

Monday Morning Routing

- Double-Click on Desk Top Icon if working Remotely.

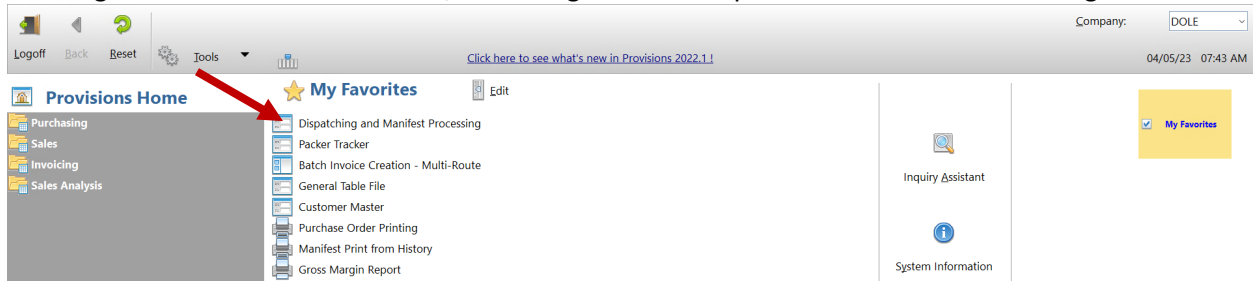


- Double-Click on Desk Top Icon if working Remotely.



Sign in with your username and password.

Once signed in and on the Provisions, Home Page click on Dispatch and Manifest Processing



Once you click on Dispatching and Manifest Processing you will come to the Dispatch Deliveries Screen. In this screen you will need to change the Ship Date to today's date, Mondays Only. Hit the enter key on the keyboard then click on the All button on the screen.

Rte	Stop	Truc...	Driv...	Weight	Status	Customer	Address	City
-----	------	---------	---------	--------	--------	----------	---------	------

Once you have clicked on the All Button all orders in the system for that day will appear. If you want to sort the orders click on the Stop Column and then the Rte Column.

Dispatch Deliveries

Exit Clear Refresh

Tools

Ship Date: 04/05/23 Carrier: All Carriers Total Orders: 7

Dispatcher: All Dispatchers Total Confirmed Orders: 7

Route #: All Routes Total Weight: 227.69-

Truck #: Items on Order by Location Total Stops: 7

Driver: NOR EASTER CATERING - ... 74 SNOW CREEK ROAD WARREN

Cust. Type: PEARL RESTAURANT / OYS... 1 JAFFREY ROAD PETERBOROUGH

Route Maintenance

Order: 74 SNOW CREEK ROAD WARREN

Route: 155 CARROLL ROAD WAITSFIELD

Stop: 155 CARROLL ROAD WAITSFIELD

Change Carrier Clear Update

Print Options:

Rte	Stop	Truc...	Driv...	Weight	Status	Customer	Address	City
26	002	306	76	12.50-	Confirmed	NOR EASTER CATERING - ...	74 SNOW CREEK ROAD	WARREN
11	006	289	31	55.19-	Confirmed	PEARL RESTAURANT / OYS...	1 JAFFREY ROAD	PETERBOROUGH
26	005	306	76	12.50-	Confirmed	NOR EASTER CATERING - ...	74 SNOW CREEK ROAD	WARREN
26	004	306	76	12.50-	Confirmed	LAWSON'S FINEST LIQUIDS	155 CARROLL ROAD	WAITSFIELD
26	003	306	76	25.00-	Confirmed	LAWSON'S FINEST LIQUIDS	155 CARROLL ROAD	WAITSFIELD
11	009	289	31	10.00-	Confirmed	FLYING BUTCHER - AMHER...	124 STREET ROUTE 101-A	AMHERST
24	005	282	41	100.00-	Confirmed	KITH AND KIN - HUDSON	40 WASHINGTON STREET	HUDSON

When you are ready to send the orders to Appian you will need to go up to Tools and click on the drop down menu. Output Options will appear. Hover on the Right Arrow and Export CSV File will appear. Click on it to send the file.

Dispatch Deliveries

Exit Clear Refresh

Tools

Ship Date: 04/05/23 Carrier: All Carriers Total Orders: 7

Dispatcher: All Dispatchers Total Confirmed Orders: 7

Route #: All Routes Total Weight: 227.69-

Truck #: Items on Order by Location Total Stops: 7

Driver: PEARL RESTAURANT / OYS... 1 JAFFREY ROAD PETERBOROUGH

Cust. Type: FLYING BUTCHER - AMHER... 124 STREET ROUTE 101-A AMHERST

Route Maintenance

Order: 40 WASHINGTON STREET HUDSON

Route: 74 SNOW CREEK ROAD WARREN

Stop: 155 CARROLL ROAD WAITSFIELD

Change Carrier Clear Update

Print Options:

Rte	Stop	Truc...	Driv...	Weight	Status	Customer	Address	City
11	006	289	31	55.19-	Confirmed	PEARL RESTAURANT / OYS...	1 JAFFREY ROAD	PETERBOROUGH
11	009	289	31	10.00-	Confirmed	FLYING BUTCHER - AMHER...	124 STREET ROUTE 101-A	AMHERST
24	009	282	41	100.00-	Confirmed	KITH AND KIN - HUDSON	40 WASHINGTON STREET	HUDSON
26	002	306	76	12.50-	Confirmed	NOR EASTER CATERING - ...	74 SNOW CREEK ROAD	WARREN
26	003	306	76	25.00-	Confirmed	LAWSON'S FINEST LIQUIDS	155 CARROLL ROAD	WAITSFIELD
26	004	306	76	12.50-	Confirmed	LAWSON'S FINEST LIQUIDS	155 CARROLL ROAD	WAITSFIELD
26	005	306	76	12.50-	Confirmed	NOR EASTER CATERING - ...	74 SNOW CREEK ROAD	WARREN

Click on yes to Create Truck Route File

Rte	Stop	Truc...	Driv...	Weight	Status	Customer	Address	City
11	006	289	31	55.19-	Confirmed	PEARL RESTAURANT / OYS...	1 JAFFREY ROAD	PETERBOROUGH
11	009	289	31	10.00-	Confirmed	FLYING BUTCHER - AMHER...	124 STREET ROUTE 101-A	AMHERST
24	009	282	41	100.00-	Confirmed	KITH AND KIN - HUDSON	40 WASHINGTON STREET	HUDSON
26	002	306	76	12.50-	Confirmed	NOR EASTER CATERING - ...	74 SNOW CREEK ROAD	WARREN
26	003	306					55 CARROLL ROAD	WAITSFIELD
26	004	306					55 CARROLL ROAD	WAITSFIELD
26	005	306					4 SNOW CREEK ROAD	WARREN

CAI Confirm

Are you sure you want to create the Truck Route file?

Yes No

User: RCER (T_513;87772) 0001/DOLE

Click on yes to confirm.

Rte	Stop	Truc...	Driv...	Weight	Status	Customer	Address	City
11	006	289	31	55.19-	Confirmed	PEARL RESTAURANT / OYS...	1 JAFFREY ROAD	PETERBOROUGH
11	009	289	31	10.00-	Confirmed	FLYING BUTCHER - AMHER...	124 STREET ROUTE 101-A	AMHERST
24	009	282	41	100.00-	Confirmed	KITH AND KIN - HUDSON	40 WASHINGTON STREET	HUDSON
26	002						CREEK ROAD	WARREN
26	003						OLL ROAD	WAITSFIELD
26	004						OLL ROAD	WAITSFIELD
26	005						CREEK ROAD	WARREN

CAI Confirm

You have not selected a Truck Route

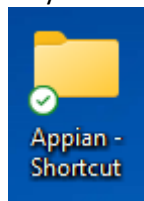
Are you sure you want to create the Truck Route file for ALL routes?

Yes No

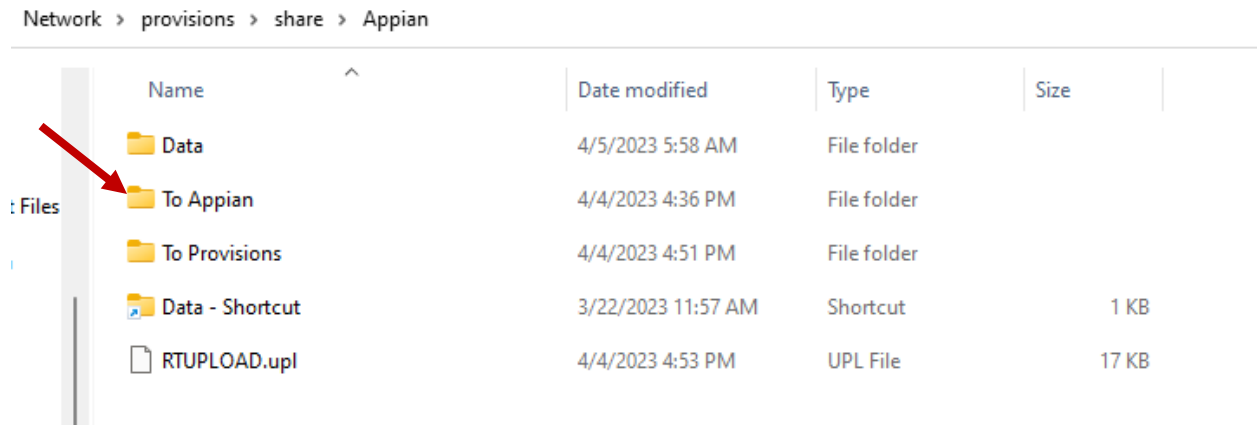
User: RCER (T_513;87772) 0001/DOLE

After clicking Yes you can minimize out of Provisions and start your Appian Routing.

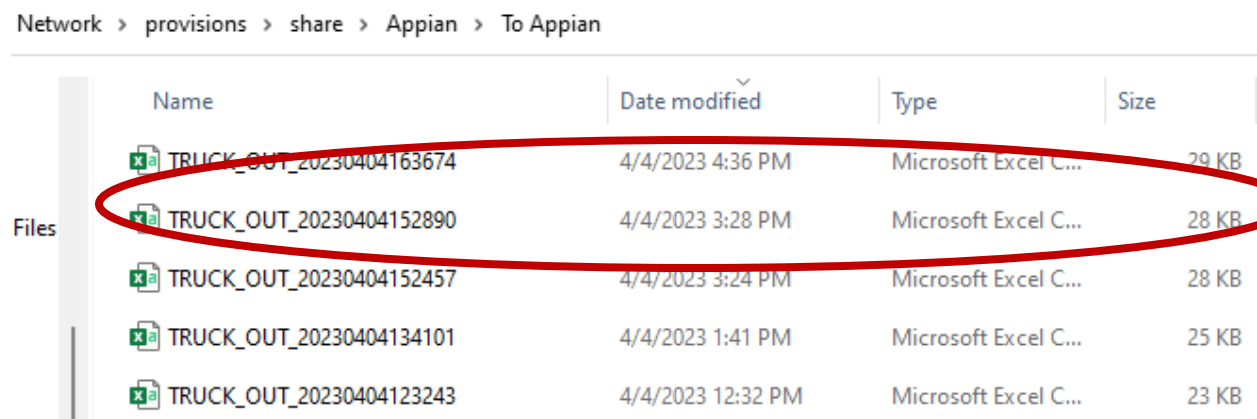
On your desktop you will double click on Appian Shortcut.



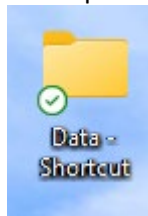
Once the Appian folder is open you will need to double click on the To Appian Folder.



When you are in the To Appian Folder you will see the latest Truck Out File. Make sure to check the date and time verifying it is the latest copy.



You will need to copy and paste the most recent Truck Out File into the Data Shortcut Folder on your Desktop.

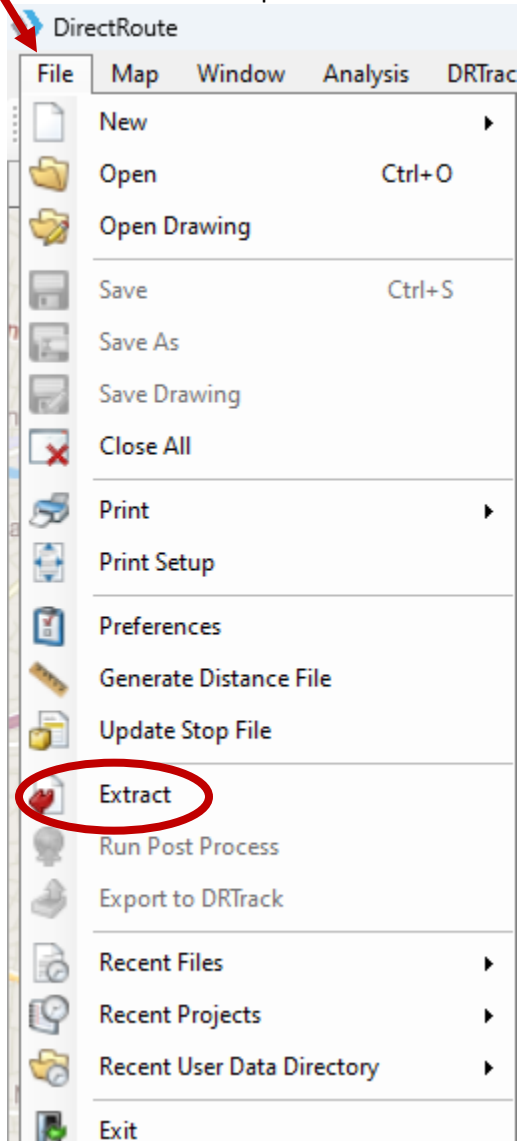


Once this is done you can use Appian to begin routing.

Click on Appian Direct Route located on your Taskbar.



Once in Direct Route please click on File then on Extract.



This box will come up when you click on extract.

Extract

File Selections

Master File 1Dole And Bailey MasterFile 141002

Extract File NOT SELECTED

Stop File NOT SELECTED

Options

☒ Create Stop File ☐ Update Master File

☒ Get Address, City, State and Zip from Master ☐ Overwrite Address, City, State and Zip

☐ Zero coordinates if addresses don't match ☐ Update blank fields

☒ Append new accounts to Stop file

☒ Append new accounts to Master

OK Cancel

Master File should always be 1Dole And Bailey Masterfile

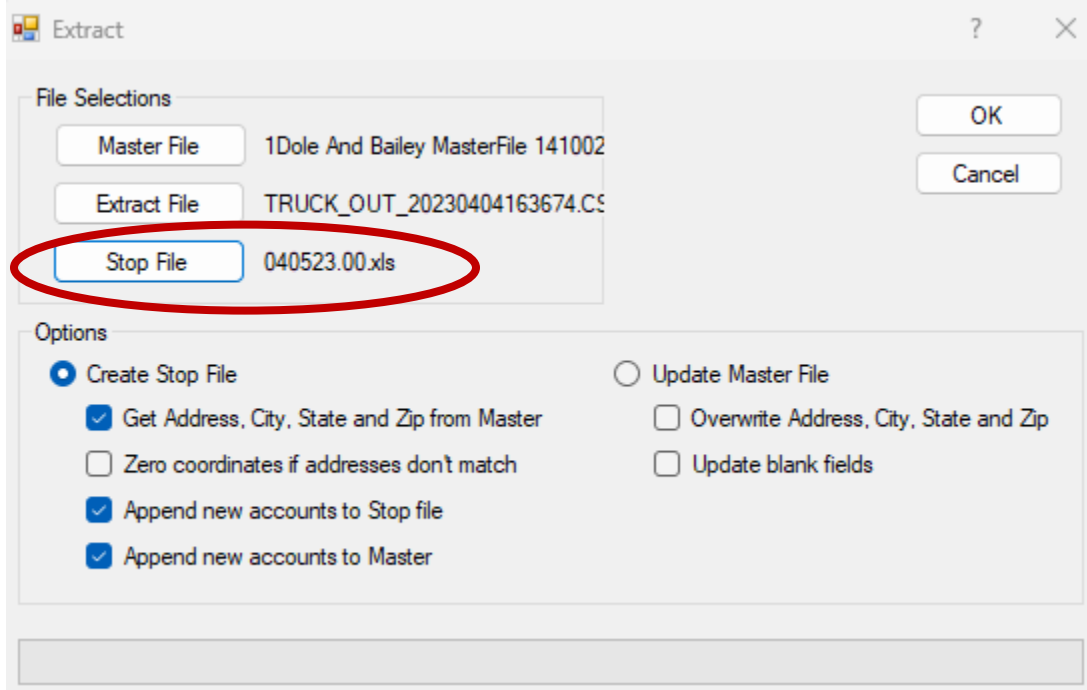
Click on Extract File. Here you will click on the most recent Truck Out File

Folder: This PC > SHARE (\\Provisions) (S:) > Appian > Data

Search Data

Name	Date modified	Type	Size
TRUCK_OUT_20230404163674	4/4/2023 4:36 PM	Microsoft Excel C...	29 KB
TRUCK_OUT_20230404152890	4/4/2023 3:28 PM	Microsoft Excel C...	28 KB
TRUCK_OUT_20230404152457	4/4/2023 3:24 PM	Microsoft Excel C...	28 KB
TRUCK_OUT_20230404134101	4/4/2023 1:41 PM	Microsoft Excel C...	25 KB
GenerateDistanceEntriesRequest	4/4/2023 12:35 PM	Microsoft Excel C...	41 KB
TRUCK_OUT_20230404123243	4/4/2023 12:32 PM	Microsoft Excel C...	23 KB
TRUCK_OUT_20230404122275	4/4/2023 12:22 PM	Microsoft Excel C...	23 KB
TRUCK_OUT_20230404120966	4/4/2023 12:09 PM	Microsoft Excel C...	22 KB
TRUCK_OUT_20230404115831	4/4/2023 11:58 AM	Microsoft Excel C...	22 KB
TRUCK_OUT_20230403163699	4/3/2023 4:36 PM	Microsoft Excel C...	26 KB

Once you click on the most recent Truck Out it will appear as shown. You will then need to click on the Stop File and Name It. MMDDYY. Copy (XX). Also shown below and then hit OK



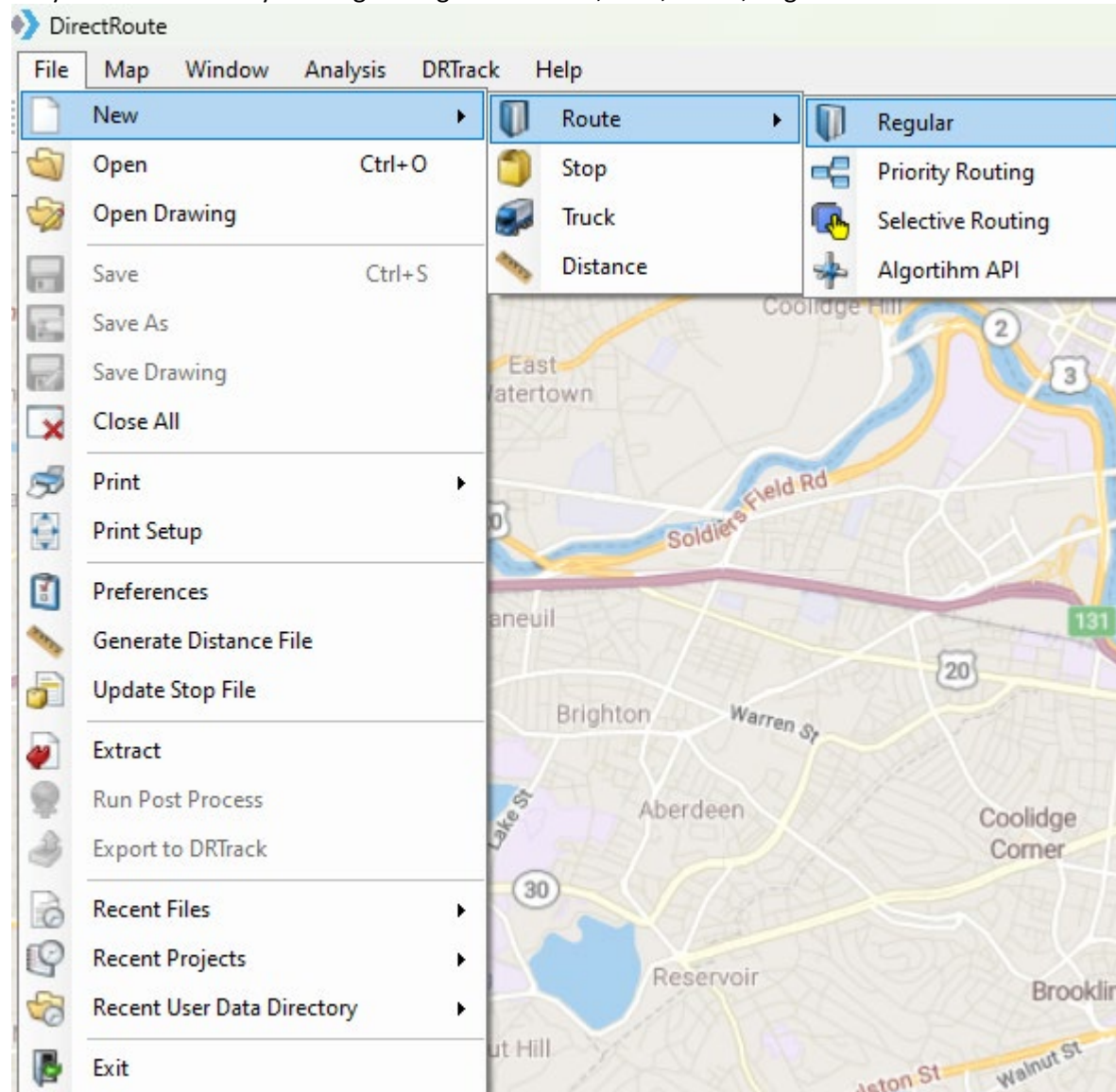
The screenshot shows a Windows-style dialog box titled "Extract". It has a standard title bar with a question mark and a close button. The dialog is divided into two main sections: "File Selections" and "Options".

File Selections: This section contains three rows of file selection controls. The first row has a "Master File" button followed by the text "1Dole And Bailey MasterFile 141002". The second row has an "Extract File" button followed by the text "TRUCK_OUT_20230404163674.CS". The third row has a "Stop File" button followed by the text "040523.00.xls". The "Stop File" button and its associated text are circled in red. To the right of these selections are two buttons: "OK" and "Cancel".

Options: This section contains two main groups of options. The first group, "Create Stop File", is selected with a radio button and includes three checked checkboxes: "Get Address, City, State and Zip from Master", "Append new accounts to Stop file", and "Append new accounts to Master". There is also an unchecked checkbox for "Zero coordinates if addresses don't match". The second group, "Update Master File", is unselected with a radio button and includes two unchecked checkboxes: "Overwrite Address, City, State and Zip" and "Update blank fields".

At the bottom of the dialog is a large, empty rectangular area, likely for a log or additional information.

On your 1st download you will go straight to File Tab, New, Route, Regular.



The following box will pop-up. Make sure under Stop it has your first Stop File 040523.00. Truck will be Monday. Distance will already be filled in. Make sure your Dispatch Date is for Monday's Date. Make sure **Enable Pre-Processing is Checked, ONLY FOR THE YOUR FIRST DOWNLOAD**, each time Initialize Route must be checked then you can click ok. This will begin the download process to Direct Route.

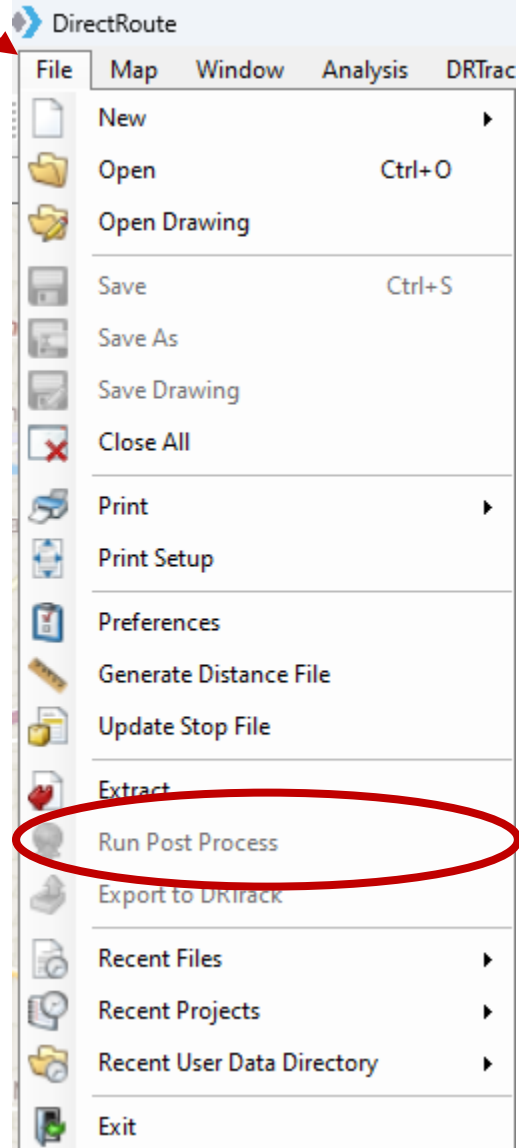
The screenshot shows the 'Build Route' dialog box with the following fields and options:

- File** tab is selected.
- Stop** field: 040523.03.xls (circled in red)
- Truck** field: Wednesday.truck (circled in red)
- Distance** field: 030822.00.DIST
- Dispatch Date**: 04/05/2023 (circled in red)
- Load Options**:
 - ☒ Enable Pre-Processing
 - ☐ No Initialization
 - ☒ Initialize Route (indicated by a red arrow)
 - ☐ Load Routes
 - ☐ Init and Load

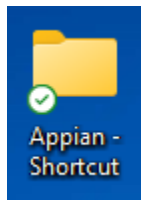
Buttons at the bottom: OK, Cancel, Help.

You will repeat this process each time you do a download from Provisions to Appian. Always make sure to change the copy number when you save. MMDDYY. COPY(XX).

When you are ready to ship, you will need to go into File and click on Run Post Process



After Run Post Process is done you will go into the Appian Shortcut Folder on your Desktop.






Once in this folder you will see RTUPLOAD.upl. Make sure it is today's date. Move this file into To Provisions.


Network > provisions > share > Appian


Name	Date modified	Type	Size
Data	4/5/2023 8:52 AM	File folder	
To Appian	4/4/2023 4:36 PM	File folder	
To Provisions	4/4/2023 4:51 PM	File folder	
Data - Shortcut	3/22/2023 11:57 AM	Shortcut	1 KB
RTUPLOAD.upl	4/4/2023 4:53 PM	UPL File	17 KB


You will now proceed back into Provisions Home then into Dispatching and Manifest Processing.


 **Provisions Home**


 **My Favorites**  Edit


 Purchasing


 Sales


 Invoicing


 Sales Analysis


 Dispatching and Manifest Processing


 Packer Tracker


 Batch Invoice Creation - Multi-Route

 General Table File

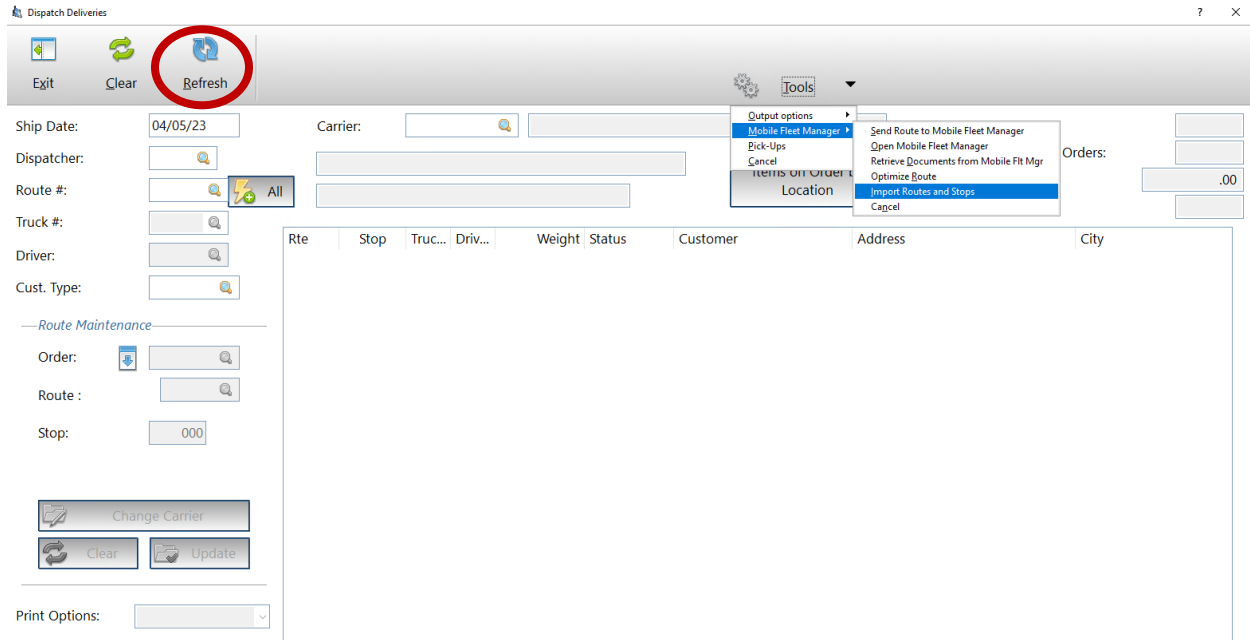
 Customer Master

 Purchase Order Printing

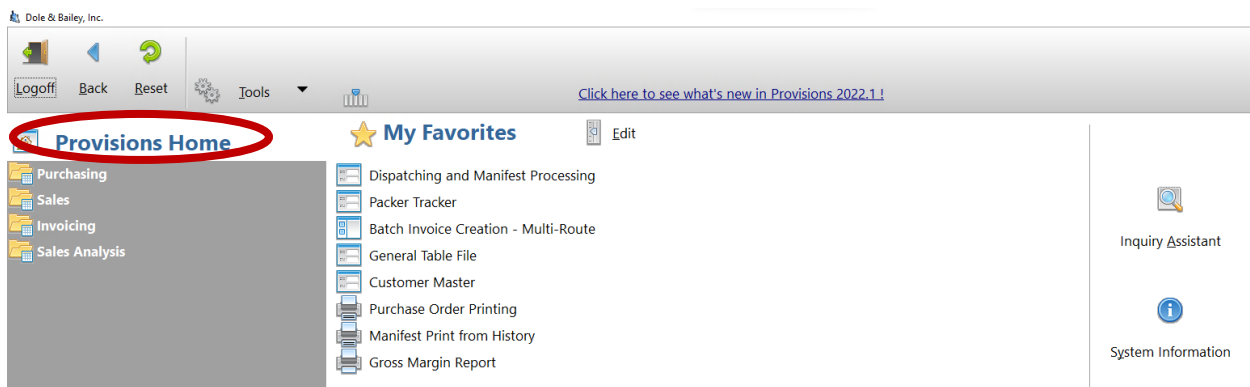
 Manifest Print from History

 Gross Margin Report

In Dispatching and Manifest Processing click on Tools, Mobile Fleet Manager, Import Routes and Stops. Once you do this step all Stops will be Exported from Appian and Imported into Provisions once you click on the Refresh Tab. Once again you can click on Stop then Rte to sort in order. At this point you can review everything to make sure all is imported correctly.



During this time, we are consistently following Packer Tracker to track the completion of Monday's orders.



Provisions Home

- Purchasing
- Sales
- Invoicing**
- Sales Analysis

Shipping & Invoicing

- Order Confirmation / Invoicing
- Invoice Printing
- One Step Invoicing
- Credit Memo Entry
- Invoice Edit Report
- Dispatcher/Salesperson Credit/Returns
- Invoice Scan / Verification
- Order Lines Not Tagged with Product
- Shipping / Packing Menu**
- Shipping Forms
- Shipping & Invoicing (cont)

Provisions Home

- Purchasing
- Sales
- Invoicing**
- Sales Analysis

Shipping / Packing Menu

- Production Packing Interface
- Dispatching and Manifest Processing
- Packer Tracker**
- Shipping Forms
- WMS Packing / Picking Exception Report
- Batch Invoice Creation
- Order Confirmation / Invoicing
- Invoice Printing
- WMS Pre-Pick File Maintenance
- Loading Zones by Day of the Week

Departments...

Route	A	B	C	E	ES	K	N	V	Total %	Invoiced %
14					100.0% 0/0/1				.0%	.0%
81								100.0% 0/0/2	100.0%	100.0%
92				.0% 0/0/1					.0%	.0%
93			.0% 0/0/1						.0%	.0%
94	100.0% 0/0/1	100.0% 0/0/2				100.0% 0/0/1	66.7% 0/0/3		71.4%	20.0%

Dole & Bailey, Inc.

LogoffBackReset

Tools

Click here to see what's new in Provisions 2022.1!

Provisions Home

PurchasingSalesInvoicingSales Analysis

Shipping & Invoicing

Order Confirmation / InvoicingInvoice PrintingOne Step InvoicingCredit Memo EntryInvoice Edit ReportDispatcher/Salesperson Credit/ReturnsInvoice Scan / VerificationOrder Lines Not Tagged with ProductShipping / Packing MenuShipping FormsShipping & Invoicing (cont)

Work Pick Printing

ExitRun

Send Output To:DF - PDF Output

PDF settings

Printing Options

Date and Customer Selections

Item Selections

Formats

Sorting Options

Page Breaks

☐ 1. Packing Sheet by Customer or Item

☐ 2. Item Summary Sheet by Location

☐ 3. Labels by Customer for Tote

☐ 4. Labels by Item

☐ 5. Driver Check Sheet

☒ 6. Driver Collection Sheet

☐ 7. Raw Material Selections

☐ 8. Staging Labels

☒ Route/Stop Number

PDF_BY_RCER_20230405112611272.PDF - Adobe Acrobat Reader (64-bit)

File Edit View Sign Window Help

Home ToolsPDF_BY_RCER_202... x

1 / 4

174%

Daily Delivery Report

ROUTE: 81 - UPS

Date: 04/05/23


Vehicle Id:


Driver:


Customer	Terms	Posi	Time	Signature/Time	Check	Cash	Totes
PROVENDER BAR & KITCHEN	CREDIT CAR	1					
PROVENDER BAR & KITCHEN CODE 01112#	COD	2					


Once all orders are completed and the Drivers have checked and sorted all product, Transportation will print Manifests and Invoices.


Manifests


 Dole & Bailey, Inc.

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 Tools ▼





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 **Provisions Home**


 Purchasing


 Sales


 **Invoicing**


 Sales Analysis


 **Shipping & Invoicing**


 Order Confirmation / Invoicing


 Invoice Printing


 One Step Invoicing


 Credit Memo Entry


 Invoice Edit Report


 Dispatcher/Salesperson Credit/Returns


 Invoice Scan / Verification


 Order Lines Not Tagged with Product


 Shipping / Packing Menu


 Shipping Forms


 **Shipping & Invoicing (cont)**


 Dole & Bailey, Inc.

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[Click here to see what's new in Provisions 2022.1 !](#)


 **Provisions Home**


 Purchasing


 Sales


 **Invoicing**


 Sales Analysis


 **Shipping & Invoicing (cont)**


 Freight Reconciliation Report


 Print Invoice Register from History

 **Manifest Print from History**

 Below Margin Tolerance Invoice Listing

 Outbound Freight Analysis Report

 Batch Invoice Creation

 Invoice list by Truck Route

Click on the Magnify Glass to pull up the Routes.

Manifest Printing

Exit Run

Send Output To: DF - PDF Output

PDF settings

Truck Route Selection

Beginning Route:

Ending Route:

All Routes ☐

Scheduled Ship Date: 04/06/23

From History ☐

From:



Sort by:

Fld#1(4) + Table Code(10) (Default)



Table Code	Description	
00	Default	
01	Great Barrington	
02	North Conway	
03	Nantucket	
04	MV	
05	N. Maine	
06	S. VT	
07	Lower Cape	
08	Burlington	
09	Hartford	
10	S. Maine	
11	S. NH	
12	Portsmouth	
13	N. NH	
14	495 S	
15	Westerly/CT. SHORE	
16	Newport	
17	Upper Cape	
18	Boston 1	
19	Boston 2	
20	Cambridge	
21	S 89	
22	Worcester	
23	Woodstock	
24	495 N	
25	NH Lakes	
26	Waits/Stowe	
27	Bangor ME	
--	...	

Make sure the Scheduled Ship Date is Correct

Manifest Printing

Send Output To: DF - PDF Output

Exit Run

Truck Route Selection

Beginning Route: 18

Ending Route: 18

All Routes

Scheduled Ship Date: 04/06/23

From History

Invoice printing

Dole & Bailey, Inc.

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[Click here to see what's new in Provisions 2022.1!](#)

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My Favorites

Dispatching and Manifest Processing

Packer Tracker

Batch Invoice Creation - Multi-Route

General Table File

Customer Master

Purchase Order Printing

Manifest Print from History

Gross Margin Report

Inquiry Assistant

System Information



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Purchasing



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Invoicing



Sales Analysis



Shipping & Invoicing



Order Confirmation / Invoicing



Invoice Printing



One Step Invoicing



Credit Memo Entry



Invoice Edit Report



Dispatcher/Salesperson Credit/Returns



Invoice Scan / Verification



Order Lines Not Tagged with Product



Shipping / Packing Menu



Shipping Forms



Shipping & Invoicing (cont)



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[Click here to see what's new in Provisions 2022.1 !](#)



Provisions Home



Purchasing



Sales



Invoicing



Sales Analysis



Shipping & Invoicing (cont)



Freight Reconciliation Report



Print Invoice Register from History



Manifest Print from History



Below Margin Tolerance Invoice Listing



Outbound Freight Analysis Report



Batch Invoice Creation



Invoice list by Truck Route

On this screen pick the route you want to print. Make sure date is correct and that the Shipping Invoice Printer is selected. Click on Run.

Batch Invoicing Multiple Routes

Exit Run

Send Output To: I1 - Shipping Office Laser - Invoice Tray

Ship Through: 04/05/23

Print Invoices ☒

Route Selection

Code	Select	Description
00	<input type="checkbox"/>	Default
01	<input type="checkbox"/>	Great Barrington
02	<input type="checkbox"/>	North Conway
03	<input type="checkbox"/>	Nantucket
04	<input type="checkbox"/>	MV
05	<input type="checkbox"/>	N. Maine
06	<input type="checkbox"/>	S. VT
07	<input type="checkbox"/>	Lower Cape
08	<input type="checkbox"/>	Burlington
09	<input type="checkbox"/>	Hartford
10	<input type="checkbox"/>	S. Maine
11	<input type="checkbox"/>	S. NH
12	<input type="checkbox"/>	Portsmouth
13	<input type="checkbox"/>	N. NH
14	<input type="checkbox"/>	495 S
15	<input type="checkbox"/>	Westerly/CT. SHORE
16	<input type="checkbox"/>	Newport
17	<input type="checkbox"/>	Upper Cape
18	<input checked="" type="checkbox"/>	Boston 1
19	<input type="checkbox"/>	Boston 2
20	<input type="checkbox"/>	Cambridge

Select All

Deselect All

All set at this point. Place message on Teams that Trucks Have Rolled.