes ASC-MDS, a communications software package that lets ASC talk to a single handheld unit or up to sixteen units by daisy chaining multiple four-unit docking stations together. ASC-MDS lets you gather order details, E-mail messages, and other account information from the handheld units for transmission to MAS 90. It also lets you transfer accounting database changes such as new customers and price changes from MAS 90 to the HHCs.

With MAS 90, ASC Route, and the WorkAbout Route for MAS 90 interface, you and your HHC users have a complete Route Delivery and Remote Sales Order Entry operation with functionality that includes route/customer sequencing, order creation, tracking returns and deposits, on-the-fly editing capabilities, receipt printing, truck inventories, order/sales reports, direct connect and remote dial up communications, and much more. Plus, it's easy enough to use that those new to portable or desktop computer automation will quickly feel right at home.

About this manual

This manual was written to support Scanco's MAS 90 implementation of ASC Route. Every effort has been made to provide accurate and concise information to you, our customer.

Contacting Scanco customer support

Contact Scanco's Customer Support organization to obtain help in resolving any WorkAbout Route for MAS 90-related problems you may encounter.

You can contact the Center via any of the following methods.

- Telephone (330) 645-9959 EXT 128
- Fax (330) 645-9969
- E-mail Support@Scanco.com
- World Wide Web www.scanco.com

You'll find helpful hints and other information on our web page.

The Scanco WorkAbout Route for MAS 90 team

These are the Scanco team members who made this software solution possible:

- Paul Heim
- Edgar VanHoose
- Rex Lowe

Manual conventions

Caution:

Caution notices indicate potentially disruptive or damaging errors. They are set in bold print and are preceded and followed by a pair of thick and thin black lines.

Note:

Notes provide supplementary comments or explanations. They are in italics and are preceded and followed by a pair of thin black lines.

Hint:

Hints provide suggestions to help you work more effectively. They are in shaded italics and are preceded and followed by a pair of thin black lines.

Related Documents

- ❑ **MAS 90 User Guide**
- ❑ **ASC Route™ Manual**
- ❑ **ASC-MDS 32™ Manual**
- ❑ **WorkAbout Route™ Manual**

WorkAbout Route for MAS 90 Overview

The WorkAbout Route for MAS 90 interface serves as the middleman between the ASC Route route accounting software and your MAS 90 accounting database software.

In turn, ASC Route serves as the middleman between your MAS 90 accounting software and the HHC units used by your salesmen or drivers. In other words, all information to/from the MAS 90 server and to/from the handhelds passes through ASC Route. All information is sent and received as ASCII text files.

These are the steps needed to make the process work.

Transferring files from MAS 90 to an HHC

1. Export information out of MAS 90 using Scanco's Export programs.
2. In ASC Route, do a Server Import to pull in the information sent from MAS 90.
3. In ASC Route, transfer information for the HHC by doing a Handheld Export.
4. The HHC user does an Import File to pull in the information sent from ASC Route via ASC-MDS.

Note: Your HHC users can communicate with you in either of two ways: via an external modem or by using a cradle and the ASC-MDS (Multiple Docking System) communication program. Modems used can vary widely as do their means of communication. For help using a modem, consult your ASC Route Manual or your IS department. This manual addresses only ASC-MDS use.

Transferring files from an HHC to MAS 90

1. The HHC does an Export Data to send (upload) files to ASC Route.
2. Make sure the ASC-MDS program is running on your PC.
3. In ASC Route, do a Handheld Import to receive the HHC information.
4. Pass the handheld files to MAS 90 by doing a Server Export.
5. Finally, in MAS 90, use Scanco's Import programs to bring in the files.

System operators and HHC users

ASC Route users operate on either of two levels: *system operator* and *handheld user*.

For system operators, we made ASC Route is easy to configure and use. For handheld users, the interface easy enough for a person with little or no computer experience to use.

System operator level

System operator responsibilities include the following:

- Configuring ASC Route so that information passes correctly between the MAS 90 server and the handhelds
- Exporting customer, item, and pricing data from MAS 90 to ASC Route
- Exporting ASC Route data, e-mail, and truck inventory to the handhelds
- Importing handheld orders, invoices, returns, cash receipts, route reconciliation, and e-mails
- Exporting handheld sales orders, invoices, credit memos, and cash receipts to MAS 90
- Generating reports

The skills required of a system operator include the following:

- General knowledge of how to use MAS 90 accounting software
- Familiarity with basic PC operations
- Knowledge of the contents of this manual
- Knowledge of the contents of the ASC Route manual

HHC users

HHC users can use WorkAbout Route in these ways:

- Automated physical counts
- Warehouse transfers
- Sales order and invoice data entry
- Route information
- Price checks
- Inventory counts
- Customer information

Configuring ASC Route

This manual assumes the ASC Route installation is complete. As you configure the settings and start using ASC Route, you always need to keep in mind where the information is coming from and where it is going. From an operational point of view, you will have a daily routine that you go through that will quickly become second nature.

Configuring the System Setup screens

See, Exploring the HH Export Files screen, page 29, for an exercise to explore the HH Export Files configuration screen.

Configuring the HH Export Files screen

Caution: If this screen is not configured properly, you may not be sending the right information to the HHC.

Before you start using ASC Route, you need to configure the System Setup screen. Go into Utilities – Configuration and select the HH Export Files tab. This is an extremely important screen because it completely controls what information goes out to the handheld. If this screen is not set up correctly, your handheld users can't go out and do their jobs.

Figure 1 – System Setup, HH Export Files screen

This is the System Setup screen with the HH Export Files tab selected.

See Appendix A, Exploring the HH Export Files screen on page 29 for an exercise that takes you through the configuration process for this screen.

This screen lets you specify the following:

- How to export the customer information
- How to export the route information
- Which day of the week to export
- What the HHC file path should be
- Which item master to export
- Which customer items to export
- Which method to use to load the vehicle
- Whether or not to have page breaks on the Load Vehicle report
- Whether or not to have page breaks on the Route report

- Whether or not to append this information to the Order file

This is how to decide which choices you should make for each of these settings.

Setting up Export Customers By Route, Area, or Area in Route

First you will setup the way you want to export the Customers. You have three options:

- by Route HHC loaded only with customers on current Route
- by Area HHC loaded with all customers in current Area
- by Area in Route HHC loaded with all customers in current salesperson's Area

Exporting customers by Route

Caution: For Daily Routes, only select tomorrow if the next day is a regular business day. If the next day is Saturday, Sunday, or a holiday, you need to set a specific date.

If you want to export customers by Route, then you have two options: Master Routes or Daily Routes.

Master Routes are only associated with a day of the week. For instance, you might have a Master Route that you run every Monday.

Daily Routes are the more usual choice because they let you set up routes that can vary from day to day. With Daily Routes, you can choose a specific date or simply select today or tomorrow.

MAS 90 uses the information in the Master Routes Table to create Daily Routes. The Master Routes Table is a list of all your delivery routes. Each route is in one area and has one or more customers.

Exporting customers by Area

Note: You cannot import Areas from MAS 90. In order to set up your customers by Area only, you will need to manually enter all of the Areas (salespersons) once.

If you export customers by Area, then the program uses the Area Table to determine which customers to send to the handhelds. The Area Table is a list of customer areas and may have one or several routes. Each customer and route is in only one Area. Most often, the territory covered by a MAS 90 salesperson determines an Area.

If you decide to export customers by Area, you will need to enter in all of the Areas one time in order to set up the table.

Exporting customers by Area in Route

Note: If you decide not to use Route and you don't want to enter in all the salespeople to use Area, you can use Area in Route.

To make things easier for you, we set up a Master Route (named 99) and bring in all the route information from MAS 90 to create it. This Master Route has Sunday as its day of the week.

When Area in Route is selected, ASC Route uses the Master Route (99). It has an Area Code for every salesperson in MAS 90 and the day of the week set to Sunday. ASC Route sets up several files, including customers, items, prices, etc., for each driver. If you want to export customers using this feature from MAS 90, make the following selections:

- Export Customers By: Area in Route
- Export Routes From: Master
- Day Of Week: Sunday

Caution: You need to make sure that the driver ID is correct in the HHC because that determines the Area.

Setting up Handheld Path

The Handheld Path box shows the directory path for the handheld files. This is set up for you in the installation process.

Setting up Item Master Export

The Item Master Export lets you decide which types of items you want to export to the HHC. The Item Master Table is a list of the items you use, produce, or sell and includes item description, prices, etc. These are your choices:

- All Items – every item in MAS 90
- All Vehicle Items – all items on the truck
- Changed Items – only items from MAS 90 that have changed in some way (price, etc.)
- Changed Vehicle Items – only items on the truck that have changed in some way (special sale, etc)

Note: Vehicle items come from the Loads Table.

Think of it this way: If you're setting up for a delivery person, you'll only want to export the items that are on his truck. If you're setting up for a salesperson, you'll need to export all of the items that they could possibly sell.

Setting up Customer Item Export

Customer Item Export differentiates the amount that various customers pay for the same item. ASC Route calculates the price based on the rules in MAS 90 according to this field. The Customer/Items Table is a list of customers with all of the items they order. It includes customer ID, items ordered regularly, shelf sequence number, prices, price group, tax status, and build-to quantity. These are your choices:

- All Items – Prices for all items
- Changed Items – Prices for those items that changed in some way
- Vehicle Items – Prices for all items on the truck

Hint: Using Price Groups (called Pricing levels in MAS 90) can drastically reduce the number of items needed in order to export All Items. All customers in the same price group (01, 02, etc.) pay the same price for a particular item. If you are using Price Groups, ASC automatically adjusts prices accordingly. Instead of a price for each item for each customer, you only need a price level, item, and price.

WorkAbout Route maintains the Pricing Groups table. In determining the price, it first checks Customer Item in its calculation process. If there's a special price for that item, it charges that price. If there is no Customer Item, it then checks Price Group. If neither of these is present, it charges the standard price.

Selecting Append to Order File

Note: You will most often want to have this box unchecked so that the items and prices can update the Order File.

The Append to Order File check box lets you decide whether or not to append the order information you export to the HHC or wipe out whatever orders are already in the HHC and create a new set of orders in the Order file.

This box is a safety feature in the event that the HHC user doesn't want his orders cleared from the previous day. For example, let's say that a salesperson is unable to send in his orders for a particular day. You would not want his order file to be wiped by fulfillment orders coming in until he had a chance to send in the original orders.

Setting up Load Vehicle Method

The Load/Vehicle Information Table is a list of each vehicle, the items loaded on it, and the loader. This screen lets you determine how the truck is to be loaded according to these options:

- Average – amount to be loaded is based on the running average of sales in the past four orders for each customer in the Daily Route. For instance, if the daily sales average for widgets is 12, that's how many will be loaded.
- Standard – lets you set a standard amount for the truck items. The load for each item is based on preset standards for the Master Route as adjusted for the current season. For instance, you may want to have 50 widgets on the truck during the Christmas season, but only 20 at other times.

Generally, the driver is the salesperson, so ASC Route will know which truck to load. For example, let's say that J&S Dairy has pre-orders. Milk will be loaded on that salesperson's truck because he is also the driver.

Setting up Load Vehicle Report

This box lets you decide whether or not to insert a page break in your Load Vehicle reports. If you enable the page break, the report starts a new page for each loader/driver. These are your options:

- Page Break on Vehicle ID
- No Page Break

Setting up Route Reports

This box lets you decide whether or not to insert a page break in your Route report. If you enable the page break on the Route report, you will start a new page every time you switch to a different route in the report. These are your options:

- Page Break on Route
- No Page Break

Setting up Handheld Drive

This box sets the target drive for exported files and can be A, B, or M. A and B are Solid State Disk (SSD) drives. M is the internal HHC drive. This is set for you in the installation procedure.

Saving your changes

Note: Be sure to press the Save button when you have finished configuring the HH Export Files screen.

Press the Save button at the bottom of the System Setup window to save your changes on the HH Export Files screen. Pressing either the Save or the Cancel button closes the System Setup window. If you press Cancel, any changes you have made are lost.

If you wish, you can make changes to the other screens in the System Setup window, such as MAS 90 or HH Import/Export, but if you change your mind when configuring another screen and press Cancel, the System Setup window will close without saving your changes to HH Export Files.

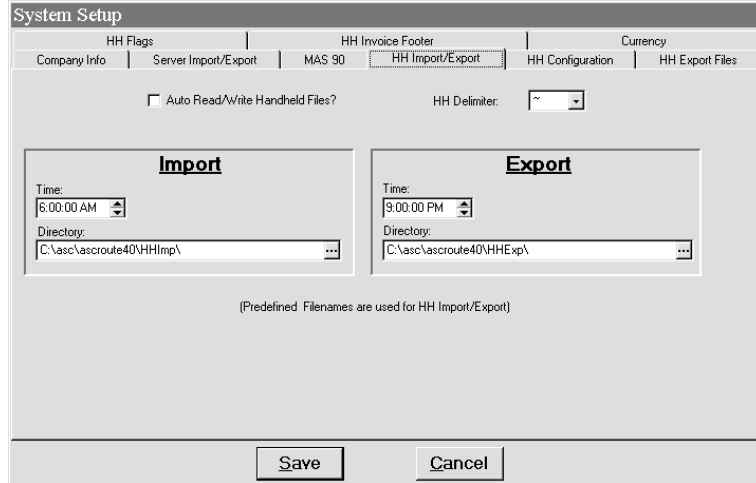
Configuring the HH Import/Export screen

Note: Refer to Automating the file transfer process on page 12 for more information on automating the file transfer process.

This screen sets the time to import files from or to export files to the HHC unit(s). It also establishes the directory paths for the files to be exchanged. You will not generally need to do anything to this screen unless you want to automate this process by ticking the Auto Read/Write Handheld Files checkbox.

Figure 2 – System Setup, HH Import/Export screen

This is the System Setup screen with the HH Import/Export tab selected.



Configuring the Server Import/Export screen

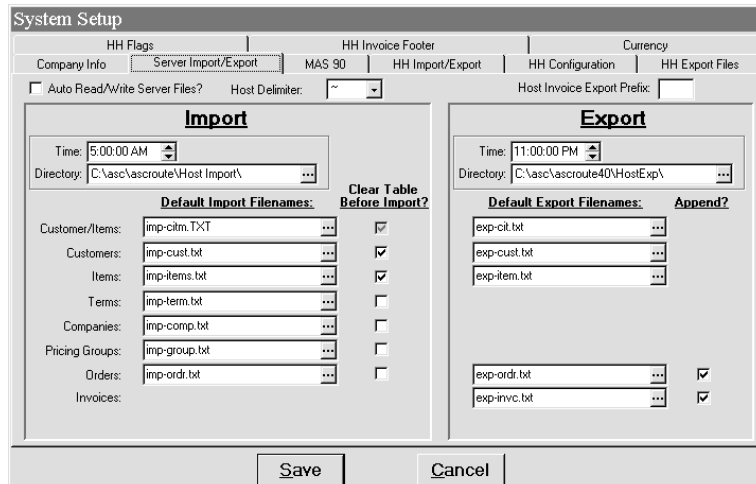
Note: Refer to Automating the file transfer process on page 12 for more information on automating the file transfer process.

This screen sets the time to import files from or to export files to the MAS 90 server. It also establishes the directory paths and the file names for the files to be exchanged. The import files have checkboxes that you can tick to clear the associated table before importing. The export order and invoice files have checkboxes that you can tick to append the exported file. If this box is not checked, a new file will be created each time you do an export.

You will not generally need to do anything to this screen unless you want to automate this process by ticking the Auto Read/Write Handheld Files checkbox.

Figure 3 - System Setup, Server Import/Export screen

This is the System Setup screen with the Server Import/Export tab selected.



Configuring the MAS 90 screen

The settings on this screen configure how a warehouse transfer file will be created for items loaded from your warehouse to your trucks. This file is imported with Bar Code Master, which allows MAS 90 inventory records to be updated on the quantities in the warehouse and the truck.

This screen lets you determine the following parameters:

- MAS 90 version - This is set for you in the installation process. Be sure not to change the set value.
- Warehouse ID - You set the warehouse identity to the one from which you are loading. The default value for the warehouse identity is 000. Any additional warehouses (which includes trucks) are numbered consecutively.
- Directory path for the MAS 90 Bar Code Master files
- The name of the Load file to be exported to MAS 90 - This file will always have an ODB extension and is usually named exp-load.odb.
- Whether to append the Load file to the existing one in MAS 90 or to create a new one each time.

You will not generally need to do anything to this screen.

Figure 4 - System Setup, MAS 90 screen

This is the System Setup screen with the MAS 90 tab selected.

The screenshot shows the 'System Setup' window with the 'MAS 90' tab selected. The 'Host Loads Export' section contains the following fields and controls:

- Version: 3.5 (dropdown menu)
- WH ID: 000 (text field)
- Directory: G:\ASCRoute\HostExp\ (text field with browse button)
- File Name: exp-load.odb (text field with browse button)
- Append?: (checkbox)

At the bottom of the window are 'Save' and 'Cancel' buttons.

Configuring the HH Flags screen

This screen controls a variety of configuration options. It is divided into bit flags and selection flags. It will be set up for you as part of the installation process and should not need to be changed unless you alter your processes in some way.

For instance, the first bit flag asks “Use Cust/Item File?”. If this box is ticked, it allows you to charge different customers different prices for the same item using the information in the Cust/Item Table (exported as the Cust/Item file to the HHC). If you decide to start charging all customers the same price for all items, then you would need to untick this box.

See the ASC Route Manual, Chapter 2, for detailed explanations of the flags on this screen.

Figure 5 - System Setup, HH Flags screen

This is the System Setup screen with the HH Flags tab selected.

The screenshot shows the 'System Setup' window with the 'HH Flags' tab selected. The window has a menu bar with 'Company Info', 'Server Import/Export', 'MAS 90', 'HH Import/Export', 'HH Configuration', and 'HH Export Files'. Below the menu bar are sub-tabs: 'HH Flags', 'HH Invoice Footer', and 'Currency'. The main area contains several sections of checkboxes and dropdown menus. The 'Flags' section includes options like 'Use Cust/Item File?' (checked), 'Use Vehicle Inventory?' (checked), and 'Show Initial Notes?' (unchecked). The 'Selection Flags' section has a 'New Customer ID' field with '999999' and dropdowns for 'Route Type' (Fulfillment), 'Route Language' (English), 'Collect Mileage' (None), and 'Purge Days' (1). At the bottom, there are dropdowns for 'Customer Sort By' (Customer ID), 'Tax By' (Customer), 'Ordering Sequence By' (Item ID), and 'Print Invoice Currency By' (Primary). 'Save' and 'Cancel' buttons are at the bottom right.

Configuring the HH Invoice Footer screen

This screen lets you set up a maximum of fifteen lines to print at the bottom of your invoices.

Figure 6 – System Setup, HH Invoice Footer screen

This is the System Setup screen with the HH Invoice Footer tab selected.

Hint: Use this screen to print messages on your truck invoices for promotions, etc.

The screenshot shows the 'System Setup' window with the 'HH Invoice Footer' tab selected. The window has the same menu bar as Figure 5. Below the menu bar are sub-tabs: 'HH Flags', 'HH Invoice Footer', and 'Currency'. The main area contains 15 numbered lines (Line 1 to Line 15) for entering footer text. At the bottom, there are 'Save' and 'Cancel' buttons.

Configuring the Company Info screen

This screen has the addressing information specific to your company and will be setup in the installation process. You should not need to alter this screen unless your company’s address information changes in some way.

For instance, if the area code for your telephone number changes, you will need to update this screen.

This is the System Setup screen with the Company Info tab selected.

Figure 7 - System Setup, Company screen

Configuring the Currency screen

This screen defines your primary and secondary currencies and sets the default tax rate. You will only need to change this screen if your tax rate or the conversion factor between your primary and secondary currencies changes.

Figure 8 - System Setup, Currency screen

This is the System Setup screen with the Currency tab selected.

Automating the file transfer process

You can set up the file update process to run automatically if you know that you will be ready for the file transfers at the same time every day. Before setting up this option, be sure that your office personnel will always have the MAS 90 files ready for export and that your HHC users will have their handhhelds docked and ready for transfers by a given time. If this is the case, you can set up the file transfers to happen automatically. Here's how.

First you need to decide exactly when you want these transfers to take place. For example, you might want to set up this schedule:

- Import from the server at 5:00:00 AM
- Import from the handheld at 6:00:00 AM
- Export to the handheld at 9:00:00 PM
- Export to the server at 11:00:00 PM

Follow these steps to automate the file transfer process:

Step	Procedure	Description
<input type="checkbox"/> Step 1	Select Utilities – Configuration and press the Server Import/Export tab.	<i>The Server Import/Export screen displays.</i>
<input type="checkbox"/> Step 2	Set the exact time in hours, minutes, and seconds (i.e. hh:mm:ss) when you want to import files from the server. <u>Note: Make sure the AM/PM setting is correct.</u>	<i>Under Import, left click on the hour. Use the up and down arrows to change to the desired hour. Left click on the minutes and use the arrows to set the desired minutes. Similarly, set the seconds.</i>
<input type="checkbox"/> Step 3	Set the exact time in hours, minutes, and seconds when you want to export files to the server. Note: Make sure the AM/PM setting is correct.	<i>Under Export, left click on the hour. Use the up and down arrows to change to the desired hour. Similarly, set the minutes and seconds.</i>
<input type="checkbox"/> Step 4	Click on the Auto Read/Write Handheld Files checkbox so that the checkmark displays.	<i>The checkmark toggles on/off each time you click on the box.</i>
<input type="checkbox"/> Step 5	Press the HH Import/Export tab.	<i>The HH Import/Export screen displays.</i>
<input type="checkbox"/> Step 6	Set the exact time in hours, minutes, and seconds when you want to import files from the handheld. Note: Make sure the AM/PM setting is correct.	<i>Under Import, left click on the hour. Use the up and down arrows to change to the desired hour. Similarly, set the minutes and seconds.</i>
<input type="checkbox"/> Step 7	Set the exact time in hours, minutes, and seconds when you want to export files to the handheld. Note: Make sure the AM/PM setting is correct.	<i>Under Export, left click on the hour. Use the up and down arrows the change to a different hour. Similarly, set the minutes and seconds.</i>
<input type="checkbox"/> Step 8	Click on the Auto Read/Write Server Files checkbox so that the checkmark displays.	<i>The checkmark toggles on/off each time you click on the box.</i>

Caution: You should not change the Directory settings unless the folder locations are actually changed on your system. The file locations will be the same whether the file transfer process occurs automatically or if you do it manually.

When you look at the Server Import/Export screen, you can see all the default import and export file names. If you click the ellipsis buttons (...), you can see where these files are stored. Be careful not to change any of these settings or the files may get lost! You will also see a column of checkboxes that lets you specify whether or not to clear the table before importing the files. The file names and checkboxes have already been set up for you by the installer and should not be changed.

Understanding the Load Process

Normally, the main warehouse has a number of 000. Let's say you have a truck with an ID of 001. Two things have to happen when you load the truck.

1. You have to tell the HHC what items you put on the truck (001).
2. You have to tell MAS 90 that these items are no longer in the warehouse (000).

You tell the HHC what you put on the truck by running a Handheld Export Process in ASC Route.

Note: You may find the file called something slightly different, but it will always have an ODB extension.

You update MAS 90 by running the Export to Server Process. This process creates the exp-load.odb file according to the information in the Load table. In MAS 90, you select Main - Import Inventory Transactions, and import the exp-load.odb file. This creates a Transfer transaction from 000 to 001. Thus everything you put on the truck is accounted for.

The Load table contains all the information the warehouse loader needs to load a vehicle for a driver to service a particular route. The exact process depends upon who decides which items to load on the truck.

Load determined by driver

This scenario assumes that the driver is the one who decides what inventory is to be placed on his truck.

	Person taking action	Action
<p>Caution: In the HHC, use the Load icon, <i>not</i> the Load under Begin Day.</p>	Driver	Sets up the load using a program icon on his HHC called Load.
	Driver	Exports the load information to ASC Route.
	Warehouse or driver	Prints a picking sheet from ASC Route.
	Warehouse or driver	Loads the truck.
	Warehouse or driver	Edit the Loads Table in ASC Route as needed to reflect what was actually loaded on the truck
	Warehouse or driver	Exports the Load file to the HHC so that its truck inventory is correct.
	You	Do an HH Import in ASC Route to bring in the Load file, which populates the Loads table.
	You	Run an Export to Server to make the Load information available to MAS 90. When you run the Server Export, ASC Route ticks the Sent to Host checkbox and creates a transaction record in Bar Code Master.
	You	Run an import in MAS 90 to actually bring that record into MAS 90.

Note: The Sent to Host and Sent to HH checkboxes tell you whether MAS 90 and the HHC have been updated. You can clear them to repeat the process.

Hint: Make sure that your HHC users complete the Load process before you send their files to MAS 90. That way, ASC can transfer the Load information to MAS 90 to update warehouse inventory records.

Automatically importing the Load file

Note: If you want the closest thing to real time in a batch system, leave Bar Code Master Unattended Import running in MAS 90. As soon as the Load file arrives, it will be pulled in to update the inventory.

This import can happen automatically for you if you have the Bar Code Master Unattended Import running in MAS 90. This program constantly looks for files to import and will complete this process for you automatically. In this case, the import happens as soon as you export the file from ASC Route. MAS 90 prints a report of any problems on a default printer. Note that this process will bring in only the Load file automatically, not any of the other files you export from ASC Route.

Manually importing the Load file

Note: When you browse for the file, you will see the file that was originally in ASC Route with the Load information.

Usually, this filename is exp-load.odt. Regardless of what the first part of the file name might be, it will always have an ODB extension

If you do not have the Bar Code Master Unattended Import running in MAS 90, after you have done a Server Export you will need to go into the Main Menu of the Bar Code Master Module and select Import Inventory Transactions.

This lets MAS 90 know which items were taken out of the specified warehouse and transferred to a particular truck.

The Server Export process takes a record from ASC Route, sends it to MAS 90, and creates a Transaction in an ASCII file. When you do an Inventory Import Transaction on the Main Menu of the Bar Code Module, it brings this file into MAS 90 for processing.

The warehouse now can print a report out of ASC Route that tells the person loading the truck what should be loaded. The warehouse then makes any necessary changes in ASC Route according to what was actually loaded onto the truck. A Handheld Export from ASC Route updates the inventory information on the truck.

Load determined by office personnel

Note: See Setting up the Loads Table on page 17.

This scenario assumes that you (or someone else at a main or branch office) decide what gets put on the truck.

Person taking action Action

You (or that person)	Set up the Loads table in ASC Route.
----------------------	--------------------------------------

You (or that person)	Run the Server Export Process.
----------------------	--------------------------------

You (or that person)	Run the Handheld Export Process.
----------------------	----------------------------------

Hint: You can untick the boxes to resend the load information to the HHC and to MAS 90 server.

When you perform the Handheld Export Process, the Sent to HH checkbox is automatically ticked and the updated load information is made available to the HHC. Similarly, ASC Route ticks the Sent to Host box when you perform the Server Export process.

For instance, if there were originally 5 gizmos on the truck and the warehouse loaded 10 more, the HHC's records would be updated to show 15 gizmos on the truck.

Load determined by warehouse personnel

This scenario assumes that warehouse personnel decide what gets put on the truck.

Person taking action Action

Warehouse personnel	Runs Load from the HHC program icon and loads the truck.
Warehouse personnel	Exports the Load file to ASC Route.
Warehouse personnel	Run the Handheld Export Process.
Warehouse personnel	Run the Server Export Process.
You	Run an import in MAS 90 to actually bring in that record.

Looking at the Loads Table

This is the information you'll find in the Loads Table:

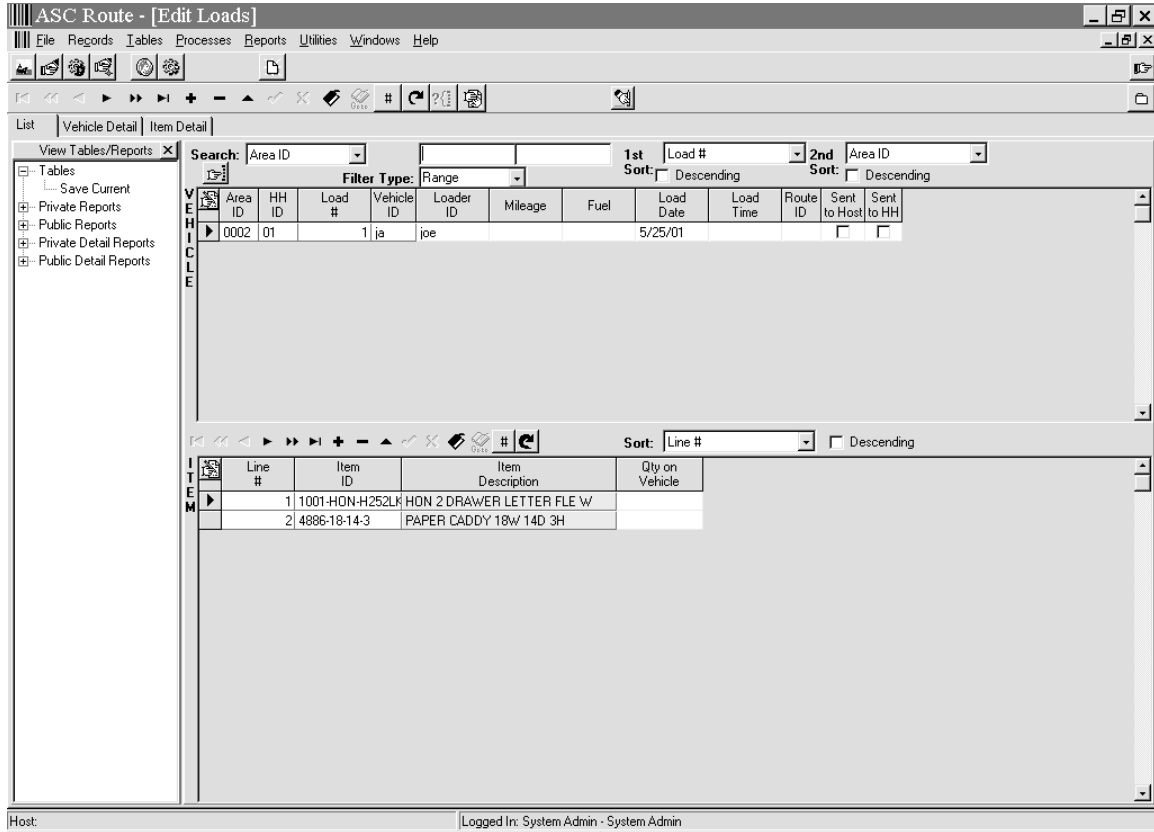
- Area ID - predefined area (for example, 0001 could be Washington DC)
- HH ID - identifies target handheld for file transfers
- Load # - an incrementing number
- Vehicle ID - identifies which truck is to be loaded
- Loader ID - warehouse personnel actually loading the truck
- Mileage - vehicle mileage
- Fuel - fuel gauge reading
- Load date - date when vehicle was loaded in dd/mm/yy format
- Load Time - time when loading was completed in hh:mm:ss format
- Route ID - identifies which route is to be serviced

Note: In Utilities – Configuration – HH Export files, Vehicle Items is derived from the Loads table.

ASC Route looks at the Loads table and sends everything that has not been previously been sent for the selected truck to the HHC. The HHC has all kinds of addressing – for the truck, for the salesperson, for the route, etc., and it constructs these files based on the Loads table. The specific files that go to the HHC are based on these addresses. Because of this flexibility, you can change the drivers and vehicles around any way you wish and ASC Route will keep track of everything for you.

Hint: If you or your handheld users don't get the right files, make sure that all the addressing is correct. The settings for area (Area ID), salesperson (HH ID), vehicle (Vehicle ID), and route (Route ID) determine which files are sent where.

Figure 9 - Edit Loads screen



Setting up the Loads Table

Note: Using the Load program icon on the HHC and then importing them into the Loads Table can also create Loads.

This procedure takes you through the Loads Table editing process. We are going to temporarily add a vehicle, configure that vehicle’s information, and specify which items are to be loaded. As the final step, we will delete the vehicle, so we won’t make any permanent changes.

Follow these steps to add a new vehicle on the Edit Loads screen:

Step	Procedure	Description
❑ Step 1	Select Tables – Route – Load/Vehicle Info.	<i>The Edit Loads screen displays. Press the Refresh button (arrow pointing up and back) to display the table.</i>
❑ Step 2	Select Records – Add Vehicle.	<i>A blank line appears in the Vehicle section. You can also add a new line by placing your cursor on the bottom line and pressing the down arrow on your keyboard.</i>
❑ Step 3	Left click on the Area ID box. Press the drop down button. Select any area.	<i>A drop down button displays. All the available areas with their IDs display. Move your cursor over the area you want and left click.</i>

Step	Procedure	Description
□ Step 4	Key in a handheld ID in the next box.	<i>Key in a few random numbers. This doesn't have to be a valid HH ID because we will delete this vehicle record when we're through.</i>
□ Step 5	Key in a Load number.	<i>This will normally be the next number in sequence. If you're not sure, use the 1st Sort field to sort by Load #. Press the Refresh button to perform the sort.</i>
□ Step 6	Press the down arrow on your keyboard. Press OK or Return.	<i>An Error window displays. ASC Route will not let you add another vehicle until all the required fields are filled.</i>
□ Step 7	Enter a Vehicle ID. Press the Tab key.	<i>Key in "temp" so you can be sure to identify this record. The next box is highlighted.</i>
□ Step 8	Enter a Loader ID.	<i>In actual practice, warehouse personnel, or whoever loads the truck, fill this in to specify who actually loaded the items on the truck.</i>
□ Step 9	Enter a value for mileage.	<i>This can be a whole number or a decimal. An error message displays if you try to enter a letter.</i>
□ Step 10	Enter a value for fuel.	<i>This can be a whole number or a decimal.</i>
□ Step 11	Click on Load Date. Left click the drop down button. Select the month, day, and year. Press the green checkmark to close the drop down calendar.	<i>A drop down button displays. A calendar drop down box displays. Use the drop down buttons to select the month and year. Use the calendar to select the day. You can also key in the desired date.</i>
□ Step 12	Click on Load Time. Use the up and down arrows to increment or decrement the hour, minute, and second settings or just key in the desired time.	<i>Once you press on one of the arrows to display a time, you can select the number(s) you want to change and key in the desired number(s). You cannot key in the colons.</i>
□ Step 13	Key in a value for Route ID.	
□ Step 14	In the Item section, highlight the Item ID Box. Press the drop down button. Select any item.	<i>A drop down button displays. A drop down list of all available items displays. Left click or press Enter to select. Note that the Line # is filled in for you when you select an item. If you enter a number, subsequent additions are automatically numbered sequentially. Also note that the Item Description is filled in for you. The color indicates that you cannot alter the description.</i>

Step	Procedure	Description
□ Step 15	Press the down arrow on your keyboard.	<i>A new line displays with the Line # already filled in.</i>
□ Step 16	Select any item.	<i>Use the drop down button.</i>
□ Step 17	Go up in the Vehicle section and click on a different record.	<i>Note that the Item section changes according to which vehicle record is selected.</i>
□ Step 18	Select the vehicle record you have just created. Press CTL + DEL or select Records – Delete Vehicle. Answer Yes.	<i>If you're not sure, look for the one with a Vehicle ID of "temp".</i> <i>An ASC Route message displays confirming that you want to delete this record.</i> <i>Note that deleting the vehicle record also deletes its associated items.</i>

Using ASC Route to transfer files

This section tells you how to use ASC Route to transfer files between the HHC and MAS 90.

This is the basic routine you will follow on a regular basis.

Receiving files from MAS 90	Select Processes – Server Import and press Yes.
Sending files to the handheld	Select Processes – Handheld Export and press Yes.
Receiving files from the handheld	Select Processes – Handheld Import and press Yes.
Sending files to the Server	Select Processes – Server Export and press Yes.

Importing/Exporting files to/from MAS 90 and the HH

Hint: Keep in mind which program you are in when deciding whether to import or export. If you are in ASC Route, on the HH Import/Export screen, you will export files to and import files from the handheld. Similarly, when you are on the Server Import/Export screen, you will export files to and import files from the MAS 90 server.

There are four routine tasks that you will normally perform:

- Importing files from MAS 90 to ASC Route
- Exporting files from ASC Route to the handheld
- Importing files from the handheld to ASC Route
- Exporting files from ASC Route to MAS 90

Before performing any of these tasks, you will need to make sure that the applicable System Setup Tabs under Utilities – Configuration are configured properly.

For the MAS 90 server, these include:

- Server Import/Export
- MAS 90

For the handhelds, these include:

- HH Import/Export
- HH Export Files

Bringing files from MAS 90 to ASC Route

These are basic steps involved in bringing in files from MAS 90 to ASC Route.

1. Export from MAS 90 by running one or more jobs.
2. Import into ASC Route by running Server Import.

In MAS 90, select Visual Integrator, Jobs menu. Depending on your application, you will see a varying number of jobs listed there that relate to these three categories:

- Customers
- Items
- Terms

The following is a list of typical jobs. At a minimum, you will have customer, item, and term jobs. The specific jobs you see on your MAS 90 screen will depend on your application, but they will be named as follows or with slight variations:

- Customer File Route with Divisions – Used for companies with more than one division; will prompt you for the division number
- Cust File Route Using Shipto Div – Handles different locations for the same customer
- Customer/Item File for Route - Div – Allows for special pricing for a customer or item; Div indicates that the customer has more than one division
- Item Master File for Route – All the items in MAS 90
- Pricing Level Records to Route – Used when you have different price groups
- Terms Code File for Route – Payment terms (net 30, COD, etc.)

Note: You might not need to run the terms code on a regular basis, but you should run all the other jobs according to their schedule. Of course, if terms change, you will need to run this job, also.

Running Jobs in MAS 90

When you run each of these jobs, MAS 90 puts a file in the folder that we specified in the ASC Route Utilities – Configuration – Handheld Export/Import screen. That way MAS 90 knows where to put the files and ASC knows where to find them. Conversely, we set up a folder in MAS 90 where ASC stores files and MAS 90 finds them.

To run a job, double-click on it and press Accept. You will be prompted that this file is already there. OK to overwrite? Click Yes. The prompt will change to say Exporting Records. It will tell you how many it read, exported, and skipped and will ask you if you want to view the log.

Note that if you have more than one division, you must run the jobs once for each division, entering the division number when prompted.

Then, when you do a Server Import on ASC Route, it imports all of the text files you exported to it from MAS 90.

Running customer jobs with and without Shipto addresses

Note: You can see the file names and the target directory by selecting Utilities – Configuration and pressing the Server Import/Export tab.

A Shipto address indicates a customer with more than one shipping location. For instance, Pseudocom may have six different locations where you deliver coffee, but they only want one bill sent to the main office. You may have customers with more than one Shipto address while other customers will have no Shipto address. It is extremely important to run the job for each group separately (those with and those without a Shipto address) and complete the import into ASC Route before running the job for the other group.

This is necessary because ASC Route does not have separate file names for Shipto and non-Shipto customers. In ASC Route you have to have a customer for every single Shipto address. In MAS 90, you can have a single customer with multiple Shipto addresses.

When you run Visual Integrator – Jobs Menu – Customer File Route with Divisions, you export a file named Imp-Cust.txt. When you run

Visual Integrator – Jobs Menu – Cust File Route Using Shipto Div, you also export a file named Imp-Cust.txt. MAS 90 puts different information into this file, depending on whether you are running a job for customers with or without Shiptos.

Hint: You can set up a Shipto code that is equivalent to the main code for all your customers. For instance, say that Pseudocom just has one Shipto location. You would set up a customer code of pseudocomD00 to assign a Shipto value of 00 to Pseudocom or any other customers that has only one Shipto address. If you do this, you can run all your jobs on MAS 90 at once and you will only have to do a single Server Import on ASC Route.

Therefore, unless you adjust your customer numbers to reflect the Shipto status, it is important that you run the export to your customers that have no Shipto addresses before you export those that have Shiptos.

First, run the non-Shipto job. Then go into ASC Route and run Processes - Server Import. You can then go back into MAS 90 and export those customers that do have Shipto addresses, afterwards running ASC Route's Processes - Server Import. When you perform the operations for customers with Shipto addresses, the file is appended to the customer file in ASC Route, so the information from both files is saved.

Caution: Be sure to complete the export process from MAS 90 and the import process from ASC Route for customers without Shipto addresses before again exporting the customer file for those that do have Shipto addresses. Otherwise, you will overwrite the first customer file.

All of the other jobs (Pricing Level Records, etc.) have unique file names. Only the Customer File Route with Divisions and Cust File Route Using Shipto Div jobs share the same file name and must be exported from MAS 90 and then imported into ASC Route separately to avoid overwriting the file. Once you import a file into ASC Route, the additional information is appended to the appropriate table.

Hint: The ASC Route screens are set up so that when you open a table, the details do not automatically display. This lets you select the report options on the left side of the screen without waiting for a large table to display. To view a table, simply press the Refresh button (an arrow curving up and back). To close a table, press the folder icon in the upper right screen area. Exit by pressing the pointing hand icon just above the folder icon.

Exporting files from ASC Route to the HHC

First make sure that the System Setup screens are configured correctly.

Second, import any necessary files from MAS 90 by running the appropriate job(s).

Hint: Leave ASC-MDS running in the background. As soon as it sees an HHC running import files from the Orders menu in Begin Day, it activates.

From your PC, make sure ASC-MDS 32 is running. If it is not already running, you can start it from either the Start – Programs menu or by double-clicking the desktop shortcut icon. ASC-MDS automatically runs based on what you've exported out of ASC Route. It knows whether to upload or download, and it lets you know when it has successfully finished or if it had a problem. If you are exporting to multiple HHCs, it cycles through each one in turn.

Finally, to export the information to the handheld, simply select Processes – Handheld Export. The “You are about to EXPORT files to the HANDHELD. Proceed?” screen displays. Press the Yes button to continue. You will see the file building process flash by as it compiles all the necessary files. When finished, the “Handheld Export Complete” screen displays.

From the HHC, the user dials the main branch. The main branch answers and runs a program that prompts the handheld user. For example, it might ask him Do you want to bring down customers? Items? Do you want customers by area or route?

Importing files from the HHC to ASC Route

Make sure that the System Setup screens are configured correctly.

You should run this process after the handheld users have all downloaded their information using either an external modem or a single- or four-bay cradle running ASC-MDS, so that all the information has been gathered from the field. The handhelds users should have all received their customers and prices and the information they need for that day.

Select Processes – Handheld Import. The “You are about to IMPORT files from the HANDHELD. Proceed?” screen displays. Press Yes to continue. The Handheld Import Complete screen displays.

Bringing files from ASC Route to MAS 90

MAS 90 has the usual accounting package modules, General ledger, etc. You select the import function from the Main Menu according to the files you want to bring into MAS 90. For instance, Sales Order is where you process orders.

Follow these steps to send sales orders or invoices from ASC Route into MAS 90:

Step	Procedure	Description
❑ Step 1	In ASC Route, select Processes – Server Export. Press Yes or Enter.	<i>An ASC Route query box displays confirming that you want to export files to the server.</i>
❑ Step 2	In MAS 90, select Sales Order – Main – Route Sales Order/Invoice Import.	<i>A list of files displays.</i>
❑ Step 3	Select the desired file and click Proceed.	<i>Press Select or double-click to select. This creates an order in MAS 90.</i>
❑ Step 4	Double click on the Go button.	<i>“Yes” appears by the name of the file you have selected. Alternatively, you can click on the file you want to import and press Select. This also changes the file status from No to Yes.</i>

Caution: To check for any errors, click on the Print button to print an error report. No other means of identifying errors is available.

Step	Procedure	Description
<input type="checkbox"/> Step 5	Post the invoice/order.	<i>If you don't post (update) the invoice or order, you can't apply cash to it. MAS 90 won't know that it exists until it is updated.</i>

Hint: The Print Log File shows you any record it had a problem with and tells you exactly what the problem was. You can Preview the log file rather than print out a hard copy.

Processing cash receipts

Note: The processing of cash receipts must follow the posting of the invoice/order so that you can apply cash to it.

If your handheld user collects money, you will need to import this information, also. This procedure assumes that you have already performed a Server Export from ASC Route and posted the invoice in MAS 90.

Follow these steps to process cash receipt records sent from ASC Route to MAS 90:

Step	Procedure	Description
<input type="checkbox"/> Step 1	In MAS 90, select Accounts Receivable – Main - Route Cash Receipts Import.	<i>When you run this option, it prints a report.</i>
<input type="checkbox"/> Step 2	Preview or print the report and then close.	<i>The A/R Cash Receipts Batch screen displays.</i>
<input type="checkbox"/> Step 3	Click # for the next batch and click OK.	
<input type="checkbox"/> Step 4	Confirm that the Bank Code, Deposit Date, and Deposit Number are correct. Click OK.	<i>Running this option essentially creates a bank deposit for the money that came in from the drivers. You process it the same as you would any other cash receipt or any other bank deposit in MAS 90, with this exception: Do not enter any dollar amount. Just leave the amount "0".</i>

Note: If the salesperson or driver invoices a customer and collects money, you will post the money collected against that invoice. If the customer wants to put money down on their account, but not against any particular invoice, the handheld user enters that transaction as a "received on account" (ROA). This will create a pre-payment in MAS 90.

Using Order and Invoice Tables

ASC Route Order and Invoice Tables have a similar set up to MAS 90 where you have header information for the sale at the top with specific details on the line items below. In ASC Route Order and Invoice tables, you have the customer information for the orders/invoices at the top and the line items at the bottom.

Performing Daily Routines

How often do you need to send files to/from MAS 90? That depends on how often you add customers, remove items, changes prices, etc. Your business needs will determine how often you need to refresh/synchronize the HHC data by performing these processes.

Step	Procedure	Description
<input type="checkbox"/> Step 1	At night, select Utilities – Configuration – HH Export Files.	<i>Set up as needed before performing the Handheld Export Process.</i>
<input type="checkbox"/> Step 2	Make sure ASC-MDS is running on your PC.	<i>This will enable the file transfer to the HHC.</i>
<input type="checkbox"/> Step 3	Select Processes – Handheld Export.	<i>This creates the files to export to the HHC for the drivers to pick up in the morning or to download via modem and makes them available to the HHC in the specified directory.</i>
<input type="checkbox"/> Step 4	In the morning, perform Processes – HH Import.	<i>This brings in the handheld files from the previous night. These may include orders, invoices, and cash receipts.</i>
<input type="checkbox"/> Step 5	Perform Processes – Server Export.	<i>This sends the handheld files to a directory in the MAS 90 server.</i>
<input type="checkbox"/> Step 6	In MAS 90, import the ASC Route files.	<i>This makes the information in the files available to MAS 90 for processing.</i>
<input type="checkbox"/> Step 7	In MAS 90, run the necessary jobs to export the desired files to ASC Route.	<i>This sends the updated files from MAS 90 to a directory in ASC Route.</i>
<input type="checkbox"/> Step 8	In ASC Route, select Processes – Server Import.	<i>This updates the tables in ASC Route.</i>

Using ASC Route in an HHC

This section provides an overview of the daily tasks performed by an HHC user. For in-depth information, please refer to the WorkAbout Route Manual.

Step	Procedure	Description
□ Step 1	In the morning, select Route – Orders – Begin Day – Today’s Date on your HHC.	<i>Put in today’s date if needed. Press Enter to return to the Begin Day menu.</i>
□ Step 2	Under Begin Day, select Today’s Route and fill in the Route information – the Area, Route, Vehicle, Salesperson Number, and WorkAbout IDs. Press Enter when you have finished entering in all the information. Press Enter again to save your changes.	<i>Vehicle number is the Warehouse ID in MAS 90 and Vehicle in ASC. Route number could be for a Tues-Thurs route, could be different every day. Regardless, they all need to be set up in ASC Route. Salesperson number is salesperson’s number from MAS 90. Workabout ID is a unique ID for each handheld.</i>
□ Step 3a	If you need to load inventory on the truck, back out of Begin Day to the Load icon. <u>Note: If you don’t load the inventory on your truck, skip steps 3a and 3b.</u>	<i>Press Esc twice, and then Enter to see the Load icon.</i>
□ Step 3b	Run Load to add inventory to your truck.	<i>Scan in what you’re putting on the truck. Item number is MAS 90 number. Description won’t need to be changed. System Quantity is what the HHC shows is currently on the truck. Build to is the quantity that you want to keep on the truck. Hit Enter to show the next item. These are only the items that you will have on the truck. You can add additional items.</i>
□ Step 4	Next you will import from ASC Route to update the HHC files. Select Route – Utils – ASC-MDS to bring in the files from ASC Route. Select Route – Utils – Import Data to update the HHC files.	<i>This updates the files in the HHC. If someone else loads your truck, you now have an updated Inventory. Place your HHC in the cradle and follow the prompts.</i>
□ Step 5	Take the HHC out of the cradle. Travel your Route.	<i>This will involve a variety of customer-related activities such as checking customers’ inventory, selling items, printing invoices, collecting payments, etc.</i>

Step	Procedure	Description
□ Step 6	<p>Under Orders, select customer and follow prompts to fill in the order information.</p> <p>Enter qty. The HHC will warn you if it shows that you don't have enough of that item on truck.</p> <hr/> <p><i>Note: Qty warning only appears if you are using Vehicle Inventory. If you are only taking orders, you will not see this warning message.</i></p>	<p><i>You can track mileage.</i></p> <p><i>You can enter orders by item description or item code, which is like a UPS code, or you can scan.</i></p> <p><i>If you wish, you can override (sell it anyway).</i></p>
□ Step 7	<p>Optionally, you can collect Payment and accept returned goods.</p> <p>Print the Order (hook up or infrared). Give one to the customer and take one with you.</p> <p>When you are finished, Exit Order.</p> <p>The HHC goes back to New Order.</p>	<p><i>The HHC has the unit price for that customer (price group, cust item).</i></p> <p><i>You could print multiple copies or have multipart forms.</i></p> <p><i>If you make a mistake, you can return to Order, Edit, and make any changes. When the order is correct, say Order Complete.</i></p> <p><i>Request date is used only when taking orders to let you set up the delivery date.</i></p>
□ Step 8	<p>At the end of the day, Select Route – Utils – Export data to export files to ASC Route. Select the file(s) you want to export to ASC Route.</p> <p>If you have added a customer or an item or a customer item record, you will need to export those, also.</p> <p>Select Route – Utils – ASC-MDS to send the files to ASC Route.</p>	<p><i>This prepares the file(s) to be sent to a directory in ASC Route.</i></p> <p><i>Most often you will only export Orders files.</i></p> <p><i>If you haven't added anything, just pick Orders. If you accepted cash receipts, these are included in the Order file.</i></p> <p><i>Place your HHC in the cradle and follow the prompts. This sends the updated file(s) to ASC Route.</i></p> <hr/> <p><i>Note: ASC WorkAbout can also handle remote logins where the handheld user will have an off site modem that he connects to his handheld via its serial port to send/receive info.</i></p>
□ Step 9	Check Inventory if you want to print it in the report.	<i>If you don't want to include Inventory in the report, skip this step.</i>
□ Step 10	Compress Files.	
□ Step 11	Shut off the HHC and/or recharge its batteries.	<i>You can take HHC out of the cradle or leave it in the cradle to charge. Either way, you're done with the HHC for the day.</i>

Troubleshooting

Symptom	Corrective action
You export files to the HHC but they never get there.	<ol style="list-style-type: none"> 1. Check the configuration of the HH Export Tab under Utilities – Configuration. If not set up correctly, the information won't get to handheld. 2. If you have selected Export Routes From Daily, make sure the correct date has been selected. 3. Make sure you are running ASC-MDS.
You import files from the HHC but can't find them.	<ol style="list-style-type: none"> 1. Make sure handheld data has gone to correct table. Has to go one of two places – Orders or Invoices. You may have be looking in the wrong one. What kind of Route are you? If order route, should go to Order Table. If delivery route, should go to Invoice Table. 2. Make sure you are running ASC-MDS.
You export files to the MAS 90 server but they never get there.	<ol style="list-style-type: none"> 1. Check the configuration of the Server Import/Export and MAS 90 Tabs under Utilities – Configuration. If not set up correctly, the information won't get to the server.
You import files from the MAS 90 server but can't find them.	<ol style="list-style-type: none"> 1. Check the configuration of the Server Import/Export Tab. If not set up correctly, the information won't come in from the server.
You Load inventory on the truck but it didn't create a Load file.	<ol style="list-style-type: none"> 1. Check to make sure all address are entered correctly. Load goes by vehicle.
You export customers by Area in Route, but they never get to the HHC.	<ol style="list-style-type: none"> 1. Make sure the driver ID is correct in the HHC. The driver ID determines the Area.
You export files to the HHC, but the HHC gets the wrong ones.	<ol style="list-style-type: none"> 1. Check the settings for Area ID, salesperson ID, Vehicle ID, Route ID.
You run both the customers with no Shipto address and those with Shipto addresses, but only the Shiptos make it through.	<ol style="list-style-type: none"> 1. Make sure you complete the import process in ASC Route before you send the Shipto customers.
You export files from MAS 90, but only some of them make it through.	<ol style="list-style-type: none"> 1. Click on the Print button to print an error report. Make any necessary adjustments to make sure all the files you want to export make it through.

Appendix A

This exercise takes you through the HH Export Files configuration screen. You may need to configure this screen to ensure proper operation of the ASC Route – MAS 90 interface and to be sure that you are transferring and receiving the right information between MAS 90 and the HHCs.

Exploring the HH Export Files screen

Follow these steps to explore the HH Export Files screen:

Step	Procedure	Description
<input type="checkbox"/> Step 1	Select Utilities – Configuration and press the HH Export files tab.	<i>The HH Export Files screen displays.</i>
<input type="checkbox"/> Step 2	Press the Export Customers By drop down button (down arrow). Select Area in Route.	<i>You have three options: Area, Route, and Area in Route.</i>
<input type="checkbox"/> Step 3	Press the Export Routes From drop down button. Select Daily.	<i>The Export Routes For box displays.</i>
<input type="checkbox"/> Step 4	Press the Export Routes For drop down button. Select Today or Tomorrow. Now select Date.	<i>The Date box displays.</i>
<input type="checkbox"/> Step 5	Press the Date ellipsis button (...). Press the drop down buttons to select the desired month and year, then highlight the day on the calendar. Press the green check mark to select that date or the red x to cancel.	<i>A pop up box displays that lets you set the month, day, and year.</i>
<input type="checkbox"/> Step 6	Press the Export Routes From drop down button. This time select Master.	<i>The Day Of Week box displays.</i>
<input type="checkbox"/> Step 7	Press the Day Of Week drop down button. Select Sunday.	<i>This sets you up to use the Master Route (99) with the information brought in from MAS 90.</i>
<input type="checkbox"/> Step 8	Press the Item Master Export drop down button (down arrow). Select All Vehicle Items.	<i>You have four options: All Items, All Vehicle Items, Changed Items, and Changed Vehicle Items.</i>
<input type="checkbox"/> Step 9	Press the Customer Item Export drop down button. Select Vehicle Items.	<i>You have three options: All Items, Changed Items, and Vehicle Items.</i>
<input type="checkbox"/> Step 10	Click the Append to Order File check box. Click once more to restore the checkmark.	<i>Clicking on the check box toggles the checkmark on and off.</i>
<input type="checkbox"/> Step 11	Press the Load Vehicle Method drop down button. Select Standard.	<i>You have two options: Average, and Standard.</i>

Step	Procedure	Description
□ Step 12	Press the Load Vehicle Report drop down button. Select Page Break On Vehicle ID.	<i>You have two options: Page Break On Vehicle ID and No Page Break.</i>
□ Step 13	Press the Route Reports drop down button. Select Page Break On Route.	<i>You have two options: Page Break On Route and No Page Break.</i>
□ Step 14	Press the Save button.	<i>This saves your changes and closes the System Setup window. Pressing Cancel also closes the window, but none of your changes will be saved.</i>

Exploring the Editing the Loads screen

Follow these steps to explore the Edit Loads screen:

Step	Procedure	Description
□ Step 1	Select Tables – Routes – Load/Vehicle Info.	<i>The Edit Loads screen displays. Press the Refresh button (arrow pointing up and back) to display the table.</i>
□ Step 2	Move the mouse so that it hovers over the Records menu selection. Note the options available.	<i>The options available under the Records menu item will vary depending on the active Table.</i>
□ Step 3	Note that the columns are colored yellow, white, and gray. The colors signify the following: Yellow: Required field White: Not required field Gray: No modification	<i>You can see the color code under Utilities – Configuration – Colors.</i> <i>Hint: You can select different colors in the Colors screen by pressing the drop down buttons.</i>
□ Step 4	Note that the upper portion of the screen contains all the vehicle-specific information.	<i>This includes the area, handheld, vehicle, loader, and route IDs, load number, date, and time, vehicle mileage and fuel, and whether the information has been sent to the host or the handheld.</i>
□ Step 5	Note that the lower portion of the screen contains information on the items to be loaded.	<i>This includes the line number, item ID, item description, and quantity on truck.</i>
□ Step 6	Close the Edit Loads form.	<i>Press the folder icon in the upper right screen area. If you press the pointing hand just above it, you will exit ASC Route.</i>

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TBA



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