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INSTALLING ROUNDSMAN

Roundsman should not be installed on computers running Windows ME or Windows XP Home.

We only support roundsman on Dos, Windows 3.x, Windows 9x, Windows 2000 and Windows XP Pro.

When installing Roundsman on a machine that is running Windows XP Pro. Insert the supplied cd in to you cd drive, the installation should start automatically follow the instructions leaving the defaults. Once done you will need to do a manual check on the config.nt file that is in the \windows\system32 folder. Open with note pad and check that at the end you have a line that says files=120 it will probably be files=40 change to files=120

Options to run Roundsman will be on the all programs menu.

SIGNING ON

This enables you to enter different user names to sign on to the system, giving you the ability to have multiple users at any one time.

A sign on of user has been set for you to start with.

How To Enter A New Sign On Name

1. Type " M A N A G E R " w here it asks you to Enter N am e .
2. Select Name Table from the Menu.
3. Select User Names from the Options at the bottom of the screen.
4. Move the cursor on the table to a blank number and press Enter.
5. You will now be asked to input the user name you want to use and press Enter.
6. You can now enter a Password, this is optional, if you do not want a password leave blank and press Enter.
7. If you w ant Spool access for A ll files press " A " but if you only w ant access to the spool files you have generated press " 0 " .
8. D iary A ccess allow s you to choose if you w ant every user to use the D iary, if so press " P " but if you only w ant the D iary used by the U sers D iscretion press " U " .
9. Access Level may be set to the Full Level of " 255 " .

To Clear Active Users

You may need to clear an active user if the name you sign on as will not be accepted. There are two reasons why your user name may not be accepted:

1. Someone else on the network is signed on as that user name.
2. Someone has aborted Roundsman in the wrong procedure.
i.e. Reset the computer without exiting Roundsman.

Menu Map 8,7



This Option sets up Roundsman.

The password is GEN in capital letters.

Menu Map 8, 7

```
Roundsmen
(C) Call Care Systems Ltd      Date: 05 Jul 1998      WESTON SUPER MARE
RM-GENERAL-PARMS

ROUNDSMAN GENERAL SYSTEM PARAMETERS  SCREEN 1/2
=====
LAST CUSTOMER NO.      1052      LAST STREET NO.      8
LAST INVOICE NO.      1107
WEEK COMMENCING.      05 Jul 1998
DAY ORDER.            1 2 3 4 5 6 7 Prd Ytd
                     SUN MON TUE WED THU FRI SAT PRD YTD
WEEKLY BILL TYPE.    1 (1-6)  ACCOUNT BILL TYPE 10 (9-10)
OTHER BILL TYPE.    8 (7-8)  DEFAULT STYLE.    2 (1-12)
MONTHLY BILLING ?   Y (Y/N)  MONTH WEEK NO.   2 (1-5)
MONTHLY BILL ACC ? Y (Y/N)  PRINT ZERO BILLS ? Y (Y/N)
FORTNIGHT BILLING ? Y (Y/N)  CYCLE ONE WEEK NO. 2 (1-2)
SHOW PRICES ?      Y (Y/N)  WARN CHANGED ?   N (Y/N)
DEFAULT PAYDAY.    SAT      DEFAULT AUTO ALLOCATE ? Y (Y/N)
NO. BLANK LINES.   0
CUSTOMER HISTORY.  12      ROUND HISTORY PERIOD. 10

IS THIS CORRECT?
1..Yes 2..No      PRINT SPOOLING
```

Last Customer No. - To set the Next Customer Number you can either set the Numbers from 1000 and this will set the rest of the Customers Numbers up automatically. The other Option is to set a 0 and you can enter your own number for each individual Customer.

Last Street No - to set the Street Number is the same procedure as the Next Customer Number.

Last Invoice Number.- to reset the invoice numbers used

Week Commencing - this is to set up the Date you actually Start Roundsmen Live. The days will appear underneath in the order from the Date you entered.

Day Order - this is the order of days that are set from the Week Commencing Date Option. This option is set by the week commencing date.

Weekly Bill Type - By entering the Weekly Bill Type you use, this will default to this Bill Type.

This is the same for Account Bill Type and Other Bill Type (Fortnightly and Monthly).

Default Style - By entering the Style you use for most Customers, this will default to this Style every time you enter a new Customer.

Monthly Billing - This Option is to set whether or not you use Monthly Billing, answer Y /N.

Month Week No. - If you answered Yes to using Monthly Billing, enter which week you are in for the current Month.

Monthly Bill Acc. - If you Bill Account Customers on a Monthly bases then answer Y to this Option.

Print Zero Bills - On printing your Bills if you have a Customer with no balance, you have the Option to Not print a Bill for that Customer, answer Y /N.

Fortnight Billing - If you have Fortnightly Customers you need to set this Option to Y to be able to print Bills for those Customers.

Cycle One Week No. - If you answered Yes to Fortnight Billing you must state which week cycle 1 is in (e.g. Is it in week 1 or 2).

Show Prices - This gives you the Option when creating a new Standing Order or Temporary Change you can have the prices shown and have the ability to enter any discounts, by answering no the prices will not be shown and no discounts can be entered.

Warn Change - This gives you a warning if you make a change against a Customer in the present week.

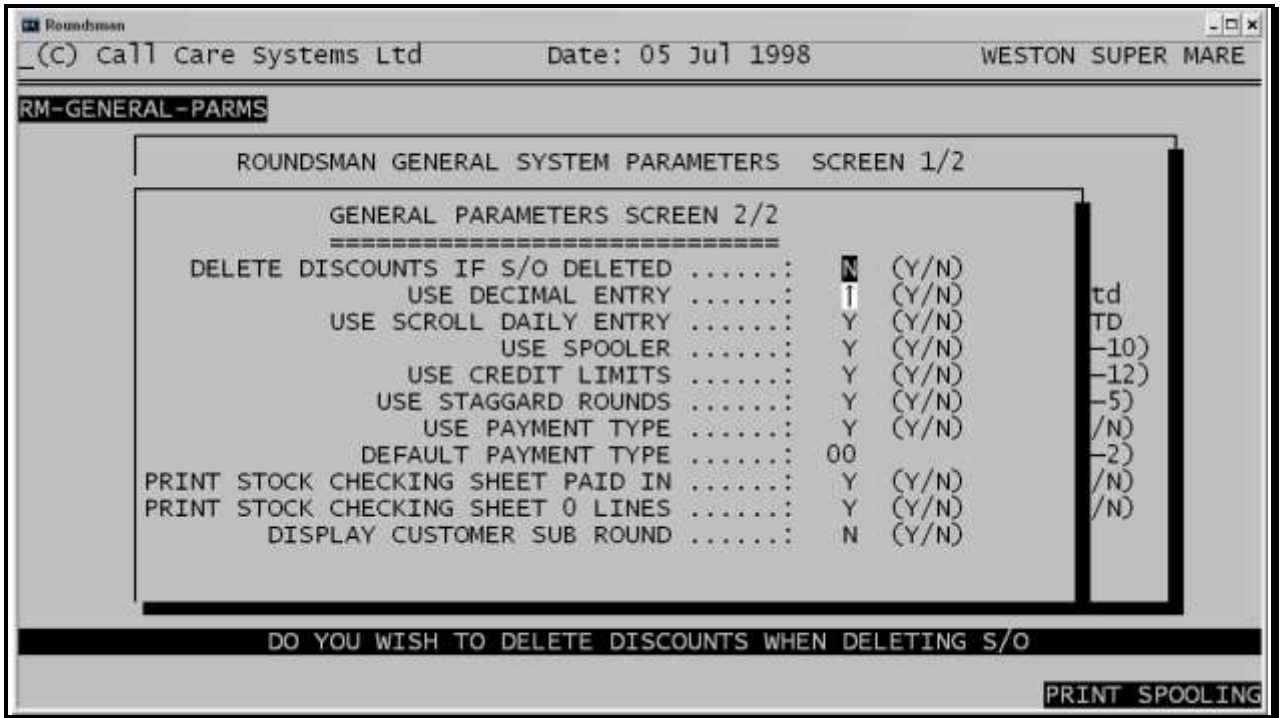
Default Payday - This allows you to set a default payday for when you enter a new Customer, but you still have the ability of changing that day on the input of that Customer.

Default Auto Allocate - This Option will automatically allocate any payments from Account Customers to the Invoices on the Sales Ledger.

No Blank Lines - Number of Blank Lines gives you the ability to enter the amount of blank lines you want between each product in the Roundsbook.

Customer History - This gives you the ability of quoting how many weeks you want the Customer History for.

Round History Period - This gives you the ability of quoting how many weeks you want the Round History for.



Options covered on this screen cover:

If standing orders are deleted do you wish to have the discounts, if setup for account customers deleted at the same time.

If you use decimal quantities then set this item to Y

We suggest that the option to use the spooler is always set to Y, all reports are then sent to the spooler

If you wish to set credit limits for customers then set this option to Y

If your rounds start on different days to Roundsman then set this option to Y

If the above is set to Y then do the rounds run part in the current week part future week or all in the future week. This option should only be used under the guidance of P.C. Support.

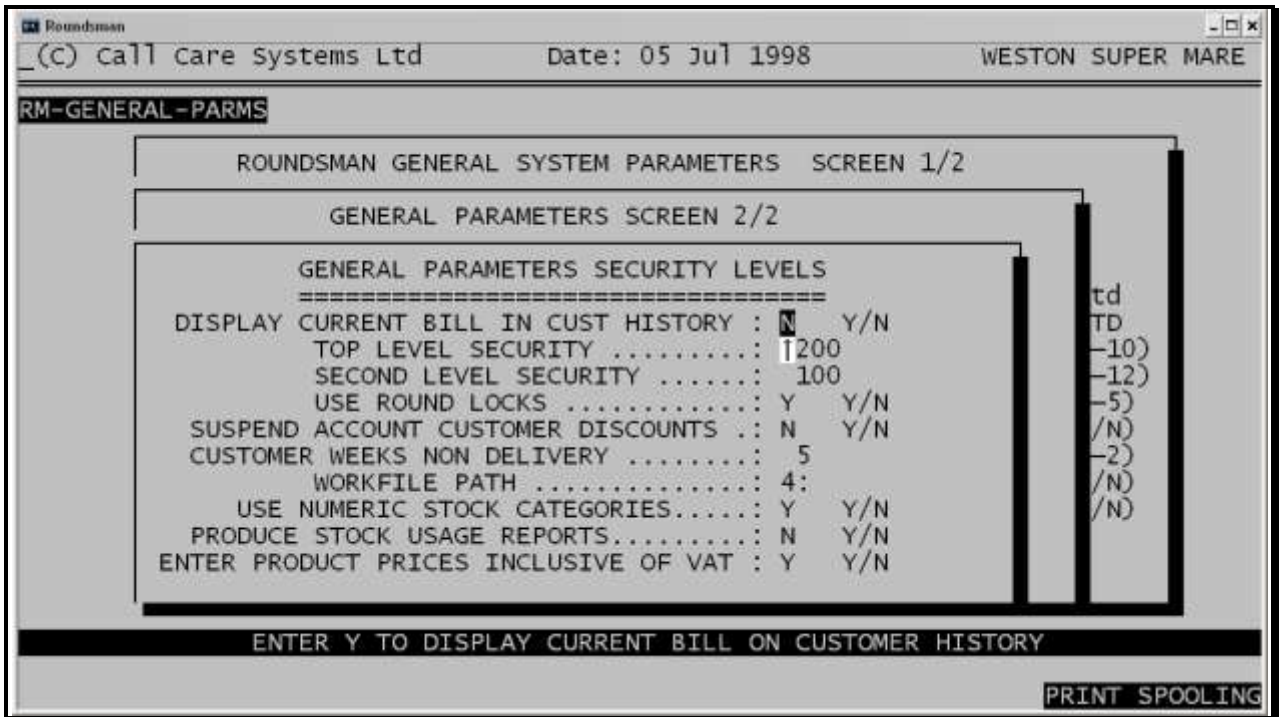
If you wish to use payment type then set this option to Y. When entering payments then you will be prompted to enter a number that relates to the type of payment made, i.e. 1 for Cash, 2 for Cheques, 3 for Tokens, 4 for Cash and Tokens or 5 for Cheque and Tokens. You can allocate as many types of payments as you require.

The next option allows you to set the default payment type if payment type is being used.

Print stock checking sheet paid in allows you to print on the checking sheet an extra item that allows the input of the paid in breakdown by coin and note type.

Print stock checking sheet 0 lines allows you to turn off the products that do not have a quantity on the stock checking sheet.

Display customer sub round allows you to turn on the display of the sub round on the scroll entry customer list.



Display current bill in cust history allows the display history to display the current weeks bill or only up to the end of the previous week.

There are 3 base levels of security built in to Roundsman top level is based on a user level above 200, level 2 between 100 and 199 and level 3 from 0 to 99. You can change these to suit your requirements.

Use round locks, is used when the Roundsman enter their own data, this makes sure that only customers on his round are available to him.

Suspend account customer discounts, do you want to delete discounts for products that are deleted from the customers standing order.

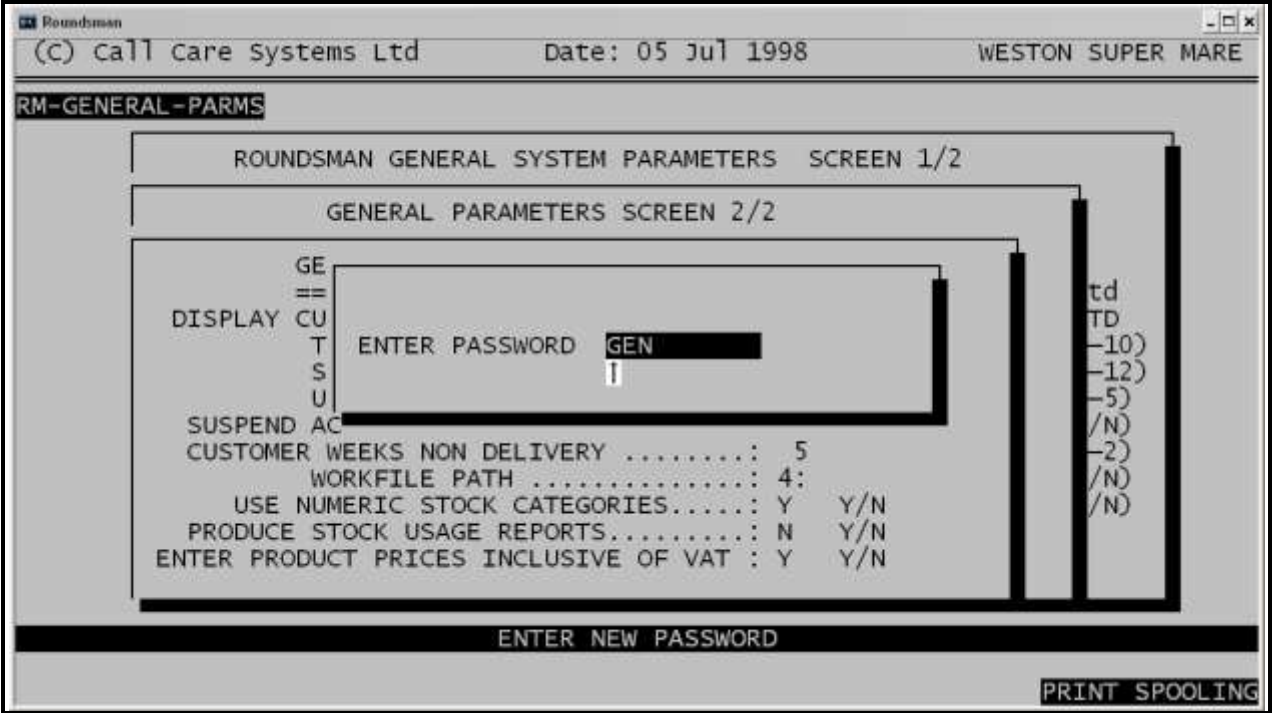
Customer weeks non delivery, allows the live customer count on the reports to be set by you by setting the base number of weeks that you want to treat as live customers.

Workfile path is where the temporary files that roundsman creates are produced please set to 4: unless otherwise instructed.

Use numeric stock categories allows the reports that use categories in roundsman to sort them by number and not text, this is only as long as you use numeric characters to categories on the stock items.

Produce Stock Usage Reports allows this option to be turned on or off.

Enter product prices inclusive of vat, allows the system to set the vat when entering sales prices this allows you to enter the required selling price including vat and the system will calculate the vat on the same basis that we use through the system.



This enables you to change the password that controls access to the general parameters and the week end routine.

ENTERING NEW STOCK ITEMS

The screenshot shows a terminal window titled "Roundsman" with the subtitle "PCS DEMONSTRATION SYSTEM (01)". The main menu displays "Menu Option: STOCK RECORDS". Below this, there are three input fields: "stock Code:", "Description-1:" (with sub-entries -2:, -3:, -4:, -5:), and "Short Name:". At the bottom left, the identifier "GPS00396" is visible. The bottom right contains a control bar with buttons for "1..Enter", "2..Amend", "3..Delete", "X-Exit", and "PRINT SPOOLING".

This screen is reached by choosing Option 8...File Maintenance at the main Menu, Option 2...Maintain Stock Items at the File Maintenance Menu and Option 1...Add/Amend/Delete Stock at the Maintain Stock Items Menu

By Selecting the Enter Option, this will allow you to input a new Product.

Enter the new Product Number, then the description and the Short Name you wish to give that Product.

The Option will appear at the bottom of the screen

"1 Accept" "2 Re enter" "3 Discard"

Re enter takes you back into the screen and allows you to change any details which have been input wrongly, Discard takes you back to the previous screen without accepting any changes that you may have made.

Accept will move you on to the next screen whilst accepting all the adjustments to the details that you have made.

You will then be presented with another screen, by pressing Enter to all the options they will default to the correct settings, then press Enter to Accept.

Then the Cost prices screen will appear for you to enter the Purchase Cost of the product, Tax Code "N", Tax Included "Y or N", you then can enter the different price bands you require, press Enter to Accept.

The next two screens are not compulsory. Press Enter through the Options and Confirm by pressing Enter to Accept.

ENTERING A NEW ROUND

PCS DEMONSTRATION SYSTEM (01)

RM-ROUND-FM

ROUND DETAILS FILE

Round Number
Roundsman Name
Address

Tel.

Round Control A/c No
Round Charges A/c No
Hamper Control A/c No
Token Control A/c No

Type of Round ? : Non Delivery days :
Retail Customers : Charge Price Code :
Casual Sale A/c Nr : Excess Stock A/c Nr.:
Round Suspended Y/N): Round Start Day :

1..Enter 2..Amend 3..Delete 4..X-exit PRINT SPOOLING

To arrive at this screen choose Option 8...File Maintenance at the Main Menu, Option 3...Maintain Rounds from the File Maintenance Menu and option 1...Enter/Amend Delete Rounds from the Maintain Rounds Menu.

By choosing the first Option from at the bottom of the screen. You will be asked to fill in the new Round Number and the Roundsmans Name, Address and Telephone number.

The system will fill in the Round Control, Round Charges and Hamper Control fields.

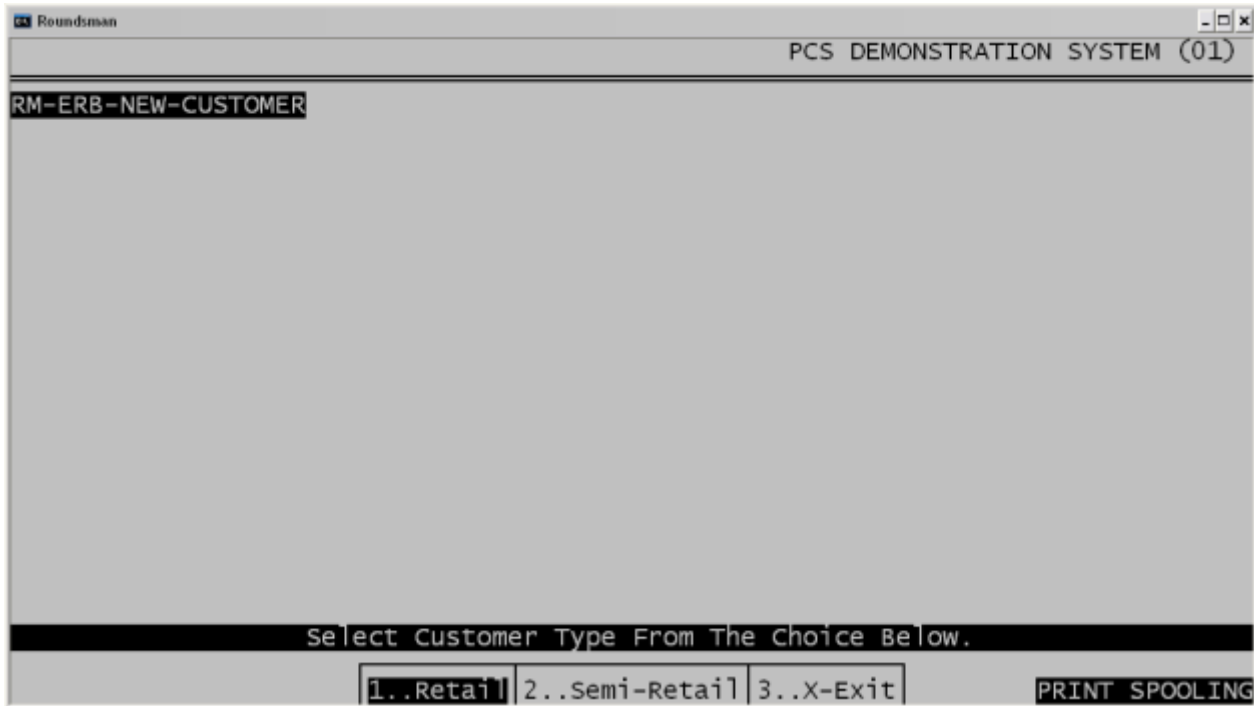
The next field for you to fill in is the Type of Round. If you are using Electronic Roundsbooks for delivery and collection then use H, if not use R. The other round types are S and F, S = Stock control with Account customers only. F = Franchise Round.

You will then be asked to fill in non-delivery days, usually 1=Sunday, but this may be another day, this field is numeric so count the days using Sunday as 1. The next two fields will be filled in automatically as you press return. Active round must be filled in by you.

ENTERING NEW CUSTOMERS

The screenshot shows a window titled 'Roundsman' with a subtitle 'PCS DEMONSTRATION SYSTEM (01)'. The main content area displays 'RM-ERB-NEW-CUSTOMER' at the top. A central box contains two input fields: 'Round : []' and 'Name : []'. The 'Round' field is currently empty, and the 'Name' field contains a cursor. At the bottom of the window, a status bar reads 'ENTER ROUND NUMBER, <ESC> TO EXIT' and 'PRINT SPOOLING'.

The Round and Name fields will be blank. Insert the Round number required in the highlighted box, or if you do not know the number of the Round, insert / and press the return key, this will bring up a list of Rounds. Using the up and down arrow keys select the Round required and press enter, this will fill in the information in the blank fields. The system will ask you "IS THIS CORRECT" pressing "1 Yes" at this stage will move you on to the next screen, pressing "2 No" will clear all the information from the fields and you can recommence the procedure by inserting the correct information.



This screen appears on successful completion of the previous page.

Roundsman is asking you to decide whether the new customer is Retail or Semi Retail, if the round is an S type round then you will not be able to input retail customers on to it. For the purposes of Roundsman these are described as

Retail:- Doorstep deliveries, that are billed weekly, fortnightly or monthly.

Semi-Retail:- Shop deliveries, or customers that require a special discount that cannot be covered by the 9 price bands.

RM ERB NEW CUSTOMER

```

Roundsman
PCS DEMONSTRATION SYSTEM (01)
RM-ERB-NEW-CUSTOMER

Number : 001053      Name : ██████████
Full Name : █

Address Details.
Room      :
House     :
Street    :
Add street :
Town      :
County    :
Post Code :
Telephone :
Short Name :

Account Details.
style      : 2
Delivery Seq : 0.00
Collect Seq : 0.00
Pay Day    : SAT
Bill Type  : 1
Round      : 001 ANDREW
Sub Round  : 001
Default Price : 1
Type       : wkly

Enter Account Name.
PRINT SPOOLING

```

By selecting the Retail option this screen will appear with address details blank and the Name field highlighted.

Insert the Customers surname in the Name field. Roundsman will accept this and automatically fill in the Full Name field with the same information. If you want to put the customers Christian name or title Mr/Mrs etc. just overtype the field and press enter.

Roundsman will now highlight Room in the Address Details column. This field is not compulsory, and is normally used in the case of a communal address such as a block of flats etc, Press enter to continue.

Roundsman has moved you to the House field, this is a compulsory field. Fill in the house Number or Name and press enter.

The Street field is now highlighted, enter the street name, if you do not know the street name type / and press enter, this will bring up a list of street names in your chosen round. Use the up and down arrow keys to locate the correct street and press enter to select. Roundsman will fill in the Street field and at the same time fill in the Add(ress) Street and Short Name fields.

The Town, Country, Post Code, and Telephone fields are not compulsory, but the more information entered about a client, the easier they are to locate.

You will automatically be moved to the next field which is Style. Account styles are described in the Appendix section. Select the appropriate style and press return. You are now in Delivery sequence, Press return, a list of all the customers in the same street will appear on the left hand side of your screen. Use the up and down arrow keys to determine in what order the new customer receives his delivery, Press enter to select . Repeat this procedure for the Collection sequence.

The highlight has now moved on to Pay Day. This field is the day that the Customer normally pays the bill, this will default to Saturday should no entry be made.

Bill Type is now highlighted. Bill type is explained in the Appendix section. This field will default to 1 if no other selection is made.

The Round and Sub-Round fields are filled in by Roundsman.

The default Price field selects the price from the products file and will automatically default to 1 if no other price designator is inserted. A selection bar has now appeared at the bottom of the page.

On pressing Return to accept, this creates a new Customer with all details as input by you. Using the Left and Right arrow keys to move the highlight to re-enter then press return which will allow you to re-enter the screen to alter any of the details which may have been entered wrongly. Highlighting the Ignore and pressing enter will clear all details without creating the new client.

Press return with the highlight on accept. Roundsman will pop up a customer message screen. This screen should be used for delivery instruction or warning messages for the delivery person.

BEWARE OF THE DOG, LEAVE THE MILK INSIDE THE PORCH etc.

On completion of this screen press return, Roundsman will now give you the Option of setting up Standing Orders or Non-Weekly Standing Orders, these procedures are explained in the Daily Routines section. Choose the Exit Option and you will Exit back to the new Customer screen for more Customer entry or select the Exit option again to go right back to the Main Menu.