

# Mercury Delivery

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The Mercury Delivery program allows you to create and maintain delivery zones, automatically create delivery routes using Microsoft® MapPoint®, mark orders as on the truck/Delivered/Not Delivered, re-route orders that were not delivered, print delivery reports, and more. Delivery orders entered in Order Entry and Point of Sale (orders with delivery zones associated with them) will display in the new Mercury Delivery mapping and routing application so that they can be routed.

FTD Mercury offers the following Mercury Delivery modules: Advanced Delivery and Wireless Delivery Confirmation.

The Advanced Delivery module offers you the Mercury Delivery application, which allows you to maintain delivery zones, route orders and create delivery routes using Microsoft MapPoint 2004, mark orders Delivered, print delivery reports, and more (see [Mapping and Routing](#) on page 14–4). It also offers you Address Verification (see [Address Verification](#) on page 14–1).

With the Advanced Delivery module you can add the Wireless Delivery Confirmation module. This module allows your delivery drivers to use wireless phones to update the delivery status of orders (mark orders Delivered or Not Delivered). See [Wireless Delivery Confirmation](#) on page 14–32.

For pricing information for either of these modules, please call Mercury Technology Sales at 1-800-767-3222.

## Address Verification

If you purchased the Advanced Mercury Delivery module, you have Address Verification. Address Verification compares addresses that you enter in the **Order Entry**, **Point of Sale**, and **Customer Detail Information** windows to a quarterly-updated address database of U.S. and Canadian addresses.

If an address is an exact match, Address Verification compares each address element, correcting any errors in your data. For example, if the address is incorrectly formatted, misspelled, or missing the 4-digit ZIP code extension, the system corrects the address.

When you press the <Tab> key to exit the address field, the Address Verification software attempts to find a match. If an exact match is found, the address will be verified, and if you entered a 5-digit ZIP code, it will be replaced with a 9-digit ZIP code. If Address Verification cannot find an exact match, it recommends close matches to the address that you entered.

If you have delivery zones set up, the delivery zone and charge will be selected for you automatically in Order Entry and Point of Sale, based on the recipient's postal code or location on the map.

By default, the system will prompt you with a close address match. You can change this setting so that addresses are corrected automatically without prompting you first. This setting can be

changed in the FTD Mercury Configuration screen (from the FTD Mercury menu bar, click **Tools**, then click **Settings**).

If an address cannot be verified (and you do not select a close match if one was suggested), you can still save and complete the order as normal. When you go to route that order in the Mercury Delivery application, Microsoft MapPoint uses its own address verification feature to try and verify the address. If MapPoint cannot verify the address, it warns you that the address cannot be verified (MapPoint cannot suggest close matches). If the address cannot be verified by MapPoint, you can still add the order to the route, however the order is not added to the delivery map and is not included in the driving instructions.

**NOTE**

In the FTD Mercury Configuration window, there is a setting called Enable Address Verification Override. If this is selected, a Verify check box is displayed in the Recipient area in Order Entry and Point of Sale. The Verify check box allows you to selectively override address verification for orders (for example, if this is for an address that is correct, yet does not verify for a reason such as new construction).

## Setting Up Address Verification

Following are the setups that you must complete before using Address Verification:

- » The Advanced Delivery module must be licensed in Mercury Administration. You should have received a General message from FTD that enabled this module on your system. To check that Address Verification is licensed on your system, go to the License option in Mercury Administration and make sure that the Address Verification component reads **Valid**. See [License Screen](#) on page 24–54 for more information.
- » In addition to installing the Microsoft MapPoint 2004 software, you should have also installed the Centrus address verification data on your system. If you purchased the Advanced Mercury Delivery module, the Centrus CDs were shipped to you with your FTD Mercury upgrade.

## Using Address Verification

In Order Entry or Point of Sale, when you enter an address, the Address Verification software attempts to find a match. If an exact match is found, the address is verified, and if you entered a 5-digit ZIP code, it is replaced with a 9-digit ZIP code. If a close but not exact match is found, the closest matches pop up on your screen so that you can select the correct address:

Figure 14-1: Address Verification

Original Address

Street: 3113 WOODCREEKE LANE

City: DOWNERS GROVE

State/Province: IL

Postal Code: 60515

Country: USA

Valid Address(es)

Street	City	State/Prov	Postal Code	Country
3113 WOODCREEK DR	DOWNERS GROVE	IL	60515-5412	USA

Select      Escape

In the example above, click **Select** to select the highlighted address. If there are multiple addresses found, you would highlight the correct address from the list and then click **Select**. If you do not want to select any of the valid addresses from the list, you can click **Escape** and return to the order without changing the address that you entered (the address will not be verified). If you selected an address, the new address displays for you in the address field.

If you have delivery zones set up, the delivery zone and charge are selected for you automatically in Order Entry and Point of Sale, based on the recipient's postal code or location on the map. (If you have the Mercury Delivery module, see [Delivery Zones](#) on page 14–6 to learn how to set up delivery zones and charges. If you do not have the Mercury Delivery module, see [Delivery Zone Screen](#) on page 24–42.)

**NOTE**

If you deliver to an army base, address verification is not able to locate it because the military does not give the exact location of their bases. Since army bases have their own postal codes, you can create a delivery zone by postal code for the army base.

By default, the system prompts you with a close address match. You can change this setting so that addresses are corrected automatically without prompting you first. This setting can be changed in the FTD Mercury Configuration window (on the FTD Mercury **Tools** menu, click **Settings**.) For more information on the FTD Mercury Configuration window, see [FTD Mercury Configuration Window](#) on page 2–17.

When the **Prompt before changing a close address match** is selected, the system first prompts you before changing an address to a close match. If this option is not selected, you are not prompted first if the system finds an address that is close to the address that you entered.

## Updating the Address Verification Database

If you have Address Verification, FTD sends you an address update CD every three months.

**TASK**      **To install the update:**

- 1 Insert disc A in your CD drive. This starts the installation automatically. If the installation does not begin automatically, click the **Start** button on your desktop, then click **Run**. Type d: \setup. exe (where d is the letter of your CD drive) and then press **Enter**.
- 2 Click **Begin**.
- 3 When prompted, insert disc B into your CD drive, then click **OK**.
- 4 When prompted, insert disc C into your CD drive, then click **OK**.
- 5 When the installation is complete, click **Finish**.

## Mapping and Routing

If you purchased the Advanced Mercury Delivery upgrade module (or purchased the Standard Mercury Delivery upgrade module in a previous release), you have mapping and routing. Delivery orders entered in Order Entry and Point of Sale (orders with delivery zones associated with them) display in the Mercury Delivery mapping and routing application so they can be routed. This application allows you to create and maintain delivery zones; automatically create delivery routes using Microsoft® MapPoint® 2004; mark orders as on the truck, delivered, or not delivered; re-route orders that were not delivered; print delivery reports; and more. Microsoft MapPoint 2004 must be installed to use the Mercury Delivery application.

**TASK**      **To access the Mercury Delivery application if you are already logged into FTD Mercury:**

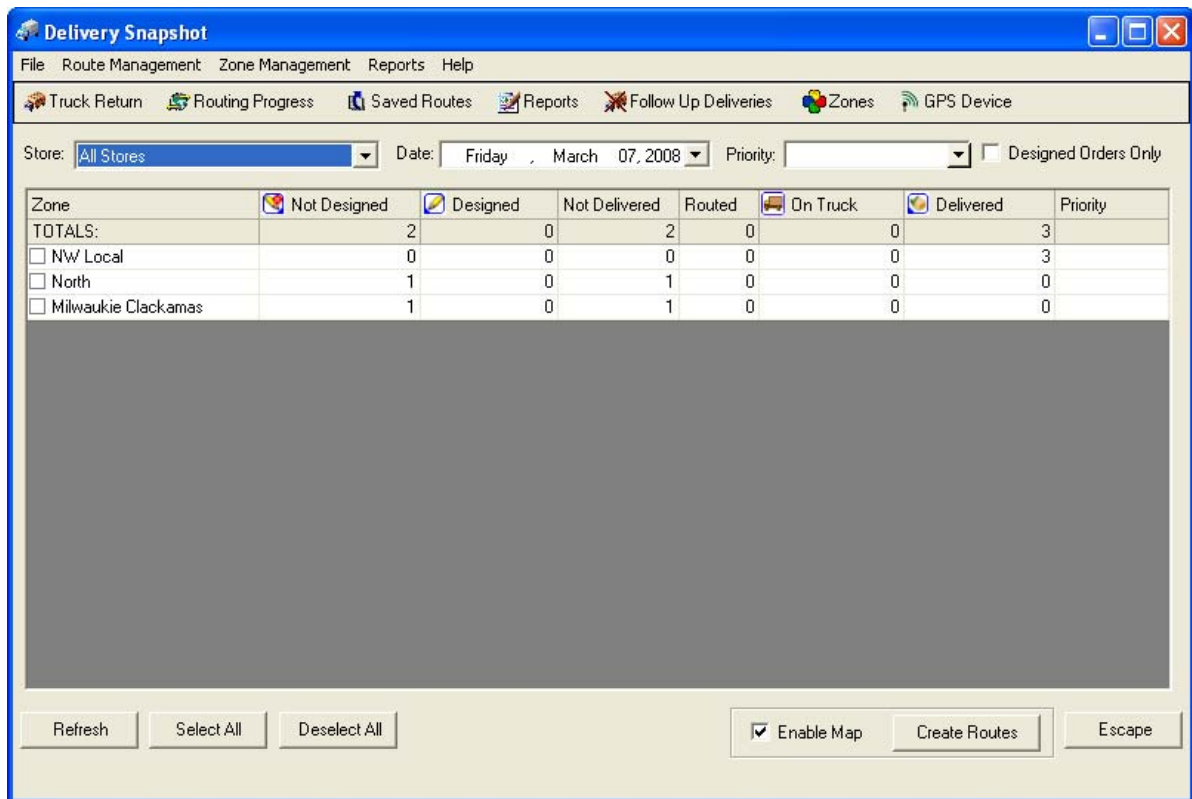
On the **FTD Mercury Main Menu**, click **Delivery**.

**TASK**      **To access the Mercury Delivery application outside of FTD Mercury:**

- 1 Double-click the **Mercury Delivery** icon on your desktop.
- 2 Enter your employee login name and password into the appropriate fields and click **Login**.

The Mercury Delivery application main window (Delivery Snapshot window) appears.

Figure 14-2: Delivery Snapshot Window



## Delivery Snapshot

The main Mercury Delivery screen displays all of your delivery zones (except for the Pickup delivery zone) that have delivery orders only for the date displayed in the Date field. You can view orders for other dates by changing the date in the Date field (click the down arrow, then click on the date on the calendar). By default, all orders ready to be routed will display (all Designed and Not Designed orders).

### TIP

Under the File menu, there is an option called Auto Refresh. If you select it, the Delivery Snapshot window automatically refreshes every three minutes to ensure the items tracked are up-to-date.

If you want to route Designed orders only, you can click the Designed Orders Only check box so that only Designed orders will display in the routing screen when you are routing orders.

If you want to route orders with specific delivery priorities (delivery times), use the Priority drop-down list and highlight one or more delivery times. When you select a priority, only the delivery zones with orders matching the priority you selected will appear in the list of delivery zones. When you select a zone and click Create Route, only the orders with the priority that you entered will be available to add to the route.

To route orders, decide which delivery zones the route will include, and then select the delivery zones by clicking in the check box so that a check mark appears. You can also click Select All to select all zones. Then click Create Routes to begin the routing process.

When creating delivery routes, you have the option of displaying a map that outlines your delivery route. If you would like to see the map, make sure Enable Map is checked. Clearing this option will

not display a map (because a map does not have to be loaded by the program, you will notice increased program speed if you leave Enable Map unchecked).

Below are descriptions of the fields in this screen:

**Table 14-1: Delivery Snapshot Window Fields**

Field	Description
<b>Zone</b>	The name of the delivery zone. Only zones that are Local delivery types are displayed.
<b>Not Designed</b>	The number of orders in the delivery zone that have not been marked Designed in Order Entry or Point of Sale.
<b>Designed</b>	The number of orders in the delivery zone that have been marked Designed in Order Entry or Point of Sale.
<b>Not Delivered</b>	The number of unrouted orders in the delivery zone that have not been marked Delivered.
<b>Routed</b>	The number of orders in the delivery zone that have been routed (they are in SAVED routes and have not yet been delivered).
<b>On Truck</b>	The number of orders in the delivery zone that are on the delivery truck (they are in COMPLETED routes and are in process of delivery).
<b>Delivered</b>	The number of orders in the delivery zone that have been marked Delivered (you have marked the orders Delivered in the Truck Return screen, or the driver has marked the order Delivered on the phone [if you have Wireless Delivery Confirmation]).
<b>Priority</b>	The highest priority assigned to any order in the delivery zone.

Click any of the following buttons to jump to another area of the program:

**Table 14-2: Delivery Snapshot Buttons**

Button	Description
<b>Truck Return</b>	To mark orders Delivered/Not Delivered when the delivery truck returns from a route.
<b>Routing Progress</b>	To check the status of a route in progress. If you have Wireless Delivery Confirmation and GPS, you can view the live location of your truck driver(s).
<b>Saved Routes</b>	To view routes that have been saved but not completed.
<b>Reports</b>	To print delivery reports.
<b>Follow Up Deliveries</b>	To reschedule or update orders that have had delivery problems.
<b>Zones</b>	To create, view, or edit delivery zones.
<b>Create Routes</b>	Select the delivery zone(s), then click this button to create a new route.
<b>GPS Device</b>	Upload your routes to a Garmin GPS device. See <a href="#">Using Garmin GPS Devices with Mercury Delivery</a> on page 14-45 for details.

## Delivery Zones

If you have the Mercury Delivery module, you can maintain your delivery zones in the Mercury Delivery application. You can also use the Delivery Zone option in Mercury Administration to

maintain your delivery zones (see [Delivery Zone Screen](#) on page 24–42). Changes made to zones in the Mercury Delivery application are copied to Delivery Zone option in Mercury Administration, and vice versa.

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**IMPORTANT** You cannot delete a delivery zone on non-cancelled orders for the current date or future date. Inactive zones are visible in Mercury Delivery, but cannot be used in delivery routes. Inactive zones do not appear in Order Entry or Point of Sale.

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There are three ways that you can create delivery zones in the Mercury Delivery application: by map, postal code, or address. In each case, a map is displayed on the screen to help you create your delivery zone. Your store address is also pin pointed on the map.

To create a delivery zone, in the main screen click the Zones button OR click the Zone Management menu, then click Zones. Then continue to one of the following three sections, depending how you want to create a delivery zone:

- » [Creating Zones by Map](#) on page 14–7
- » [Creating Zones by Postal Code](#) on page 14–9
- » [Creating Zones by Address](#) on page 14–10

**NOTE** After creating or editing your delivery zones, a message appears warning you that you must restart FTD Mercury before your changes can take effect. Restarting FTD Mercury allows you to use your new delivery zones in Order Entry and Point of Sale.

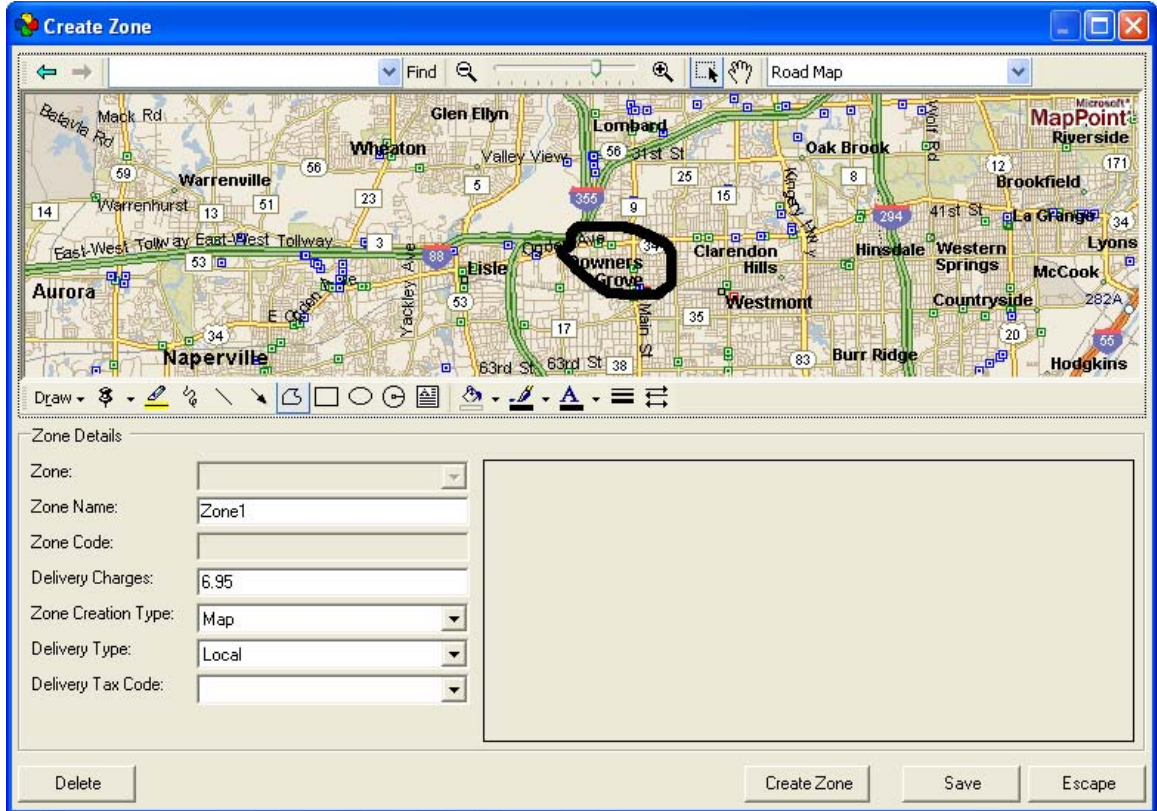
## Creating Zones by Map

Creating a delivery zone by map involves actually drawing a zone on a map of your delivery area. If the recipient's address falls within this delivery area in Order Entry and Point of Sale, the delivery charge associated with the delivery zone is added to the order automatically.

**TASK** **To create a zone by map:**

- 1 Begin by accessing the **Create Zone** window (click the **Zones** button in the main screen).
- 2 Click **Create Zone**.
- 3 At Create operation will clear all the data fields in this window. Do you wish to create a new zone? click **Yes**.
- 4 In the **Zone Name** field, type a name for the delivery zone that will easily identify it in **Order Entry** and **Point of Sale**.
- 5 In the **Delivery Charges** field, type the dollar amount that you want to charge for delivering to this area.
- 6 From the **Delivery Type** list, select either **Local** or **Wire Out**.
- 7 From the **Delivery Tax Code** list, you can select a tax code to associate with this zone. This is an optional setting.
- 8 In the **Zone Creation Type** field, click the arrow and select **Map**.

Figure 14-3: Creating Delivery Zones by Map





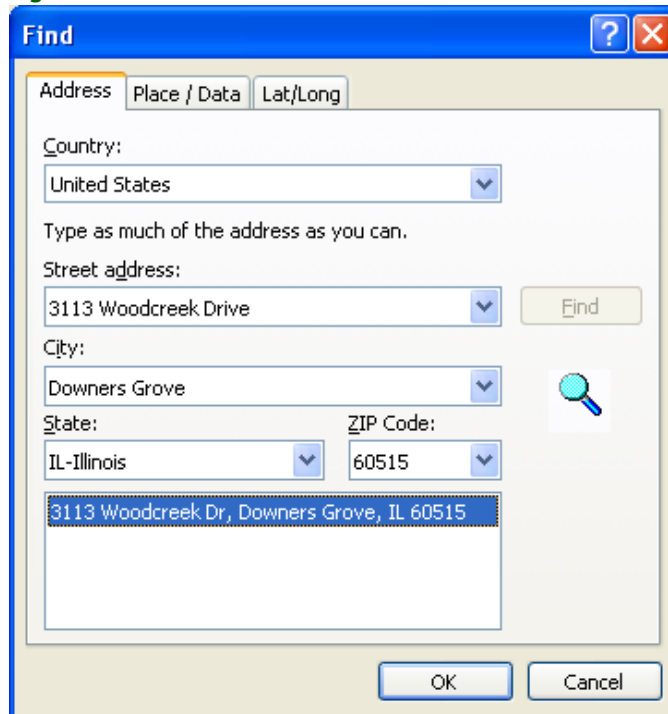


- 9 If the map does not display your delivery area, there are three ways that you can zoom to your delivery area:
  - » Type the ZIP code in the **Type place or address** field in the toolbar at the top of the screen, then press **ENTER**. The system zooms to that ZIP code.
  - » Select the grab tool  to grab and drag the map to your delivery area, or use the zoom bar  to zoom in and out until the desired area is displayed. You will want the map zoomed enough to at least see the names of the major streets in the area.
  - » Click the **Find** button to bring you to a desired location. Click the **Find** button to enter an address that you want the map to jump to:



Figure 14-4: Find Window



Enter an address in this window, then click **Find**. The window locates the address, and the program jumps to that location on the map.

- 10 Next, physically draw the delivery zone area on the map. You can use two tools to draw the delivery area: the **Scribble**  or the **Freeform**  (the other tools such as oval and rectangle are not supported). The **Scribble** tool is recommended to use if the area is very irregular and jagged; the **Freeform** tool is recommended to use if the area can be drawn with a series of straight lines (the delivery area in the example above was drawn with the Freeform tool).

Begin by clicking the tool that you want to use, then start drawing. The **Scribble** tool is used by clicking and holding down the mouse button to draw the area. The **Freeform** tool is used by first clicking a beginning point, then moving your mouse to the next point and clicking again to create a straight line (when you are finished drawing the area with the **Freeform** tool, double-click). This process may take some trial and error. If you make a mistake, press the **Esc** key while the drawing object is selected to delete it, then begin again.

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**TIP**

When you are finished drawing a delivery area, you can right-click and then select **Close Curve** from the pop up menu. This ensures that you are closing the circle/square that you have drawn. (You can only use this feature when clicking and dragging to create your delivery area.)

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- 11 When you are finished drawing the delivery zone's delivery area, click **Save**. You are alerted that the zone was saved.

Next time you enter the delivery zone screen, the delivery zone will be outlined on the map along with the associated delivery charge.

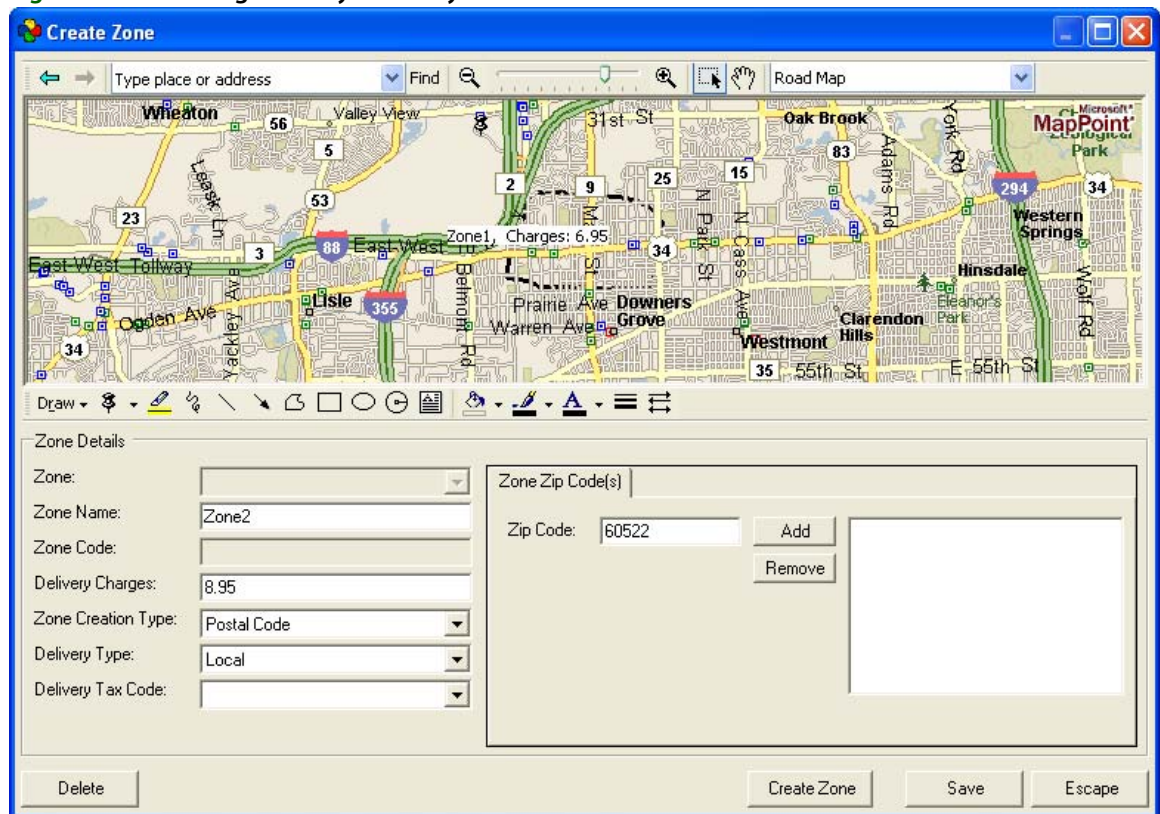
## Creating Zones by Postal Code

Creating a delivery zone by postal code allows you to assign the zone to one or more ZIP codes. For example, you can create a delivery zone that delivers to ZIP codes 60563, 60564, and 60565. If the recipient's address matches one of these ZIP codes in Order Entry and Point of Sale, the delivery charge associated with the delivery zone is added to the order automatically.

**TASK** To create a zone by postal code:

- 1 Within the **Mercury Delivery** application, click the **Zones** button.
- 2 In the **Create Zone** window, click **Create Zone**.
- 3 When you receive a message Create operation will clear all the data fields in this dialog. Do you wish to create a new zone?, click **Yes**.
- 4 In the **Zone Name** field, type a name for the delivery zone. This should be something that will easily identify it in Order Entry and Point of Sale.
- 5 In the **Delivery Charges** field, type the dollar amount that you want to charge for delivering to this area.
- 6 From the Delivery Type list, select either Local or Wire Out.
- 7 From the Delivery Tax Code list, you can select a tax code to associate with this zone. This is an optional setting.
- 8 In the **Zone Creation Type** field, click the arrow and select **Postal Code**. The **Zone Zip Code(s)** tab appears on the right side of the window.

**Figure 14-5: Creating Delivery Zones by Postal Code**



- 9 Type a ZIP code you want to add in the **Zip Code** field and click **Add**. Repeat this step until all the ZIP codes you want included are in the list.
- 10 When you are finished adding ZIP codes, click **Save**. You are alerted that the zone was saved.

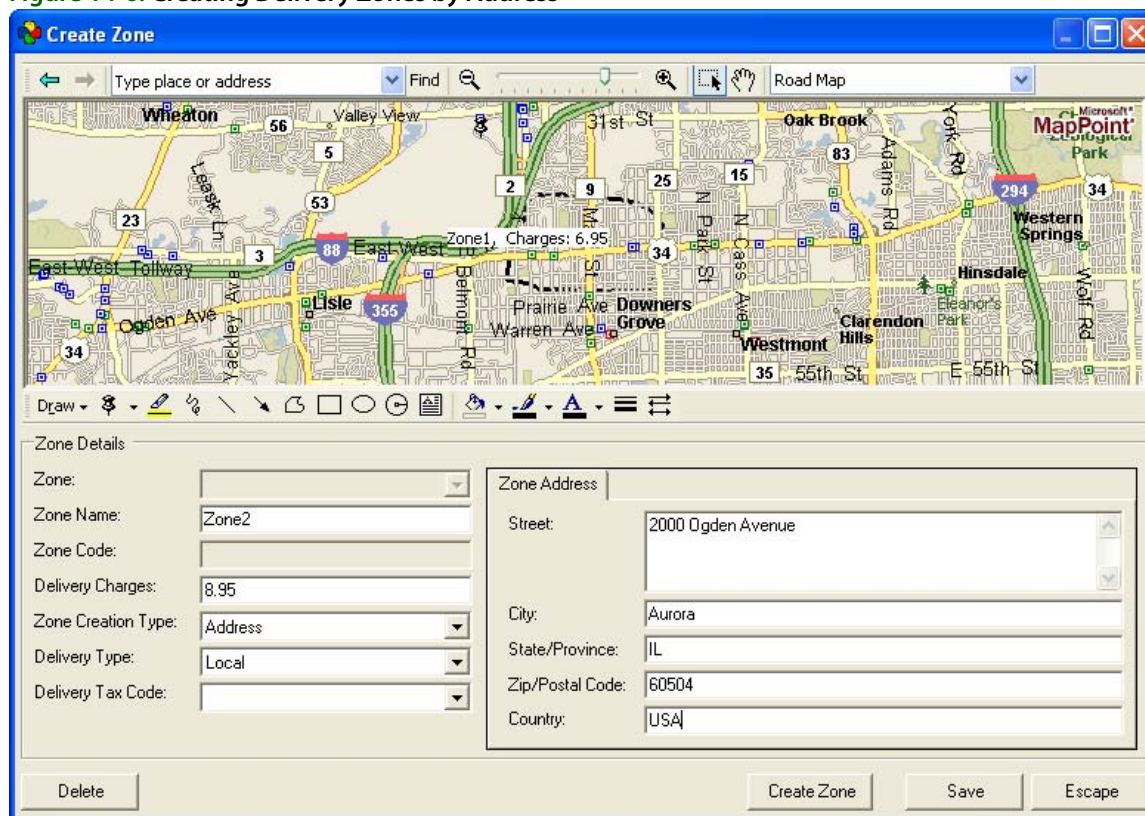
## Creating Zones by Address

You may want to create a delivery zone with a particular address so that when you enter that address in **Point of Sale** or **Order Entry**, a certain delivery charge is added to the order. For example, you might want to charge \$8.00 to deliver to your local hospital. When the hospital address is entered in the recipient section of **Order Entry** or **Point of Sale** (the hospital is selected from a facility search or the address is typed correctly and verified), the correct delivery zone and charge is

selected. By creating a delivery zone with this hospital's address, the \$8.00 delivery charge is added to the order, regardless if this hospital is located within a different delivery zone.

- 1 Begin by accessing the **Create Zone** window (click the **Zones** button in the main screen).
- 2 Click **Create Zone**.
- 3 At Create operation will clear all the data fields in this dialog. Do you wish to create a new zone? click **Yes**.
- 4 In the **Zone Name** field, type a name for the delivery zone that will easily identify it in Order Entry and Point of Sale.
- 5 In the **Delivery Charges** field, type the dollar amount that you want to charge for delivering to this address.
- 6 From the **Delivery Type** list, select either **Local** or **Wire Out**.
- 7 From the **Delivery Tax Code** list, you can select a tax code to associate with this zone. This is an optional setting.
- 8 In the **Zone Creation Type** field, click the arrow and select **Address**. The **Zone Address** section appears on the right side of the window.

**Figure 14-6: Creating Delivery Zones by Address**



- 9 Type the address in the **Street**, **City**, **State/Province**, **Zip/Postal Code**, and **Country** fields.
- 10 When you are finished typing the address, click **Save**. You are alerted that the zone was saved.

## Removing Delivery Zones

You cannot remove a delivery zone that is used for current or future orders, unless the order has been cancelled. You also cannot remove a delivery zone that is used in a Standing Order Template.

**TASK** To remove a delivery zone in Mercury Delivery:

- 1 Within the **Mercury Delivery** application, click the **Zones** button.
- 2 In **Zone Details**, from the **Zone** list, select the zone you want to remove.
- 3 Click **Delete**.
- 4 Confirm the deletion.
- 5 Click **Escape** to close the **Create Zone** window.

You must restart FTD Mercury before the change will be seen in **Order Entry** and **Point of Sale**.

## Creating Delivery Routes

A delivery route is a delivery trip that a driver makes to deliver multiple orders. A delivery route can consist of any number of orders within multiple delivery zones. Mercury Delivery assumes that you want to create routes only for orders with the same delivery date, so the Delivery Snapshot window lists zones with orders only for a single date. However, you include orders in your delivery route with multiple delivery dates by adding these orders to the route when you create it.

Delivery routes can only be created for delivery orders entered in Order Entry and Point of Sale. Pick up and carry out orders do not display in the Mercury Delivery application. If you change a delivery order to a pick up order in Order Entry or Point of Sale, the pick up order is removed from the Mercury Delivery application and from your delivery route, unless you already marked that route complete.

To create a delivery route, first you select the orders that will go out on that trip, then map them in the order that you want them delivered. The goal is to make the delivery trip as fast and efficient as possible, delivering all of your orders on time. The program suggests a delivery route for you automatically, and can calculate the fastest or shortest delivery route. It also maps the route and calculates driving directions (turn by turn).

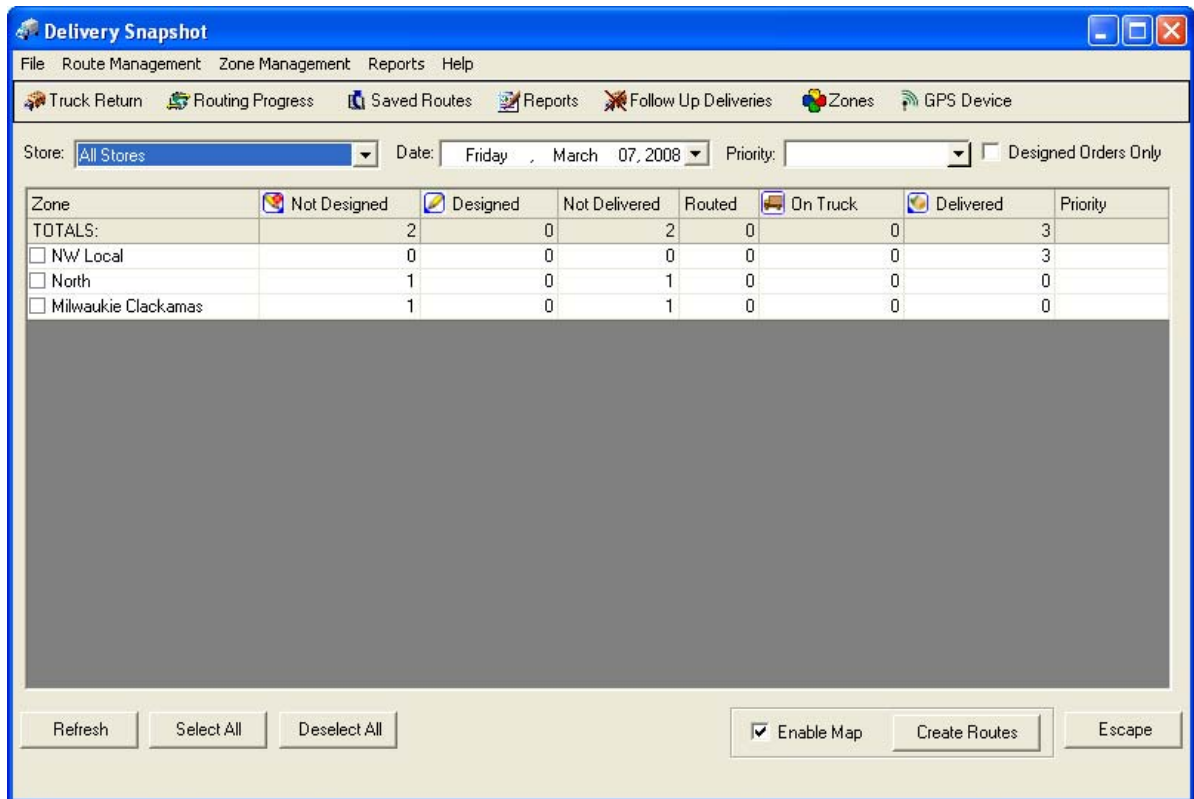
There are four steps to creating a delivery route:

- » [Step 1: Selecting Zones](#)
- » [Step 2: Adding Orders to the Delivery Route](#)
- » [Step 3: Printing the Map](#)
- » [Step 4: Saving the Route](#)

### Step 1: Selecting Zones

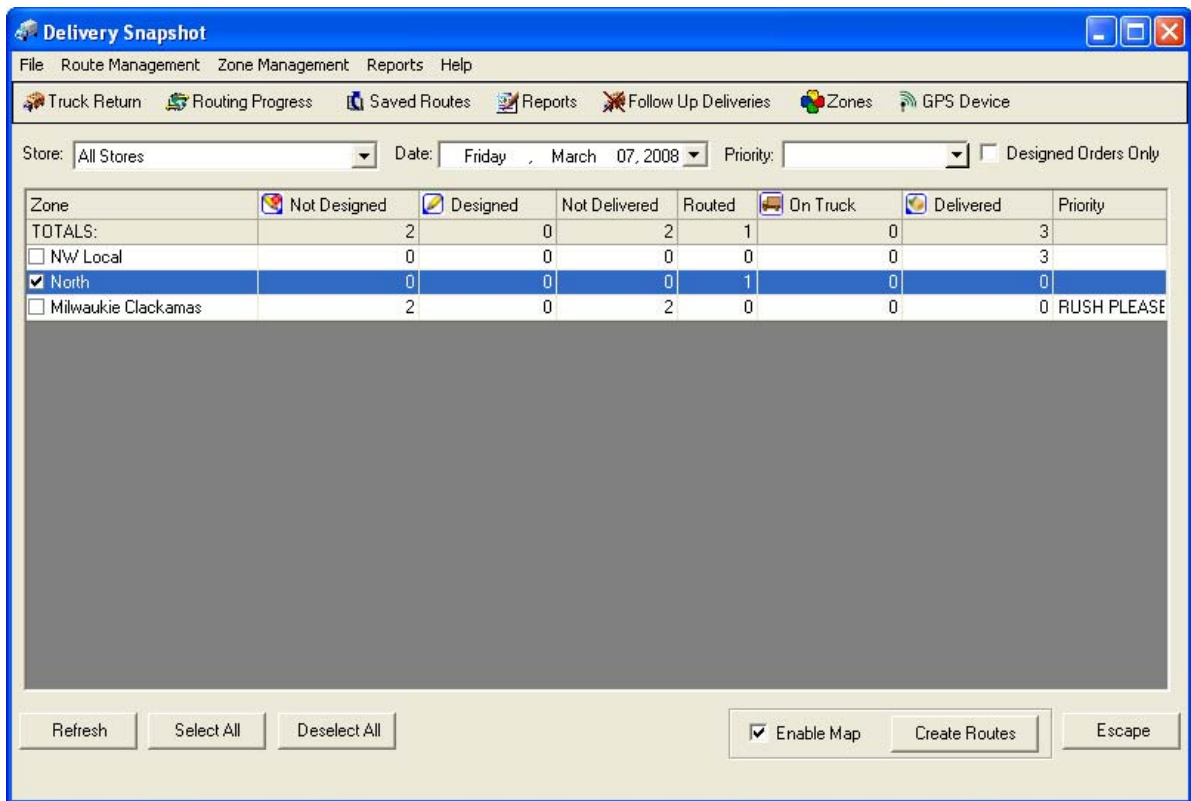
The first step to creating a delivery route is to select the delivery zone(s) that include the orders that you want to deliver. You do not have to route all of the orders within the zone(s); you are just selecting the zones at this point.

Figure 14-7: Delivery Snapshot Window—No Zones Selected



None of the delivery zones that have deliveries for today's date are selected when you open the Mercury Delivery application. (To route orders for a different delivery date, change the Date field.) Decide which delivery zones this route will include, and then select the delivery zones by clicking in the check box so that a check mark appears. You can also click Select All to select all zones.

Figure 14-8: Delivery Snapshot Window—Zones Selected



Again, you are only selecting the zones at this point. You do not have to route all of the orders within these zones.

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**IMPORTANT** Zones can be marked as inactive in Mercury Administration. These zones will still appear in Mercury Delivery, but will not be available for delivery routes.

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When creating delivery routes, you have the option of displaying a map that outlines your delivery route. If you want to see the map, make sure **Enable Map** is checked. Clearing this option will not display a map (because a map does not have to be loaded by the program, you will notice increased program speed if you leave **Enable Map** unchecked).

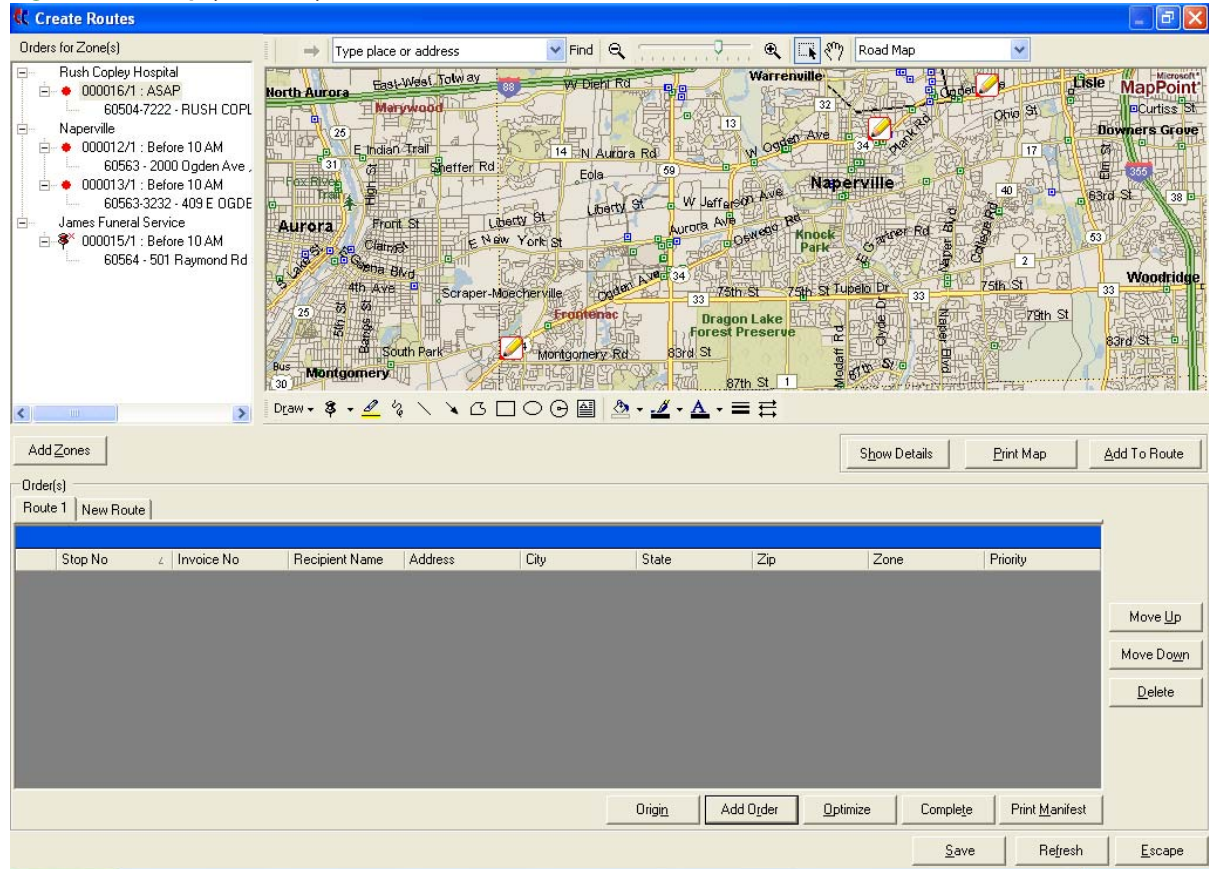
When you are finished selecting delivery zones, click the **Create Routes** button OR select **Route Management** from the menu bar, then click **Create Routes**. This takes you to the **Create Routes** screen where you will add orders to your delivery route.



## Step 2: Adding Orders to the Delivery Route


The Create Routes screen lists all of the orders within the delivery zones that you selected, along with a map indicating the location of each of the delivery stops. At this point no orders have been added to the route.

If you do not have Address Verification in FTD Mercury, or if an order's address was not verified in FTD Mercury, Microsoft MapPoint uses its own address verification feature to try and verify the address. If MapPoint cannot verify the address, it warns you that the order cannot be verified (MapPoint cannot suggest close matches). If the address cannot be verified by MapPoint, you can still add the order to the route, however the order is not added to the delivery map and is not included in the driving instructions.





Figure 14-9: Empty Delivery Route



In the Orders for Zone(s) section in the left pane, Designed orders are marked with a circle  icon and Not Designed orders are marked with a square icon  (these icons display in red if delivery times are associated with them; otherwise they display in black). Each of these orders is also pin pointed on the map.

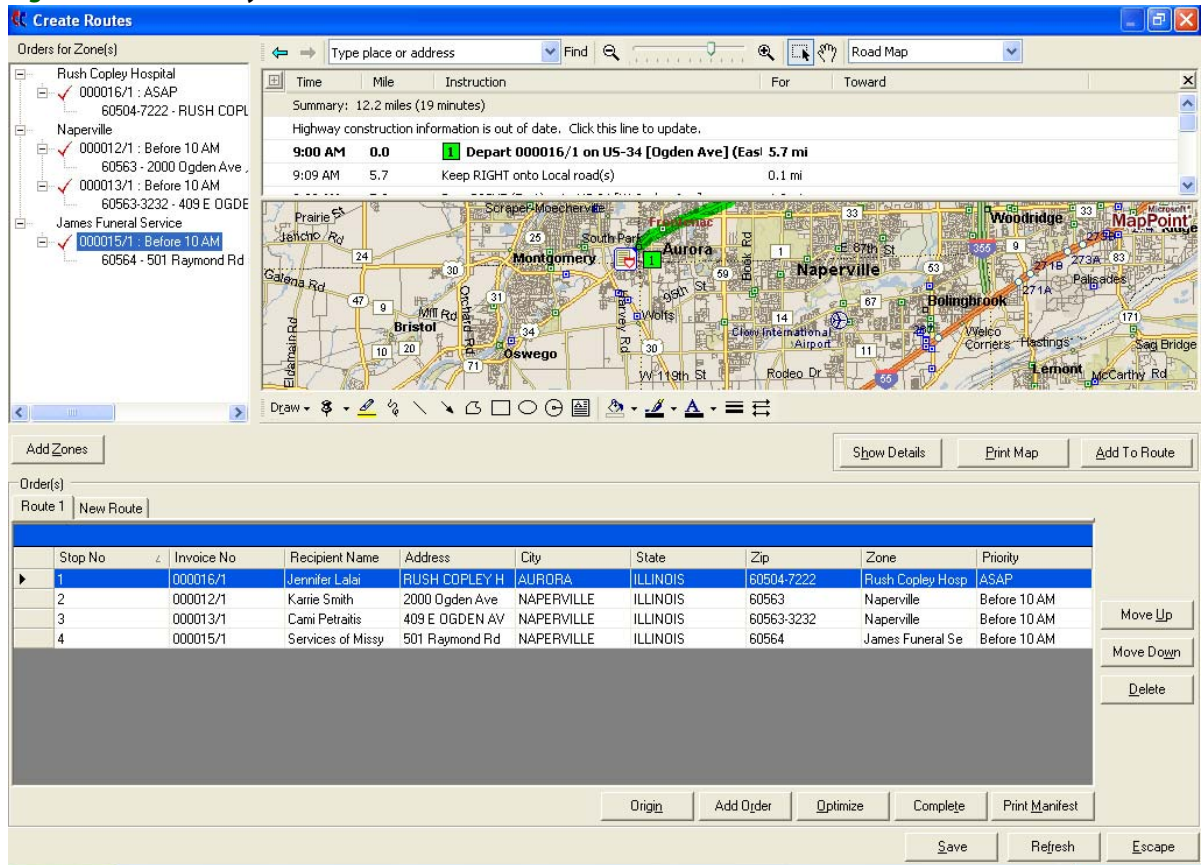
If an address has not been verified by FTD Mercury and/or Microsoft MapPoint, the order displays in the order list with a cancelled push pin icon . The order is not placed on the map and is not included in the driving instructions, but you can add the order to your delivery route.

**TASK** To add an order to the route, you can do any one of the following:

- » Right-click on the  or  icon next to the order (in the left pane) and then click Add To Route.
- » Click on the  or  icon next to the order (in the left pane) and drag it to the dark gray area of the empty route list at the bottom of the window.
- » Use the Freehand tool to select the order on the map, then click Add to Route. When prompted for the order number, type the order number.

You will see the order appear in the list at the bottom of the window, and a check mark displays next to the order in the Order for Zone(s) section in the left pane:

Figure 14-10: Delivery Route with Orders



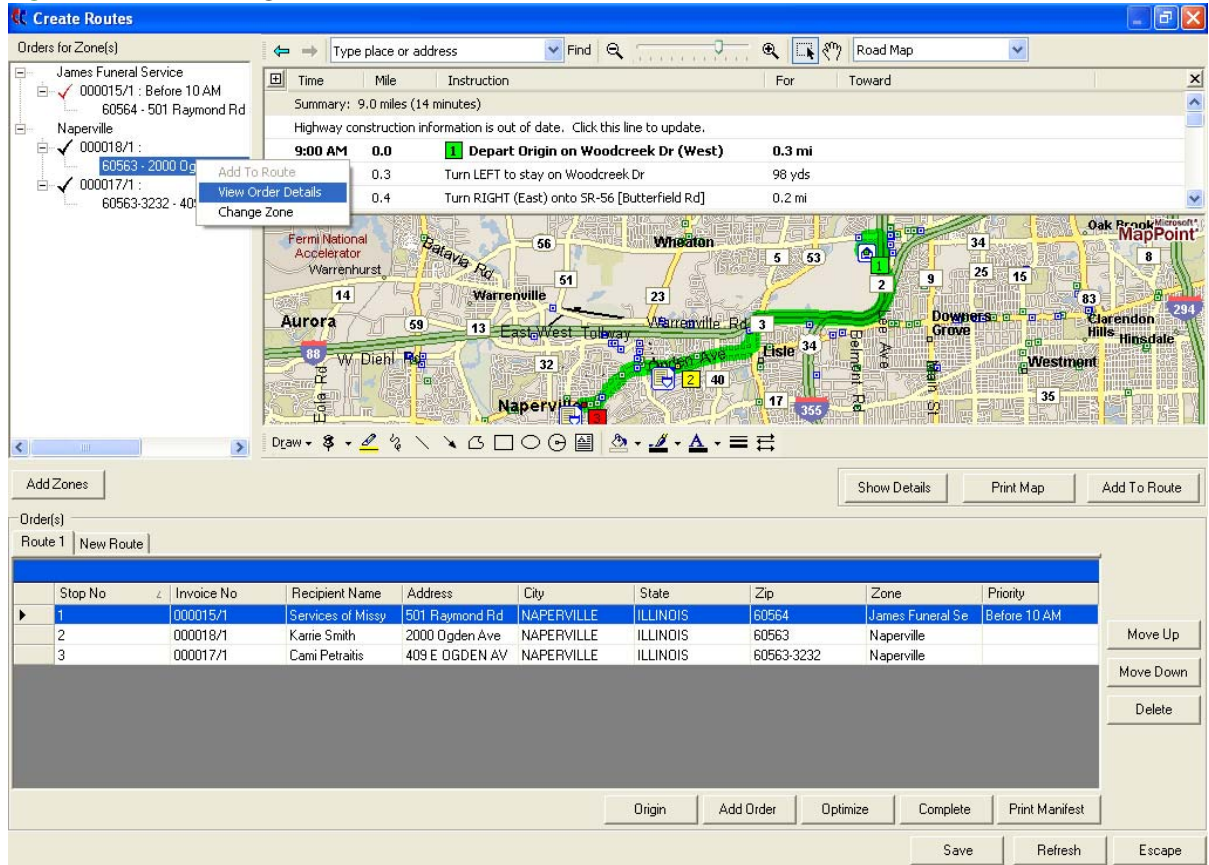
As you add orders, the map automatically creates a suggested delivery path and the driving directions (above the map) are updated. The orders are numbered on the map in the order that the program recommends delivery. The route origin displays as the first stop in green (see [Changing the Route Name or Origin](#) on page 14-18 to learn how to set the origin), the last stop displays in red, and all stops in between are numbered in yellow.

## Viewing Order Details (Products)

**TASK** To view the details of an order (such as invoice number, sale date, or products) within Mercury Delivery:  
Right-click the order and click **View Order Details**.

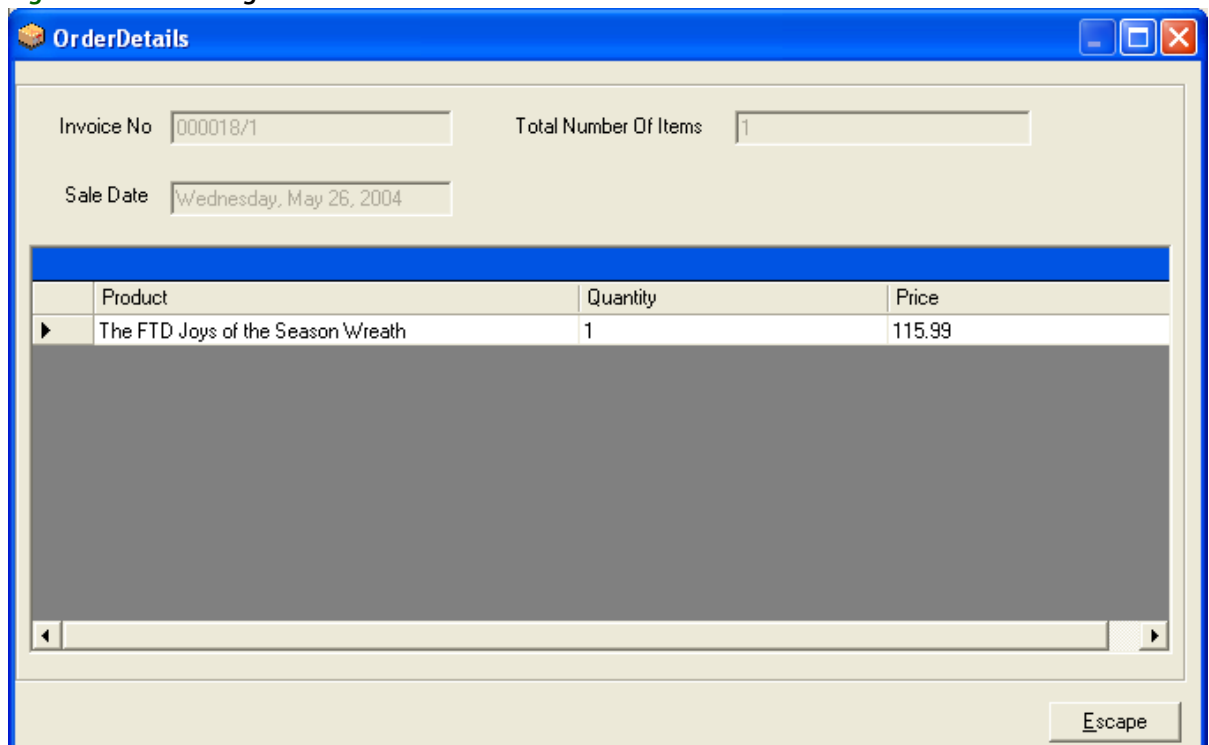


Figure 14-11: Accessing Order Details



The program displays general order information and lists all of the products to be delivered:

Figure 14-12: Viewing Order Details

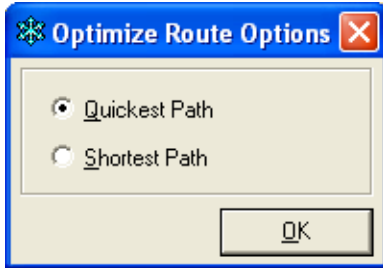


Click **Escape** to return to the **Create Routes** screen.

## Changing the Delivery Path

There are two ways that you can change the delivery path for your delivery driver. If you want the system to find the shortest or quickest route, click **Optimize**:

**Figure 14-13: Optimize Route**



Select **Quickest Path** or **Shortest Path** and then click **OK**. The map and driving directions are updated accordingly.

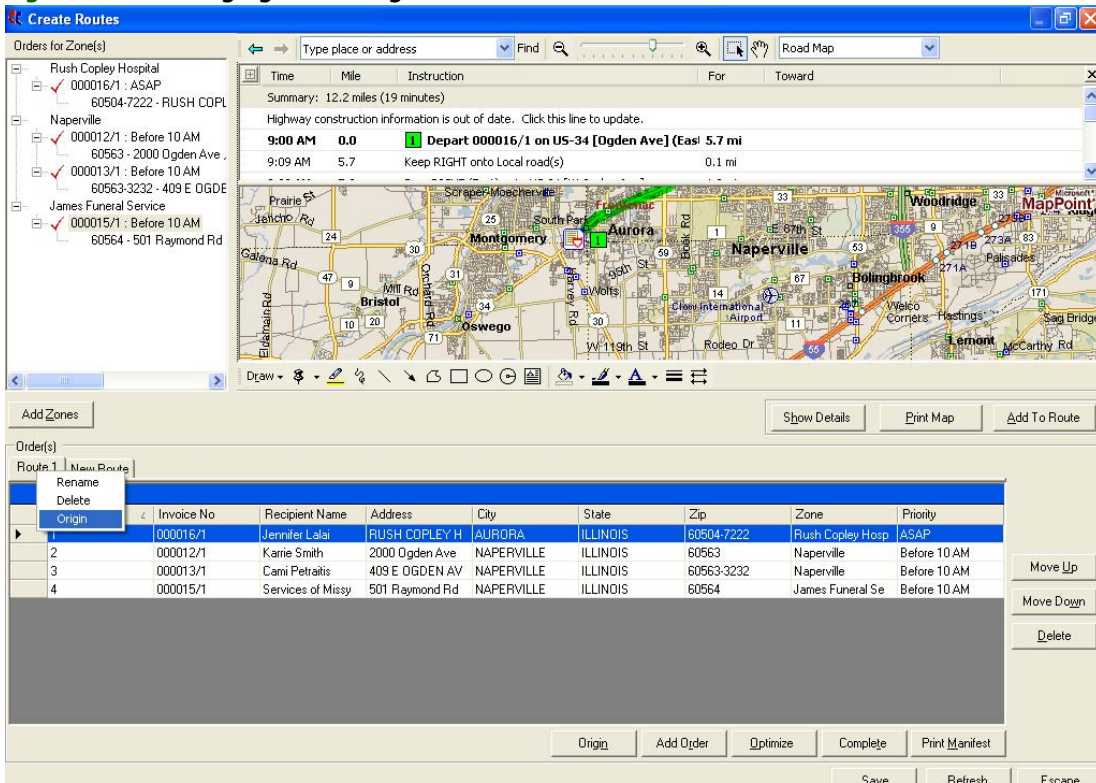
You can also change the stop order in the delivery route by rearranging the delivery stops. To do this, highlight a delivery stop in the Order(s) section at the bottom of the screen, then click the **Move Up** or **Move Down** buttons to change the stop order.

## Changing the Route Name or Origin

For the map and driving directions to be correct, the driver's origin must be correct. Most likely the driver's origin is your shop address, but you can specify any other address.

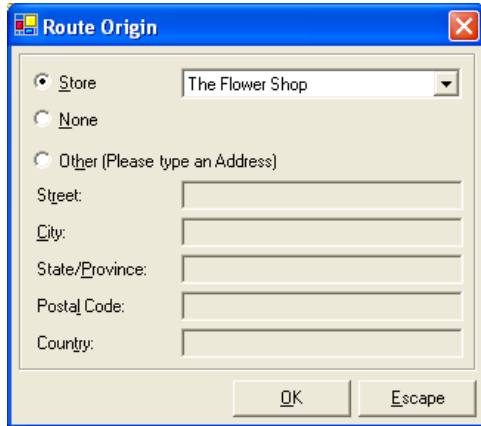
To change the origin of the route, click the **Origin** button, or right-click on the route tab and then click **Origin**:

**Figure 14-14: Changing Route Origin**



The **Route Origin** window displays:

**Figure 14-15: Specifying a Route Origin**



The screenshot shows a dialog box titled "Route Origin". It features three radio button options: "Store" (which is selected), "None", and "Other (Please type an Address)". The "Store" option is linked to a dropdown menu currently displaying "The Flower Shop". Below these options are five text input fields, each with a label: "Street:", "City:", "State/Province:", "Postal Code:", and "Country:". At the bottom of the dialog are two buttons: "OK" and "Escape".

Indicate if you want the route to originate from the **Store address**, or **Other**. If you select **Other**, type an address. Click **OK** when finished.

To change the name of the route, right-click on the **Route** tab, and click **Rename**. You are prompted for a new name for the route.

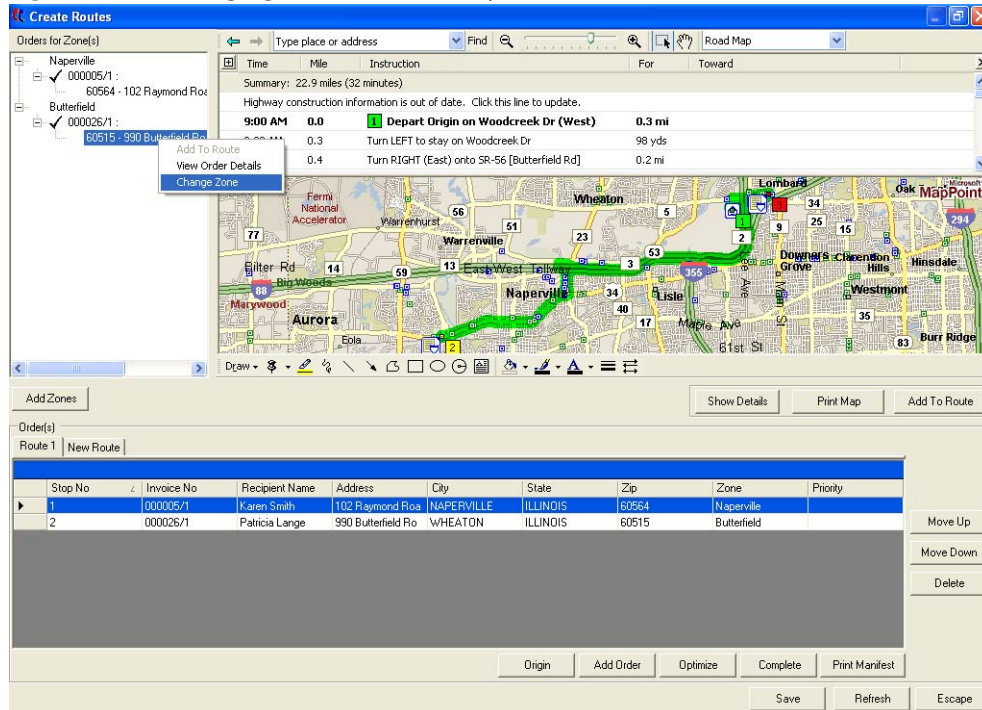
## Changing an Order's Delivery Zone

While you are creating or editing delivery routes, you can change an order's delivery zone. The order remains in the route, however the delivery zone name changes in the list of orders. Changing an order's delivery zone in Mercury Delivery also changes the delivery zone on the order. However the delivery charge on the order does not change (if a different delivery charge is associated with the new delivery zone).

**TASK** To change an order's delivery zone:

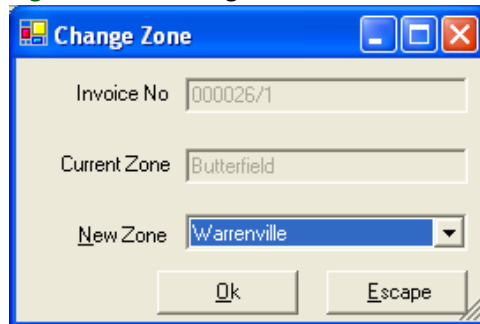
- 1 Right-click on the order in the Orders for Zone(s) list, then click Change Zone from the pop up menu:

**Figure 14-16: Changing an Order's Delivery Zone**



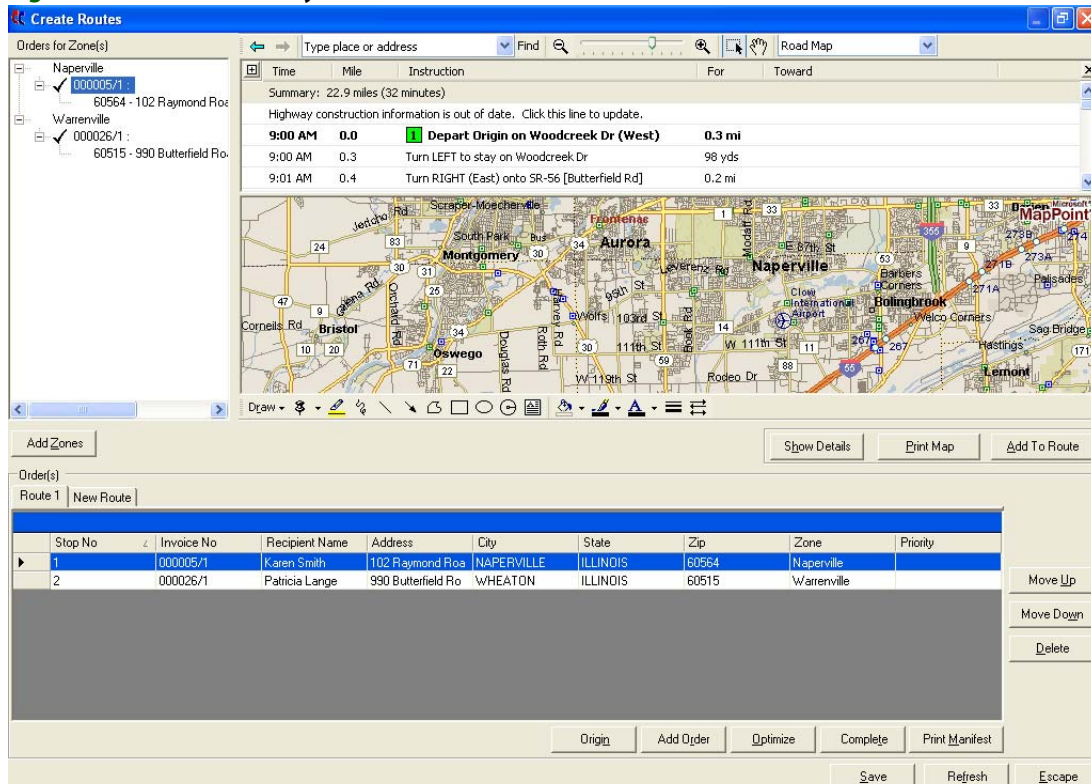
- 2 The **Change Zone** window displays. Select **New Delivery Zone**

**Figure 14-17: Change Zone Window**



- 3 In this window, select the new delivery zone from the drop-down list in the **New Zone** field, then click **OK**. The order displays under the new delivery zone.

Figure 14-18: New Delivery Zone



## Adding Additional Orders to the Route

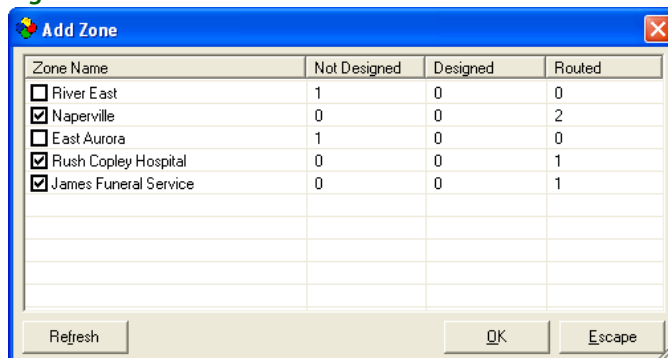
You can add orders to the delivery route that do not already display in the Orders for Zone(s) section on the left hand side of the screen. You can either add all orders within a particular delivery zone, or you can add orders individually by order number.

### NOTE

You can only add orders to a route when you are in the process of creating the route in the Create Routes screen. If you want to add an order to a route that has already been completed, see [Viewing Routing Progress](#) on page 14–24 for instructions and limitations.

To add delivery zone, click the **Add Zones** button. This brings up all of your delivery zones that have orders available to route.

Figure 14-19: Add Zones



The delivery zones that you are currently routing are checked. To add another delivery zone, click on that zone so a check mark appears, then click **OK**. All orders within that delivery zone are added to the screen and are available to route.

To add by order number, click the Add Order button in the Create Routes window. When you are prompted for the order number, type the order number and then click OK. You can also use a bar code scanner, if available, to populate the order number field by scanning the bar code on the invoice. If the order's store or delivery date are different from the store and date for the route, you will be asked to confirm your decision to include the order on the route. The order is added to the screen and is available to route.

## Removing Orders from the Route

Orders that are in your delivery route are listed at the bottom of the screen in the Order(s) section. To remove an order from that list, highlight it and then click **Delete**. In the Order for Zone(s) section, that order then is marked as Not Delivered ( ● if Designed or ■ if Not Designed).

## Step 3: Printing the Map

You will have the option to print driving directions and the route manifest (routing slip) when you click **Complete** to complete the route. However you are not prompted if you want to print the map. If you want to print the map (as it appears in the **Create Routes** window), click the **Print Map** button before clicking **Complete**.

**NOTE** You can print the map later while the route is in progress by clicking the Print Map button on the Routing Progress screen (see [Viewing Routing Progress](#) on page 14-24).

## Step 4: Saving the Route

When you are finished creating the delivery route, you can either save the route to edit later, or you can complete it if the delivery route is final and the truck is ready to leave.

To save the route to complete later, click the **Save** button. The routing slip, driving directions, and map are not printed. This is a great feature during busy holiday periods if you want to prepare delivery routes ahead of time. See [Editing Saved \(Incomplete\) Routes](#) on page 14-23 to learn how to bring up and edit a saved route.

To complete the route (the delivery slip and driving directions print, and the route cannot be changed), click the **Complete** button. You are prompted for driver and truck information.

**Figure 14-20: Route Complete**

The screenshot shows a dialog box titled "Complete Route" with a close button in the top right corner. The dialog is divided into a "Route Details" section and a section for printing options. In the "Route Details" section, there are four input fields: "Route Name" (containing "Route 1"), "Driver" (a dropdown menu showing "Administrator"), "Truck" (a dropdown menu), and "Start Mileage" (containing "0"). Below these fields are four checkboxes: "Print Manifest" (checked), "Download to Phone" (unchecked), "Print Directions" (checked), and "Print Bar Code" (checked). At the bottom of the dialog are two buttons: "Complete" and "Escape".

The following table explains each setting on this window:

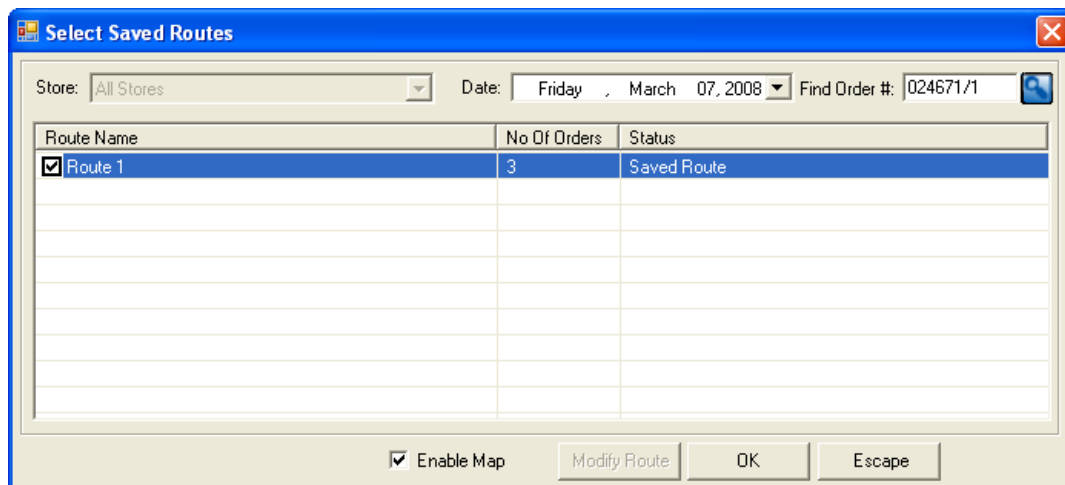
**Table 14-3: Complete Route Settings**

Setting	Description
<b>Driver</b>	This field contains all of your employee IDs listed in alphabetical order. Click the arrow and select the name of the employee that will be delivering the orders on this route, or type the first few letters of the employee's ID to display it in the list.
<b>Truck</b>	Type the name of the truck that is being used for delivery (optional). The truck name that you type here is saved so that you can select it from a drop-down list next time you complete a route.
<b>Start Mileage</b>	Type the mileage of the truck before it leaves on the route (if you track truck mileage using the Delivery Trip Analysis report).
<b>Print Manifest</b>	To print the route manifest (routing slip), make sure this option is checked.
<b>Print Directions</b>	To print the driving directions, make sure this option is checked.
<b>Print Barcode</b>	To print the barcode of the ticket on the route manifest, make sure this option is checked.
<b>Download to Phone</b>	This option only is active if the delivery driver that you selected is set up to use Wireless Delivery Confirmation. If the field is active, you can click this check box to download the route to the employee's phone. See <a href="#">Downloading the Route Information to the Phone</a> on page 14–39.
<b>Show All Employees</b>	By default, only employees with a truck driver employee type are listed in the Driver field. Select this option if you want to view all employees.

## Editing Saved (Incomplete) Routes

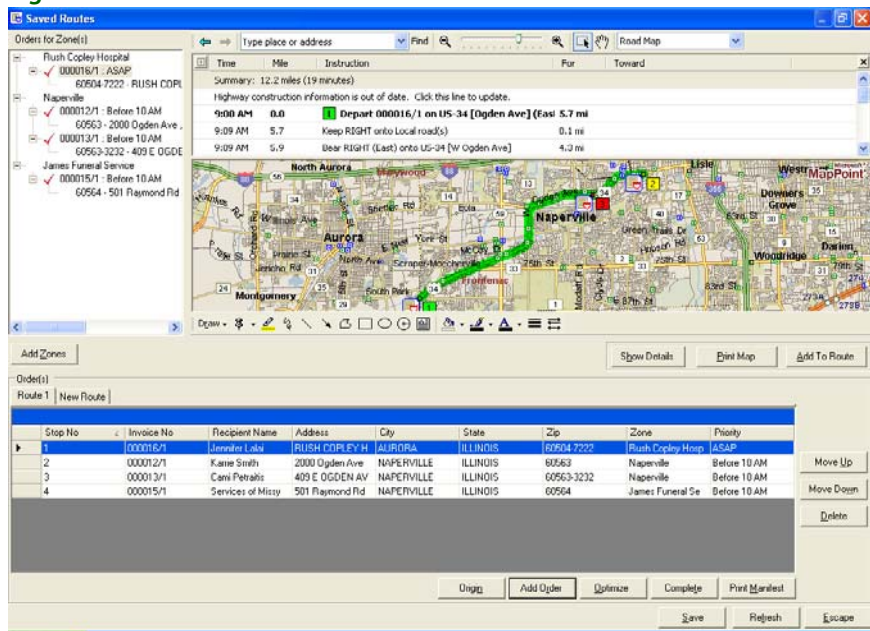
If you saved a route to complete later, you can bring up the route by clicking the Saved Routes button in the main screen, OR click Route Management in the menu bar, then click Saved Routes. A list of saved routes pops up for the date that you selected in the main delivery screen (the Delivery Snapshot screen). To see routes saved for another date, change the date in the Date field. To find the route that contains a specific order for any date, enter the order number in the Find Order # field, then press Return. You can also use a bar code scanner, if available, to populate the order number field by scanning the bar code on the invoice.

**Figure 14-21: Opening a Saved Route**



To bring up a route on the screen, check the check box next to that route so that a check mark appears, then click **OK**. The Saved Routes screen appears (which is a replica of the **Create Routes** screen).

**Figure 14-22: Saved Routes Screen**



**NOTE**

If a recipient address has not been verified in Microsoft MapPoint, you receive the following message when accessing the orders on the Saved Routes screen: “The following orders are not added to the map because they contain invalid address” (followed by the order numbers). You can add orders with unverified addresses to the delivery route, however they are not placed on the map and are not included in the driving instructions.

On this screen, add or remove orders, print the map/manifest, etc. When you are finished making changes, you can click **Save** if you plan on making more changes later, or click **Complete** if the route is complete (no further changes can be made).

## Viewing Routing Progress

The **Routing Progress** option lists all of the delivery routes for the chosen date and displays the status of each delivery route. From this window you can view the details of the delivery route or modify the route by adding or removing orders for example.

If you have Wireless Delivery Confirmation, you can view the progress of a delivery route while the truck is on delivery. When a delivery driver updates the status of a delivery on his or her wireless phone, the information is updated to FTD Mercury automatically. Anytime while that driver is on route, you can look up the status of the route and see which orders have been delivered and which have not. If you have GPS, you can view the live location and delivery path of the delivery driver.

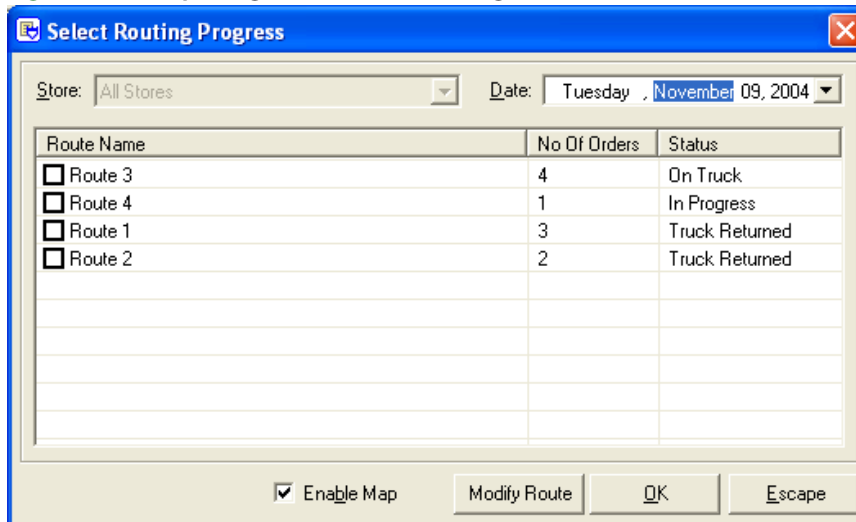
**TASK**

**To view the progress of a delivery route:**

On the toolbar, click the **Routing Progress** button. Alternatively, on the **Route Management** menu, click **Routing Progress**.



Figure 14-23: Opening a Route to View Progress



Below is a list of valid status types for this screen:

Table 14-4: Routing Status Types

Status	Description
<b>On Truck</b>	The delivery route has been completed. No changes have been made to the orders in the route (such as marked Delivered or Not Delivered). This type of delivery route can be updated by selecting the route and then clicking Modify Route (you can add orders to the route, change the delivery order, etc.).
<b>Truck Returned</b>	The Truck Return process for the delivery route has been completed. The orders in the route have all be marked Delivered or Not Delivered, either in the Mercury Delivery application or on the Wireless Delivery phone. No changes can be made to this type of delivery route.
<b>On Phone</b>	If you checked Download to phone when you completed the delivery route, the route has the On Phone status. No changes can be made to this type of delivery route.
<b>In Progress</b>	If you have made changes to the route, such as marked some orders Delivered or Not Delivered, the route has the In Progress status. No changes can be made to this type of delivery route.

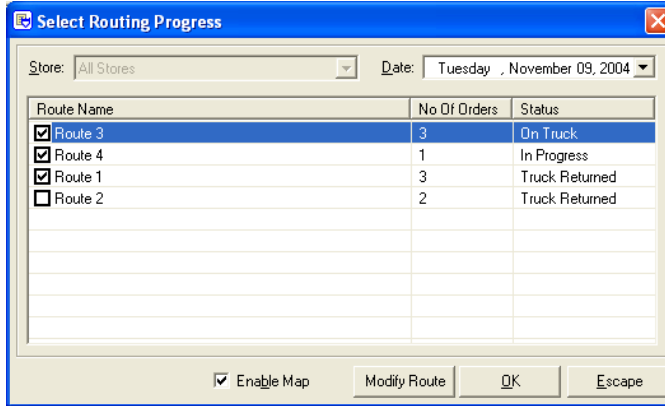
## Viewing the Route Details (View Only)

You can only modify a route that has the **On Truck** delivery status (see [Modifying a Delivery Route](#) on page 14-27). You can however view any route in a view-only mode.

### TASK To view the route details:

- 1 From the menu bar click the **Routing Progress** button, OR click **Route Management** in the menu bar, then click **Routing Progress**.
- 2 Check the check box next to the route(s) so that a check mark appears. You can select multiple routes.

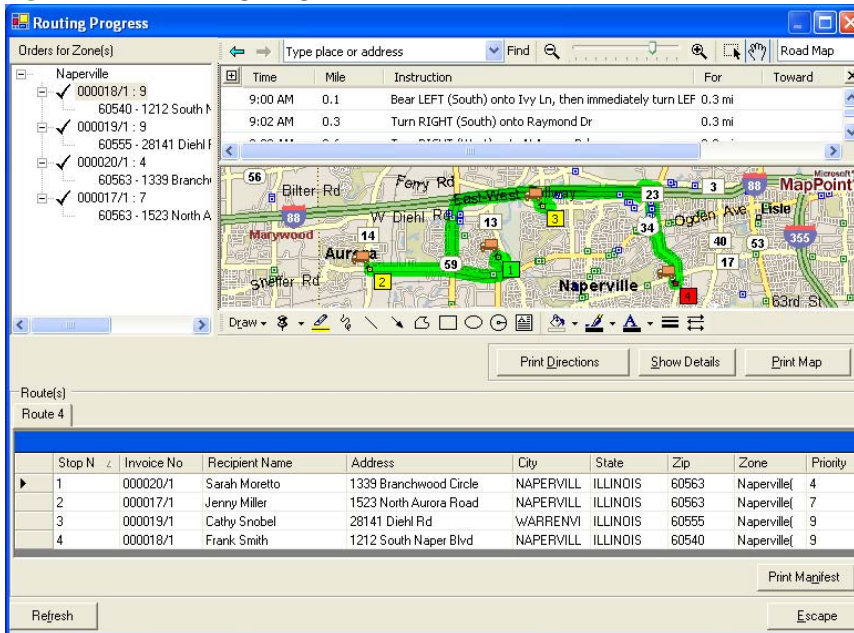
Figure 14-24: Viewing Route Details



3 With the route(s) selected, click the OK button.

After clicking OK, the Routing Progress screen appears (which is similar to the Create Routes screen, however the screen is read-only).

Figure 14-25: Routing Progress Screen




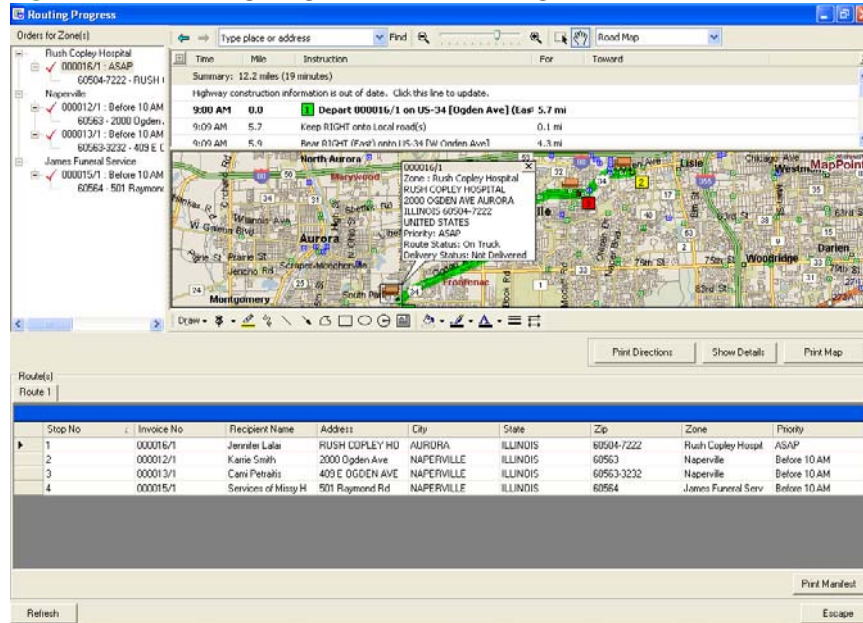
This read-only screen allows you to print the driving directions, map, or delivery manifest. Each stop is marked with a truck icon , indicating that the order is on the truck. To view the details of a particular stop, you can double-click on the truck icon for that stop.

Figure 14-26: Routing Progress Screen: Viewing Details



If you have GPS, you can view the live location of the driver while he or she is on route. Blue dots indicate the trail of the delivery driver, and yellow dots indicate the direction of the delivery truck.

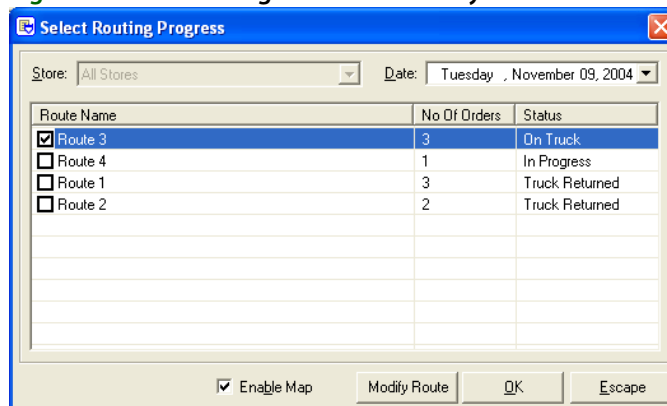
## Modifying a Delivery Route

If the route has a status of **On Truck**, you can make changes to that delivery route, such as add or delete orders, change the delivery stop order, etc.

### TASK To modify a delivery route:

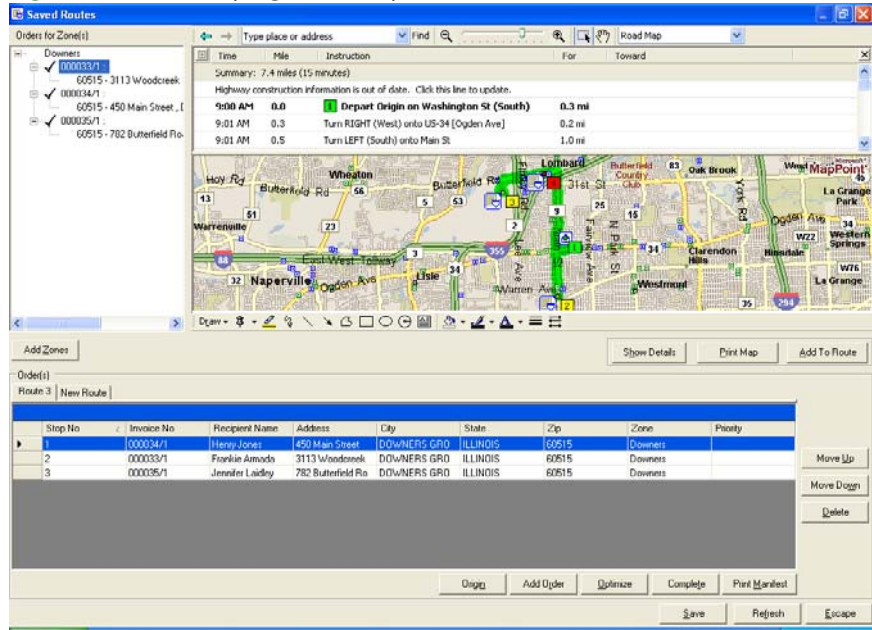
- 1 From the menu bar click the **Routing Progress** button, OR click **Route Management** in the menu bar, then click **Routing Progress**.
- 2 Select the route that you want to modify. Remember that only the routes with the **On Truck** delivery status may be modified, and you can modify only one route at a time.

Figure 14-27: Selecting a Route to Modify



- 3 With the route selected, click **Modify Route**. The route opens so that you can make changes.

Figure 14-28: Modifying a Delivery Route



At this point make the required changes and then complete the route again by clicking the **Complete** button or save the route clicking the **Save** button. Note that if you click **Save**, the route is listed under **Saved Routes** option and not the **Routing Progress** option.

If you click **Escape** without making any changes to the route, the route is not updated and remains as originally routed.

## Truck Return

When a truck returns from a delivery route, you must open the delivery route in Mercury Delivery and mark orders as delivered or not delivered. If orders have been delivered, you must enter the delivery time of the order so that orders are considered delivered.

If an order is marked Delivered and the delivery time is specified, the routing process is complete for that order. Or, you can simply indicate the TIME the order was delivered and this marks the order Delivered automatically. The order is marked as **Delivered** on the delivery date of the order, not the system date (if you are marking orders **Delivered** the next day for example).

If an order is marked **Not Delivered**, it is considered a “problem” order and you can bring it up later to update the delivery status (see [Follow Up Deliveries](#) on page 14–30).

If you have the Wireless Delivery Confirmation upgrade, your delivery drivers can update the delivery status of the orders while they are on route. On the delivery phones, they can mark a delivery as Delivered or Not Delivered by selecting a delivery status code for the delivery. The information is updated to the Mercury Delivery application automatically. Therefore it is not necessary to mark orders Delivered or Not Delivered manually in the Truck Return screen, unless you want to change settings or add comments.

## Handling Truck Returns

**TASK** To handle a truck return:

- 1 Open Mercury Delivery.
- 2 In the **Delivery Snapshot** window, enter the date for which you want to handle a truck return.

- 3 Click the **Truck Return** button on the toolbar. A list of delivery routes for the date you selected in the **Delivery Snapshot** window appears.
- 4 Select the route belonging to the returning truck. To find the route that contains a specific order, enter the order number in the Find Order # field. You can also use a bar code scanner, if available, to populate the order number field by scanning the bar code on the invoice. If the order contains tickets from more than one route, both routes will be highlighted and you will need to select a route.
- 5 Click **Details**. The **Truck Stop Details** window opens.
- 6 In the **Truck Stop Details** window, mark each order with a delivery code. You can do this by clicking the cell in the **Delivery Status** column so an arrow appears, and then clicking the arrow to select a delivery code from that list.

**TIP**

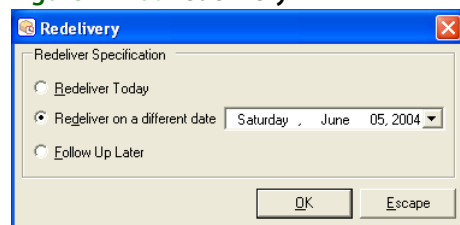
You can quickly select an option in a drop down menu by typing the first letter of that option (for example, if you type **d** it highlights **delivered**).

If the delivery code is a **Delivered** code, the order displays a green check mark next to it, indicating that it was delivered. If the delivery code is a **Not Delivered** code, the order displays a red cross mark next to it, indicating that it was not delivered. You are prompted for redelivery information for **Not Delivered** orders.

**Table 14-5: Redeliver Specifications**

Redeliver Specification	Description
<b>Redeliver Today</b>	Removes the order from the Truck Return screen and moves it to the list of today's deliveries where it can be re-routed.
<b>Redeliver on a different date</b>	Removes the order from the Truck Return screen and moves it to the list of that day's deliveries where it can be re-routed. The delivery date change is posted to order notes.
<b>Follow Up Later</b>	Removes the order from the Truck Return screen and moves it to the Follow Up Deliveries screen.

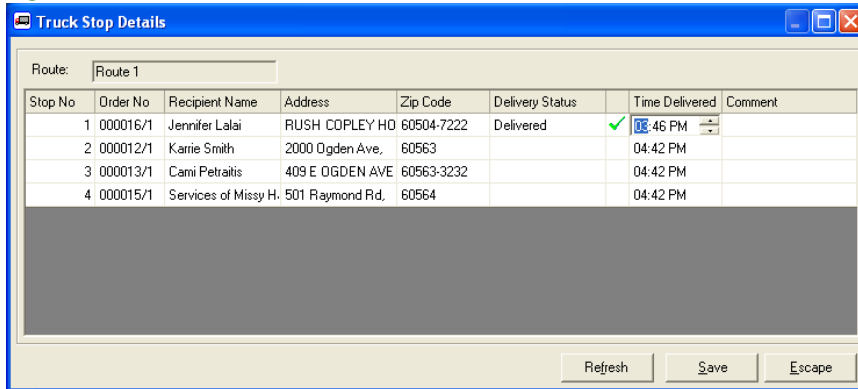
**Figure 14-29: Redelivery**

**NOTE**

If an order is re-routed, the order is still listed in the history of the original delivery route (when printing the original route in the Reprint Route Report or the Delivery Trip Analysis report).

- 7 Next, type the **TIME** the order was delivered in the **Time Delivered** column (the delivery time is required for the order to be marked **Delivered**). To indicate the time an order was delivered, click inside of the **Time Delivered** column so that the current time displays.

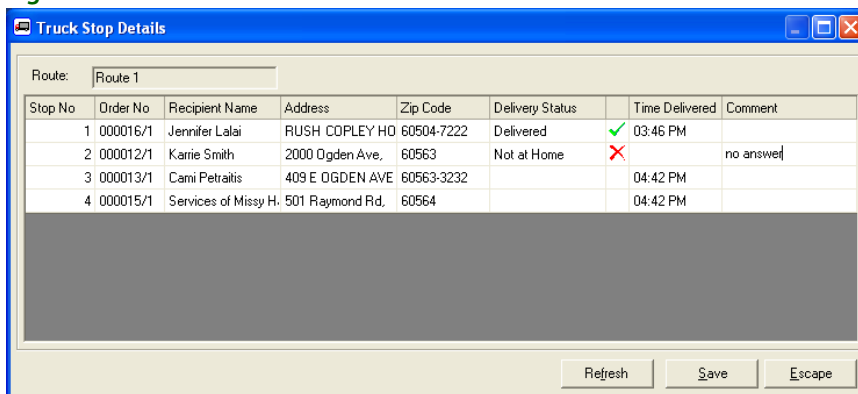
Figure 14-30: Truck Return: Time Delivered



Highlight the hour/minutes, then use the up and down arrows to change the time.

- To add comments to an order, click inside of the **Comment** column and begin typing.

Figure 14-31: Truck Return: Comment



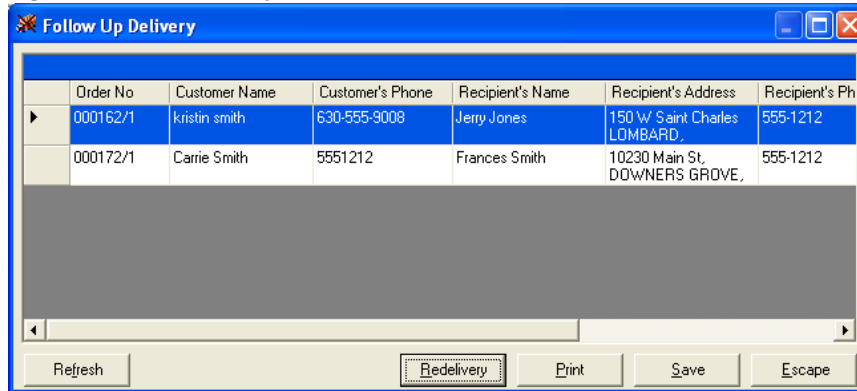
- When you are finished marking deliveries, click **Save**. You are returned to the **Truck Return** screen; click **Escape** in this screen to return to the main screen.

## Follow Up Deliveries

If an order was marked Not Delivered during the truck return process, you can later return to the order in Follow Up Deliveries. Here you can mark the order Delivered or Not Delivered with a delivery code or enter comments. Here you can also select new delivery options, for example to redeliver the order today or on another date.

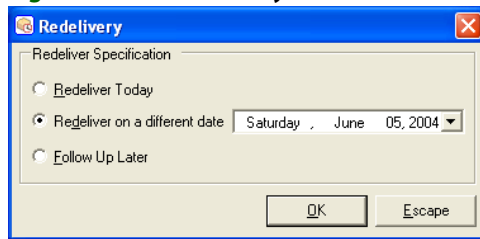
To update the delivery status of an order, click the **Follow Up Deliveries** button in the Main Menu of the Mercury Delivery application, OR from the menu bar click **Route Management**, then click **Follow Up Deliveries**.

**Figure 14-32: Follow Up Deliveries**



To mark an order Delivered or Not Delivered, select a new delivery status. If you select a Not Delivered delivery status, you are prompted for redelivery information. To select new delivery options for an order, highlight the order and then click the **Redelivery** button. The Redelivery window opens.

**Figure 14-33: Redelivery**



- » **Redeliver Today** moves the order to the list of today's deliveries where it can be re-routed.
- » **Redeliver on a different date** moves the order to the list of that day's deliveries where it can be re-routed. The delivery date change is posted to order notes.
- » **Follow Up Later** keeps the order in Follow Up Deliveries.

**NOTE**

If an order is re-routed, the order is still listed in the history of the original delivery route (when printing the original route in the Reprint Route Report or the Delivery Trip Analysis report).

When you are finished, click **Save**. If you marked an order Delivered, it is removed from this window after you click **Save**. Click **Close** when you are finished making changes.

## Downloading Free Microsoft MapPoint Construction Updates

Microsoft offers free Highway Construction downloads on the Microsoft Web site. You can check to see if you have the latest highway construction update using your MapPoint software. If you do not have the latest update downloaded, the program asks you if you want to download the latest information.

**TASK**

**To check that you have the latest MapPoint update:**

- 1 Open the MapPoint software by clicking the **Windows Start** menu, pointing to **All Programs**, and then clicking **Microsoft MapPoint North America 2004**.
- 2 On the **Route** menu, click **Update Construction Information**.

- 3 If you do not have the latest information, you are asked if you want to download the free update. Click **Yes**.
- 4 When the download completes, you are alerted that it was successful. Click **OK**.

The construction updates only update highway construction information in your area. To receive a full MapPoint update, you will have to keep current with the MapPoint software by purchasing upgrades when they are available from Microsoft.

For more information about the free construction updates or new releases of the MapPoint software, see the MapPoint online help (click **Help** in the menu bar, then click **Microsoft MapPoint Help**) or see the Microsoft Web site at [www.microsoft.com](http://www.microsoft.com).

## Wireless Delivery Confirmation

Wireless Delivery Confirmation is an optional add-on feature that you can purchase in addition to the Advanced Mercury Delivery module. It allows your delivery drivers to use wireless phones to update the delivery status of orders (mark orders Delivered or Not Delivered) real-time. With the GPS feature, you can track your drivers' progress throughout the day minute-by-minute, and your drivers can receive live turn-by-turn driving directions.

For pricing information, please call Mercury Technology Sales at 1-800-767-3222.

## Setting Up Wireless Delivery Confirmation

When setting up wireless delivery confirmation, you need to perform the following steps:

- » [Step 1: Set Up Delivery Codes](#)
- » [Step 2: Collect the Login Names of Your "Wireless" Employees](#)
- » [Step 3: Confirm the License Key is Valid](#)
- » [Step 4: Set Up Remote Delivery in Mercury Administration \(Support Assisted\)](#)
- » [Step 5: Create Wireless Employees on the Gearworks Web Site \(Support Assisted\)](#)
- » [Step 6: Set Up Your Phones on the Gearworks Web Site \(Support Assisted\)](#)
- » [Step 7: Activate Your Phones \(Support Assisted\)](#)

### Step 1: Set Up Delivery Codes

Delivery codes flag an order as Delivered/Not Delivered. For example, you might set up delivery codes such as Delivered (Delivered), Left on Front Porch (Delivered), Not at Home (Not Delivered), Discharged from Hospital (Not Delivered), etc.

Your delivery drivers have these options listed on their phones so that they can mark orders Delivered/Not Delivered while they are on route. The information is then downloaded to FTD Mercury and update the delivery status of the orders.

You **MUST** at least set up the following five delivery codes. If you do not set up these exact delivery codes, Wireless Delivery Confirmation may not function:

- » DELIVERED
- » LEFT WITH NEIGHBOR
- » LEFT AT FRONT DOOR
- » IN ICU
- » REFUSED



For instructions on setting up delivery codes, see [Delivery Code Screen](#) on page 24–39.

## Step 2: Collect the Login Names of Your “Wireless” Employees

Next, decide which employees will be using wireless phones for delivery confirmation. In step 5 you will specify on the Gearworks Web site the FTD Mercury login names of the employees that will be using the wireless phones (the Mercury Technology Assistance Center will help you with this step). Therefore in this step you should write down all of the login names of your “wireless” employees (or if the employees are not created or do not have login names, please create them now or assign login names as necessary. See [Employees Screen](#) on page 24–50).

Note that employees can share phones. For example, if you have five wireless employees and you only have two phones, you should set up five employee accounts.

For each wireless employee, look up the employee’s detail information, either through an Employee Search or in the Mercury Administration program.

**Figure 14-34: Employee Detail**

Name: <input type="text" value="Steve Smith"/>		Employee ID: <input type="text" value="12"/>	
Address Information <input type="text" value="Home"/> <input type="text" value="3121 Main Street&lt;br/&gt;DOWNERS GROVE, IL 60515"/> <input checked="" type="checkbox"/> Primary Address		<input checked="" type="checkbox"/> Allow this Employee Online Login Name: <input type="text" value="steve"/> Language: <input type="text" value="English"/>	
Phone Information <input type="text" value="Home"/> <input type="text" value="630-555-1212"/> <input type="checkbox"/> Primary Phone		Password: <input type="text" value="*****"/> Confirm: <input type="text" value="*****"/>	
<input checked="" type="checkbox"/> Active Status Social Security No: <input type="text" value="123-45-6789"/> Employee Type: <input type="text" value="Full Time"/> Job Category: <input type="text" value="Truck Driver"/>		Notes <div style="border: 1px solid gray; height: 100px;"></div>	
<input type="button" value="Apply"/>		<input type="button" value="Terminate..."/>	
<input type="button" value="Undo"/>			

Write down the login name in the Login Name field for each wireless employee. For example, the login name for the employee above is “steve.” On the Gearworks Web site you will have to type the login name of each wireless employee exactly as it is displayed in this screen.

## Step 3: Confirm the License Key is Valid

After you purchase the Wireless Delivery Confirmation feature (with or without GPS), the Mercury Technology Assistance Center sends you a General message that enables the features on your system. Before you begin setting up Wireless Delivery Confirmation, make sure that the General message has turned on the features for you.

To check that the module(s) have been enabled, in Mercury Administration go to the License option and make sure that **Wireless Delivery Confirmation** and/or **GPS** (if you purchased GPS) reads **Valid**. For more information, see [License Screen](#) on page 24–54.

## Step 4: Set Up Remote Delivery in Mercury Administration (Support Assisted)

The remaining steps take place while you are on the phone with the Mercury Technology Assistance Center. The Mercury Technology Assistance Center representative will follow up with you to help you set up and start using the wireless phones. The Mercury Technology Assistance Center can be reached at 1-888-309-2244.

The fourth step is to work with the Mercury Technology Assistance Center to complete the remote delivery information in the Mercury Administration program. The Mercury Technology Assistance Center will give you your account information and show you how to set up the information in the Remote Delivery option in Mercury Administration.

Make sure that you write down your “admin” and “webservice” user account names, passwords, and your company number when the representative gives them to you. In step 5 you will have to log into the Gearworks Web site using this information.

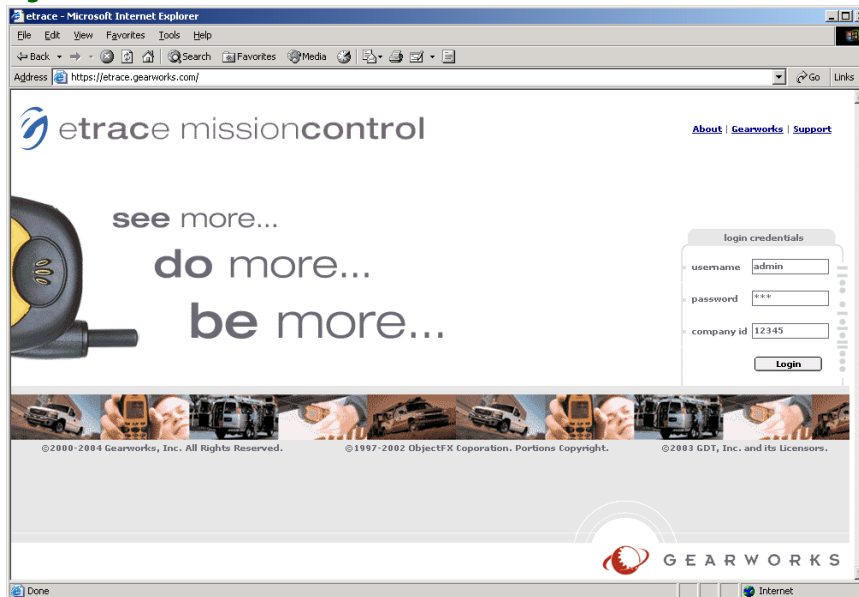
## Step 5: Create Wireless Employees on the Gearworks Web Site (Support Assisted)

Now you will go to the Gearworks Web site and set up your wireless employees. You will be setting up one account for each employee. A Mercury Technology Assistance Center Representative will walk you through this process.

You will need the following before you begin:

- » The password for the “admin” account provided by the Mercury Technology Assistance Center
  - » Your company ID number provided by the Mercury Technology Assistance Center
  - » The FTD Mercury login names of the employees that will be using the wireless phones
- 1 On your Web browser, type `https://etrace.gearworks.com` and press **Enter**. This takes you to the Gearworks Web site.

Figure 14-35: Gearworks Web Site



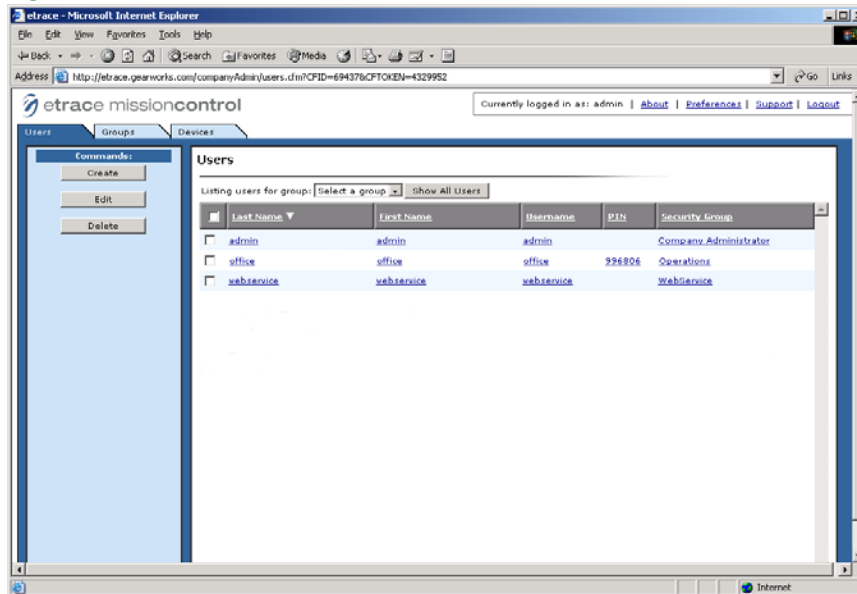
- 2 In the **username** field, type `admin`.
- 3 In the **password** field, type the admin password that was given to you by the Mercury Technology Assistance Center.

- 4 In the **company id** field, type the company ID number that was given to you by the Mercury Technology Assistance Center.
- 5 Click **Login**. This takes you to the main admin screen, which displays a current list of wireless employees. At this time, three employees are set up for you: **Admin**, **Webservice**, and **Office**.

**Caution**

These user accounts should never be deleted. If they are deleted, Wireless Delivery Confirmation will not function.

**Figure 14-36: Gearworks Web Site: Users Tab**



- 6 Click **Create** to create the first wireless employee. The **Create User** window opens.

**Figure 14-37: Gearworks Web Site: Create User**

The screenshot shows the 'Create User' form in the Gearworks web application. The form includes the following fields:

- First Name: Steve
- Middle Name: (empty)
- Last Name: Smith
- Preferred Name: (empty)
- Group: FTD (dropdown)
- Security Group: Mobile Worker (dropdown)
- Timezone: CDT (dropdown)
- Username (\*): steve
- Password (\*): (empty)
- Confirm Password (\*): (empty)

**Contact Information**

- Street: (empty)
- Phone Number: (empty)
- Apt/Suite: (empty)
- Mobile Number: (empty)
- City: (empty)
- Fax Number: (empty)
- State/Province: (empty)
- Email: (empty)
- Postal Code: (empty)
- Country: US

(\*) Required fields

Buttons: Create, Cancel

- 7 Complete the following fields in this window.

**NOTE**

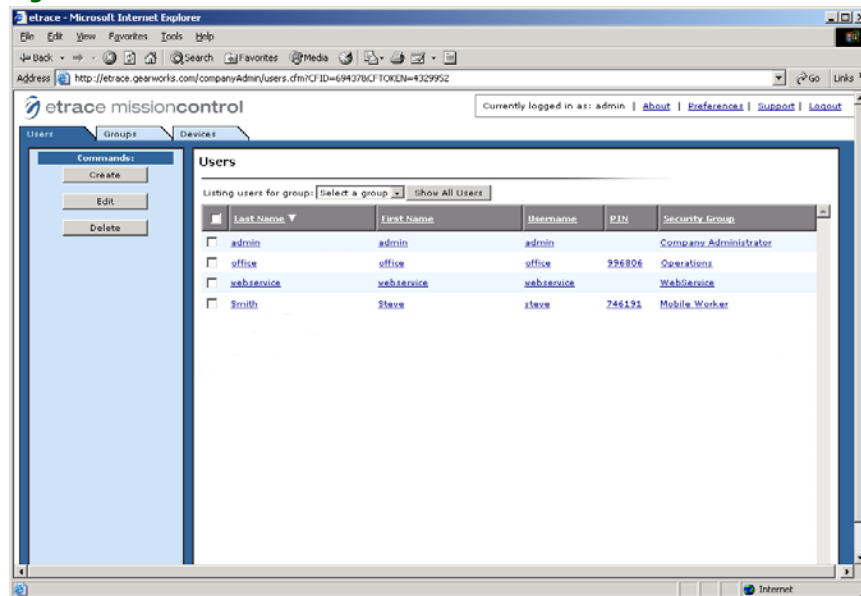
Note: All required fields are marked with an asterisk. In addition to asterisk fields, you must either indicate a Last Name or a Preferred Name.

- » **First Name** - type the employee's first name.
- » **Last Name** - type the employee's last name.
- » **Group** - select FTD.
- » **Security Group** - select Mobile Worker.
- » **Timezone** - select your time zone.
- » **Username** - type the employee's FTD Mercury login name exactly as it appears in the Employee Detail window in FTD Mercury. This field is case sensitive.
- » **Password** - type a password for the employee.
- » **Confirm Password** - type the password again to confirm.

You can leave the rest of the information blank (it does not display anywhere except for this screen).

- 8 Click **Create** to add the employee. The employee's name now displays in the list of users, and a PIN number is assigned to the employee (see the PIN column).

**Figure 14-38: Gearworks Web Site: Add New User**



Write down the employee's PIN number and give it to the employee to memorize. Each time the employee logs onto the wireless phone, he or she is required to enter this PIN number.

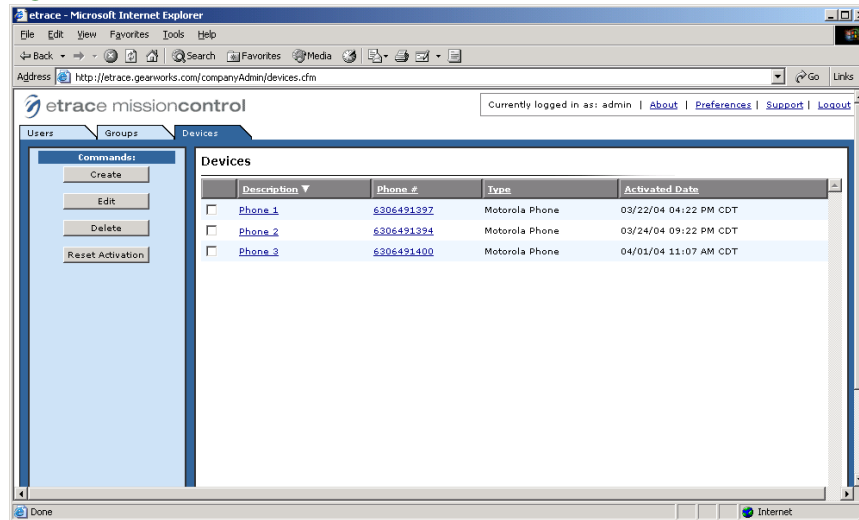
- 9 Repeat steps 6-8 to add additional wireless employees.

## Step 6: Set Up Your Phones on the Gearworks Web Site (Support Assisted)

Next an MTAC Representative will walk you through setting up the Motorola wireless phones in the Gearworks Web site.

**TASK** To set up your phones on the Gearworks Web site:

- 1 On the Gearworks Web site, click the **Devices** tab. This screen lists any phones that are already set up (if any).

**Figure 14-39: Gearworks Web Site: Devices Tab**

- 2 To add a phone, click **Create**. The **Create Device** window opens.

**Figure 14-40: Gearworks Web Site: Create Device**

**Create Device**  
 Device type: Motorola Phone  
 Device status: Active  
 Description: Phone 4  
 Serial Number:   
 Phone Number: 6306491904  
 Save Save and New Cancel

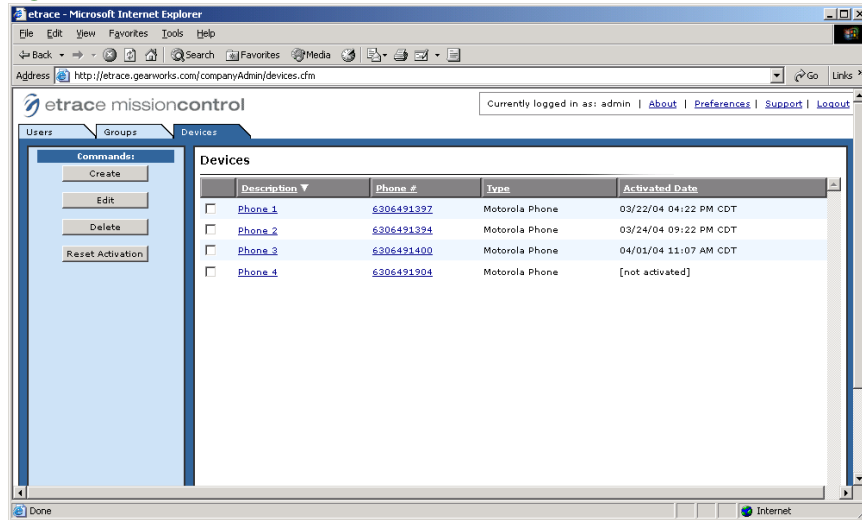
- 3 Complete this screen, specifying the following information:

**NOTE**

Note: You do not have to complete the Serial Number field.

- » **Device type** - select Motorola Phone to set up a regular wireless delivery confirmation phone, or select Smart Talk Device to set up IVR.
  - » **Device status** - select Active.
  - » **Description** - type a description for the phone that will help identify it.
  - » **Phone Number** - type the phone number of the phone.
- 4 Click **Save** to save the phone information, or if you have multiple phones, click **Save and New**. This saves the information you just entered and clears the fields in the window so that you can enter another phone. When you are finished entering your phones, click **Save**. The phone is displayed in the device list, with the Activated Date of “not activated” (you will activate the phone later).

Figure 14-41: Gearworks Web Site: Add New Device



You are now finished with the setups in the Gearworks Web site. Click logout in the upper right hand corner of the screen to log off of the site. Next you will activate the phones.

## Step 7: Activate Your Phones (Support Assisted)

Next you will activate Wireless Delivery Confirmation on your phone(s). An MTAC Representative will walk you through this process.

### TASK To activate your phones:

- 1 Turn on the phone by pressing and holding the power button at the top of the phone.
- 2 When you reach the Nextel main screen, press the menu button.

### NOTE

You may be prompted to update the Web browser features on your phone. If so, follow the prompts to update the Web browser before proceeding.

- 3 Highlight **Java Apps** and then press **Select**.
- 4 In the **Java Apps** menu, highlight **etrace** and the press **Install**. The program then installs.
- 5 Press **Done** when the install is complete.
- 6 Highlight **etrace** and then press **Run**.
- 7 At "Please enter phone number" type the phone number of the phone and then press **OK**. The phone takes a few seconds to activate.
- 8 When the activation is complete, you are prompted for a PIN number. Employees were assigned PIN numbers in step 4. (Note that PIN numbers are not specific to any phone. They are specific to each employee.) Type an employee's PIN number and press **Login**.
- 9 At the message "Etrace Requests Location Reload?" press **Grant**.
- 10 At "Always Grant Request?" press **Yes**.
- 11 At "Press RED PHONE..." press **Resume**.
- 12 At the warning message, press **Accept**.

Congratulations! Your wireless phones and employees are now set up and you are ready to use Wireless Delivery Confirmation. Before downloading orders to the phone, you may want to familiarize yourself with the phone and read through the Nextel user's guide to learn navigation methods.

Continue to [Using Wireless Delivery Confirmation](#) on page 14-39 to learn how to download orders to the phone, and how to mark orders Delivered or Not Delivered using the phone.

## Using Wireless Delivery Confirmation

When you use wireless delivery confirmation, you can perform the following tasks:

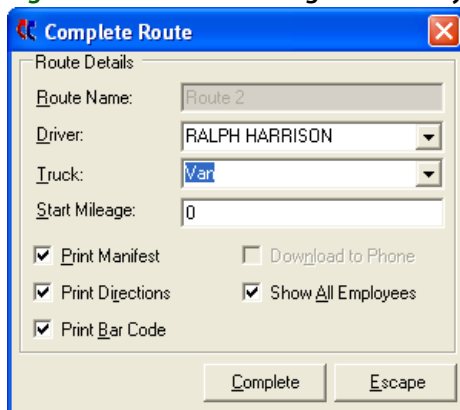
- » Downloading the Route Information to the Phone
- » Receiving Orders on the Phone/Marking Orders Delivered
- » Completing a Route
- » Updating Your etrace Phone Software

### Downloading the Route Information to the Phone

To use Wireless Delivery Confirmation, you should create and save routes as normal. However you must make sure that you do the following (see the example below):

- » After you click **Complete** in the **Create Routes** screen to complete the route, the **Complete Route** window pops up. Make sure **Download to Phone** is checked in this window (the **Download to Phone** option is active only for employees that you set up as wireless employees on the Gearworks Web site).
- » Make sure that you select the correct driver name in the **Complete Route** window because the route information is downloaded to that driver's phone.

**Figure 14-42: Downloading the Delivery Route to the Phone**



Click **Complete** to complete the route and to download the information to the driver's phone. If the driver is logged on to the phone, he or she will receive a message that "You have X new jobs" where X - 1 is the number of orders to be delivered (for example, if the phone states that you have 10 new jobs, you actually have 9 new jobs. The Route Complete option is counted as a job number). The phone will also beep to warn the driver.

#### NOTE

The delivery driver must complete a delivery route before you can download him a second delivery route. The driver must mark that route complete on the phone before he or she can receive another route. If you try to download a route to a driver that has not yet marked a route complete on the phone, you receive the message "Driver <name> has not completed a previous route from the phone. A new route will not appear on the phone until the driver completes the previous route from the phone."

### Receiving Orders on the Phone/Marking Orders Delivered

Before a delivery driver can receive orders, he or she must be logged into the phone.

#### TASK

##### To log in to the phone:

- 1 Press the menu button on the wireless phone.
- 2 Highlight **Java Apps** and then press **Select**.
- 3 Highlight **etrace** and then press **Run**.

- 4 At "Please enter PIN," type your employee PIN number (that was assigned in step 4) and then press **Login**.
- 5 At the warning message, press **Accept**.

If you have jobs waiting for you, your phone will beep and you will receive the message "You have X new jobs" where X - 1 is the number of deliveries waiting for you (one job is the "route complete" job, which marks the delivery route complete). Press OK to accept this message. Note that it will take a minute or two after logging in for your phone to receive the orders.

**TASK** To view jobs or mark jobs **Delivered/Not Delivered (on the phone):**

- 1 **Highlight Jobs** and then press **Select**. The list of orders to be delivered displays. (Note that **Route Complete** is listed at the end of the job list. This will always be listed as your last job. For example, if you received 10 jobs, there will be 9 jobs to deliver, then the 10th job will be the **Route Complete** option.)

- 2 Highlight the first job, then press **Select**.

To mark an order **Delivered/Not Delivered**:

- a. Highlight **Status** and then press **Select**. On the next screen, the list of delivery codes that you set up in Mercury Administration displays. See [Delivery Code Screen](#) on page 24-39 to learn how to set up delivery codes.
- b. Highlight a delivery code in the list and then press **Select**. The order then displays in the jobs list with a check mark next to it.

If the delivery code is a **Delivered** code, it marks the order **Delivered**. If the delivery code is a **Not Delivered** delivery code, it marks the order **Not Delivered**. **Not Delivered** orders can be rescheduled in the **Follow Up Deliveries** screen in the **Mercury Delivery** application (see [Follow Up Deliveries](#) on page 14-30).

To view the details of a job (recipient and product information, highlight **Details** and then press **Select**. When you are finished viewing details, press **Back** to return to the jobs list.

To receive driving instructions (GPS users only), highlight the delivery address (option 3) and then press **Select**. It will take the program a few seconds to find your current location and then display the driving instructions.

## Completing a Route

You must mark your route complete when you are finished with your deliveries. If you do not mark your route complete, the orders will not be removed from the phone, and your route will still be "in progress" in the Mercury Delivery application. You will not be allowed to receive another route until the first route is complete.

**TASK** To complete a route:

- 1 In your jobs list, highlight **Route Complete** and then press **Select**.
- 2 Highlight **Status** and then press **Select**.
- 3 Highlight **Complete** and then press **Select**.
- 4 Highlight **Confirm Complete** and then press **Select**.

## Updating Your etrace Phone Software

Updates will occasionally be available for you to download from your wireless phones. You are notified on your phone when an update is available. You must first uninstall the existing software, and then install the update. You will have to perform this procedure on each of your delivery confirmation wireless phones.



**TASK To uninstall the earlier version of etrace software and update to the new version:**

- 1 Press the **menu** button on the phone.
- 2 Highlight the **Java Apps** menu and press **OK**.
- 3 Highlight **etrace** and press the **menu** button on the phone.
- 4 Select **Deinstall** and press **OK**.
- 5 At the **Are You Sure** confirmation, press **Yes**.
- 6 If you receive a message that **Power loss may destroy additional apps**, press **OK**.
- 7 Once there are green check marks next to the steps, press **Done**.
- 8 In the **Java Apps** menu, highlight **Download Apps** and press **OK**.
- 9 Highlight **Subscriptions** and then press **Select**.
- 10 Move down on the list until you see **Gearworks etrace**, highlight it, and press **Select**.
- 11 Press **Get It**.
- 12 If you receive a warning message, press **Get It**. If you receive a memory error, press **Main**.
- 13 Press **Exit** to exit the **Download Apps** menu.
- 14 In the **Java Apps** menu, highlight **etrace** and then press **OK**. The program then installs.
- 15 Press **Done** when the install is complete.
- 16 Highlight **etrace** and then press **OK**.

Your phone software is now upgraded. Follow any additional prompts if required. Enter your PIN number and then press the Login button to log in.

## GPS Upgrade

If you use Wireless Delivery Confirmation, you have the option of upgrading to a phone that has a Global Positioning System (GPS) receiver. A GPS receiver is a device that can pinpoint your exact location using the Global Positioning System – a worldwide radio-navigation system formed from 24 satellites. GPS uses these satellites as reference points to calculate your position very accurately (within a matter of feet).

GPS is a very useful tool for businesses with delivery operations, like your shop. You can monitor your delivery drivers' progress and location while they are on route. GPS gives you the following features:

- » While your drivers are on route, you can view their exact location (see [Viewing Routing Progress](#) on page 14–24).
- » You can view the exact location of all of the phones, even if a route is NOT downloaded to the phone (if a driver has a phone with him or her that does not have routes downloaded to it, you can still track the location of the phone). See [Tracking Phone Location \(With No Orders Downloaded\)](#) on page 14–41" below.
- » Your drivers can use their wireless phones to get turn-by-turn driving directions from their current location anytime while they are on route.

For GPS pricing information, please call Mercury Technology Sales at 1-800-767-3222.

## Tracking Phone Location (With No Orders Downloaded)

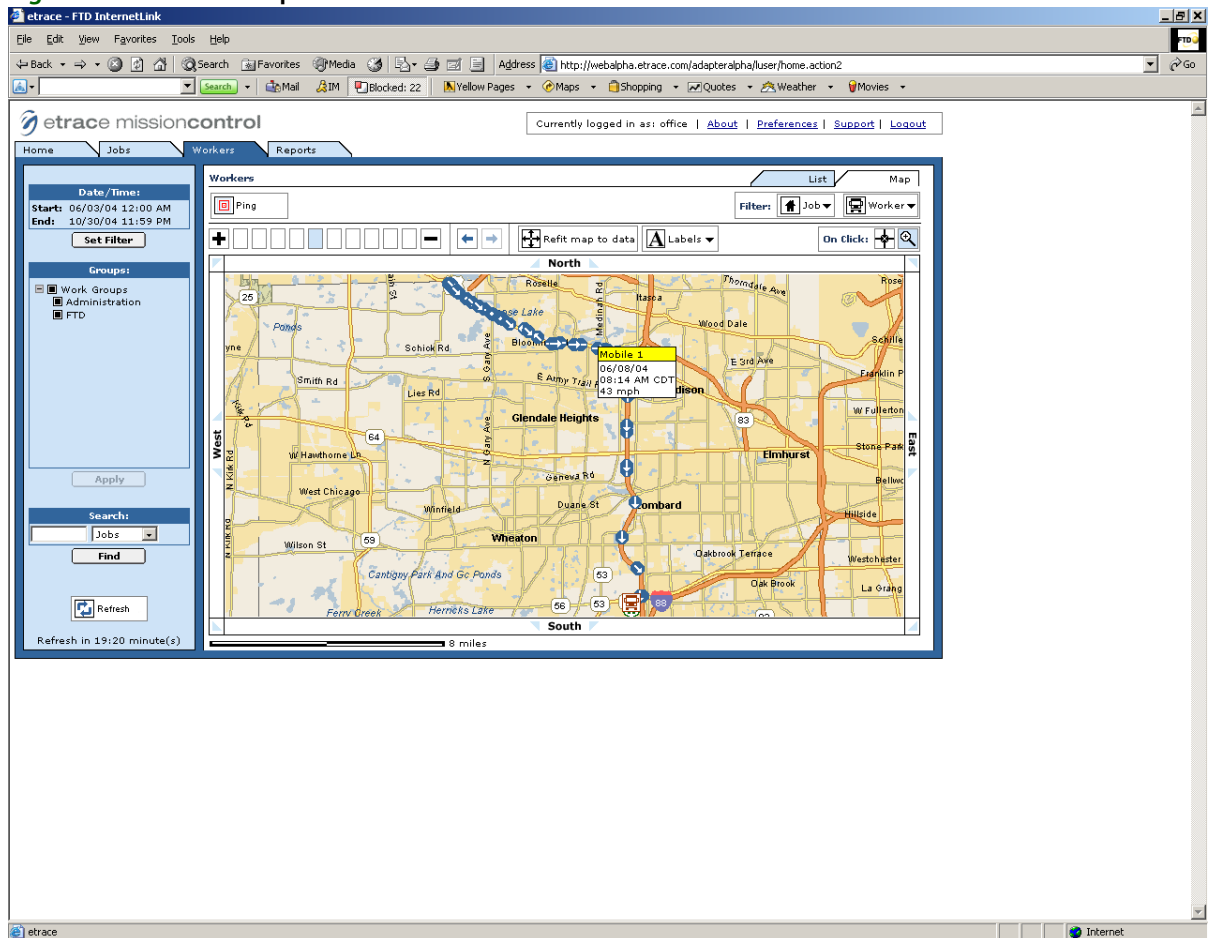
If you have GPS, you can track the location of your wireless delivery phones when orders are NOT downloaded to the phone. If no orders are downloaded to the phone, you must track the phones on the Gearworks Web site. You cannot view this information from the View Routing Progress screen.

**TASK** To track phones with no orders downloaded:

- 1 In your Web browser, type `https://etrace.gearworks.com` and press **ENTER**. This takes you to the Gearworks Web site.
- 2 On the main Gearworks Web page:
  - a. In the **username** field, type `office`.
  - b. In the **password** field, type the office password issued to you by FTD.
  - c. In the **company id** field, type the company ID issued to you by FTD.
  - d. Click **Login**.
- 3 Click the **Workers** tab.
- 4 Click the **Map** tab.

The truck icon shows the location of your phones. If you have any active routes (routes that have not been marked complete), the path of those routes displays on the screen.

**Figure 14-43: Phone Map**



## IVR

If you have Wireless Delivery Confirmation, you can use IVR (Integrated Voice Response). IVR allows you to mark orders Delivered or Not Delivered using ANY cellular phone that has caller ID enabled. First you must set up a cellular phone as a SmartTalk IVR device on the Gearworks Web site. Then using that phone, call a phone number to activate the IVR account. Then using your employee PIN number (generated on the Gearworks Web site), you can call from ANY phone (with caller ID) to log in and retrieve orders.

**NOTE** Make sure that you have enough “anytime” minutes on the cell packages of the phones that you are using for IVR. The phone number that you will be calling is 651-209-0495, which is most likely a long distance number for your shop. Make sure that your phone packages accommodate for these phone calls.

## Setting Up IVR

Setting up IVR phones is very similar to setting up your wireless delivery confirmation phones. IVR allows you to use ANY wireless phone with caller ID. However, you first must set up a particular phone on the Gearworks Web site to activate IVR, then you can use any phone you wish to log in and mark orders Delivered or Not Delivered.

Complete following steps outlined in the [Setting Up Wireless Delivery Confirmation](#) on page 14–32. Some of these steps require the assistance of the Mercury Technology Assistance Center. Call the MTAC at 1-888-309-2244 for assistance with these steps.

- 1 Complete [Step 1: Set Up Delivery Codes](#) on page 14–32.
- 2 Complete [Step 2: Collect the Login Names of Your “Wireless” Employees](#) on page 14–33.
- 3 Complete [Step 3: Confirm the License Key is Valid](#) on page 14–33.
- 4 Complete [Step 4: Set Up Remote Delivery in Mercury Administration \(Support Assisted\)](#) on page 14–34.
- 5 Complete [Step 5: Create Wireless Employees on the Gearworks Web Site \(Support Assisted\)](#) on page 14–34.
- 6 Complete [Step 6: Set Up Your Phones on the Gearworks Web Site \(Support Assisted\)](#) on page 14–36, using the Device Type of SmartTalk instead of Motorola Phone.

Continue with [Activating IVR \(Support Assisted\)](#) on page 14–43, where you will activate the phone that you set up in step 6.

## Activating IVR (Support Assisted)

After setting up your employees and devices as described in “Setting Up IVR” above, IVR is set up but it is not activated. Next you must activate IVR from that phone by calling 651-209-0495.

### **TASK** To activate IVR:

- 1 From the phone that you set up in “Setting Up IVR” above, dial 651-209-0495.
- 2 You are prompted for a PIN number. Type your employee PIN number that was generated in [Step 5: Create Wireless Employees on the Gearworks Web Site \(Support Assisted\)](#) on page 14–34.

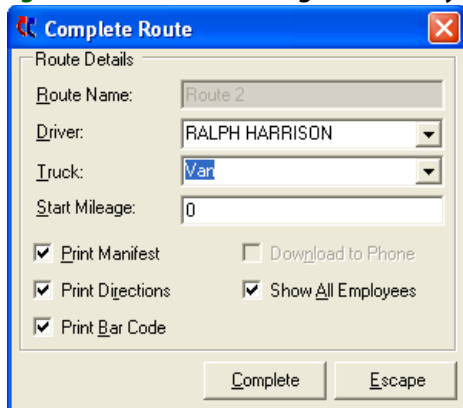
Your IVR account is now activated. Now your employees can use any phone that has caller ID to dial the IVR number (651-209-0495), log in with their employee PIN numbers, and mark orders Delivered or Not Delivered.

## Completing Delivery Routes in Mercury Delivery for IVR

To save a route so that it can be retrieved using IVR, you should create and complete routes as normal. However you must make sure that you do the following (see the example below):

- » After you click **Complete** in the **Create Routes** screen to complete the route, the **Complete Route** window pops up. Make sure **Download to Phone** is checked in this window (the **Download to Phone** option will be active only for employees that you set up as wireless employees on the Gearworks Web site).
- » Make sure that you select the correct driver name in the **Complete Route** window because the route information will be available for that employee next time he or she calls the IVR phone number to retrieve orders.

Figure 14-44: Downloading the Delivery Route to the Phone



## Calling In to Receive Orders/Marking Orders Delivered

When a driver is ready to mark an order Delivered or Not Delivered, he or she should follow the procedure below.

**TASK** To call in to mark an order as delivered or not delivered:

- 1 From any cellular phone with caller ID, dial **651-209-0495**.
- 2 When prompted for a PIN number, type your employee PIN number (which was generated in [Step 5: Create Wireless Employees on the Gearworks Web Site \(Support Assisted\)](#) on page 14-34).
- 3 After you type the PIN number, your orders are listed numerically. Press the number of the order that you want mark Delivered/Not Delivered.
- 4 Delivery codes are then listed numerically. Type the number of the delivery code that you want to assign to the order.
- 5 To mark another order, press \*\* (press the star button twice). This returns you to the Main Menu so that you can perform another action.
- 6 When you are finished marking orders, hang up the phone.

Once you key in a delivery code for the order, the order is removed from the list of orders. The only way to change the status of the order is to manually change it at the shop upon return.

## Completing a Route from the Phone

You must mark your route complete when you are finished with your deliveries. If you do not mark your route complete, the orders will not be removed from the phone, and your route will still be “in progress” in the Mercury Delivery application.

**NOTE** You can mark a route complete without marking each order complete, however this will not take orders off of the route or the phone. You will have to go to the Follow Up Deliveries option in Mercury Delivery to follow up on these orders.

**TASK** To complete a route from the phone:

- 1 From any cellular phone with caller ID, call **651-209-0495**.
- 2 When prompted for a PIN number, type your employee PIN number (which was generated in [Step 5: Create Wireless Employees on the Gearworks Web Site \(Support Assisted\)](#) on page 14-34).
- 3 Follow the prompts to mark the route complete, then to confirm complete.
- 4 Hang up the phone when you are instructed to do so.

# Using Garmin GPS Devices with Mercury Delivery

FTD Mercury has integrated GPS upload functionality for the Garmin StreetPilot c330, Garmin StreetPilot c340, and Garmin Nuvi 350 devices through Mercury Delivery. These three devices are the only Garmin GPS devices supported in FTD Mercury.

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**IMPORTANT** You must be a licensed Advanced Delivery user to use these devices. Additionally, you must call FTD Technology Sales to activate this feature (1-800-767-3222).

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The basic process you should use for each delivery route is:

- 1 Set the GPS device home (or verify that it is set to the correct home location). You will need this home location so you can get directions from the last stop on your route to your final destination (usually your shop).
- 2 Ensure the previous routes are removed from the GPS device, so you avoid accidentally driving the wrong route.
- 3 Create your delivery routes as normal in Mercury Delivery.
- 4 Upload the delivery routes to the GPS device. You *must* upload from the same computer where you created the delivery routes. Delivery routes are uploaded by driver, and the GPS device can only handle routes assigned to a single driver at a time.
- 5 Follow the GPS device directions to each of your destinations.
- 6 Follow the GPS device directions to your home location.
- 7 Perform a Truck Return to mark deliveries as delivered/not delivered. If the entire route has been delivered, mark the route with the status of Delivered so the route will not be uploaded again to the GPS device.
- 8 Remove the previous routes from the GPS device.

---

**IMPORTANT** The Garmin StreetPilot c330, StreetPilot c340, and Nuvi GPS devices include a printed Setup and Go! guide. You can download more information about the Garmin StreetPilot c330, StreetPilot c340, or Nuvi 350 on Garmin's Web site at [www.garmin.com](http://www.garmin.com).

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## Setting Your Home Location on the GPS Device

Prior to using the Garmin StreetPilot c330, StreetPilot c340, or Nuvi 350 GPS device for turn-by-turn directions, you should set your home location—which should be either your shop location or the location where the driver returns to complete the route and mark orders as delivered.

**TASK** To set your home location:

- 1 On the **Garmin StreetPilot c330, StreetPilot c340, or Nuvi 350 Main Menu**, press **Where to?**
- 2 Press **My Locations**.
- 3 Press **Set Home**.
- 4 If a home location already exists, press **Yes, enter my Address**.
- 5 Select the state where your shop is located. If your state is not displayed, press **Spell State**, type the name of your state. When the GPS device presents the **Select State** menu, select your state.
- 6 Press **Spell City**. Type the name of your city. When the GPS device presents the **Select City** menu, select your city.
- 7 Enter the street address (number) for your shop. Press **Done**.
- 8 Enter the street name. When the GPS device presents the **Select Street** menu, select your street name.
- 9 When the full address of your shop appears, click **Save** to save it as your home address.

## Removing Previous Routes from the GPS Device

When you return to the shop to mark orders as delivered in Mercury Delivery, you need to remove the existing route from the GPS device so it does not conflict with future routes and destinations. You should also remove the previous delivery route before you upload a new route (just in case someone did not remove it following Truck Return).

**TASK** To remove a previous route from the GPS device:

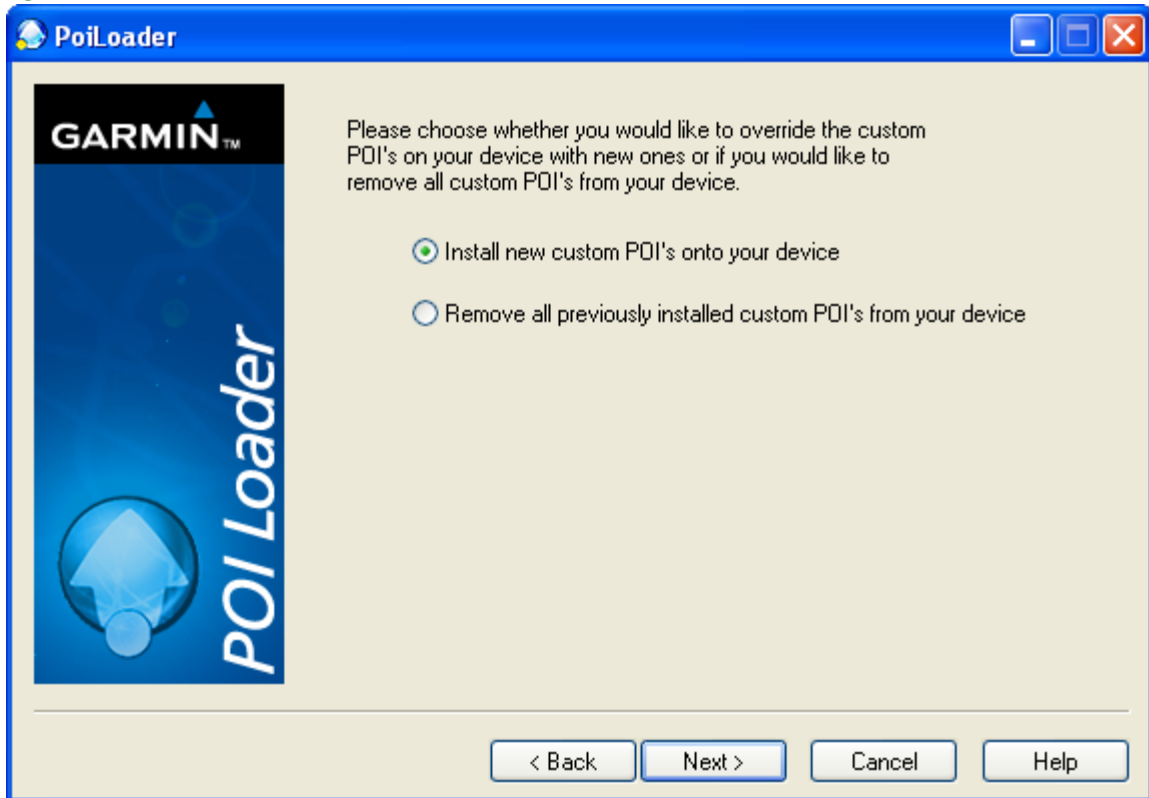
- 1 Plug the GPS device into the USB port on your computer.
- 2 In **Mercury Delivery**, click the **GPS Device** button on the toolbar. The **PoiLoader** window opens.
- 3 On the **Welcome** panel, click **Next**.
- 4 On the **Device Search** panel, if the Garmin StreetPilot c330, StreetPilot c340, or Nuvi 350 GPS device is not automatically found, click **Find Device**. Once the device has been found, click **Next**.
- 5 Click **Remove all previously installed custom POI's from your device** and click **Next**.
- 6 When a message appears stating To reinstall custom POI's you will need to run POI Loader again. Are you sure you want to proceed? click **Yes**.
- 7 On the **Finish** screen, click **Finish**.

Your Garmin GPS unit will reset after the route has been removed.

## Uploading Routes to the GPS Device

Once you create your delivery routes in Mercury Delivery, you can easily upload them to the Garmin StreetPilot c330, StreetPilot c340, or Nuvi 350 GPS device. This is accomplished using the POI Loader.

Figure 14-45: The Garmin POI Loader.



**IMPORTANT** The GPS device can only store routes for a single driver at a time. If you attempt to upload routes for a second driver to the same GPS device, routes for the first driver will be removed automatically from the GPS device. Additionally, you must upload from the same computer where you created the delivery routes.

**TASK** To upload routes to the GPS device:

- 1 Create your delivery routes as normal in Mercury Delivery. Ensure you finish by clicking **Complete Routes**.
- 2 Plug the GPS device into your computer's USB port.
- 3 Click the **GPS Device** button on the toolbar. The **PoiLoader** window opens.
- 4 On the **Welcome** panel, click **Next**.
- 5 On the **Device Search** panel, if the Garmin StreetPilot c330, StreetPilot c340, or Nuvi 350 GPS device is not automatically found, click **Find Device**. Once the device has been found, click **Next**.
- 6 Select **Install new custom POI's onto your device** and click **Next**.
- 7 On the **Data Selection** panel:
  - a. Click **Browse** and browse to C: \Wi ngs\GPSdata and select the folder with the name of the driver for whom you want to upload routes. Click **OK**.
  - b. Ensure your units are set appropriately.
  - c. Select **Express (Recommended)** as the mode.
  - d. Click **Next**.
- 8 On the **Finish** screen click **Finish**.

Your Garmin GPS unit will reset after it has loaded.

## Accessing Routes on the GPS Device

Once you have uploaded routes to the GPS device, you can access them to show you where each stop is on each route. If you have only uploaded a single route, the Custom POIs menu will display each stop as an individual Point of Interest (POI). However, if you have uploaded multiple routes, the Custom POIs menu displays each route as its own point of interest. When you upload multiple routes, each route is named in the format Day\_Date\_RouteName. For example, a route in Mercury Delivery called Northside for Tuesday, July 24th, 2007 will be named Tue\_July\_24\_2007\_Northside.

**NOTE** When only one route is uploaded, the name of the route is not displayed on the Garmin GPS device.

**TASK** To access a route on the GPS device:

- 1 On the **Garmin StreetPilot c330, StreetPilot c340, or Nuvi 350 Main Menu**, press **Where to?**
- 2 Press **My Locations**.
- 3 Press **Custom POIs**.
- 4 If multiple routes have been uploaded, press the route you want to access.
- 5 From the list, press the destination where you want to go. Each destination is preceded by a number, which corresponds to the stop number on the route.
- 6 Press **Show Map**.
- 7 Press **Go!**
- 8 Follow the directions to the destination.

Repeat this for each subsequent stop on the route. When you are finished, you can go back to your home location to perform a Truck Return and mark orders as delivered/not delivered.

## Getting Directions to Your Home Location

At the end of a route, you need to know how to get back to your shop (or truck return location). You have already set the home location, so getting directions from your present location to your final destination is easy.

**TASK** To get directions from your current location to your home location:

- 1 On the **Garmin StreetPilot c330, StreetPilot c340, or Nuvi 350 Main Menu**, press **Where to?**
- 2 Press **My Locations**.
- 3 Press **Go Home**.

The GPS device provides you directions from your current location to your home location.

## Returning to Your Shop After a Delivery Route

When you return to your shop after you have finished your route, perform your Truck Return as normal. Once an entire route has been marked as Delivered in Truck Return, Mercury Delivery automatically deletes the route file from the driver folder on the system. However, the route is not removed from the GPS device until either you upload new routes or explicitly remove previous routes from the GPS device.

---

**TIP** When you have finished, a best practice is to remove the previous routes from the GPS device.

---

## Delivery Reports

You can print several reports from the Mercury Delivery application. These reports allow you to see which orders have been routed, not routed, delivered, and not delivered. You can also print the order statistics per delivery zone, and analyze your delivery trips by delivery driver.

You can print the following reports:

- » [Delivery Zone Report](#)
- » [Delivery Trip Analysis Report](#)
- » [Delivery Trip Analysis Report](#)
- » [Delivery Problem Report](#)

### Delivery Zone Report

The Delivery Zone Report prints the number and total dollar amount of deliveries per delivery zone for a given date range.



Figure 14-46: Sample Delivery Zone Report

DELIVERY ZONE REPORT BY DELIVERY DATE FROM 11/04/04 TO 11/04/04			STORE: All Stores
ZONE	NUMBER OF ORDERS	TOTAL ZONE AMOUNT	
DOWNTOWN NAPERVILLE	6	\$305.55	
EAST AURORA	2	\$112.24	
JAMES FUNERAL SERVICE	1	\$155.07	
NAPERVILLE EAST	7	\$417.18	
NAPERVILLE WEST	2	\$98.60	
RUSH COPLEY HOSPITAL	2	\$134.41	
<b>Totals:</b>	<b>20</b>	<b>\$1,223.05</b>	

## Generating the Delivery Zone Report

### TASK To generate the Delivery Zone report:

- 1 From the Mercury Delivery application menu bar, click **Reports**, then click **Delivery Zone Report**.
- 2 If a window opens asking whether you wish to enable or disable macros, click **Enable Macros**. The Delivery Zone Report window opens.

Figure 14-47: Delivery Zone Report

- 3 In the **Select Store** field, click the arrow and select the store's data that you want to print. To use the data from all stores, select **All Stores** from the list.
- 4 Select start and end dates in the **Start Date** and **End Date** fields. In each field, click the arrow to display a calendar, then click on a date.
- 5 Click **Finish**.
- 6 From the Excel menu bar, click **File**, then click **Print** to print the report.
- 7 Click **File**, then click **Save** to save the report.

## Delivery Report

There are four types of Delivery Reports:

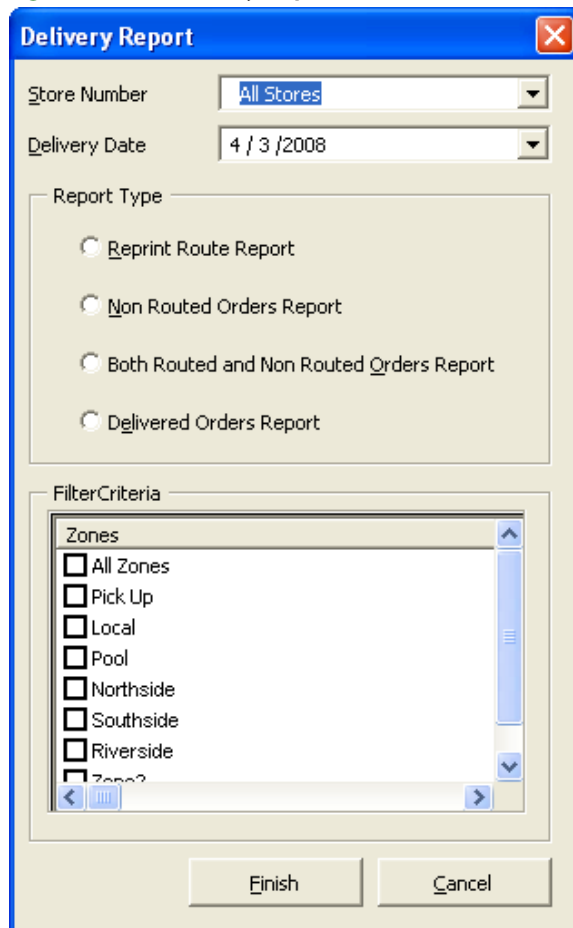
**Table 14-6: Delivery Report Types**

Delivery Report Type	Description
<b>Reprint Route Report</b>	Prints order, delivery, recipient, and product information for saved and completed routes.
<b>Non Routed Orders Report</b>	Prints all orders that have not been routed for a particular delivery date.
<b>Both Routed and Non Routed Orders Report</b>	Prints routed and non routed orders for a particular delivery date.
<b>Delivered Orders Report</b>	Prints all orders that have been delivered on a particular delivery date.

## Delivery Report Window

Delivery reports are generated from the Delivery Report window. The Delivery Report window enables you to select the store, delivery date, and type of delivery report. You can also select filter criteria to limit the information in the report to specific delivery zone(s).

**Figure 14-48: Delivery Report Window**



## Reprint Route Report

The Reprint Route Report prints route information for a saved route (routes that have been SAVED or COMPLETED). It lists each order in the saved route, along with the order's stop number, delivery zone, recipient information, product information, and priority.

**NOTE** If an order has been re-routed, it can display in multiple delivery routes. When a route is completed, the route history shows all orders in the original route, regardless if any of the orders were re-routed.

**Figure 14-49: Sample Delivery Report: Reprint Route Report**

STOP	ZONE	ORDER	DELIVER TO	TOTAL PRODUCTS	DELIVERY INSTRUCTIONS
TRUCK DEPART TIME: 10:21 AM TRUCK DRIVER: Kevin TRIP NUMBER: Route 1					
1	Lombard	000023/1	Leslie Thompson 782 Main Street LOMBARD, IL 60148 Tel: 555-1212 ENTRY DATE: 11/09/04 TIME:10:13 AM	1 - Fresh Arrangement  TOT PRODS: 1 RECEIVED BY: _____	
2	Butterfield	000024/1	Karen Lange 990 Butterfield Road WHEATON, IL 60515 Tel: 555-3434 ENTRY DATE: 11/09/04 TIME:10:15 AM	1 - The FTD Happiness Bouquet  TOT PRODS: 1 RECEIVED BY: _____	Leave on front porch if not home.
3	Lombard	000027/1	Jennifer Dooley 150 W St Charles Road LOMBARD, IL 60148 Tel: 555-5656 ENTRY DATE: 11/09/04 TIME:10:18 AM	1 - The FTD Rose Fest Bouquet  TOT PRODS: 1 RECEIVED BY: _____	
4	Lombard	000028/1	Patrick O'Malley 983 Eagle Street LOMBARD, IL 60148 Tel: 555-7887 ENTRY DATE: 11/09/04 TIME:10:18 AM	1 - The FTD Winter Elegance Bouquet  TOT PRODS: 1 RECEIVED BY: _____	
<b>TOTALS ZONES: 2 TOTAL ORDERS: 4 TOTAL STOPS: 4</b>					

## Generating the Reprint Route Report

**NOTE** Before printing this report, know the route number that you want to print.

**TASK** **To generate the Reprint Route report:**

- 1 On the **Reports** menu, click **Delivery Report**.
- 2 If a window opens asking whether you wish to enable or disable macros, click **Enable Macros**.
- 3 When the **Delivery Report** window opens, today's date is listed in the **Delivery Date** field. If you want to print a delivery route for a different date, click the arrow and select that date from the calendar.
- 4 In the **Report Type** section, select **Reprint Route Report**.
- 5 In the **Trip Number** field, click the arrow and select the route number that you want to print.
- 6 Click **Finish**. The report generates in Microsoft Excel.

**TASK** **To print the report from Microsoft Excel:**

On the Excel menu bar, click **File**, then click **Print** to print the report.

**TASK** **To save the report in Microsoft Excel:**

On the Excel menu bar, click **File**, then click **Save** to save the report.

## Non Routed Orders Report

The Non Routed Orders Report prints all orders that have not been routed for a particular delivery date. Orders are sorted by delivery zone.

**Figure 14-50: Sample Delivery Report: Non Routed Orders Report**

Date: 03/10/04		NON ROUTED ORDERS FOR DELIVERY DATE: 03/13/04			Time: 03:19 PM STORE: All Stores	
ZONE	ORDERS	PRIORITY	DELIVER TO	PROD(S)	MISC INFO	
NAPERVILLE	01/031709	ASAP	Sarah Kosnoff 2000 Ogden Ave  NAPERVILLE, IL 60563 6305559016	1 LATEX BALLOON(S) 1 LUCKY BAMBOO TOTAL PRODS: 2	ENTRY DATE: 03/10/04 TIME:02:54: PM	
NAPERVILLE	01/031710		Cathy Jameson 803 Raymond Road  NAPERVILLE, IL 60563 6305558012	1 DISH GARDEN TOTAL PRODS: 1	ENTRY DATE: 03/10/04 TIME:02:57: PM	
<b>TOTAL FOR ZONE: NAPERVILLE: 2 orders</b>						
NORTH AURORA	01/031711		Kenneth Gambacorta 446 Eola Road  AURORA, IL 60504 6305558901	1 BLOOMING PLANT(S) 1 GREETING CARD(S) TOTAL PRODS: 2	ENTRY DATE: 03/10/04 TIME:03:01: PM	
<b>TOTAL FOR ZONE: NORTH AURORA: 1 orders</b>						
West Aurora	01/031712		Leslie Catera 981 Red Hawk Drive  AURORA, IL 60504 6305556734	1 BASKET ARRANGEMENT TOTAL PRODS: 1	ENTRY DATE: 03/10/04 TIME:03:01: PM	
<b>TOTAL FOR ZONE: West Aurora: 1 orders</b>						
<b>TOTAL FOR ZONE: N/A : 0 orders</b>						
<b>TOTAL FOR ZONE: PICK UP : 0 orders</b>						
<b>TOTAL FOR ZONE: Downtown Naperville: 0 orders</b>						
<b>TOTAL FOR ZONE: East Aurora: 0 orders</b>						
<b>TOTAL FOR ZONE: James Funeral Service: 0 orders</b>						
<b>TOTAL FOR ZONE: Lombard: 0 orders</b>						
<b>TOTAL FOR ZONE: Downers Grove: 0 orders</b>						
<b>GRAND TOTAL: 10 ZONES: 4 ORDERS</b>						

## Generating the Non Routed Orders Report

### TASK To generate the Non Routed Orders report:

- 1 On the **Reports** menu, click **Delivery Report**.
- 2 If a window opens asking whether you wish to enable or disable macros, click **Enable Macros**. When the Delivery Report window opens, today's date is listed in the **Delivery Date** field. If you want to print a delivery route for a different date, click the arrow and select that date from the calendar.
- 3 In the **Report Type** section, select **Non Routed Orders Report**.
- 4 In the **Filter Criteria** section, select the delivery zones that you want to print. To select a delivery zone, click in the check box next to the zone so that a check mark appears. To select all delivery zones, scroll to the bottom of the list of delivery zones and check **All Zones**.
- 5 Click **Finish**. The report generates in Microsoft Excel.

**TASK To print the report from Microsoft Excel:**

On the Excel menu bar, click **File**, then click **Print** to print the report.

**TASK To save the report in Microsoft Excel:**

On the Excel menu bar, click **File**, then click **Save** to save the report.

## Both Routed and Non Routed Orders Report

The Both Routed and Non Routed Orders report prints routed and non-routed orders for a particular delivery date. The following two types of orders print on this report:

- » Orders in COMPLETE delivery routes (orders that are in SAVED routes do not print)
- » Delivery orders that have been entered in Order Entry for the given date range, but have not been routed.

Figure 14-51: Sample Delivery Report: Both Routed and Non Routed Orders Report

Both Routed and Non Routed Orders Report			
Date: 03/17/04	ORDERS NOT Routed AND ORDERS Routed FOR DELIVERY DATE: 03/17/04		Time: 12:22 PM STORE: All Stores
ORDER	DELIVERED TO	PROD(S)	MISC INFO
NON Routed ORDERS FOR ZONE: Downers			
000002/1	Leslie Washington 3113 WOODCREEK DR DOWNERS GROVE, IL 60515-8412	1 The FTD Smooth Jazz Bouquet TOTAL PRODS: 1	ENTRY DATE: 03/17/04 TIME:11:30: AM PRIORITY: BEFORE 10AM
000005/1	Frank Lioteinne 1298 BUTTERFIELD RD DOWNERS GROVE, IL 60515-1032 6305559969	1 The FTD Joys of the Season Wreath TOTAL PRODS: 1	ENTRY DATE: 03/17/04 TIME:11:35: AM PRIORITY:
<b>TOTALS FOR ZONE</b>	<b>Downers Grove</b> <b>2 NON Routed ORDERS</b> <b>0 Routed ORDERS</b>		
ROUTED ORDERS FOR ZONE: Naperville			
000004/1	Laura Leider 1102 RAYMOND DR NAPERVILLE, IL 60563-4041 6305558992	1 The FTD Holiday Pizzazz Centerpiece TOTAL PRODS: 1	ENTRY DATE: 03/17/04 TIME:11:33: AM PRIORITY:
000006/1	Kristi Jones 100 OLESEN DR NAPERVILLE, IL 60540-5858 6305557781	1 The FTD Celebration Of Life Bouquet TOTAL PRODS: 1	ENTRY DATE: 03/17/04 TIME:11:36: AM PRIORITY:
<b>TOTALS FOR ZONE</b>	<b>Naperville</b> <b>0 NON Routed ORDERS</b> <b>2 Routed ORDERS</b>		
ROUTED ORDERS FOR ZONE: North Aurora			
000001/1	Karen Smith 2345 SHADOW HILLS LN AURORA, IL 60504-6293 6305558901	1 The FTD Changing Colors Bouquet TOTAL PRODS: 1	ENTRY DATE: 03/17/04 TIME:11:29: AM PRIORITY: ASAP
000003/1	Cathy Lewis 2000 OGDEN AVE AURORA, IL 60504-7222 6305556906	1 The FTD Holiday Fruit Basket TOTAL PRODS: 1	ENTRY DATE: 03/17/04 TIME:11:32: AM PRIORITY:
000007/1	Elizabeth Connelley 320 N EOLA RD AURORA, IL 60504-9062 6305559822	1 The FTD Paradise Island Arrangement TOTAL PRODS: 1	ENTRY DATE: 03/17/04 TIME:11:37: AM PRIORITY:
<b>TOTALS FOR ZONE</b>	<b>North Aurora</b> <b>0 NON Routed ORDERS</b> <b>3 Routed ORDERS</b>		
<b>TOTALS FOR ZONE</b>	<b>N/A</b> <b>0 NON Routed ORDERS</b> <b>0 Routed ORDERS</b>		
<b>TOTALS FOR ZONE</b>	<b>Wire Out</b> <b>0 NON Routed ORDERS</b> <b>0 Routed ORDERS</b>		
<b>TOTALS FOR ZONE</b>	<b>Lombard</b> <b>0 NON Routed ORDERS</b> <b>0 Routed ORDERS</b>		

## Generating the Both Routed and Non Routed Orders Report

### TASK To print the Both Routed and Non Routed Orders report:

- 1 On the **Reports** menu, click **Delivery Report**.
- 2 If a window opens asking whether you wish to enable or disable macros, click **Enable Macros**.
- 3 When the **Delivery Report** window opens, today's date is listed in the **Delivery Date** field. If you want to print a delivery route for a different date, click the arrow and select that date from the calendar.
- 4 In the **Report Type** section, select **Both Routed and Non Routed Orders Report**.

- 5 In the **Filter Criteria** section, select the delivery zones that you want to print. To select a delivery zone, click in the check box next to the zone so that a check mark appears. To select all delivery zones, scroll to the bottom of the list of delivery zones and check **All Zones**.
- 6 Click **Finish**.

**TASK To print the report from Microsoft Excel:**

On the Excel menu bar, click **File**, then click **Print** to print the report.

**TASK To save the report in Microsoft Excel:**

On the Excel menu bar, click **File**, then click **Save** to save the report.

## Delivered Orders Report

The Delivered Orders Report prints all orders that have been marked Delivered for a particular delivery date. Orders are sorted by delivery zone.

**Figure 14-52: Sample Delivery Report: Delivered Orders Report**

Delivered Orders Report				
Date: 03/09/04	DELIVERED REPORT FOR DELIVERY DATE: 03/09/04			Time: 02:07 PM STORE: All Stores
ZONE	ORDER	DELIVER TO	PROD(S)	MISC INFO
NAPERVILLE	01/031697	Sarah Moretto 1339 Branchwood Circle NAPERVILLE, IL 60563 6305554481	1 BASKET ARRANGEMENT TOT PRODS: 1	DELIVERED: Y PRIORITY:
NAPERVILLE	01/031696	Karen Smith 3390 Hobson Road NAPERVILLE, IL 60564 6305558091	1 FRESH ARRANGEMENT TOT PRODS: 1	DELIVERED: Y PRIORITY:
NAPERVILLE	01/031695	Marcus Gilding 1862 Butterfield Road NAPERVILLE, IL 60563 6305551141	1 DISH GARDEN TOT PRODS: 1	DELIVERED: Y PRIORITY:
NAPERVILLE	01/031691	Frank and Linda Polotto 6002 Henderson Drive NAPERVILLE, IL 60565 6305550008	2 LUCKY BAMBOO TOT PRODS: 2	DELIVERED: Y PRIORITY:
NAPERVILLE	01/031693	Cathy Snobel 28141 Diehl Rd WARRENVILLE, IL 60555 6305553890	1 BABY BOY NOVELTY ARRANGEMENT TOT PRODS: 1	DELIVERED: Y PRIORITY:
NAPERVILLE	01/031699	Jenny Miller 1523 North Aurora Road NAPERVILLE, IL 60563 6305559012	1 AZALEA PLANT TOT PRODS: 1	DELIVERED: Y PRIORITY:
<b>TOTAL FOR ZONE NAPERVILLE: 6 orders</b>				
NEAR COUNTY	01/031685	Lisa Jones 1020 Main Street Naperville, IL 60563 6305558849	1 BASKET ARRANGEMENT TOT PRODS: 1	DELIVERED: Y PRIORITY:
NEAR COUNTY	01/031686	Stefanie Laggos 8 Wyndham Circle Naperville, IL 60563 6303630901	1 BASKET ARRANGEMENT TOT PRODS: 1	DELIVERED: Y PRIORITY:
<b>TOTAL FOR ZONE NEAR COUNTY: 2 orders</b>				
<b>TOTAL FOR ZONE NA : 0 orders</b>				
<b>TOTAL FOR ZONE PICK UP : 0 orders</b>				
<b>TOTAL FOR ZONE Wire Out : 0 orders</b>				
<b>TOTAL FOR ZONE Downers Grove : 0 orders</b>				
<b>TOTAL FOR ZONE Downtown Naperville : 0 orders</b>				
<b>TOTAL FOR ZONE East Aurora : 0 orders</b>				
<b>TOTAL FOR ZONE James Funeral Service : 0 orders</b>				
<b>TOTAL FOR ZONE Lombard : 0 orders</b>				
<b>GRAND TOTAL: 10 ZONES 8 ORDERS</b>				





## Generating the Delivery Trip Analysis Report

### TASK To generate the Delivery Trip Analysis report:

- 1 On the **Reports** menu, click **Delivery Trip Analysis Report**.
- 2 If a window opens asking whether you wish to enable or disable macros, click **Enable Macros**. The Delivery Trip Analysis window opens.

Figure 14-54: Delivery Trip Analysis Window

- 3 When the **Delivery Trip Analysis** window opens, in the **Delivery Date Range** section, select a start and end delivery date of orders that you want to include on the report. To select a date, click the arrow so that a calendar appears, then click on the date.
- 4 In the **Driver Number** field, select the name/number of the driver that you want to print. To print all drivers, select **All Drivers**.
- 5 Click **Finish**. The report generates in Microsoft Excel.

### TASK To print the report from Microsoft Excel:

On the Excel menu bar, click **File**, then click **Print** to print the report.

### TASK To save the report in Microsoft Excel:

On the Excel menu bar, from the **File** menu, click **Save**.

## Delivery Problem Report

The **Delivery Problem Report** prints orders that have not been delivered due to a delivery problem (not home, refused, etc.). The report prints all orders that have been marked for follow-up delivery through Mercury Delivery on the day the order is to be redelivered. Use the Follow Up Deliveries option to mark these orders Delivered when they are delivered (see [Follow Up Deliveries](#) on page 14-30) or re-route the orders.

---

**IMPORTANT** Orders marked not-delivered in Order Entry or Point of Sale are not included in this report.

---

**Figure 14-55: Sample Delivery Problem Report**

ORDER #	DELIVERY DATE	PRIORITY	NAME/ADDRESS	MISC INFO
000001/1	3/9/04		Karen Smith 2345 SHADOW HILLS LN AURORA,IL 60504-6293 6305558901 REASON: Not at Home	ENTRY DATE: 03/9/04 ENTRY TIME:11:29: AM ZONE---North Aurora  DRIVER: John, ATTEMPTS: 1
000004/1	3/9/04		Laura Leider 1102 RAYMOND DR NAPERVILLE,IL 60563-4041 6305558992 REASON: Refused	ENTRY DATE: 03/9/04 ENTRY TIME:11:33: AM ZONE---Naperville  DRIVER: Vince, ATTEMPTS: 1
000006/1	3/9/04	B2P	Kristi Jones 100 OLESEN DR NAPERVILLE,IL 60540-5858 6305557781 REASON: Not at Home	ENTRY DATE: 03/9/04 ENTRY TIME:11:36: AM ZONE---Naperville  DRIVER: Vince, ATTEMPTS: 1

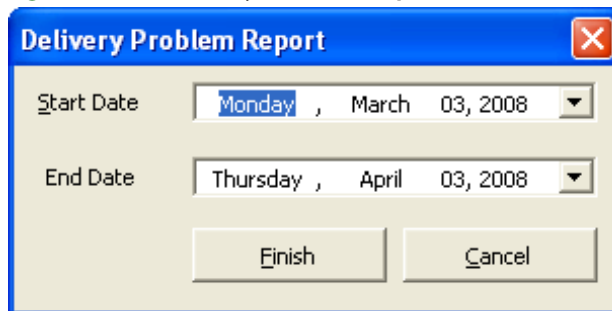
TOTAL NUMBER OF NON DELIVERED ORDERS: 3

## Generating the Delivery Problem Report

**TASK** To generate the Delivery Problem report in Mercury Delivery:

- 1 On the **Reports** menu, click **Delivery Problem Report**.
- 2 If a window opens asking whether you wish to enable or disable macros, click **Enable Macros**. The Delivery Problem Report window opens.

**Figure 14-56: Delivery Problem Report Window**



- 3 When the **Delivery Problem Report** window opens, select a date range of orders to include. Select a start and end date by clicking the down arrows in the appropriate fields and then clicking on the date.
- 4 Click **Finish**. The report opens in Microsoft Excel.

**TASK** To print the report from Microsoft Excel:

On the Excel menu bar, on the **File** menu, click **Print** to print the report.

**TASK** To save the report in Microsoft Excel:

On the Excel menu bar, on the **File** menu, click **Save** to save the report.

## Reference

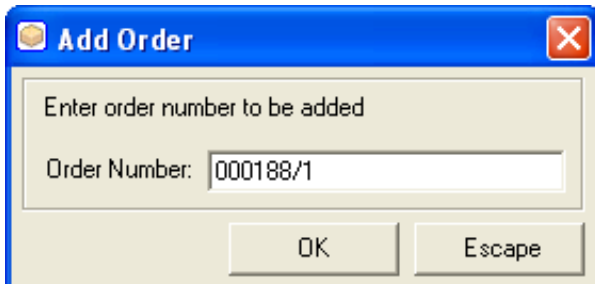
The following windows and screens are available in Mercury Delivery:

- » [Add Order Window](#)
- » [Add Zone Window](#)
- » [Complete Route Window](#)
- » [Create Zone Window](#)
- » [Optimize Route Options Window](#)
- » [Order Details Window](#)
- » [Redelivery Window](#)
- » [Rename Route Window](#)
- » [Route Origin Window](#)
- » [Routing Progress Window](#)
- » [Select Routing Progress Window](#)
- » [Select Saved Routes Window](#)
- » [Truck Stop Details Window](#)

## Add Order Window

The **Add Order** window allows you to add orders to the delivery route that do not already display in the Orders for Zone(s) section on the left hand side of the Create Routes screen.

Figure 14-57: Add Order Window



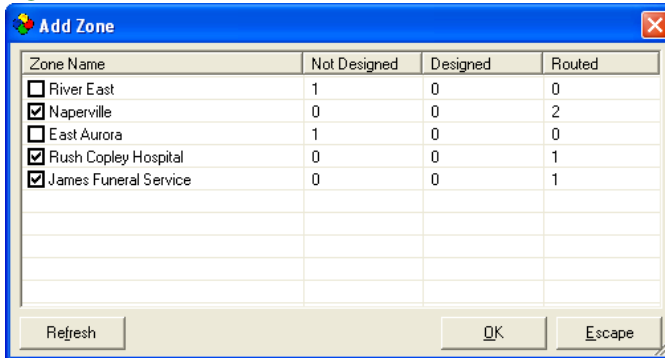
To add an order, type the order number followed by a forward slash and the ticket number (for example, type 000015/1) and then click **OK**. The order will be added to the screen and will be available to route.

You can also scan the ticket's bar code (from an invoice). The ticket is automatically added to the route.

## Add Zone Window

The **Add Zone** window allows you to add delivery zones to the route that you are creating. This window brings up all of your delivery zones that have orders available to route.

Figure 14-58: Add Zone Window

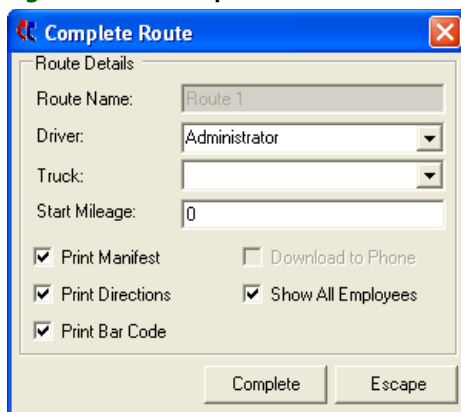


The delivery zones that you are currently routing will be checked. To add another delivery zone, click on that zone so a check mark appears, and then click **OK**. All orders within that delivery zone will be added to the screen and will be available to route.

## Complete Route Window

The **Complete Route** window allows you to complete the delivery route (the delivery slip and driving directions will print, and the route cannot be changed).

Figure 14-59: Complete Route Window



Complete the following truck and driver information:

Table 14-7: Complete Route Window Settings

Field	Description
<b>Route Name</b>	The name of the route.
<b>Driver</b>	This field contains all of your employee IDs, listed in alphabetical order. Click the down arrow and select the name of the employee that will be delivering the orders on this route, or type the first few letters of the employee's ID to display it in the list.
<b>Truck</b>	Type the name of the truck that is being used for delivery (optional). The truck name that you type here will be saved so that you can select it from a drop-down list next time you complete a route.
<b>Start Mileage</b>	Type the mileage of the truck before it leaves on the route (if you track truck mileage using the Delivery Trip Analysis report).
<b>Print Manifest</b>	To print the route manifest (routing slip), make sure this option is checked.

Table 14-7: Complete Route Window Settings (cont.)

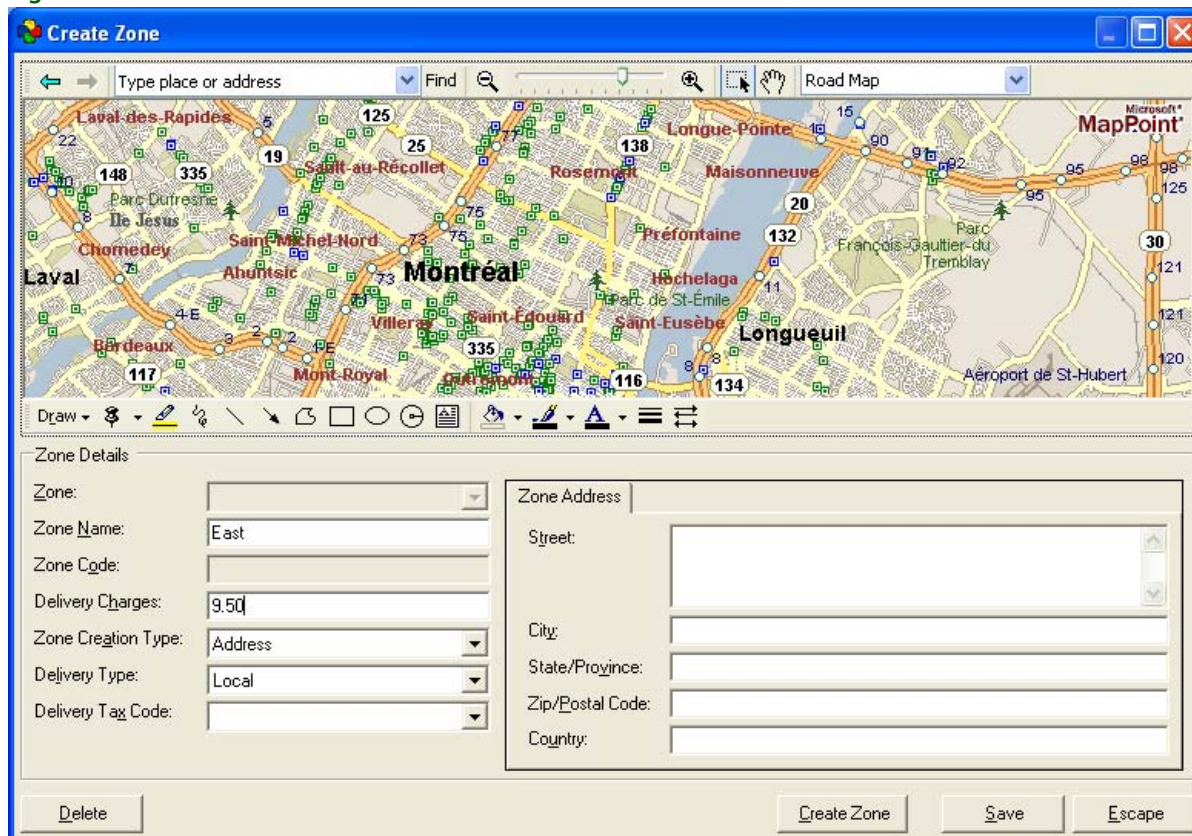
Field	Description
Print Directions	To print the driving directions, make sure this option is checked.
Print Barcode	To print the barcode of the ticket on the route manifest, make sure this option is checked.
Print Bar Codes	To print the bar codes of ticket numbers on the route manifest, ensure this option is selected.
Download to Phone	This option will only be active if the delivery driver that you selected is set up to use Wireless Delivery Confirmation. If the field is active, you can click this check box to download the route to the employee's phone. See "Downloading the Route Information to the Phone" on page 78.
Show All Employees	By default, only employees with a truck driver employee type are listed in the Driver field. Select this option if you would like to view all employees.

Click **Complete** when you are ready to complete the route and print the manifest and/or driving directions.

## Create Zone Window

When you create or edit a zone in Mercury Delivery, you do so using the **Create Zone** window. The window consists of two main areas: a map with drawing controls, and a details area, containing detailed information about the zone.

Figure 14-60: Create Zone Window



## Zone Details Area

The **Zone Details** area contains information about the zone you are creating or editing. For zones of **Address** or **Postal Code** type, additional fields are included in tabs on the right side of the area.

**Table 14-8: Zone Details Area Settings**

Setting	Description
<b>Zone</b>	If you are editing an existing zone, select it from this list.
<b>Zone Name</b>	If you are creating a new zone, enter the name for this zone in this field.
<b>Zone Code</b>	This field will always be blank and inactive in FTD Mercury. It is only used when part of an FTD Mercury Advantage system.
<b>Delivery Charges</b>	Enter the delivery charge for this zone.
<b>Zone Creation Type</b>	From this list, select <b>Map</b> , <b>Address</b> , or <b>Postal Code</b> . If you select <b>Map</b> , draw the zone on the map. If you select <b>Address</b> , the <b>Zone Address</b> tab appears, allowing you to specify the address for this zone. If you select <b>Postal Code</b> , enter one or more ZIP/postal codes you want included in this zone in the <b>Zone Zip Code(s)</b> tab.
<b>Delivery Type</b>	From this list, select either <b>Local</b> or <b>Wire Out</b> . Select <b>Local</b> for any zones to which your store will actually deliver products; select <b>Wire Out</b> for zones for which you will be sending outgoing orders.
<b>Delivery Tax Code</b>	Optionally select a tax code to associate with this zone.

### Zone Address Tab

When you select the **Zone Creation Type** of **Address**, the **Zone Address** tab appears. You need to provide the address for this delivery zone.

**Table 14-9: Zone Address Area Settings**

Setting	Description
<b>Street</b>	Enter the street address.
<b>City</b>	Enter the city for this address.
<b>State/Province</b>	Enter the state or province for this address.
<b>Zip/Postal Code</b>	Enter the ZIP or postal code for this address.
<b>Country</b>	Enter the country in which this address is located.

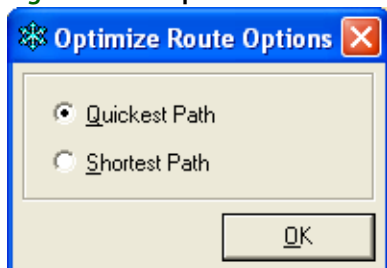
### Zone Zip Code(s) Tab

If you select the **Zone Creation Type** of **Postal Code**, the **Zone Zip Code(s)** tab appears. Enter a ZIP/postal code in the **Zip Code** box and click **Add** to add it to the ZIP/Postal Code list.

## Optimize Route Options Window

The **Optimize Route Options** window allows you to change the map and driving directions based on the quickest or shortest driving path. Select **Quickest Path** (to select the fastest path) or **Shortest Path** (to select the path with the shortest distance) and then click **OK**. The map and driving directions will be updated accordingly.

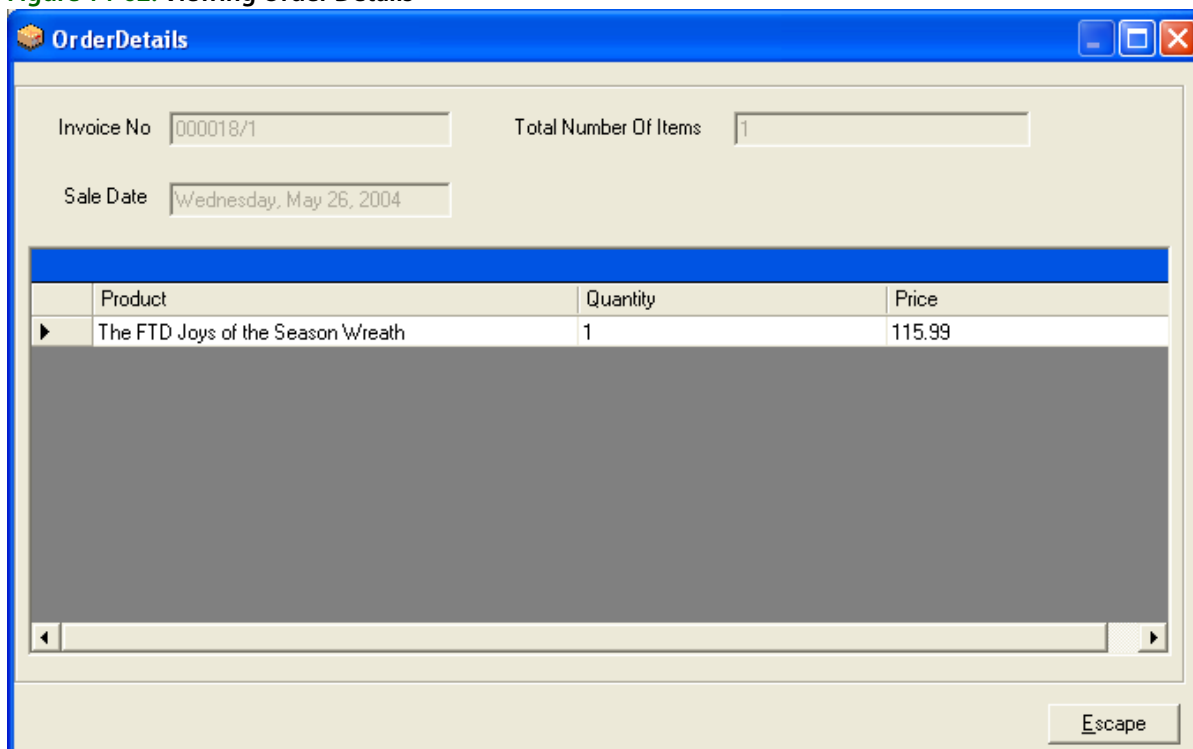
Figure 14-61: Optimize Route



## Order Details Window

The **Order Details** window displays the sale and product information for the order. The products to be delivered are listed in the middle of the window.

Figure 14-62: Viewing Order Details



The top of the screen lists the general order information:

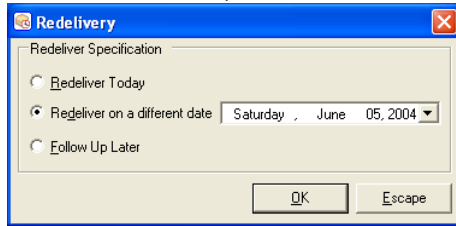
Table 14-10: Order Details Window Information

Information	Description
Invoice No	The Order Entry invoice number and ticket number for the order.
Sale Date	The date that the sale was entered.
Total Number of Items	The total number of products in the order.

## Redelivery Window

The **Redelivery** window allows you to indicate when you would like to redeliver the order.

Figure 14-63: Redelivery Window



Following are your options in this window:

Table 14-11: Redelivery Options

Option	Description
<b>Redeliver Today</b>	Removes the order from the Truck Return or Follow Up Deliveries screen and moves it to the list of today's deliveries where it can be re-routed.
<b>Redeliver on a Different Date</b>	Removes the order from the Truck Return or Follow Up Deliveries screen and moves it to the list of that day's deliveries where it can be re-routed. The delivery date change is posted to order notes.
<b>Follow Up Later</b>	Does not assign the order to a particular delivery date. The order will remain in Follow Up Deliveries until you assign a delivery date.

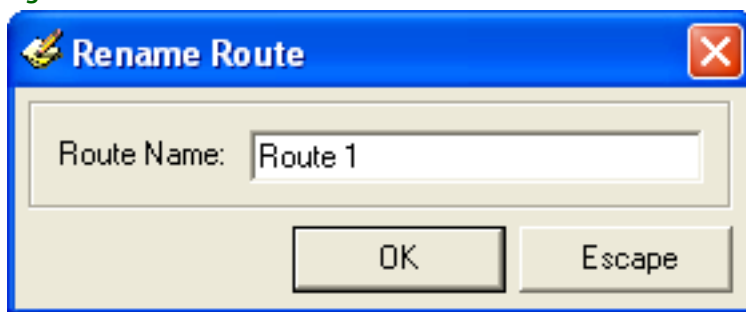
**NOTE** If an order is re-routed, the order will still be listed in the history of the original delivery route (when printing the original route in the **Reprint Route** report or the **Delivery Trip Analysis** report).

Click **OK** when you are finished.

## Rename Route Window

The Rename Route window allows you to enter a new name for a delivery route. Enter a new name for the route in the text field, and then click **OK**.

Figure 14-64: Rename Route Window



## Route Origin Window

For the map and driving directions to be correct, the driver's origin must also be correct. Most likely, the driver's origin will be your shop address, but you can specify any other address as well.

In the Route Origin window, indicate if you want the route to originate from the store address or another address. If you select Other, enter the address. Click **OK** when you are finished.



Figure 14-65: Specifying a Route Origin

## Routing Progress Window

The **Routing Progress** window allows you to view the current status of a delivery route.

Figure 14-66: Routing Progress Screen

Stop N	Invoice No	Recipient Name	Address	City	State	Zip	Zone	Priority
1	000020/1	Sarah Moretto	1339 Branchwood Circle	NAPERVILL	ILLINOIS	60563	Naperville(	4
2	000017/1	Jenny Miller	1523 North Aurora Road	NAPERVILL	ILLINOIS	60563	Naperville(	7
3	000019/1	Cathy Snobel	28141 Diehl Rd	WARRENVIL	ILLINOIS	60555	Naperville(	9
4	000018/1	Frank Smith	1212 South Naper Blvd	NAPERVILL	ILLINOIS	60540	Naperville(	9

You can view the progress of the delivery route by looking at the delivery map. Each stop is marked with a truck icon, indicating that the order is on the truck. To view the details of a particular stop, you can double click on the truck icon for that stop.

This screen also allows you to print the driving directions, map, or delivery manifest.

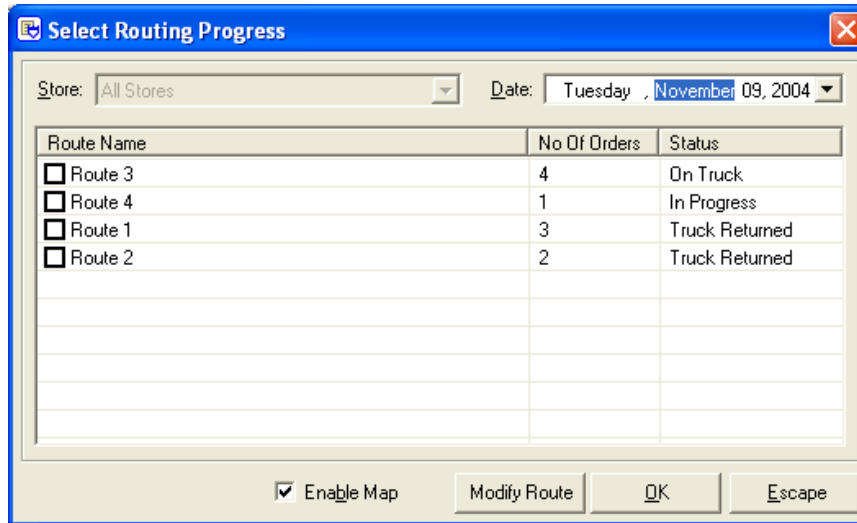
If you have Wireless Delivery Confirmation, the **Routing Progress** window can show you which orders have been marked **Delivered** or **Not Delivered** by the delivery driver. Double-click on the truck icon for any stop to see the delivery status.

If you have GPS, you can view the live location of your delivery driver. The map refreshes every few seconds.

## Select Routing Progress Window

By default, this window lists routes for the date that you selected in the main delivery screen (Delivery Snapshot screen).

Figure 14-67: Select Routing Progress Window



To see routes saved for another date, change the date in the **Date** field. To bring up a route on the screen, check the check box next to that route so that a check mark appears, then click **OK**.

When creating delivery routes, you have the option of displaying a map that outlines your delivery route. If you would like to see the map, make sure **Enable Map** is checked. Clearing this option will not display a map (because a map does not have to be loaded by the program, you will notice increased program speed if you leave **Enable Map** unchecked).

A status type is listed for each delivery route:

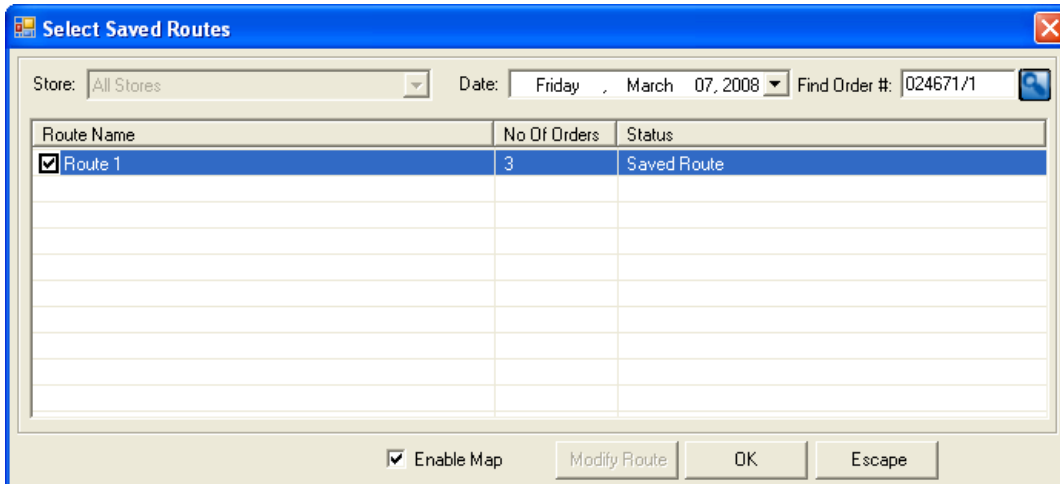
Table 14-12: Delivery Status Types

Status	Description
<b>On Truck</b>	The delivery route has been completed. No changes have been made to the orders in the route (such as marked Delivered or Not Delivered). If you are working in the Select Routing Progress screen, this type of delivery route can be updated by selecting the route and then clicking Modify Route (you can add orders to the route, change the delivery order, etc.).
<b>Truck Returned</b>	The Truck Return process for the delivery route has been completed. The orders in the route have all be marked Delivered or Not Delivered, either in the Mercury Delivery application or on the Wireless Delivery phone. No changes can be made to this type of delivery route.
<b>On Phone</b>	If you checked Download to phone when you completed the delivery route, the route will have the On Phone status. No changes can be made to this type of delivery route.
<b>In Progress</b>	If you have made changes to the route, such as marked some orders Delivered or Not Delivered, the route will have the In Progress status. No changes can be made to this type of delivery route.

## Select Saved Routes Window

By default, this window lists routes for the date that you selected in the main delivery screen (Delivery Snapshot screen).

Figure 14-68: Saved Route Window



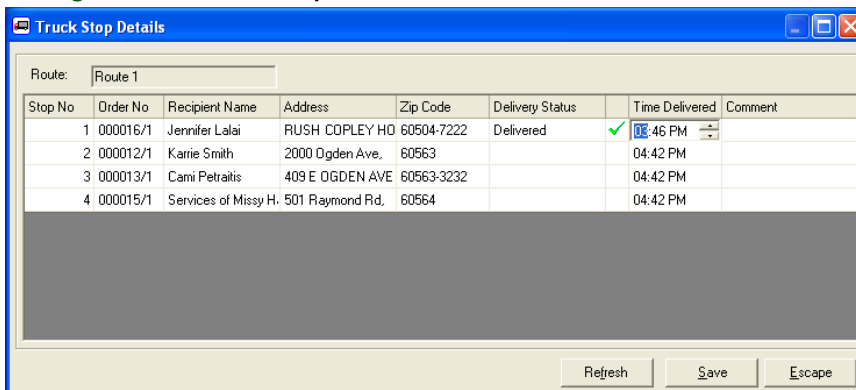
To see routes saved for another date, change the date in the **Date** field. To bring up a route on the screen, check the check box next to that route so that a check mark appears, then click **OK**. To find the route that contains a specific order, enter the order number in the Find Order # field, then press Return. You can also use a bar code scanner, if available, to populate the order number field by scanning the bar code on the invoice.

When creating delivery routes, you have the option of displaying a map that outlines your delivery route. If you would like to see the map, make sure **Enable Map** is checked. Clearing this option will not display a map (because a map does not have to be loaded by the program, you will notice increased program speed if you leave Enable Map unchecked).

## Truck Stop Details Window

The **Truck Stop Details** window lists all of the orders in the selected route.

Figure 14-69: Truck Stop Details Window



From this list, mark each order with a delivery code (delivery codes are set up in Mercury Administration). To do this, click inside the **Delivery Status** column so that a down arrow appears. Then click the down arrow and select a delivery code from the list.

If the delivery code is a **Delivered** code, the order will display a green check mark next to it, indicating that it was delivered. If the delivery code is a **Not Delivered** code, the order will display a red cross mark next to it, indicating that it was not delivered.

Next, you can type the time the order was delivered in the **Time Delivered** column (you must maintain delivery times if you would like to print the **Delivery Trip Analysis** report). If you do not indicate a delivery time, the current time will be saved as the delivery time. Type any comments on the delivery in the **Comment** column if desired.

To indicate the time an order was delivered, click inside of the **Time Delivered** column so that the current time displays. Highlight the hour/minutes, then use the up and down arrows to change the time.

To add comments to an order, click inside of the **Comment** column and begin typing.

When you are finished marking deliveries, click **Save**.