

RSO - WEEKLY GUIDE

NEW ACCOUNTS (RSO – Customers/Customer Entry)

- Setup New Customers in RouteStar Online

Customer Entry / Home / Customer Entry

MENU: Dashboard, Customers, Customer Entry, Customer List, Customer Map, Memorized Trns, Equipment List, Additional Info

Parent: Choose..

Customer/Lead Name: Customer/Lead Name Company: Company

First Name: First Name Last Name: Last Name

Search for Service Address: Enter Street Address

ROUTE ADJUSTMENTS (RSO – Customers/Customer List/Customer Detail)

- Make any frequency or technician adjustments to existing Customers

Details Activity Additional Info Additional Contacts Equipment Routes Notes Attachments

Menu

Last

	Frequency	Route	Date	Day	Assigned To
1	Week 1	CLTRM01	06/04/2019	Tuesday	CLTRM01

PRICE ADJUSTMENTS (RSO – Customers/Customer List/Customer Detail)

- Make any price or line item adjustments to existing Customers

Details Activity Additional Info Additional Contacts Equipment Routes Notes Attachments Pricing

Menu

Last

	Item	Description	Cost	Sales Price	Default Qty
1	Sani Service Weekly	Sani Service - Weekly	\$0.00	\$29.50	
2	Trip Chg	Trip Charge	\$0.00	\$2.00	
3	Individual Rolls:JTP	JTP - Ind. Rolls	\$0.00	\$3.00	
4	Individual Rolls:BRT	Natural Roll Towel - Ind. Rolls	\$0.00	\$5.75	
5	Choose..				

CANCELLATIONS (QB – Customer Center, RSO/Route Schedule/Delete Stop)

- Perform customer cancellations in QuickBooks.

zzz cancelled customers with a balance

CUSTOMER NAME zzz Applebee's - Monroe

Inactivate customers with no balance

Customer is inactive

ADVANCE ROUTE SCHEDULE (RSO – Route/Schedule/Advance Route Dates)

- Select the current weeks date range and advance the schedule, all routes

Route: All Routes Start: 05/27/2019 End: 06/02/2019 Advance Route Dates Reset Assigned

PRINT ROUTE SHEETS (RSO – Route/Schedule/Menu/Print)

- Select the following weeks date range, route, category, version and Print

Print Route Sheets

AUTO-GENERATE INVOICES (RSO – Route/Schedule/Menu/Auto Generate)

- Select the following weeks date range and generate invoices, all routes

Auto-Generate Invoices

Start Date: 06/03/2019

End Date: 06/09/2019

Route: All Routes

Customer: All Customers

What items from customer specific pricing do you want to load?: All

CANCEL GENERATE

PRINT INVOICES (RSO – Invoices/Pending/Print)

- Select date range, format and Print <Ctrl><P>

All Routes 06/03/2019 06/09/2019 Double w/ Logo Show Total/Qty No Print

MISSED INVOICES (RSO – Route/History)

- Select missed reason

Route Schedule History

Frequency	Route	Date	Day	Assigned To	Assigned Date	Stop	Customer	Service Address	Missed
1	Week 1 GRN1	07/19/2019	Friday	GRN1	07/19/2019		Grey Rock	125 S Main St Greenville, SC 29601	Business Closed Down
2	Week 1 GRN1	07/19/2019	Friday	GRN1	07/19/2019		Yee Haw Brewing Co.	207 E Mc Bee Ave Suite C Greenville, SC 29601	

POST INVOICES & PAYMENTS (RSO – Invoices/Pending/Post to QuickBooks)

- Select Route, date range & Post to QuickBooks

05/31/2019 05/31/2019 Select Report Show Total/Qty No Print Combine Invoices? No Post to QuickBooks

Select, NO – POST INVOICES ONLY

Post to QuickBooks

CANCEL

YES - POST ROUTES & INVOICES

NO - POST INVOICES ONLY

RECONCILE COD (QB – RECORD DEPOSITS)

- Record COD deposits and reconcile bank account

SELECT PAYMENTS TO DEPOSIT

DATE	TIME	TYPE	NO.	PAYMENT METHOD	NAME	AMOUNT
04/14/2017		PMT	2224527	Check	Stock Builders 4114	109.25
04/14/2017		PMT	2224527	Check	Stock Panels	32.42
02/02/2017		PMT	204012117...	Visa	Chick - Fil - A - Indian La...	199.00
09/22/2017		PMT	900156129	ACH	Gates Petroleum Rocky...	48.00