

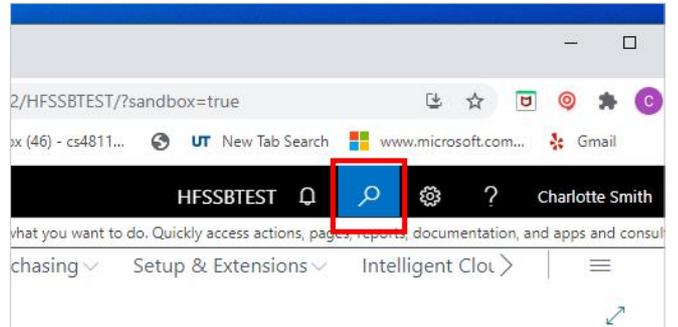
HFS DSD Route Order Staging

Step 1:

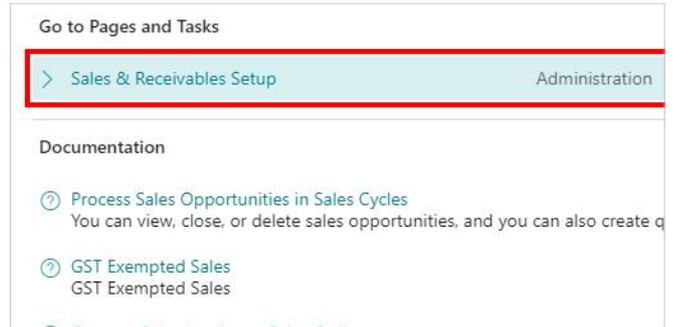
1. Sales & Receivable Setup	1
2. Customer	4
3. Route	12
4. Sales Route Order Control Groups	18
5. Create Customer Route Sales Order	20

1. Sales & Receivable Setup

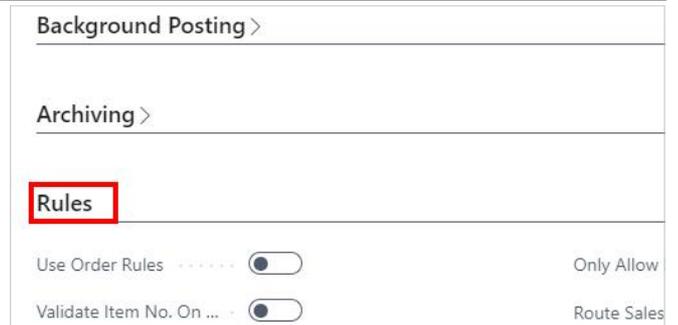
Click on the search button



Click on **Sales & Receivables Setup Administration**



Click on **Rules**



Click on the link Use Order Rules

Only applies to Base BC Sales Orders



HFS DSD Route Order Staging

Click on the link **Item Setup Priority**

Validate Item No. On ...	<input type="checkbox"/>	Route Sale
Default Min. Qty. On ...	<input type="checkbox"/>	Route Sale
Auto Round Order M...	<input type="checkbox"/>	Route Sale
Item Setup Priority	Item Setup Takes Priority	Order Rule
Item Setup Priority <i>Learn more</i>	<input type="checkbox"/>	Allow Neg
	Item Setup Takes Priority	Allow Posi
Sales Route Control ...	ZONE1	Allow Ext

Click on the link **Cust. Route Order Rules Item Setup Priority**

Auto Round Order M...	<input type="checkbox"/>	Route Sales
Item Setup Priority	Item Setup Takes Priority	Order Rule C
Use Cust. Route Orde...	<input type="checkbox"/>	Allow Negat
Cust. Route Order Rul...	Item Setup Takes Priority	Allow Positiv
Sales Route Control ...	ZONE1	Allow Extern
Order Template Lead ...	3	Ext. Doc. No
Order Template Pref. ...	4	Settlement J

Click on the field **Cust. Route Order Rules Item Setup Priority**

Auto Round Order M...	<input type="checkbox"/>	Route Sales It
Item Setup Priority	Item Setup Takes Priority	Order Rule Gr
Use Cust. Route Orde...	<input type="checkbox"/>	Allow Negative
Cust. Route Order Rul...	Item Setup Takes Priority	Allow Positive
Sales Route Control ...	Item Setup Takes Priority	Allow External
Order Template Lead ...	Item or Item Category Setup can pass	Ext. Doc. No. f
Order Template Pref. ...	4	Settlement Jo

Click on the link **Sales Route Control Group Code**

Auto Round Order M...	<input type="checkbox"/>	Route Sa
Item Setup Priority	Item Setup Takes Priority	Order Ru
Use Cust. Route Orde...	<input type="checkbox"/>	Allow Ne
Cust. Route Order Rul...	Item Setup Takes Priority	Allow Po
Sales Route Control...	ZONE1	Allow Ext
Order Template Lead ...	3	Ext. Doc.
Order Template Pref. ...	4	Settleme

Click on the link **Order Template Lead Days**

The last day that an item may have changes made to the order based on the Work Date.

Item Setup Priority	Item Setup Takes Priority	Order R
Use Cust. Route Orde...	<input type="checkbox"/>	Allow N
Cust. Route Order Rul...	Item Setup Takes Priority	Allow P
Sales Route Control ...	ZONE1	Allow E
Order Template Lead...	3	Ext. Doc
Order Template Pref. ...	4	Settleme
Order Template No. o...	14	Settleme

HFS DSD Route Order Staging

Click on the link Order Template Pref. Days

Default order date when Cust. Route Sales Order Sheet form is opened based on system date. It represents the Preferred dates for route orders

Use Cust. Route Orde...	<input checked="" type="checkbox"/>	Allow Neg
Cust. Route Order Rul...	Item Setup Takes Priority	Allow Posit
Sales Route Control ...	ZONE1	Allow Ext
Order Template Lead ...	3	Ext. Doc. N
Order Template Pref....	4	Settlement
Order Template No. o...	14	Settlement

Click on the link Order Template No. of Days

How many days the order matrix page will show and how many weeks that the Order Staging Perms will update (does not limit input if date is greater than many dates showing).

14 = 3 weeks (current week + 2)

Use Cust. Route Orde...	<input checked="" type="checkbox"/>	Allow
Cust. Route Order Rul...	Item Setup Takes Priority	Allow
Sales Route Control ...	ZONE1	Allow
Order Template Lead ...	3	Ext. Do
Order Template Pref. ...	4	Settler
Order Template No. o...	14	Settler

Click on the link **Only Allow Delete Of Sales Route Detail Older Than Calc Formula**

<input checked="" type="checkbox"/>	Only Allow Delete Of...	-7D
<input checked="" type="checkbox"/>	Route Sales Custome...	C
<input checked="" type="checkbox"/>	Route Sales Ship-to P...	D
<input checked="" type="checkbox"/>	Route Sales Item Prefix	F

Click on the field **Route Sales Customer Prefix**

Only Allow Delete Of ...	-7D
Route Sales Custome...	C
Route Sales Ship-to P...	D
Route Sales Item Prefix	F

Click on the link **Route Sales Ship-to Prefix**

<input checked="" type="checkbox"/>	Only Allow Delete Of ...	-7D
<input checked="" type="checkbox"/>	Route Sales Custome...	C
<input checked="" type="checkbox"/>	Route Sales Ship-to P...	D
<input checked="" type="checkbox"/>	Route Sales Item Prefix	F
Item Setup Takes Priority	Order Rule Grp Cust. ...	Use Custome

HFS DSD Route Order Staging

Click on the link **Route Sales Item Prefix**

A screenshot of a configuration page with several fields. The field 'Route Sales Item Prefix' is highlighted with a red box. Other visible fields include 'Only Allow Delete Of ...' with value '-7D', 'Route Sales Custome...' with value 'C', 'Route Sales Ship-to P...' with value 'D', 'Order Rule Grp Cust. ...' with value 'Use Custome', and 'Allow Negative Invoic...' with a toggle switch.

Click on the field **Order Rule Grp Cust. Priority**

A screenshot of the configuration page showing a dropdown menu for 'Order Rule Grp Cust. ...'. The dropdown is open, showing options 'Use Customer' (highlighted with a red box) and 'Use Order Rule Group'. Other fields like 'Route Sales Custome...' (C), 'Route Sales Ship-to P...' (D), and 'Route Sales Item Prefix' (F) are visible above.

Click on the link **Allow Negative Invoice Posting**

A screenshot of the configuration page with the 'Allow Negative Invoice...' toggle switch highlighted by a red box. The toggle is currently turned on. Other fields include 'Route Sales Ship-to P...' (D), 'Route Sales Item Prefix' (F), 'Order Rule Grp Cust. ...' (Use Custome), 'Allow Positive Sales C...' (toggle), and 'Allow External Doc. N...' (toggle).

Click on the field **Ext. Doc. No. Reuse Source**

A screenshot of the configuration page with the 'Ext. Doc. No. Reuse S...' dropdown menu highlighted by a red box. The dropdown is open, showing 'Bill-To Customer' as the selected option. Other fields include 'Allow Negative Invoic...' (toggle), 'Allow Positive Sales C...' (toggle), 'Allow External Doc. N...' (toggle), 'Settlement Journal Te...' (dropdown), and 'Settlement Copy Bal. ...' (dropdown).

2. Customer

Click on the search button

A screenshot of a web browser window. The search button (magnifying glass icon) in the top navigation bar is highlighted with a red box. The browser address bar shows '2/HFSSBTEST/?sandbox=true'. The page title is 'HFSSBTEST' and the user name 'Charlotte Smith' is visible in the top right.

HFS DSD Route Order Staging

Click on **Customers Lists**

View all entries for selected customers for a selected period

- Sales Quote
Offer items or services to a customer.

Go to Pages and Tasks

- Customers**
- Customer Templates
- HFS Customer Staging

Click on the link in cell **No.** with the value **C413581**

Customers

Search + New Manage Process Report New Document

No. ↑	Name	Responsibility Center	Loc
C413581	Wendys Burger #1		MA

Click on the field **Order Rule Usage**

Enforces the Order Rule Group as the absolute authorized items list for a customer

All items **MUST** have a status = Allowed

Profit (\$) 0.00

Profit % 0.0

Last Date Modified 2/11/2021

Order Rule Usage **Strictly Enforce**

Order Rule Group

Max Daily Order Qty. Gr... ..

Click on **Order Rule Group**

These group the authorized products for this customer if Allowed or Not Allowed

Profit %

Last Date Modified 2/11/2021

Order Rule Usage Strictly Enforce

Order Rule Group

Max Daily Order Qty. Gr... ..

Disable Search by Name ...

Minimum Sales Order A... ..

Click on **Shipping**

C413581 · Wendys Burger #1

New Document Approve Request Approval Prices & Discounts

Shipping

Default Ship-To Code

Ship-to Code

Location Code MAIN

HFS DSD Route Order Staging

Click on **Max Daily Order Qty. Group Code**

0.00	Last Date Modified	2/11/2021
0.00	Order Rule Usage	Strictly Enforce
▼	Order Rule Group	
	Max Daily Order Qty. Gr...	
▼	Disable Search by Name	<input checked="" type="checkbox"/>
▼	Minimum Sales Order A...	

Click on the link **Minimum Sales Order Amount**

▼	Order Rule Group	
	Max Daily Order Qty. Gr...	
▼	Disable Search by Name	<input checked="" type="checkbox"/>
▼	Minimum Sales Order A...	
▼		

Click on the link **Direct Store Delivery**

<input type="checkbox"/>	Auto-Create Stales Credi...	<input checked="" type="checkbox"/>
▼	Alternate Location Code	
▼	Use Alt. Route Order Re...	<input checked="" type="checkbox"/>
	Direct Store Delivery	<input checked="" type="checkbox"/>
▼	HFS Customer Order Type	Temp-Perm
▼	Guaranteed Order	<input checked="" type="checkbox"/>
▼	Dark Stop	<input checked="" type="checkbox"/>

Click on the link **HFS Customer Order Type**

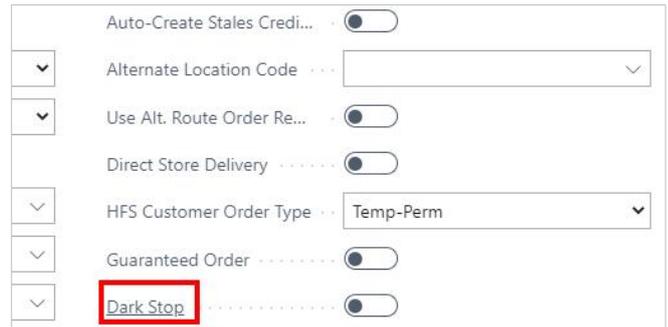
▼	Alternate Location Code	
▼	Use Alt. Route Order Re...	<input checked="" type="checkbox"/>
	Direct Store Delivery	<input checked="" type="checkbox"/>
▼	HFS Customer Order Type	Temp-Perm
▼	Guaranteed Order	<input checked="" type="checkbox"/>
▼	Dark Stop	<input checked="" type="checkbox"/>

Click on the link **Guaranteed Order**

	Auto-Create Stales Credi...	<input checked="" type="checkbox"/>
▼	Alternate Location Code	
▼	Use Alt. Route Order Re...	<input checked="" type="checkbox"/>
	Direct Store Delivery	<input checked="" type="checkbox"/>
▼	HFS Customer Order Type	Temp-Perm
▼	Guaranteed Order	<input checked="" type="checkbox"/>
▼	Dark Stop	<input checked="" type="checkbox"/>

HFS DSD Route Order Staging

Click on the link **Dark Stop**



Auto-Create Stales Credi...

Alternate Location Code

Use Alt. Route Order Re...

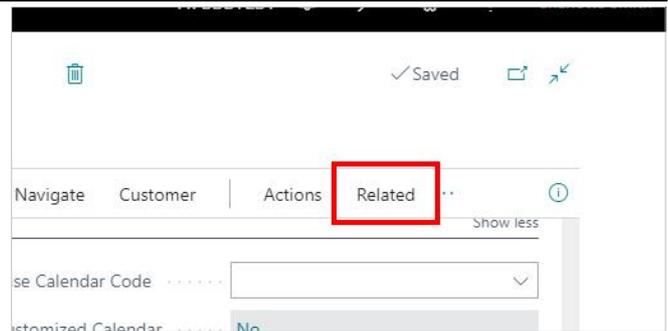
Direct Store Delivery

HFS Customer Order Type

Guaranteed Order

Dark Stop

Click on the navigation menu item popup **Related**



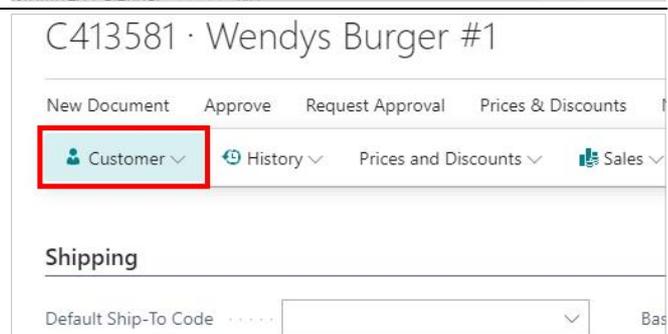
✓ Saved

Navigate Customer Actions **Related** Show less

se Calendar Code

stomized Calendar: Mo

Click on the navigation menu item popup **Customer**



C413581 · Wendys Burger #1

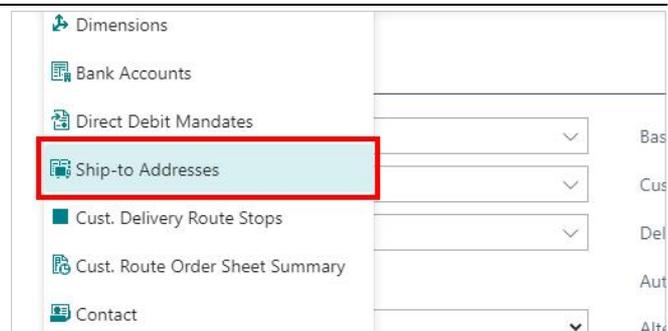
New Document Approve Request Approval Prices & Discounts

Customer History Prices and Discounts Sales

Shipping

Default Ship-To Code

Click on the link **View or edit alternate shipping addresses** where the customer wants items delivered if different from the regular address.



Dimensions

Bank Accounts

Direct Debit Mandates

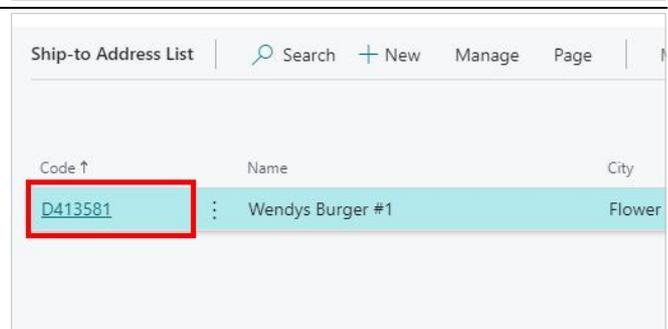
Ship-to Addresses

Cust. Delivery Route Stops

Cust. Route Order Sheet Summary

Contact

Click on the link in cell **Code** with the value **D413581**



Code ↑	Name	City
D413581	Wendys Burger #1	Flower

HFS DSD Route Order Staging

Click on the link **Location Code**

Phone No.	<input type="text"/>	Store I
Contact	<input type="text"/>	Reuse
Fax No.	<input type="text"/>	Ship-to
Email	<input type="text"/>	Salesp
Home Page	<input type="text"/>	Reuse
Location Code	MAIN	▼

Click on the link **Order Rule Group**

<input type="text"/>	Shipping Agent Servi...	▼
<input type="text"/>	Last Date Modified	2/11/2021
<input type="text"/>	Tax Liable	<input checked="" type="checkbox"/>
...	Tax Area Code	▼
<input type="text"/>	Order Rule Group	▼
...	Auto Update From C...	<input type="checkbox"/>
▼	Max Daily Order Qty. ...	DSD

Click on the link **Auto Update From Customer**

<input type="text"/>	Last Date Modified	2/11/2021
<input type="text"/>	Tax Liable	<input checked="" type="checkbox"/>
...	Tax Area Code	▼
<input type="text"/>	Order Rule Group	▼
...	Auto Update From C...	<input type="checkbox"/>
▼	Max Daily Order Qty. ...	DSD
<input type="text"/>	RAS Import Exclude f...	<input type="checkbox"/>

Click on the link **Max Daily Order Qty. Group Code**

<input type="text"/>	Tax Liable	<input checked="" type="checkbox"/>
...	Tax Area Code	▼
<input type="text"/>	Order Rule Group	▼
...	Auto Update From C...	<input type="checkbox"/>
▼	Max Daily Order Qty. ...	DSD
<input type="text"/>	RAS Import Exclude f...	<input type="checkbox"/>
<input type="text"/>	Store Identification	<input type="text"/>

Click on the link **RAS Import Exclude from AR**

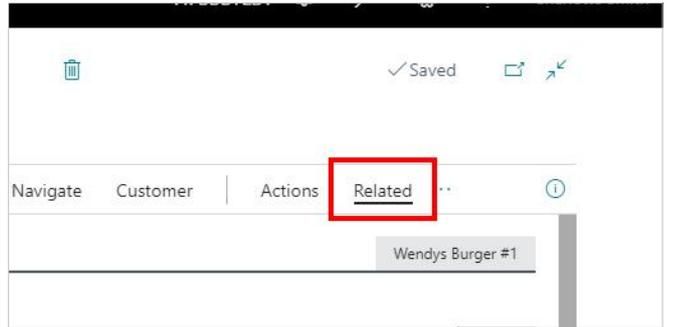
<input type="text"/>	Order Rule Group	▼
...	Auto Update From C...	<input type="checkbox"/>
▼	Max Daily Order Qty. ...	DSD
<input type="text"/>	RAS Import Exclude f...	<input type="checkbox"/>
<input type="text"/>	Store Identification	<input type="text"/>
<input type="text"/>	Reuse External Doc. ...	<input type="checkbox"/>
<input type="text"/>	Ship-to Cust Price Gr...	▼

HFS DSD Route Order Staging

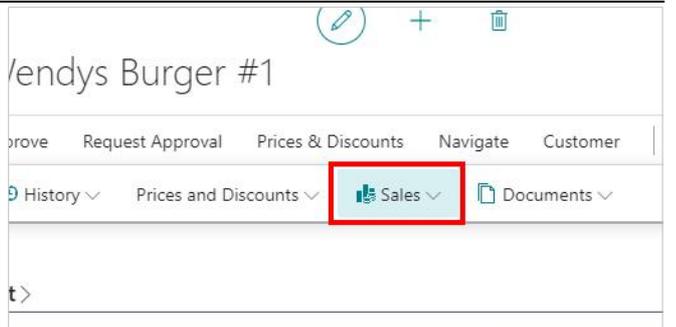
Click on the back button



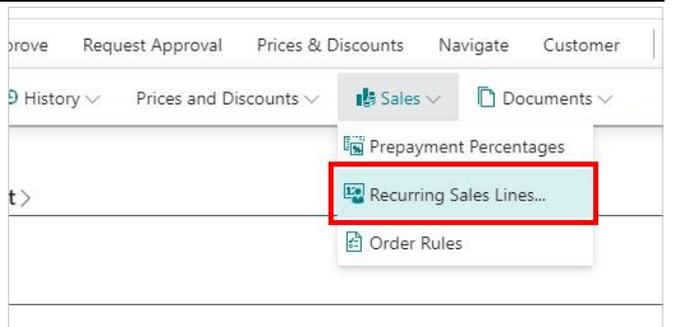
Click on the navigation menu item popup **Related**



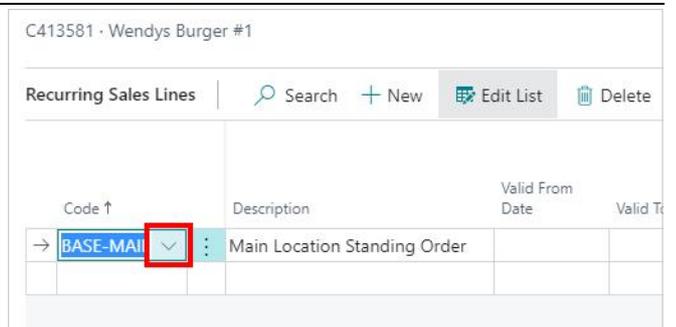
Click on the navigation menu item popup **Sales**



Click on the navigation menu item **Recurring Sales Lines...**



Click on the lookup button in the cell **Code**



HFS DSD Route Order Staging

Click on the field **Code**

Page

General

Code **BASE-MAIN**

Description Standing Orders for Location

Click on the cell **Type** with the value **Item**

Lines | Manage | More options

Type	No.	Description	Customer No.	Ship
→ Item	F74158	Wendy 3in 12 Pk	C413581	D41
Item	F74242	Wendy 4in 12 Pk	C413581	D41
Item	F74737	Wendys 4.25in 12 Pk	C413581	D41

Click on the cell **No.** with the value **F74158**

Lines | Manage | More options

Type	No.	Description	Customer No.	Ship
→ Item	F74158	Wendy 3in 12 Pk	C413581	D413
Item	F74242	Wendy 4in 12 Pk	C413581	D413
Item	F74737	Wendys 4.25in 12 Pk	C413581	D413

Click on the cell **Description** with the value **Wendy 3in 12 Pk**

Lines | Manage | More options

Type	No.	Description	Customer No.
→ Item	F74158	Wendy 3in 12 Pk	C413581
Item	F74242	Wendy 4in 12 Pk	C413581
Item	F74737	Wendys 4.25in 12 Pk	C413581

Click on the cell **Customer No.** with the value **C413581**

Page | More options

No.	Description	Customer No.	Ship-to Code	Sunday Quantity
F74158	Wendy 3in 12 Pk	C413581	D413581	
F74242	Wendy 4in 12 Pk	C413581	D413581	
F74737	Wendys 4.25in 12 Pk	C413581	D413581	

HFS DSD Route Order Staging

Click on the cell **Ship-to Code** with the value **D413581**

Description	Customer No.	Ship-to Code	Sunday Quantity	Monday Quantity
Wendy 3in 12 Pk	C413581	D413581		5
Wendy 4in 12 Pk	C413581	D413581		10
Wendys 4.25in 12 Pk	C413581	D413581		15

Click on the cell **Monday Quantity** with the value **5**

Customer No.	Ship-to Code	Sunday Quantity	Monday Quantity	Tuesday Quantity	Wednesday Quantity
13581	D413581		5	10	
13581	D413581		10	15	
13581	D413581		15	20	

Click on the cell **Tuesday Quantity** with the value **10**

Ship-to Code	Sunday Quantity	Monday Quantity	Tuesday Quantity	Wednesday Quantity
D413581		5	10	
D413581		10	15	
D413581		15	20	

Click on the cell **Thursday Quantity** with the value **15**

Monday Quantity	Tuesday Quantity	Wednesday Quantity	Thursday Quantity	Friday Quantity
5	10		15	20
10	15		20	25
15	20		25	30

Click on the cell **Friday Quantity** with the value **20**

Tuesday Quantity	Wednesday Quantity	Thursday Quantity	Friday Quantity	Saturday Quantity
10		15	20	25
15		20	25	30
20		25	30	35

HFS DSD Route Order Staging

Click on the cell **Saturday Quantity** with the value **25**

Monday Quantity	Tuesday Quantity	Wednesday Quantity	Thursday Quantity	Friday Quantity	Saturday Quantity
5	10		15	20	25
10	15		20	25	30
15	20		25	30	35

Click on the back button



Ship-to Address

C413581 Wendys Burger #1
Burger #1

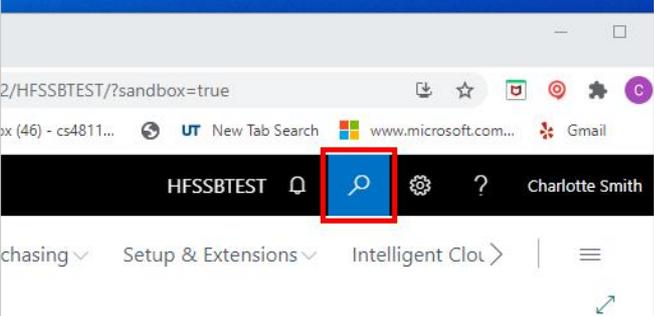
Create Order Rules | Related | Fewer options

Address 1 Tax L

Address 2 Tax L

3. Route

Click on the search button

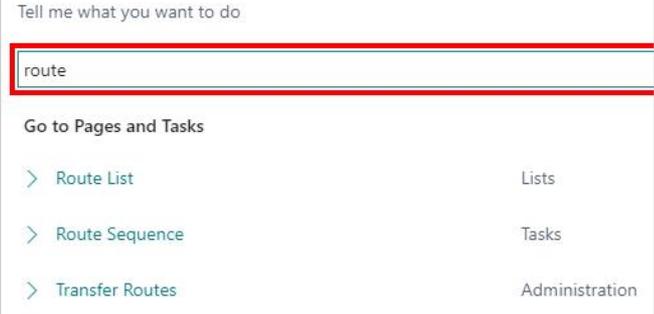


2/HFSSBTEST/?sandbox=true

HFSSBTEST

Charlotte Smith

Click on the field **Type to start search:**



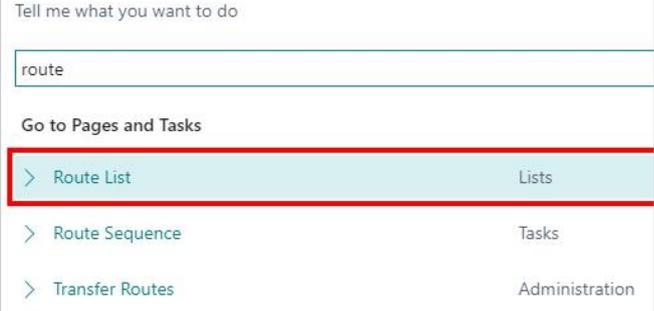
Tell me what you want to do

route

Go to Pages and Tasks

- > Route List Lists
- > Route Sequence Tasks
- > Transfer Routes Administration

Click on **Route List Lists** □



Tell me what you want to do

route

Go to Pages and Tasks

- > Route List Lists
- > Route Sequence Tasks
- > Transfer Routes Administration

HFS DSD Route Order Staging

Click on the link in cell **Code** with the value **R40006**

Route List

Search + New Manage Page

Code ↑	Description	Home Location Code	Route Group Bin Code
R40006	Bob Jones	MAIN-DC1	

Click on **General**

Route Card

R40006 · Bob Jones

Authorized Prod Groups Apply New Weekday Stop Sequence

[General >](#)

[Setup >](#)

Click on the link **Home Location Code**

General

Code	R40006	Settleme
Description	Bob Jones	Blocked
Home Location Code	MAIN-DC1	Blocked F
Route Group Bin Code		Blocked T
Facility Location Code	MAIN	Block Pro

Click on the link **Facility Location Code**

Code	R40006	Settleme
Description	Bob Jones	Blocked
Home Location Code	MAIN-DC1	Blocked
Route Group Bin Code		Blocked
Facility Location Code	MAIN	Block Pr
Shipping Agent Code		Supervi.
Shipping Agent Servi...		

Click on **Cust. Delivery Route Stop Detail**

Setup >

Week Number Filter

Weekday Filter

[Cust. Delivery Route Stop Detail](#) | Manage More options

HFS DSD Route Order Staging

Click on the column header **Week Number**

Week Number Filter

Weekday Filter

Cust. Delivery Route Stop Detail [Learn more](#) [More options](#)

Customer No.	Ship-to Code	Week Number	Weekday	Starting Date
→ C413581	D413581	0	Sunday	
C413581	D413581	0	Monday	
C413581	D413581	0	Tuesday	

Click on the column header **Weekday**

Filter

Filter

Delivery Route Stop Detail | Manage | More options

Customer No.	Ship-to Code	Week Number	Weekday	Starting Date	Ending Date
→ C413581	D413581	0	Saturday		
C413581	D413581	0	Friday		
C413581	D413581	0	Thursday		

Click on the column header **Starting Date**

Filter

Filter

Detail | Manage | More options

Ship-to Code	Week Number	Weekday	Starting Date	Ending Date	New Stop Sequence
C413581	0	Sunday			0
C413581	0	Monday			0
C413581	0	Tuesday			0

Click on the column header **New Stop Sequence**

Filter

Filter

More options [More options](#)

Weekday	Starting Date	Ending Date	New Stop Sequence	Customer Name
Monday			0	Wendys Burge
Monday			0	Wendys Burge
Tuesday			0	Wendys Burge

Click on the column header **Home Location Code**

Dynamics 365 Business Central

list

Search + New Manage Page

Description	Home Location Code	Route Group Bin Code	Facility Location (mf)
Bob Jones	MAIN-DC1		MAIN

HFS DSD Route Order Staging

Click on the navigation menu item **Authorized Prod Groups**

Route Card

R40006 · Bob Jones

Authorized Prod Groups Apply New Weekday Stop Sequence

General >

Setup >

Click on the cell **Route Stop Authorized Prod Group** with the value **ALLITEMS**

Authorized Prod Groups

Search + New Edit List Delete Route Stop Authoriz

Route Stop Authorized Prod Group ↑	Description
→ ALLITEMS	All Items

Click on the navigation menu item **Route Stop Authorize Product Group Card**

Business Central HFSBTEST

✓ Saved

Edit List Delete **Route Stop Authorize Product Group Card** Page ...

Route Stop Authorized Prod Group ↑	Description
→	All Items

Click on **Route Stop Authorized Prod Group Rules**

General

Code ALLITEMS

Route Stop Authorized Prod Group Rules | Mana

Item Type ↑	Item Ref. No. ↑	Unit of Measure Code ↑
→ Item No.	F74158	PCS

Click on the cell **Item Type** with the value **Item No. Item Category**

Route Stop Authorized Prod Group Rules | Manage

Item Type ↑	Item Ref. No. ↑	Unit of Measure Code ↑	Sta
→ Item No.	F74158	PCS	
Item No.	F74242	PCS	
Item No.	F74737	PCS	

HFS DSD Route Order Staging

Click on the column header **Item Ref. No.**

Code ALLITEMS Description

Route Stop Authorized Prod Group Rules		Manage
Item Type ↑	Item Ref. No. ↑	Unit of Measure Code ↑
→ Item No. ↓	F74158	PCS
Item No.	F74242	PCS
Item No.	F74737	PCS

Click on the column header **Unit of Measure Code**

Code ALLITEMS Description

Route Stop Authorized Prod Group Rules		Manage
Item Type ↑	Item Ref. No. ↑	Unit of Measure Code ↑
No. ↓	F74158	PCS
No.	F74242	PCS
No.	F74737	PCS

Click on the column header **Start Date**

Code EMS Description All Items

Group Rules		Manage
Item Ref. No. ↑	Unit of Measure Code ↑	Start Date ↑
74158	PCS	
74242	PCS	
74737	PCS	

Click on the column header **End Date**

Description All Items

Unit of Measure Code ↑	Start Date ↑	End Date	Status
PCS			Allowed
PCS			Allowed
PCS			Allowed

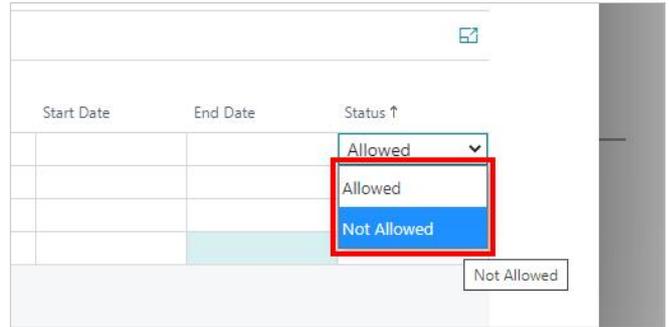
Click on the column header **Status**

Description All Items

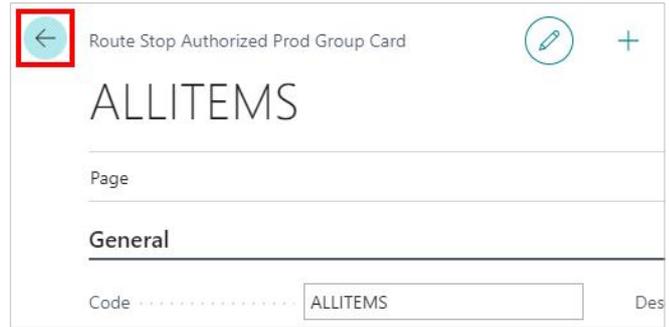
Start Date ↑	End Date	Status
		Allowed
		Allowed
		Allowed

HFS DSD Route Order Staging

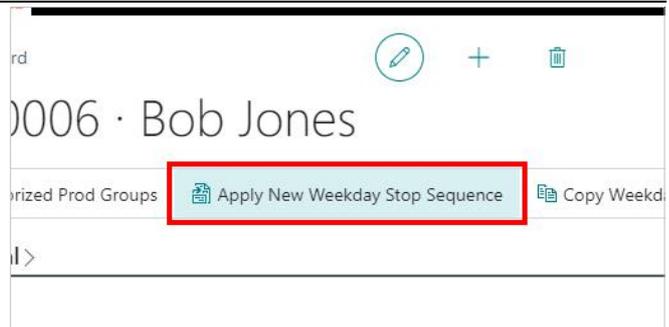
Click on the item **Not Allowed** in the list



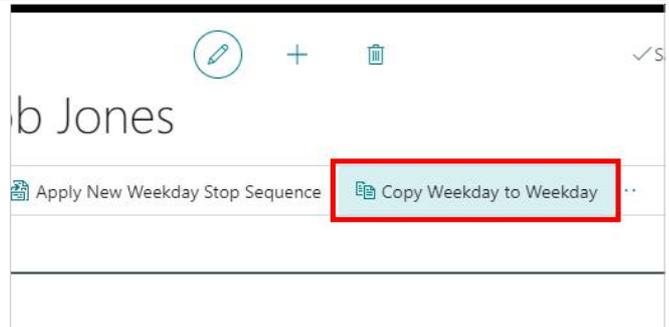
Click on the back button



Click on the navigation menu item **Apply New Weekday Stop Sequence**



Click on the navigation menu item **Copy Weekday to Weekday**



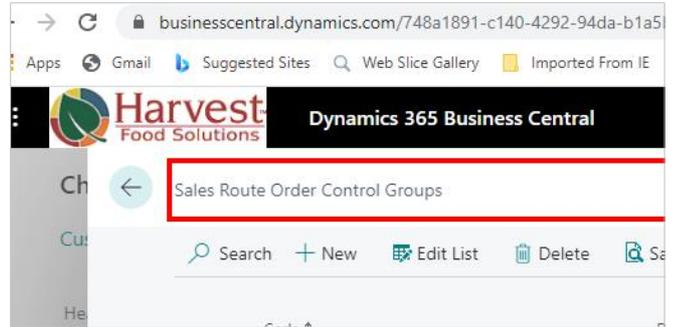
Click on the back button



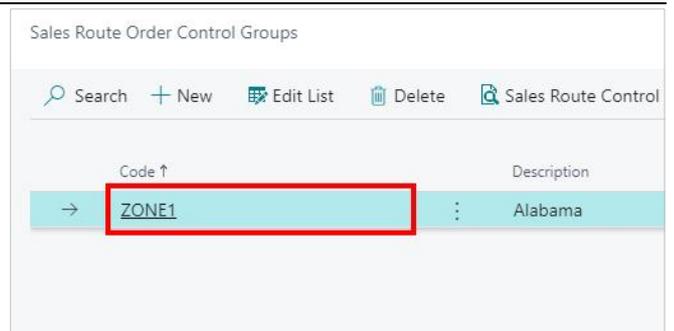
HFS DSD Route Order Staging

4. Sales Route Order Control Groups

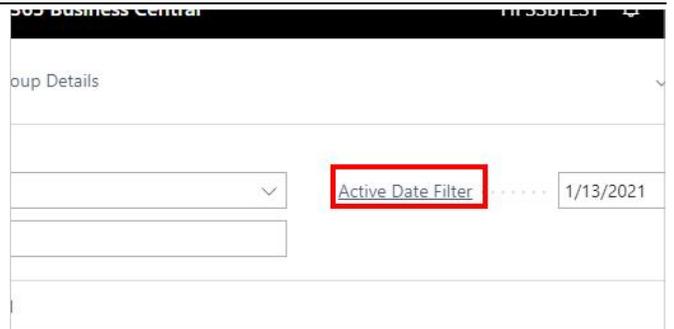
Click on **Sales Route Order Control Groups**



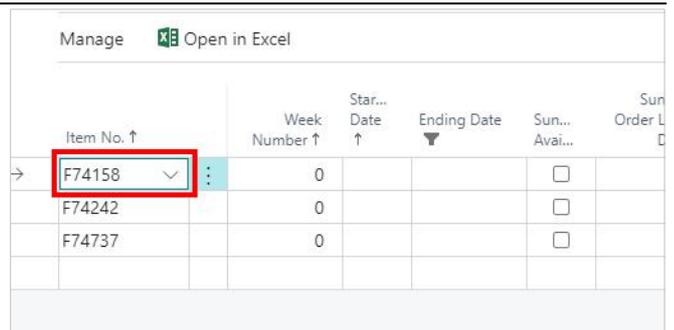
Click on the cell **Code** with the value **ZONE1**



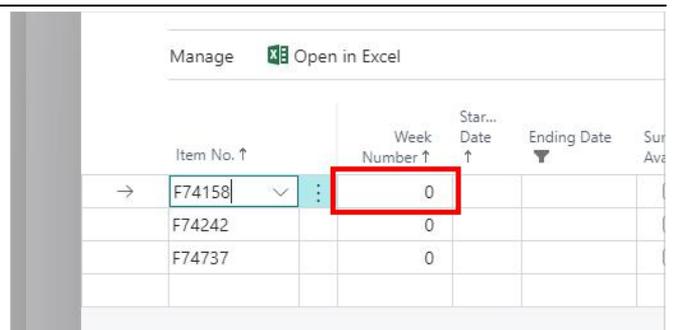
Click on the link **Active Date Filter**



Click on the cell **Item No.** with the value **F74158**



Click on the cell **Week Number** with the value **0**



HFS DSD Route Order Staging

Click on the column header **Monday Available**

Item No. ↑	Sunday HHC Cutoff Day	Mo... Avai...	Monday Order Lead Days	Monday Order Cutoff Day
F74158		<input checked="" type="checkbox"/>	3	Friday
F74242		<input checked="" type="checkbox"/>	3	Friday
F74737		<input checked="" type="checkbox"/>	3	Friday

Click on the column header **Monday Order Lead Days**

Item No. ↑	Sunday HHC Cutoff Day	Mo... Avai...	Monday Order Lead Days	Monday Order Cutoff Day	Monday HHC Lead Days
F74158		<input checked="" type="checkbox"/>	3	Friday	0
F74242		<input checked="" type="checkbox"/>	3	Friday	0
F74737		<input checked="" type="checkbox"/>	3	Friday	0

Click on the column header **Monday Order Cutoff Day**

Item No. ↑	Sunday HHC Cutoff Day	Mo... Avai...	Monday Order Lead Days	Monday Order Cutoff Day	Monday HHC Lead Days	Monday HHC Cutoff Day
F74158		<input checked="" type="checkbox"/>	3	Friday	0	
F74242		<input checked="" type="checkbox"/>	3	Friday	0	
F74737		<input checked="" type="checkbox"/>	3	Friday	0	

Click on the column header **Monday HHC Lead Days**

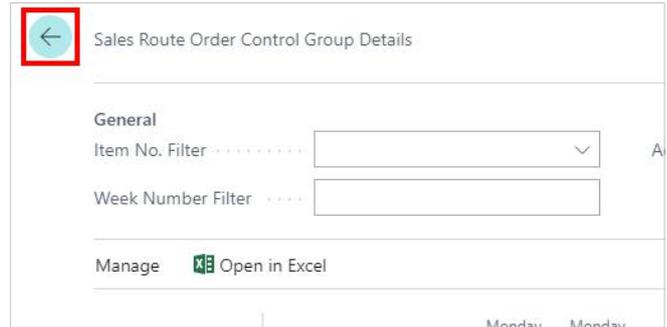
Item No. ↑	Sunday HHC Cutoff Day	Mo... Avai...	Monday Order Lead Days	Monday Order Cutoff Day	Monday HHC Lead Days	Monday HHC Cutoff Day	Tue... Avai...
F74158		<input checked="" type="checkbox"/>	3	Friday	0		<input checked="" type="checkbox"/>
F74242		<input checked="" type="checkbox"/>	3	Friday	0		<input checked="" type="checkbox"/>
F74737		<input checked="" type="checkbox"/>	3	Friday	0		<input checked="" type="checkbox"/>

Click on the column header **Monday HHC Cutoff Day**

Item No. ↑	Sunday HHC Cutoff Day	Mo... Avai...	Monday Order Lead Days	Monday Order Cutoff Day	Monday HHC Lead Days	Monday HHC Cutoff Day	Tue... Avai...	Tuesday Order Lead Days	Tue... Order Cutoff Day
F74158		<input checked="" type="checkbox"/>	3	Friday	0		<input checked="" type="checkbox"/>	3	Sat
F74242		<input checked="" type="checkbox"/>	3	Friday	0		<input checked="" type="checkbox"/>	3	Sat
F74737		<input checked="" type="checkbox"/>	3	Friday	0		<input checked="" type="checkbox"/>	3	Sat

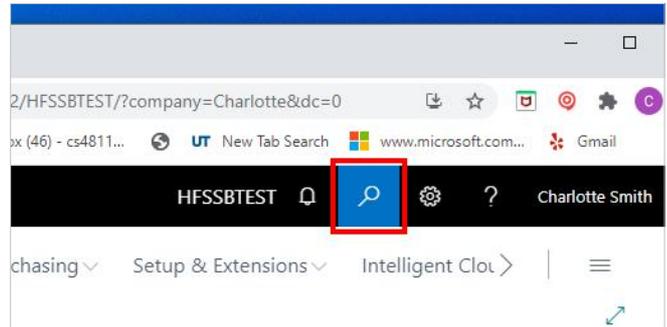
HFS DSD Route Order Staging

Click on the back button

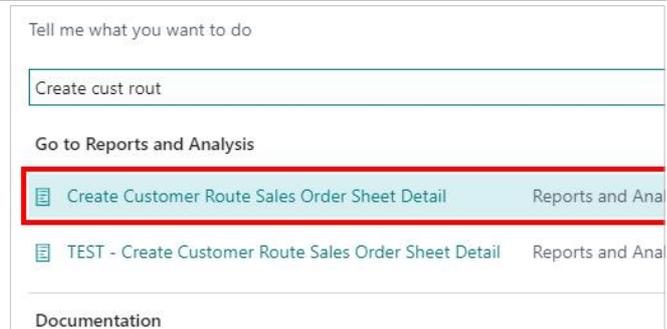


5. Create Customer Route Sales Order

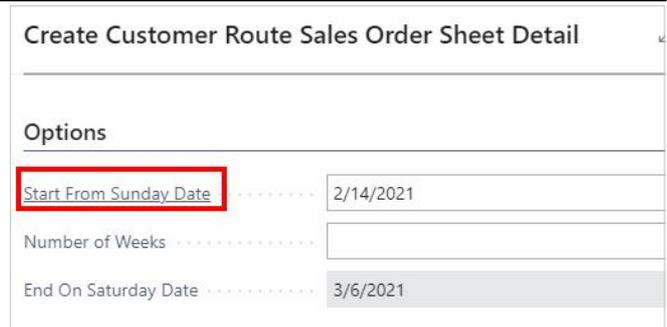
Click on the search button



Click on **Create Customer Route Sales Order Sheet Detail Reports and Analysis**



Click on the link **Start From Sunday Date**



Click on the link **Number of Weeks**



HFS DSD Route Order Staging

Click on the field **Number of Weeks**

Start Date 2/14/2021

Number of Weeks 3

End Date 3/6/2021

Click on **End On Saturday Date 3/6/2021**

Options

Start From Sunday Date 2/14/2021

Number of Weeks

End On Saturday Date 3/6/2021

Filter: Standard Sales Code

Click on **Filter: Standard Sales Code**

End On Saturday Date 3/6/2021

Filter: Standard Sales Code

× Code

+ Filter...

Click on **Code**

Number of Weeks

End On Saturday Date 3/6/2021

Filter: Standard Sales Code

> Code

+ Filter...

Click on the link in cell **Code** with the value **BASE-MAIN**

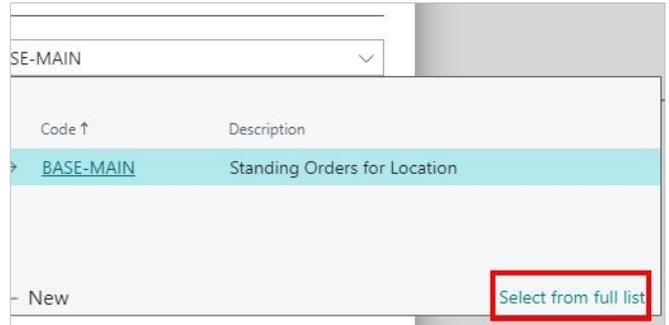
Standard Sales Code

Code ↑	Description
→ BASE-MAIN	Standing Orders for Location

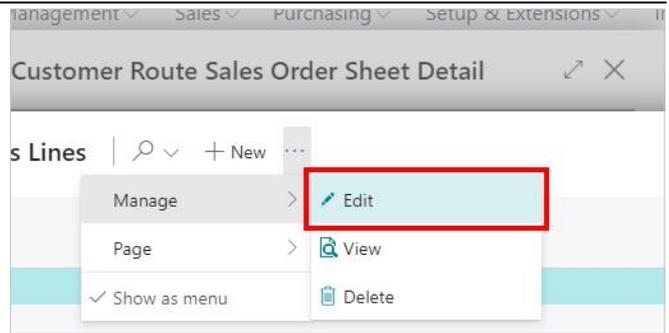
+ New

HFS DSD Route Order Staging

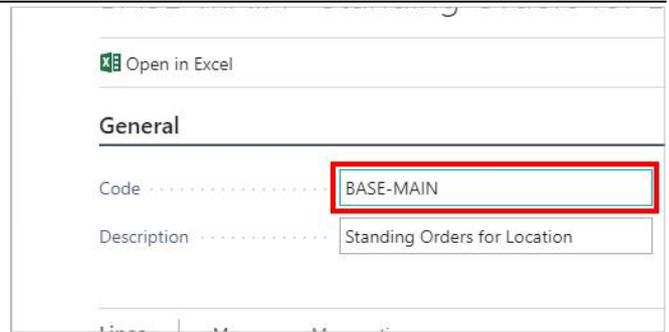
Click on the link **Select from full list**



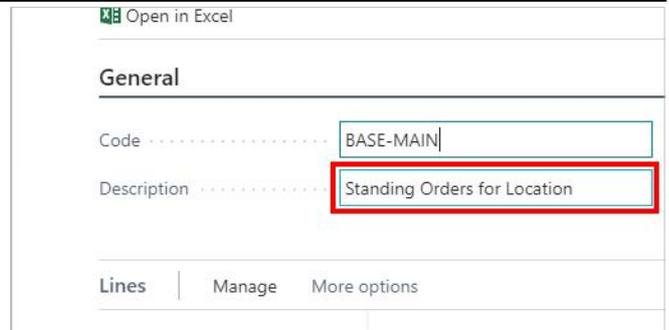
Click on the navigation menu item **Edit**



Click on the field **Code**



Click on the field **Description**



Click on the cell **No.** with the value **F74158**

Type	No.	Description	Customer No.	Ship-t
→ Item	F74158	Wendy 3in 12 Pk	C413581	D413:
Item	F74242	Wendy 4in 12 Pk	C413581	D413:
Item	F74737	Wendys 4.25in 12 Pk	C413581	D413:

HFS DSD Route Order Staging

Click on the cell **Monday Quantity** with the value 5

Customer No.	Ship-to Code	Sunday Quantity	Monday Quantity	Tuesday Quantity	Wednesday Quantity
13581	D413581		5	10	
13581	D413581		10	15	
13581	D413581		15	20	

Click on the column header **Tuesday Quantity**

Ship-to Code	Sunday Quantity	Monday Quantity	Tuesday Quantity	Wednesday Quantity
D413581		5	10	
D413581		10	15	
D413581		15	20	

Click on the back button

Standard Sales Lines Card

BASE-MAIN · Standing Orders for L

Open in Excel

General

Code BASE-MAIN

Click on the button **Schedule...**

Filter...

anced >

Schedule... OK Cancel

Click on the field **Description**

- Create Customer Route Sales Order Sheet Detail

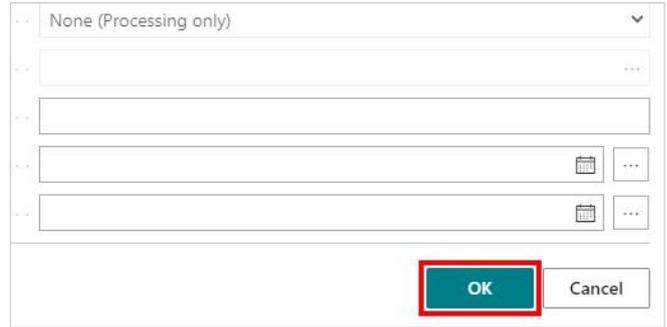
Create Customer Route Sales Order Sheet Detail

Create Customer Route Sales Order Sheet Detail

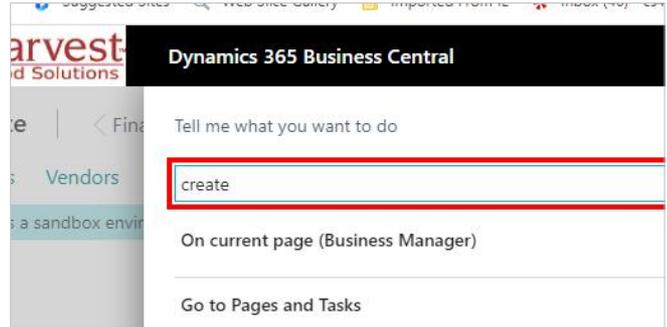
None (Processing only)

HFS DSD Route Order Staging

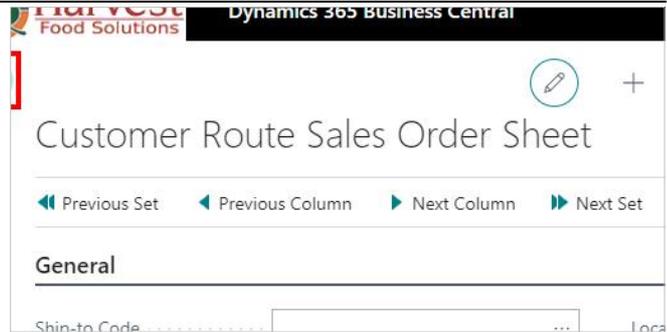
Click on the button **OK**



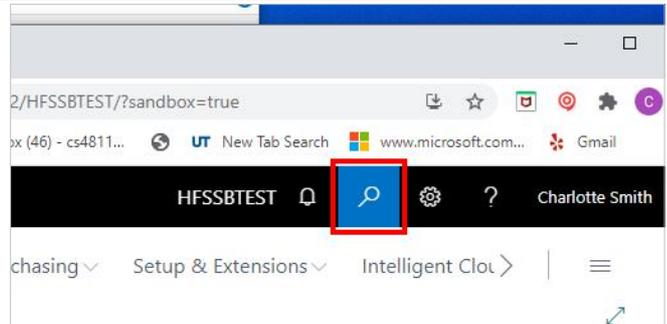
Click on the field **Type to start search:**



Click on the back button



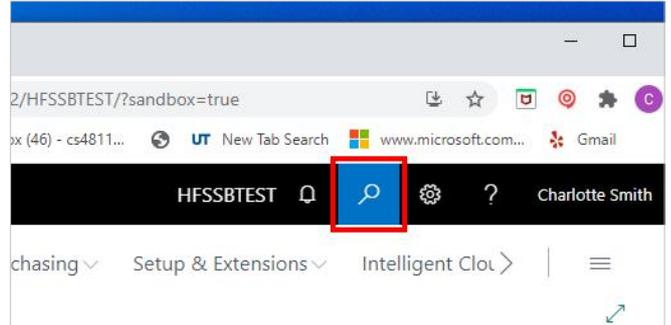
Click on the search button



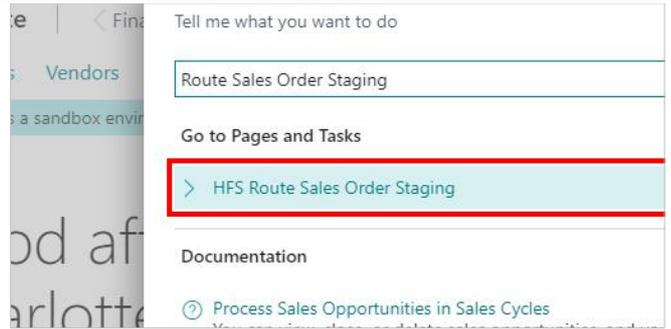
HFS DSD Route Order Staging

Step 2:

Click on the search button



Click on **HFS Route Sales Order Staging Lists**



Entry Date is the HHC Created Date

Limiting the data will allow the process to run faster

Entry No. ↑	Entry Date	Sell-to Customer No.	Ship-to Co
→ 1	2/12/2021	C413581	D413581
2	2/12/2021	C413581	D413581
3	2/12/2021	C413581	D413581

Click on the link in cell **Sell-to Customer No.** with the value **C413581**

Entry No. ↑	Entry Date	Sell-to Customer No.	Ship-to Code	Cust. Delivery Route Code
→ 1	2/12/2021	C413581	D413581	R40006
2	2/12/2021	C413581	D413581	R40006
3	2/12/2021	C413581	D413581	R40006

Click on the link in cell **Ship-to Code** with the value **D413581**

Entry No. ↑	Entry Date	Sell-to Customer No.	Ship-to Code	Cust. Delivery Route Code	Requested Ship Date
1	2/12/2021	C413581	D413581	R40006	2/13/2021
2	2/12/2021	C413581	D413581	R40006	2/13/2021
3	2/12/2021	C413581	D413581	R40006	2/13/2021

HFS DSD Route Order Staging

Click on the link in cell **Cust. Delivery Route Code** with the value **R40006**

Date	Sell-to Customer No.	Ship-to Code	Cust. Delivery Route Code	Requested Ship Date	Item No.
2021	C413581	D413581	R40006	2/13/2021	F74158
2021	C413581	D413581	R40006	2/13/2021	F74242
2021	C413581	D413581	R40006	2/13/2021	F74737

Click on the cell **Requested Ship Date** with the value **2/13/2021**

Ship-to Customer No.	Ship-to Code	Cust. Delivery Route Code	Requested Ship Date	Item No.	Unit of Measure Code
13581	D413581	R40006	2/13/2021	F74158	PCS
13581	D413581	R40006	2/13/2021	F74242	PCS
13581	D413581	R40006	2/13/2021	F74737	PCS

Click on the link in cell **Item No.** with the value **F74158**

Ship-to Code	Cust. Delivery Route Code	Requested Ship Date	Item No.	Unit of Measure Code	Temp Change Mode
D413581	R40006	2/13/2021	F74158	PCS	Add
D413581	R40006	2/13/2021	F74242	PCS	Tot
D413581	R40006	2/13/2021	F74737	PCS	Tot

Click on the link in cell **Unit of Measure Code** with the value **PCS**

Requested Ship Date	Item No.	Unit of Measure Code	Temp Change Mode	Total Quantity
2/13/2021	F74158	PCS	Add/Cut	4
2/13/2021	F74242	PCS	Show more about "PCS"	0
2/13/2021	F74737	PCS	Total Order	15

Click on the cell **Temp Change Mode** with the value **Add/Cut** and **Total Order** will prompt according to Mode used in during entry.

Requested Ship Date	Item No.	Unit of Measure Code	Temp Change Mode	Total Quantity	Perm Quant...	Total Quantity
2021	F74158	PCS	Add/Cut	4	0	
2021	F74242	PCS	Total Order	0	10	
2021	F74737	PCS	Total Order	15	0	

HFS DSD Route Order Staging

Click on the cell **Total Quantity** with the value **4**

No.	Unit of Measure Code	Temp Change Mode	Total Quantity	Perm Quant...	Temp Quant...	Total Qua... Mat...
58	PCS	Add/Cut	4	0	0	<input type="checkbox"/>
42	PCS	Total Order	0	10	0	<input type="checkbox"/>
37	PCS	Total Order	15	0	0	<input type="checkbox"/>

Click on the cell **Perm Quantity** with the value **0**

Unit of Measure Code	Temp Change Mode	Total Quantity	Perm Quant...	Temp Quant...	Total Qua... Mat...	Perm Qua... Mat...
PCS	Add/Cut	4	0	0	<input type="checkbox"/>	<input type="checkbox"/>
PCS	Total Order	0	10	0	<input type="checkbox"/>	<input type="checkbox"/>
PCS	Total Order	15	0	0	<input type="checkbox"/>	<input type="checkbox"/>

Click on the cell **Temp Quantity** with the value **0**

Temp Change Mode	Total Quantity	Perm Quant...	Temp Quant...	Total Qua... Mat...	Perm Qua... Mat...
Add/Cut	4	0	0	<input type="checkbox"/>	<input type="checkbox"/>
Total Order	0	10	0	<input type="checkbox"/>	<input type="checkbox"/>
Total Order	15	0	0	<input type="checkbox"/>	<input type="checkbox"/>

If the data passed the tests, a check mark will be displayed.

Errors are identified by a check mark as well. Corrections can be made to the data. If corrections are made, Test Selected Line would need to be run again to process.

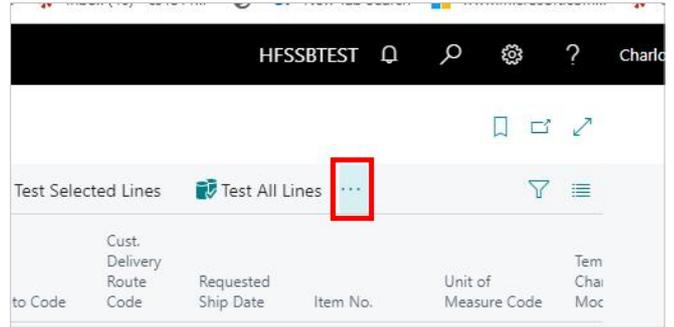
Sell-to Customer No.	Ship-to Code	Cust. Delivery Route Code	Requested Ship Date	Item No.	Unit of Measure

Click on the link **Test Selected Lines** if only one line needs to be tested.

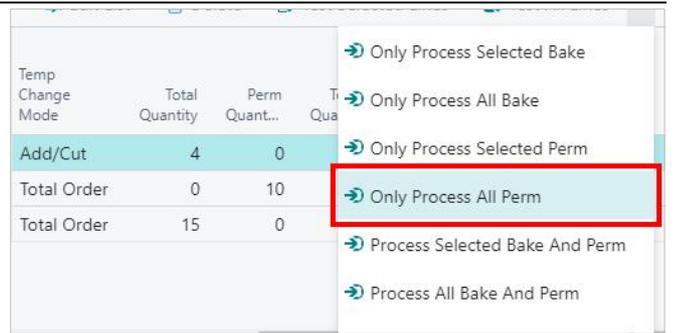
Entry Date	Sell-to Customer No.	Ship-to Code	Cust. Delivery Route Code	Requested Ship Date

HFS DSD Route Order Staging

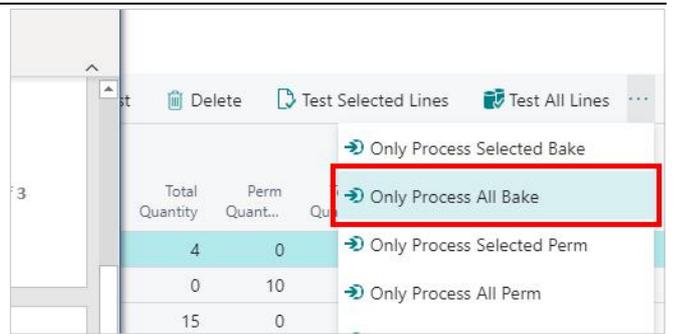
Click on the navigation menu item popup



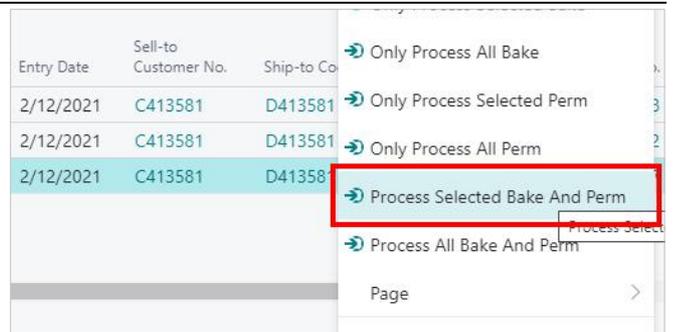
Click on the navigation menu item **Only Process All Perm**



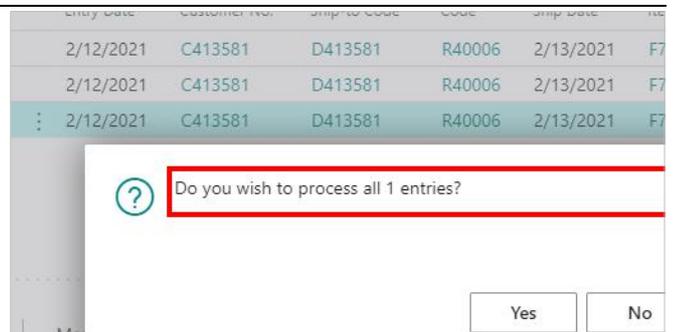
Click on the navigation menu item **Only Process All Bake**



Click on the navigation menu item **Process Selected Bake And Perm**

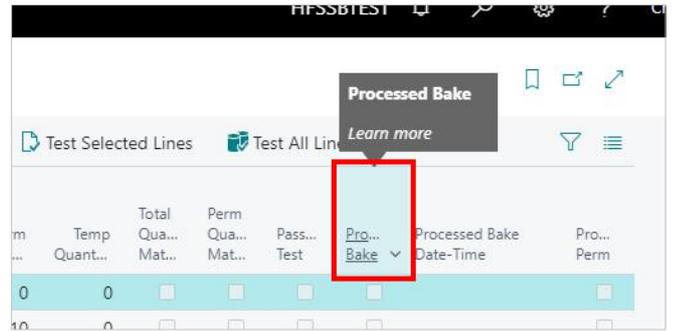


Click on **Do you wish to process all 1 entries?**



HFS DSD Route Order Staging

Click on the column header **Processed Bake**



HFS DSD Route Order Staging