VeriDistro User Manual

Nov 10, 2026 · @Kevin

Manual version 1.2 (November 11, 2026), for VeriDistro version 1.2. The manual and the software share one version number, so you can tell which program a copy describes: the software's version shows on the sign-on screen and at the top right of every screen (v1.2; hover over it for the build), and F1 on any menu says it too. 1.2: settlement and A/R can take orders; promotion prices and rebates need an End Date; one sign-on per person; old codes still work; the Manual button; Load Groups on the load sheet; your own set of tabs (MYTABS, TABS); Invoice Re-pricing writes price adjustment lines instead of changing the sale; working in several browser tabs (a new section under Getting started), and the save check that stops two tabs or two people from overwriting each other's changes. 1.1: field names on the screens are now plain words (for example PRICE SCHEDULE, ORDER TYPE, CREDIT LIMIT); the VeriDistro Name Cross-Reference lists every old name and its new one.

About this manual

This manual explains VeriDistro, the software for route delivery and accounting, for each part of the business: the order desk, dispatch, pricing, route settlement, the warehouse, accounts receivable, the office manager and the drivers. It follows the working day: taking orders, loading trucks, delivery, settling routes and closing the day.

How to read it:

- **Menu paths** are written as **Main menu → 1 Pre-Order Management → 70 Route Optimization**. Type the option number in the selection box and press Enter.
- **Keys** are written as **Enter**, **F3**, **F10** and so on. The keys for each screen are always listed along the bottom of the screen, and you can click them as well as press them.
- **Dates** are keyed as MMDDYY: November 9, 2026 is keyed 110926.
- **Times** are keyed as HHMM on a 24-hour clock: 7:30 AM is 0730, 2:00 PM is 1400.

What you can see and change depends on your sign-on's role. If an option says you are not authorized, ask the office manager (see Administration).

Getting started

VeriDistro runs in a web browser on any office computer. Open the company's VeriDistro address, sign in, and you land on your starting menu.

You can have as many VeriDistro screens open as you need, each in its own browser tab: for example two or three Order Entry tabs to handle several callers, or one for entry and one for research. Working in several tabs, later in this section, shows how.

Signing in and out

1. Key your user name and password, then press Enter.
2. To sign out, take option **90 Sign Off** from any menu, or press F3 on the main menu. VeriDistro asks first: key Y and press Enter to sign off. Enter on its own, N or F12 keeps you signed on, so a stray F3 never logs you out.
3. A sign-in lasts 16 hours, long enough for an early route and the office work after it. After that you are asked to sign in again.
4. To change your password, take **Main menu → ADM → 30 Change My Password**. Passwords must be at least 8 characters.

Drivers sign in on their phones at the driver app address (/driver). Stores sign in at the ordering portal address (/portal). Neither can open the office screens.

The screen

- The bar across the top shows the screen name, your user name, the depot and the **business date**. The business date is the day the office is working on: the Settlement Date, the day whose routes are being settled. It isn't always today's calendar date. It only moves forward when Day End is run. At the far right is the software version (v1.2), the same number as this manual.
- Under it, a path shows which menu you came from.
- Fields you can key into are shaded. The cursor starts in the first field.
- Messages appear in the line above the keys: green when something worked, amber for a warning, red for an error.
- **Print** (top right) prints the current screen or report. **Green screen** switches to a green-screen style layout for anyone who prefers it. Manual opens this manual, the copy for the version you're using, in a new tab (so does MANUAL on any selection line, and the link on the sign-on screen).

Getting to order entry

Order entry is never more than one click away:

- **Order entry** button, top right of every screen.
- **OE**, the first choice on the main menu. You can also key **OE** on the selection line of any menu.

The button shows for everyone who takes orders: the order desk, dispatch, settlement, A/R, operators, managers and administrators. Settlement and A/R can key orders but still can't change customers or routes. **Settlement and A/R: Ctrl+click the button** to open order entry in a new tab, so the settlement or payment you're working on stays where it is (see Working in several tabs, below). Read-only users don't see it, but OE on the main menu still works for looking up orders.

Menus list their choices in a single column, in plain sections (for example Orders, Loading, Routing and dispatch, Reports). Key the number or click the line.

- **Each screen is listed once**, on its home menu, and choices that were never built or not carried over aren't shown. Every option number you know **still works when keyed**, even where it's no longer listed. For example, 63 on the settlement menu still opens the Live Dispatch Board.
- **Sign Off** is listed on the main menu only. 90 and F3 on the main menu work from anywhere, and both ask first.
- Ctrl+K (Search) finds any screen by name.

Working in several tabs

When something new comes up in the middle of a job, open it in a **new browser tab** instead of leaving the screen you're on. The job you were doing stays exactly where you left it, half-keyed fields included, and you click back to its tab when you're done. Each tab is its own VeriDistro screen with its own F3 and F12; one sign-in covers them all.

Arrange the tabs the way you work. For example:

Tab	Open on	Used for
1	Order menu	The caller on the line
2	Order menu	A second caller, or an order you're waiting to confirm

Tab	Open on	Used for
3	Settlement menu	The route you're settling
4	File Maintenance (if your role allows it)	Fixing a customer, product or price
5	Research	Price checks, sales trends, A/R lookups

Opening a screen in a new tab

- **Ctrl+click** (Cmd+click on a Mac) or **middle-click** a menu option or the **Order entry** button.
- On the selection line, key the option number, menu or screen name and press **Ctrl+Enter** instead of Enter.
- Or key **NEW** and the name, for example **NEW OE** for order entry. **NEW** on its own opens a tab at your menu.
- Every screen has its own address, shown in the browser's address bar (for example …/#VDORDERENTRYHIST). Bookmark it, and the bookmark opens straight to that screen; F3 still takes you back to your menu.

Telling the tabs apart. Each tab is named after the screen it shows, for example "Route Settlement · VeriDistro". On the test copy the name starts with TEST.

If two tabs change the same thing. When you save an order, a customer or another file record, VeriDistro checks that nobody changed it since you opened it, whether another person or you in another tab. If someone did, nothing is saved and the message line says who changed it and when, for example *ORDER 10452 WAS CHANGED BY ORDERS AT 10:42 AM SINCE YOU OPENED IT*. Open the record again (F12, then Enter) to see the latest, and key your change again. Lists such as the code files reload themselves.

Your own set of tabs. Key **MYTABS** to keep the screens you open every day, one per tab, in order. Key the menu or screen names, or press **F6** to fill the list from the VeriDistro tabs open now, then press Enter. From then on, key **TABS** on any selection line: this tab becomes your first one and the rest open beside it. The list goes with your sign-on, so it's the same on any computer. The first time, the browser may block the extra tabs; allow pop-ups for the VeriDistro address once (the icon at the right of the address bar) and key TABS again.

Signing off in one tab signs off every tab. The other tabs say *Session ended. Sign on again.* the next time you press a key there.

Working on a screen

- **Keys** are in the same order on every screen: Enter first, then the F-keys, then **F12=Back** and **F3=Exit**. F12 goes back one screen; F3 leaves the program.
- **Dates** can be keyed as MMDDYY, or as 11/9, 11/9/26, today (or t), tomorrow, yesterday, +1 or -2 (days from the business date). The day of the week shows beside the date, and "not a date" shows in red if it can't be read.
- **Customer, product and vendor numbers** show the name beside them when you leave the field.
- **Errors** show in the message line, and the field they're about is marked in red with the cursor in it.
- **Long notes** at the bottom of a screen fold to two lines. Click More to read the rest.

Keys used everywhere

Key	What it does
Enter	Continue, save, or run the screen
F3	Exit the screen and go back to the menu
F4	Search for a customer or product from the field you are in
F5	Refresh the screen, for example to see a change someone else just made, such as a customer's new credit limit
F12	Go back one step without leaving the screen
F10	Final or important actions (post, settle, apply). Most ask you to press F10 a second time to confirm

Menus and jumping to a screen

Each menu lists numbered options grouped by purpose. Key the number and press Enter. On any menu you can also key a menu or screen name directly to jump to it. Old menu and screen codes keyed from habit still open the right screen; the VeriDistro Name Cross-Reference lists every old code and its new one.

The main menu:

Option	Menu	Used by
OE	Order Entry (straight to the order screen)	Order desk, dispatch, most office users
1	Pre-Order Management: orders, load sheets, routing, dispatch	Order desk, dispatch
2	Route Settlement Management	Settlement clerks
3	Accounts Receivable Management	A/R, credit
4	Management Inquiry	Managers, sales
5	File Maintenance: customers, products, routes, prices	Office manager
6	Sales Analysis	Managers
7	Warehouse Inventory Management	Warehouse
40	Purchasing Management	Buyers, receiving
OPR	System Operator: release orders, Day End	Office manager
ADM	Administration: users, maintenance log	Office manager

Finding a customer or product

In any customer or product field, press **F4**. Key part of a name, address, phone number, or customer or product number, and press Enter. Select the line you want and it is filled in for you.

Roles

Each sign-on has one role, which decides what it may change. Everyone may look things up. Each person has one sign-on: to do two jobs at once, open them in two tabs rather than signing on twice (see Working in several tabs).

Role	May change
admin, manager	Everything
orders	Orders

Role	May change
dispatch	Orders, dispatch, routing, warehouse entries
settlement	Route settlement, dispatch, order entry
ar	Receivables and billing, order entry
operator	Orders, dispatch, settlement, Day End
readonly	Nothing (look only)
driver	Only the driver app
customer	Only the store ordering portal

The test copy (staging)

The test copy is a full working VeriDistro for practice and for checking updates. Nothing entered there is real, and it can be wiped and reloaded at any time.

- **Address:** vdswedeiqxmnjuyg4tpy-stg.azurewebsites.net. A red **TEST COPY** bar runs across the top of every screen; if you don't see it, you are not on the test copy.
- **Sign-ons:** the test copy has its own users and passwords (ADMIN, ORDERS, DISPATCH, SETTLE, AR, and the store sign-on PALISADE at `/portal`). Your everyday password does not work there unless it was set the same.
- **Updates arrive there first.** Every change to VeriDistro runs on the test copy before it reaches the live system, so new screens and fixes can be tried there.
- **Trying something out:** sign in as the user who does that work and go through it exactly as you would for real. Take an order, release a route, settle it: nothing goes to a customer, a driver or the books.
- **Found a problem?** Note the screen, what you keyed and the message shown, and send it to KPROTEC.
- **Never** key real card, bank or customer details on the test copy.

To set a test copy password, ADMIN uses User Maintenance there, the same as on the live system.

The daily routine at a glance

Every business day follows the same loop: orders come in for future delivery, today's trucks are loaded and delivered, routes are settled when the trucks return, and Day End closes the day. The times below are typical; set your own.

1. **Early morning (about 4:00–5:00 AM) — load and release.** The warehouse loads each truck from its load sheet, pulling the oldest good code dates first. The office releases the routes (**OPR → 2 Release Orders to Sales**), which takes the product out of the warehouse, puts it on the truck and opens the delivery tickets. Adds and cuts made while loading are written on a copy of the load sheet and keyed in the office straight away, because they change inventory.
2. **Departure — drivers start the day.** Drivers open the driver app, download their route and leave. Dispatch watches the **Live Dispatch Board** (**1 → 72**).
3. **Morning and midday — take orders for future dates.** The order desk keys phone and fax orders (**1 → 91 → 1 Order Entry**). Stores order themselves on the portal until the cutoff (2:00 PM the day before delivery, unless you change it). Standing-order customers may already have partial or complete orders; change them only when the store asks. Check **Suggested Order Review** (**1 → 75**) for stores that look over- or under-ordered.
4. **After the cutoff (about 2:00–3:00 PM) — close tomorrow's orders.** Run **Load Control by Route** (**1 → 9**) to find scheduled customers with no order, and call them or enter a safety order. Check **Routes Ready to Load** (**1 → 34**) and **Route Overload Report** (**1 → 11**) so no truck is over its limits.
5. **Afternoon — print for tomorrow.** Print load sheets (**1 → 16 or 17**) and delivery tickets (**1 → 19 or 20**) for the warehouse and drivers.
6. **Afternoon — trucks come back.** Drivers send their end-of-day count and money from the app. Settlement clerks check each route in, key customer adds and cuts, returns, damaged product on the truck and the deposit, and settle the route; later in the afternoon, once every money and product difference is explained, they final settle it (**2 → 91 → 7 Route Settlement**).
7. **Afternoon — post payments.** A/R posts checks that came in the mail (**3 → 91 → 1**).
8. **End of day — Day End.** When every delivered route is final settled, the office manager runs **OPR → 4 Day End Processing**. The business date moves to the next day and standing orders are built for the next two delivery days.

Weekly, monthly and yearly work (statements, month-end rebates, year end) is covered under Day end, month end and year end.

Customers, products and routes

Three master files drive everything else: customers (who and when we deliver), products (what we sell and how it packs) and routes (who drives which truck). Keep them right and orders, loads and bills come out right.

Customers

Open **5 → 5 → 5 Customer Master Maintenance**, key the customer number (or F4 to search) and press Enter. Key a new number to add a customer. The fields people change most:

Field	What it means
Name, address, phone, contact	Printed on tickets and statements. The address is also used to find the stop on the map
Kind	customer (we deliver), billto (an account that pays for other stores), driver (a driver's own account)
Primary route and stop sequence	The route that normally delivers, and the stop's place in that route's order
Load group	Which section of the load sheet the stop is loaded in: blank = the main load, or a group such as CHEF for a Chef's Kitchen load, a floor or a building. Group names are kept in Code File Maintenance under LOADGROUP
Deliver days	Seven 1/0 flags, Monday to Sunday. 1111110 = Monday to Saturday
Route of day	The route that delivers on a given weekday when it isn't the primary route, for example Saturday on route 102. Blank days use the primary route
Deliver time	The usual time, printed on tickets and load sheets. It does not limit routing
Window opens / Window closes	Only for stores that can receive only in certain hours, for example a dock open 0700 to 1100. Leave blank for no time restriction

Field	What it means
Order type	2 = calls or keys orders in advance, 3 = standing order (an order is built automatically from the standing quantities)
Prices, override, promotions	Which price schedules apply (see Prices and promotions)
Case-up	Y = the store must order full cases
Cash customer	The driver collects on delivery
Terms, credit limit, bill-to	How and when they pay, and which account pays
Mand PO	1 = a PO number is required on every order, 2 = warn if missing
Active	N stops all ordering and delivery

Other customer screens on **5 → 5**: **31 Customer Routing Change** (move several stops between routes and days on one screen), **19 Resequence/View Route Delivery Patterns** (re-space the stop numbers), **40 Mail-to File Maintenance** (a separate billing address and the email for order confirmations), **60 Customer Search**, and lists by number, name and route. Delivery instructions that print on tickets are on **1 → 91 → 91 → 28**.

Stop locations and time at each stop

Routing needs every stop's location and how long a delivery usually takes. Open **1 → 71 Stop Locations** and key a route (or blank for all).

- **F6 Locate stops** looks up missing locations from the address.
- **F7 Learn from GPS** replaces looked-up locations with the place drivers actually deliver, from the driver app. Locations you key by hand are marked MANUAL and are never overwritten.
- **Keyed Min** is the minutes at that stop if you want to set it yourself. Leave it blank and VeriDistro uses what the driver app measured (arrival to delivery done, the middle value of the last 90 days, at least two visits). With no measurements yet, it uses the route's base minutes plus seconds per case.
- The **Used** and **How** columns show the minutes routing will use for each stop and where they came from.

Products

Open **5 → 7 → 7 Product Master Maintenance**. The fields that matter most day to day:

Field	What it means
Description, size, UPC, category	Shown on order screens, tickets and the store portal
Units/case, cases/pallet, unit weight	Used for case-ups, truck loads and overload checks
Cost	Used for margin reports
Shelf life days	Days from receipt to the sell-by date. Blank = not code dated
Code alert days	Warn this many days before the code date (default 2)
Case only	Must be sold in full cases
Reserve	Order entry warns when the warehouse is short
Taxable, active	Sales tax applies; N stops selling it

Container names the crate or rack one case goes out in (see Profit, returns and crates). Leave it blank for products that do not use one.

Use **5 → 7 → 30 Product Search** to find a product, and **5 → 7 → 91 Product Renumbering Menu** to change a product number everywhere at once (entry, list, then update).

Routes

Open **5 → 4 Route File Maintenance** and key the route.

Field	What it means
Name, driver, truck, branch	Shown on load sheets, tickets and the dispatch board
Run days	Seven 1/0 flags for the days the route runs
Weight max, case max, pallet max	The truck's limits, used by overload checks and route balancing

Field	What it means
Load seq	customer = pick by stop, bulk = load by product
Start time	When the truck leaves the depot (HHMM)
Base min per stop	Parking, paperwork and walking in, before unloading
Seconds per case	Unloading time for each case
Avg speed mph	Only used when road travel times cannot be looked up
Max hours	The longest working day, depot to depot, used by route balancing
Driver account	The driver's own customer number for shortages and route charges

The depot for each branch, with its address and map location, is on **7 → 92 → 16 Branch/Warehouse File Maintenance**.

Taking orders

Orders are taken for a delivery date (the route date), often tomorrow. Standing-order customers get their order automatically at Day End, so it is in place the day before delivery; everyone else calls, faxes, or orders on the portal. All of them land in the same place and follow the same rules.

Keying an order

1. Open **1 → 91 → 1 Order Entry**.
2. Key the customer number (F4 to search), the route date as MMDDYY, and the order number (leave 1 unless the customer gets two deliveries that day). Press Enter.
3. The screen shows every product the customer can buy, with these columns:
   - **Hist**: what the customer took on the same weekday last time.
   - **Stdg**: the standing order for that weekday.
   - **Sugg**: the suggested order (see below). Hover over a number to see why.
   - **Net**: the customer's price for that date.

4. Key quantities in **units** in the Qty column. For a case-up customer or a case-only product, a quantity that is not a full case turns red and will not save.
5. Shortcuts: **F5** copies history, **F7** copies the standing order, **F8** copies the suggested order. Change any line after copying.
6. Key the PO number if the customer gave one (required for some customers).
7. Press **Enter** to save. The message shows the ticket number, cases and dollar total, plus any warning.

Warnings you may see: over the credit limit, not normally delivered that day, a holiday, or not enough stock of a reserved product. Warnings do not stop the order (unless credit checking is set to stop); a short product is logged on the **Demands Not Met Report** (**1→43**).

To **change** an order, open it the same way, change the quantities and press Enter. To **delete** it, key a reason in Delete reason and press **F11**. Once the load sheet is printed, use **Order Adjustment Entry** instead (below).

Standing orders

A standing-order customer has fixed quantities for each weekday. Day End builds their orders for the next two delivery days, so the order desk only touches them when something changes.

- To change **one day's** order, change it in Order Entry as usual.
- To change the standing quantities **from now on**, press **F9** in Order Entry before saving. The message line confirms that saving will also replace the standing order for that weekday.
- **1→96→49 Standing Order Listing** shows each customer's standing quantities for all seven days.

Suggested orders

VeriDistro suggests what each store will most likely need, from what it actually sold:

- the same weekday over the last 8 weeks, with the newest weeks counting most
- less product that came back (returns and credits)
- plus product the store ordered but did not get (shorts on the truck)
- scaled up when a no-delivery holiday means this delivery has to last longer (for example, two days instead of one)
- rounded to full cases for case-up customers

With less than two weeks of history, the suggestion is the standing order.

Use **1 → 75 Suggested Order Review** each afternoon. Key the delivery date (and a route, or blank for all). Each customer shows suggested units against the order on file. **CHECK** marks a customer whose order is 20% or more away from the suggestion: they may be over-ordering (stale product, returns) or under-ordering (shorts, empty shelves). Select a customer to see the product detail and the reason for each suggestion.

Customers with no order

- **1 → 9 Load Control by Route** lists customers scheduled for a route on a date who have no order yet. Call them before the cutoff.
- **1 → 91 → 8 Call Scheduling and Order Control by Call Desk** lists the customers each order taker should call, by desk and call time.
- **1 → 73 Portal Orders** shows which portal stores have ordered online for a date.

Other order tools

Need	Where
Copy or move orders to another date or route (for example, around a holiday)	**1 → 4 Order Utilities**
Change an order after the load sheet is printed, with a reason	**1 → 91 → 91 → 44 Order Adjustment Entry**
Add a product to many customers' orders at once (a new item or a sample)	**1 → 91 → 91 → 35 Special Product Distribution**
Key a store's shelf count and order the difference to its par	**1 → 91 → 3 Store Inventory Entry**
Import orders from a file	**1 → 25 Order Import**
Extra stock on a truck for selling off the truck	**1 → 91 → 10 Product Build Up Maintenance**
Find a customer's orders	**1 → 91 → 41 Order Search**
Orders for one product, and which customers ordered it	**1 → 91 → 5** and **1 → 91 → 14**
Cases and weight by customer on a route	**1 → 91 → 6**

Need	Where
Every order for a route or date	**1 → 15 Order Register**
Orders that look unusual for the customer	**1 → 33 Order Exception Report**
Orders deleted, moved or changed, and by whom	**1 → 96 → 52 Orders Moved/Deleted Log**

Holidays

Mark holidays on **5 → 65 Holiday Maintenance**. Set **No delivery** to Y when trucks do not run. Order entry warns on a no-delivery date, standing orders are not built for it, the store portal skips it, and suggested orders cover the extra days on the delivery before it. Use Order Utilities to move any orders already on file for that date.

Credit holds

Customers over their credit limit get a warning in order entry (or are stopped, if credit checking is set to stop on Location Control). Orders placed on credit hold are not released to the truck. Review them on **3 → 31 Soft Credit Hold Review**.

Online ordering for stores

Stores can place, change and cancel their own orders on the ordering portal (the company's VeriDistro address followed by /portal), from a phone or a computer. Their orders go through exactly the same checks as orders keyed in the office.

Setting up a store

1. Open **ADM → 1 User Profiles**.
2. Key a user name (2 to 10 letters or digits, for example PALISADE), the person's name, and role **customer**.
3. In **Stores**, key the customer numbers this sign-on may order for, separated by spaces. A chain manager can have several stores.
4. In **Email**, key where order confirmations should go.
5. Key a starting password (8 or more characters), set Active to Y and press Enter.
6. Give the store the portal address, the user name and the password. They can change the password on the portal's Account page.

To stop a store from ordering online, set Active to N.

The cutoff

Each delivery day closes for online ordering at a set time before delivery. The default is 2:00 PM the day before. Change it on **5 → 2 → 2 Location Control**:

Field	Example	Meaning
Portal cutoff	1400	Time ordering closes (Eastern time)
Portal lead days	1	How many days before delivery the cutoff falls
Portal days ahead	14	How far ahead stores can order
Portal message	Closed Thanksgiving	A note shown at the top of every store's page

After the cutoff, or once the warehouse has printed the load sheet or the truck is loaded, the store sees the day as closed and is told to call the office.

What the store sees

- **Next deliveries**: each scheduled delivery day for the next two weeks (no-delivery holidays left out), its cutoff, and whether an order is in. Their delivery window is shown if they have one.
- **The order screen**: their usual items first (standing order, last order, recent purchases), then the full catalog by category, at their own prices. Buttons fill the screen with the **Suggested order**, the **same order as last week**, or the **Standing order**. Case-up stores step in full cases. They can add a PO number and a note for the driver or office, review, then place, update or cancel the order.
- **Invoices**: their balance, what is past due, open invoices and payments for the last 90 days, and recent deliveries. Any delivery ticket can be opened and printed.
- **Account**: their email for confirmations, password change, and switching stores (for chain sign-ons).

Watching portal orders

1 → 73 Portal Orders (also **1 → 91 → 30**) lists every store with a portal sign-on for a delivery date: **ONLINE** (ordered or changed on the portal), **OFFICE/STANDING** (an office or standing order is on file), or **NO ORDER YET**. It shows when each order was last changed

and any note from the store. Call the NO ORDER YET stores before the cutoff.

Office users (admin, manager, orders) can open the portal themselves and key a customer number to see exactly what that store sees.

Email confirmations

Every time a store places, changes or cancels an order on the portal, VeriDistro emails a confirmation with the items, prices, total, PO number and note. It goes to the email on the store's sign-on and the email on the customer's Mail-to record (**5 → 5 → 40**).

Emails wait in **1 → 74 Email Outbox** until they are sent. The top of that screen shows whether a mail server is set up; see Administration. Each email is tried up to 5 times; one that still fails shows FAILED with the reason.

Prices and promotions

Prices live in **schedules**, and every rate in a schedule has a Begin Date and an End Date. The End Date is required on promotion prices and rebates, so they stop on their own; on other prices it is optional. A customer's price for a delivery date is worked out from the schedules on the customer, using the newest rate that began on or before that date. Price changes are therefore keyed **ahead of time** with a future begin date, and take effect on their own.

How a customer's price is built

1. **Base price**: the customer's price schedule (customer master PRICE SCHEDULE). A customer with no schedule uses the default schedule on Location Control.
2. **Override**: a schedule of cents off (or a set price) for this customer or group (customer master OVERRIDE SCHEDULE).
3. **Promotions**: up to two promotion schedules (PROMO 1 SCHEDULE and PROMO 2 SCHEDULE on the customer master). How a promotion combines with the price (cents off, or a replacement price) is set on Location Control. Every promotion price has an End Date and stops after it.
4. **Rebates** are not taken off the ticket. They accrue and are credited to the account at month end. Each rebate has a Begin Date and an End Date and counts only sales between them.

To see the result for any customer and product, use **4 → 20 Customer Price Inquiry**. It shows the base price, override, promotion and net price, and why. In order entry, hover over a product line to see the same explanation.

Record types

Type	Used for
1	Price (the base price)
2	Promotion
7	Retail (suggested shelf price, printed on labels)
8	Override (cents off the base price)

Changing a price for one schedule

1. Open **5 → 8 → 1 Price Maintenance**.
2. Key the record type and schedule, then Enter. The current rates are listed with their begin and end dates.
3. Key the product, the new rate, and the **begin date** (the first delivery date at the new price). An End Date is required for a promotion price. For the other types it is optional: leave it blank and the price stays until the next one begins.
4. Press Enter. A new begin date adds a dated rate; the same begin date replaces that rate.

The old price stays on file, so tickets before the begin date still price correctly, and you can look back at price history (**5 → 8 → 61**).

A general price change (many products or schedules)

1. **5 → 8 → 92 → 5 Mass Price Pre-List** shows the current rates for your selection.
2. **5 → 8 → 92 → 1 Mass Price Entry**: choose the record type, the schedule (or * for every schedule), a product or category (or blank for all), the method and the begin date.
   - **AMT**: up or down by an amount (0.10 = up a dime).
   - **PCT**: up or down by a percent (-2 = 2% down).
   - **SET**: a new price.

3. **5 → 8 → 92 → 6 Mass Price Edit List** shows every pending change with the old and new rate. Check it.
4. **5 → 8 → 92 → 2 Mass Price Update** writes the new dated rates.
5. **6 → 4 → 7 Price Change Notice Report** lists what changes for each customer, to send ahead of the change.

Prices can also be loaded from a spreadsheet saved as CSV: **5 → 8 → 60 Price file import from Spreadsheet**.

Moving a customer to a different schedule

- Now: change PRICE SCHEDULE on the customer master, or use **5 → 8 → 2** (pricing fields only).
- On a future date: **5 → 8 → 5 Date Effective Price Schedule Change**. Day End moves the customer on that date.

Overrides and promotions

- **5 → 8 → 3 Price Override Maintenance**: key cents-off overrides by schedule and product.
- **5 → 8 → 4 Copy Promotions**: copy a promotion to another schedule with new dates.
- **5 → 8 → 94 Customer Promotion Management**: set up a **deal** (which promotion, which customers, which dates). Day End puts deals on customers when they start and takes them off when they end; **2 Activate Customer Promotions** does it immediately.
- **5 → 8 → 93 Specialized Pricing**: tier (bracket) pricing by delivery size, qualifying products, buy programs, price rounding, rolling back a price for customers on an override, and moving the begin date of a future price.

Checking prices

Report	Where
One customer's prices and why	**4 → 20 Customer Price Inquiry**
One product across every schedule	**4 → 21 Base Price Inquiry By Product**
A customer's price history	**4 → 22**
Every rate in the price file	**4 → 23 Price File Listing**

Report	Where
Customers on each schedule	**6 → 4 → A Customers by Price Schedule**
Customer/product combinations below the default price	**1 → 96 → 30 Top Price Report**
Prices that look too high or too low	**6 → 4 → 8 High and Low Price Exceptions**
Ticket prices that differ from the price file	**2 → 60 → 4 Price Edit List**
A price list for a schedule (unit and case)	**5 → 5 → 18 In House Price List**

Fixing tickets after a late price change

If a price change should have applied to deliveries already made, run **OPR → 8 Invoice Re-pricing** for the customers and dates affected. Enter shows what would change; F10 makes the adjustments. Each ticket is priced again at the rates now on file for its sale date, and the original sale is never changed. For every ticket that comes out different, Invoice Re-pricing:

- writes a **price adjustment line** into ticket history, on the ticket it corrects (type PRICE ADJ, with the date it was made and who ran it), and
- adds an **A/R adjustment** for the difference, *Price adjustment, ticket 10452*, which goes on the customer's next invoice. A reduction comes off that ticket's open balance first.

Run it just before the invoice job. **Cash customers and tickets already on a statement are never repriced**: the customer already has those prices, so the screen lists them instead. Running it again only adjusts what has changed since. In Ticket History the ticket list has a **Price adj** column, and the ticket itself shows the adjustment lines under its sales and credits. Which customers repricing is for, and how it ties to the weekly invoice, is still being settled.

Loading the trucks

The afternoon before delivery, check that every route is ready and within its truck, then print load sheets for the warehouse and delivery tickets for the drivers. In the morning, release the routes once the trucks are loaded.

1. Check the routes

- **1 → 34 Routes Ready to Load**: for a route date, each route's orders against its scheduled customers, its load against the truck, and a status: WAITING (scheduled customers still without orders), READY, LOADED or SETTLED. Select a route to see who is missing.
- **1 → 11 Route Overload Report**: cases, weight and pallets for each route against the truck's limits. Anything over shows how much over. Move stops to another route (see Routing → Route balancing) or cut orders before loading.
- **1 → 10 Plant Requirements Reports**: total product ordered against what is on hand, so the warehouse and buyers can cover shortages.

2. Print load sheets

- **1 → 16 Load Sheets – All Or A Branch**, **17 – Selected Routes**, or **18 – Specific Order**.
- A **pick by customer** route prints each stop with its products, then the route total. A **bulk** route prints one total by product.
- **Load Groups.** Stops that are loaded together (a floor, a building, or a special load such as a Chef's Kitchen) each get their own titled section: LOAD GROUP and the group's name, its stop count and cases, then its products (for a pick-by-customer route, each stop first). The main load, stops with no group, prints first. The sheet ends with the route total for all groups. Set a customer's group in **Customer Master → LOAD GROUP**; the group names are in the Codes file under LOADGROUP. A route with no groups prints as before.
- Each load sheet ends with **PULL OLDEST CODE DATES FIRST**: for each product, the code dates to load and how many of each (for example, 11/10 x40, 11/14 x8). Expired product is never listed. Product with no code date shows as NO CODE.
- The bottom line shows the load in cases, pallets and pounds against the truck's limits, and *** OVERLOAD *** if it is over.
- Once a load sheet is printed, the stores can no longer change that order on the portal, and office changes go through Order Adjustment Entry.

3. Print delivery tickets

- **1 → 19 Delivery Tickets – All Or A Branch**, **20 – Selected Routes**, or **21 – Specific Order**.
- Each ticket shows the customer, stop, delivery date and time, PO number, every product with quantity and price, the total, the previous balance, terms and any delivery instructions. Cash customers are marked COLLECT ON DELIVERY.

- Drivers using the driver app do not need paper tickets; the app has the same information and can print or share a ticket.

4. Release the routes

After the trucks are loaded, run **OPR → 2 Release Orders to Sales** for the route date and routes. Releasing:

- takes the product out of warehouse stock, oldest good code date first, and records which code dates went to which ticket (for recalls)
- puts the product on the truck
- opens the delivery tickets for settlement and sends the route to the driver app

Orders on credit hold are not released. A route that is already final settled for that date cannot be released again.

If you relieve the warehouse the evening before instead, use **OPR → 9 Inventory Relief**; Release Orders then only opens the tickets.

Load changes after printing

Change	Where
Cut or add product on an order, with a reason	**1 → 91 → 91 → 44 Order Adjustment Entry**
Load cut, load add, load correction or truck-to-truck transfer	**2 → 91 → 1**
Reduce a bulk load by what is already on the truck	**1 → 22 Inventory Reduction Order**
Driver or truck change for the day	**2 → 91 → 96 → 21 Driver Of Day Change**
Product moved between warehouse locations for a load	**1 → 91 → 91 → 45 Load Tracking Maintenance**

Routing

VeriDistro can put each route's stops in the best order, check that every truck and driver's day fits, and move stops between routes when one is overloaded. It uses real road driving times, the time each delivery usually takes, and each store's delivery window.

What routing needs

1. **Stop locations** for every customer: **1 → 71** (see Customers, products and routes).
2. **The depot location** for the branch: **7 → 92 → 16**.
3. **Route settings** on **5 → 4**: start time, base minutes per stop, seconds per case, truck limits and max hours.
4. **Delivery windows**, only for stores that need them: Window opens / Window closes on the customer master.

How times are worked out

- **Driving** comes from the road network: actual drive times and miles between stops, and the map lines follow the streets. Times are looked up once and remembered for 90 days. If the road service cannot be reached, VeriDistro falls back to straight-line miles times 1.3 at the route's average speed, and the screen says so.
- **Time at each stop**, in this order: minutes keyed on the stop; otherwise what the driver app measured there; otherwise the route's base minutes plus seconds per case for the usual order. The Stop Locations and Route Optimization screens show which was used.
- **Delivery windows**: a truck that would arrive before a store's window opens waits until it opens, and that wait counts. A stop reached after its window closes is late.

Route Optimization

1. Open **1 → 70 Route Optimization**.
2. Key the route and the weekday (0 = Monday through 6 = Sunday). Optionally key a different leave time, and whether the truck returns to the depot and whether delivery windows must be kept (both Y by default). Press Enter.
3. The screen compares **NOW** (today's order) with **PROPOSED**: miles, driving minutes, minutes at stops, waiting minutes, finish time, late stops and minutes late. It shows how many miles and minutes the new order saves.
4. The map draws the proposed route in green along the roads and today's order dashed in grey. Late stops are red. **F6** switches between proposed and today's order.
5. The stop list shows each stop's new number, its old number, arrival time, delivery window, wait, lateness and minutes at the stop.
6. Stops with no location are listed and left out. Locate them first (**1 → 71**).

7. To use the new order, press **F10** twice. The stops are renumbered for that route. Load sheets, tickets, the dispatch board and the driver app all follow the new order. Stops that belong to another route on other days keep their own numbering.

Run it whenever stops are added, moved or dropped, and for each weekday the route runs.

Truck capacity and route balancing

1 → 76 Route Balancing / Truck Capacity checks a whole weekday at once.

1. Key the weekday and, optionally, a branch. Set **Even out the day** to Y if you also want the longest route shortened when other routes have room.
2. For each route, the screen shows its typical load for that weekday (the standing orders, or the average of its last four orders) in cases, pallets and pounds against the truck, and its working day in hours against the route's max hours. Anything over is shown in red.
3. If a route is over a limit, VeriDistro suggests moving stops to other routes of the same branch that run that day and have room. It picks the moves that add the least driving. Each move shows the customer, from and to, where it fits in the new route, the cases, and the minutes added and saved. The table shows each route before and after the moves.
4. Apply the moves:
    - **F10** (press twice): for **that weekday only**. The customer's route of day is changed; other days stay on its own route.
    - **F11** (press twice): for **every day**. The customer moves to the new route, numbered right after the stop shown.
5. Run Route Optimization on the routes that changed.

If a route is still over after balancing, no other route has room. Add a route, raise a limit, or cut the load.

For one date's actual orders, **1 → 11 Route Overload Report** checks every truck, and the Live Dispatch Board warns on an overloaded truck.

Moving customers by hand

- **5 → 5 → 31 Customer Routing Change**: change routes, delivery days, route of day and stop numbers for many customers on one screen.

- **5 → 5 → 19 Resequence/View Route Delivery Patterns**: re-space stop numbers so new stops fit between them.
- **5 → 2 → 23 Delivery Week List** and **5 → 5 → 32 Delivery List With Route of Day**: who is delivered on which day by which route.

Drivers and the driver app

Drivers run their route from a phone. The app holds the whole day on the phone, so it keeps working with no signal; everything the driver does is sent to the office as soon as there is a connection.

Setting up a driver

1. **ADM → 1 User Profiles**: key a user name, the driver's name, role **driver**, and in **Driver route** the route the app opens on. Give a starting password.
2. On the phone, open the company's VeriDistro address followed by /driver and sign in.
3. Add it to the home screen (Share → Add to Home Screen on iPhone, menu → Add to home screen on Android) so it opens like an app.

The driver's day

1. **Start**: the app downloads the route for the next delivery date that has released orders: every ticket, plus scheduled stops with no order (for selling off the truck). The chip at the top shows whether everything has been sent (All sent), what is waiting, or that the phone is offline.
2. **Stops**: in route order, each with name, address, delivery window, CASH tag for cash customers and NO ORDER for stops without a ticket. **Route map** opens the remaining stops as one route in the phone's maps app; **Navigate** on a stop opens directions to it.
3. **At a stop**, open it (this records the arrival time and place):
    - change any delivered quantity that is different from the ticket
    - add products sold off the truck
    - add credits for product taken back, with the reason (out of code, damaged, fresh return)
    - take payment: cash or check (with the check number). For charge customers a payment is posted to their account as a collection
    - have the receiver sign on the screen and key their name; optionally take a photo
    - tap **Delivered**. The time and GPS location are saved with the signature

4. **Can't deliver?** Tap **Skip** and choose a reason: closed, no one to receive, refused delivery, customer cancelled, ran out of time, or credit hold. The office sees it right away.
5. **Ticket**: print it to a paired printer or share it (text or email) from the stop.
6. **Truck tab**: what is on the truck now, after deliveries, sales and credits.
7. **End of Day tab**: count what is left on the truck, key damaged and returned product and the money turned in, and send. The office uses this to settle the route.

Crates and racks: at each stop the app shows how many crates, racks and dollies the store is holding. Key how many you picked up before tapping Delivered (or Skip). Crates going out with the product are counted automatically.

While the driver is out, the app reports the truck's location every few minutes for the dispatch board.

In the office

- **2 → 61 Driver Activity / Proof of Delivery**: every stop a driver reported for a route day, with the time, place, who signed and money collected.
- **2 → 62 Proof of Delivery**: the signature, photo, location and payment for one ticket. Use it when a store disputes a delivery.
- Driver changes to quantities, sales, credits and payments are already on the tickets when the settlement clerk opens the route.

If something goes wrong

- **Offline**: keep working. The chip shows how many actions are waiting; they are sent automatically when the signal returns. Nothing is sent twice.
- **A red problem chip**: tap it to see which action the office could not accept and why (for example, a product not on file). Call the office.
- **Signed out**: sign in again. Anything waiting on the phone is kept and sent after signing in.

Live dispatch board

1 → 72 Live Dispatch Board (also **2 → 63**) shows every route for a day on one screen: where each truck is, how far along it is against plan, and the problems to act on now. It refreshes itself every 30 seconds; **F5** refreshes immediately. Key a different date to look back at another day.

Reading the board

- **Route cards** (left): driver and truck, a progress bar of stops done, skipped stops, minutes behind or ahead of plan, the next stop and its planned time, when the truck was last heard from, and the load as a percent of the truck. A red dot counts problems; an amber dot counts things to watch. Click a card to select that route.
- **Map** (right): each truck where the driver app last reported it. For the selected route: its stops numbered (green delivered, amber skipped, yellow open), the planned road route as a blue dashed line, and where the truck actually went as a dark line.
- **Stop table** (below): each stop with ticket, plan time, expected minutes at the stop, delivery window, status, time done, ordered and delivered units. Click a delivered stop to see its proof of delivery.

Plan times come from the route's start time, road driving times, the expected minutes at each stop, and waiting for delivery windows to open.

Alerts and what to do

Alert	What to do
Truck overloaded	Cut or move orders before the truck leaves; see Route balancing
Will miss its window	Call the store, agree a new time or a delivery tomorrow
Skipped (with reason)	Call the store; re-deliver later or move the order to another day
Short	Product the driver could not deliver; consider a later drop or a credit
Order on credit hold	Talk to A/R before the driver gets there
Delivered before or after its window	Note it for the store and the driver
No word from the truck for over 20 minutes	Call the driver; the phone may be off or out of signal
No stops reported yet	Check the driver is using the app
Planned day over the max hours	Consider route balancing for that weekday

The route card also shows END OF DAY IN when the driver has sent the end-of-day count, and FINAL once the route is settled.

Route settlement

Settlement accounts for every product and every dollar on a route for the day: what went out, what was sold, what came back, and the money turned in. A route must be **final settled** before Day End can run. Final settlement posts the tickets to receivables and locks the route.

Checking in a route

Work in this order for each route that comes back. Driver app routes arrive with most of this already done.

1. **Tickets**: correct delivered quantities, add products sold off the truck, and key credits on **2 → 91 → 3 Sales Ticket Entry and Adjust**. For paper peddle tickets use **2 → 91 → 2 Sales Ticket Entry**, or **2 → 91 → 96 → 27 Multiple Ticket Entry** for many at once. Credits can also be keyed on their own ticket with a reason on **2 → 91 → 5**.
2. **Returns, damaged and courtesy product**: **2 → 91 → 4 Route Inventory, Good Returns, Damaged and Courtesy Entry**.
3. **Load changes**: load cuts, adds, corrections and truck-to-truck transfers on **2 → 91 → 1**.
4. **Collections**: money the driver collected on account from charge customers, on **2 → 91 → 6 Route Collection Entry**. Key the route, customer, amount and check number (blank for cash). It is applied to the oldest open items and added to the route's deposit due.
5. **Blank or void tickets**: mark them on **2 → 18 Ticket Control/Mark Tickets**.

Settling

1. Open **2 → 91 → 7 Route Settlement**, key the route and settlement date, and press Enter.
2. The product table shows, for each product: **Begin** (on the truck at the start), **Load**, **Adj**, **Dmg**, **Ret**, **End** (counted on the truck now), **Acct** (what should be accounted for), **Sold** (from the tickets), **Diff** and **Diff $**. Key the counted ending inventory in **End**, or press **F9** to treat blank counts as no difference.

3. The money panel shows tickets (and how many are not adjusted yet), ticket total, cash tickets, collections and the **deposit due**. Key the **actual deposit**; the cash over/short is shown at once.
4. Press **Enter** to save the counts and deposit. Investigate any large product or cash difference before going on (see research tools below).
5. Press **F10**, read the message, and press **F10** again to **final settle**. The tickets post to receivables, and the route is locked for that date.

2 → 8 Bulk Route Settlement final settles several routes at once when their differences are within a tolerance you set. **2 → 12 Settlement Control Inquiry** shows every route's status for a date. A route settled on the wrong date can be moved with **2 → 32 Change Route Settlement Date** before it is final.

Research tools

Question	Where
Which customers took the product that is short	**2 → 10 Disappearance Research**
Missing or unaccounted tickets	**2 → 11 Ticket Listing**
Product and cash over/short by route	**2 → 40 Route Inventory O/S Inquiry**, 13-week trend on **2 → 43**
Deposits against what was due	**2 → 36 Deposit Report**
Payments and adjustments by route	**2 → 24**
Month-to-date totals by route	**2 → 25 MTD Route Settlement Report**
Old tickets	**2 → 91 → 9 Ticket History Inquiry**
Delivery temperatures over the limit	**2 → 94 → 42 Temperature Report**

Day-end settlement reports

2 → 60 Day End Settlement Reports holds the balancing reports to run after the routes are settled: the Daily Transaction Summary (the main balancing report), the detail transaction listing, the day-end ticket listing, the price edit list (ticket prices that differ from the price file), route product recap, managers report, route check-in sheets, delivery exceptions, and the stock tie-outs by location, branch and route.

Warehouse, code dates and purchasing

The warehouse on-hand for each branch changes only through the entries below, and every entry is kept, so the counts, reconciliation and audit list all agree. Code-dated products are also tracked by code date (sell-by date), so the oldest good product goes out first and any recall can be traced to the store.

Receiving

- **With a purchase order**: **40 → 91 → 2 Purchase Receipt Entry**. Key the PO number, the received date and the vendor invoice number if you have it. Key the quantity received on each line (**F6** fills every line with its open quantity), the cost if it differs, the bin, and the **code date** printed on the product (MMDD).
- **Without a purchase order**: **7 → 91 → 1 Purchased Receipt Entry**. Key the branch, date and reference (packing slip or bill of lading), then each product, quantity, cost, bin, **code date** and lot number.
- Leave the code date blank and VeriDistro uses the received date plus the product's shelf life. Products with no shelf life are not code dated.

Code dates and lots

Each receipt of a code-dated product becomes a **lot** with its code date. Loads, damage, issues and transfers always take the **oldest code date first**. Truck loads skip anything already past its code date, so expired product is never loaded.

- **7 → 40 Code Date Status**: every lot on hand, oldest first, with days left and a status: **EXPIRED**, **SELL NOW** (within the product's code alert days) or OK. Set Only problems to Y to see just the first two. Check it every morning and push SELL NOW product.
- **7 → 42 Lot Adjustment**: key the lot id (from Code Date Status), a negative quantity, and a reason (EXPIRED, DAMAGED, RECALL, COUNT) to dump or hold product. It posts through the warehouse, so on-hand changes too.
- Load sheets list which code dates to pull for each product (see Loading the trucks).
- Warehouse transfers carry the code dates to the other branch.

Recalls

1. Open **7 → 41 Recall / Lot Trace**.
2. Key the product and the code date (or a lot number). Leave the code date blank to see every code date of that product.

3. The screen shows how much was received, how much went to how many stores, and how much is still in the warehouse.
4. **Deliveries** lists every store that received it: date, route, ticket, customer, city, **phone number**, code date and units. Use it as your call list. Print it with **Print**.
5. Hold what is still in the warehouse with **Lot Adjustment** (reason RECALL).

Product that came back on a truck is returned to stock without its code date, so it is not on the recall list; check returned product by hand.

Other warehouse entries

Entry	Where
Returns to production and warehouse damage	**7 → 91 → 4 Returns and Damaged Entry**
Samples, donations, spoilage	**7 → 91 → 91 → 3 Miscellaneous Issues Entry** (reason required)
Branch to branch or bin to bin	**7 → 91 → 5 Warehouse Transfer Entry** (print tickets on **7 → 91 → 91 → 17**)
Sales from the warehouse dock	**7 → 91 → 91 → 8 Warehouse Sales/Credits Entry**
Load cuts and adds after loading	**7 → 91 → 91 → 9**

Physical inventory

1. Print count sheets: **7 → 91 → 10 Warehouse Count Sheet**.
2. Key the counts: **7 → 91 → 6 Physical Inventory Entry**. Counts are held, not posted.
3. Review and post: **7 → 91 → 7 Warehouse Reconciliation** shows each product's book on-hand against the count, in units and dollars, and posts the differences. Past reconciliations are on **7 → 34**.

Warehouse reports

Report	Where
On hand, with products below reorder point	**7 → 11 Inventory On-Hand Report**

Report	Where
On hand in every branch and on trucks	**7 → 30** (by product), **7 → 20** (by vendor)
Overstocked products	**7 → 19 Overstock Suspect Inquiry**
Issues by week and by day	**7 → 25**, **7 → 26**, **7 → 28**
Inventory value by usage (ABC)	**7 → 31**
Every inventory transaction	**7 → 92 → 12 Warehouse Audit List**
Reorder points and quantities, recalculated from usage	**7 → 92 → 21**
Bins	**7 → 91 → 22** (by product), **23** (by location), maintenance on **7 → 92 → 24**

Purchasing

1. **Vendors** and the products they supply: **40 → 92 → 11 Vendor Maintenance** and **40 → 91 → 19 Vendor Item Maintenance**.
2. **Prices from vendors**: **40 → 3 Quote Entry**, or **40 → 24 Bulk Quote Entry** to change all of a vendor's items at once.
3. **Requests**: anyone can ask for product on **40 → 91 → 26 Purchase Requisition**; the buyer turns requests into orders on **40 → 91 → 10 Convert Requisitions to PO**.
4. **Purchase orders**: **40 → 91 → 1 Purchase Order Entry**; print or re-print on **40 → 91 → 6**; expected receipts for the dock on **40 → 91 → 7**.
5. **Receive** as above. **40 → 91 → 8 Received List For Accounts Payable** and **40 → 9 Inventory Accrual Suspect** match receipts to vendor invoices.
6. **Follow up**: **40 → 13 Purchase Order Status**, **40 → 25 Purchase Order Inquiry**, **40 → 15 Buyers Guide** (what to buy), **40 → 27 Purchase Variance Report** (invoice cost differs from the PO).

Accounts receivable

Every delivery ticket becomes an open item on the customer's account when its route is final settled (or on the bill-to account that pays for that store). Payments, credits and adjustments are applied against those items. Statements and invoices go out on each customer's billing cycle.

Looking up an account

3 → 6 A/R Current/History Inquiry: the balance, aging (current, 1–30, 31–60, over 60 days), the last payment, and every open and paid item with check numbers. Select an item to see its detail. **3 → 7 Historical Sales Inquiry** shows what was delivered on each ticket.

Posting payments

1. Open **3 → 91 → 1 Payment & Adjustment Entry** and key the customer (F4 to search).
2. The screen shows the balance, aging and last payment, and the open items oldest first.
3. Key the **payment amount** and **check number**.
4. Apply it to the oldest items automatically, or key amounts against specific items. Anything left over stays on account.
5. To adjust the balance at the same time (a small short pay, a pricing error), key an **adjustment amount** (positive reduces what they owe) and an **adjustment reason**.
6. Press Enter to post.

Other ways to post payments:

Situation	Where
Money the driver collected	**2 → 91 → 6 Route Collection Entry** (see Route settlement)
One check paying many invoices or many stores	**3 → 91 → 91 → 2 Payment by Invoice Number** or **3 Multiple Customer/Ticket Payments**
A chain paying everything in a date range	**3 → 91 → 91 → 5 Mass Cash Application**
Record the day's checks for the bank deposit	**3 → 32 Deposit Entry and Register**
Clear small leftover balances	**3 → 91 → 91 → 6 Small Balance Clearing**
A charge or credit that is not a delivery	**3 → 91 → 91 → 26 Miscellaneous Billing Entry**

Billing

Each customer has a billing code that decides how often they are billed. On **3 → 92 Billing Menu**:

- **16 Statements**: delivery date, ticket and amount for each item, with the balance forward.
- **17 Invoice (Week/Month)**: products by delivery date in a grid.
- **18 Invoice (Month Only)** and **19 Invoice (Daily)** for customers billed that way.
- **20 Special Invoice** for a large account's own format.

For an urgent bill outside the cycle, use **3 → 91 → 21 Demand an Invoice/Statement**. Bills go to the Mail-to address when the customer has one.

Collections

Need	Where
Aged balances by customer, bill-to or collector	**3 → 10 A/R Trial Balance Options**
Past-due customers	**3 → 12 Delinquent Report Options**
Every open item	**3 → 4 A/R Open List by Customer**
Collection letters (first and second notice)	**3 → 91 → 15 Dunning Letters**
Notes on an account, and follow-ups due	**3 → 44 Accounts Receivable Text**, **3 → 22 Customer Text Action**
Orders waiting for customers over their limit	**3 → 31 Soft Credit Hold Review**
Aged balances for each route's customers	**2 → 94 → 14 Route Aged Trial Balance**
Cash customers' balances by route	**3 → 11 Route Cash Recap**

Credit limits, terms and the bill-to account are on the customer master, or **3 → 91 → 9 Customer A/R Maintenance** for the receivable fields only. Whether being over the limit warns or stops order entry is set on Location Control.

Daily and period reports

- **3 → 23 A/R Payment & Adjustment Retrieval** and **3 → 40 Daily A/R Adjustment Detail and Summary**: payments and adjustments by reason.

- **3 → 35 A/R Exception Reports**: skipped items, negative payments, payments on account.
- **ADM → 20 General Ledger Export** and **ADM → 22 General Ledger Journal**: the day's receivable totals as journal lines, downloadable as CSV for the accounting system.

Rebates and commissions

- Rebates accrue on each customer's deliveries during the month and are credited to the account automatically at month end (see Day end). Rates are on **5 → 8 → 6**.
- Commission rates by sales rep and product class are on **3 → 43 Commission Rate Maintenance**. Reports: **3 → 41 Commission Report** and **3 → 42 Salesman/Broker Commission Report**. Brokers who share a customer are set on **ADM → 24**.

Day End, month end and year end

Day End closes the business day: it moves the business date forward one day and prepares the next days' work. Run it once a day, after every released route is final settled. It cannot be run twice for the same date.

Before Day End

- [ ] Every route released today is final settled (**2 → 12 Settlement Control Inquiry** shows any that are not).
- [ ] Today's payments and collections are posted.
- [ ] Day-end settlement reports printed or saved (**2 → 60**), especially the Daily Transaction Summary.
- [ ] Everyone is out of order entry and settlement.

Running Day End

1. Open **OPR → 4 Day End Processing**.
2. The screen shows the business date being closed and whether it is ready. **DAY END IS BLOCKED** lists any routes still not final settled; settle them first. Orders that were never released are listed too; they stay on file.
3. The bottom of the screen lists recent Day Ends: date, when, by whom, standing orders created, and whether it was a month end.
4. Press **F10**, read the message, and press **F10** again.

5. The message confirms the new business date and how many standing orders were created. Everyone sees the new date the next time they open a screen.

What Day End does

1. Moves the business date to the next day.
2. Applies driver and truck changes keyed for the new day.
3. Moves customers to new price schedules that take effect that day (Date Effective Price Schedule Change).
4. Starts and ends promotion deals that begin or end that day.
5. Builds standing orders for the next two delivery dates (not on no-delivery holidays).
6. At the turn of the month, credits month-end rebates to customer accounts.
7. Logs who ran it and when, for the maintenance log.

Backups are automatic; there is no backup step at Day End.

Month end

After the last Day End of the month:

1. Rebates are posted automatically by that Day End (**ADM → 21 Month-End Rebate Posting** shows them and can post a month that was missed).
2. Run statements and monthly invoices (**3 → 92**).
3. Transfer the month to the general ledger: **OPR → 7 Route Accounting G/L Transfer** and **OPR → 17** for warehouse inventory. **OPR → 15 → 7 G/L Transfer History** lists every transfer.
4. Sales tax: **4 → 37 Tax Summary Report** (and by county or city on **6 → 8 → 55 and 56**).
5. Month-to-date reviews: **2 → 25 MTD Route Settlement Report**, **6 → 8 → 1 Product Sales Summary**, butterfat reporting on **6 → 8 → 60 and 61**, dump reports on **6 → 8 → 62 to 64**.

Year end

After the last Day End of the fiscal year, run **OPR → 6 Year End Processing**. It starts the new year's totals on the customer and product records; last year's figures stay available for this-year/last-year reports. **OPR → 15 → 8 Year End History** lists each closed year with its sales, units and open receivables.

The fiscal calendar (period and year end dates) is on **OPR → 15 → 6 Processing Calendar Maintenance**.

Correcting the business date

Only if Day End was run by mistake or the date is wrong: **OPR → 15 → 5 Change Day End Control Date**. Talk to the office manager first; orders and settlements are tied to dates.

Reports and sales analysis

Every report shows on screen first. Select a line to drill into the detail behind it, use **Print** to print it, and F12 to go back up a level. Most reports ask for a date or date range, and optionally a route, customer or product; leave a field blank for all.

4 Management Inquiry holds the quick lookups. **6 Sales Analysis** holds the full set, grouped as product (6 → 1), customer (6 → 2), customer/product (6 → 3), pricing (6 → 4), receivables (6 → 5), pre-order review (6 → 6), general ledger (6 → 7) and the period reports (6 → 8). Sales reps have their own short menu on **4 → 80**.

Where to find the answer

Question	Report
How is a product selling, by day, week and month?	**4 → 1 Product Detail Inquiry**, 13-week trend on **4 → 2**
What did a route load, sell, dump and come up short?	**4 → 3 Route/Product Inquiry**
Everything about one customer	**4 → 10 Customer Master File Inquiry**, **4 → 11 Customer Profile and Sales History**
Is a customer buying less?	**4 → 14 12 Week Unit Sales Trend**, **6 → 2 → 2** (13-week margin trend)
This year against last year	**4 → 12**, **4 → 38 Comparison Reports**, **6 → 2 → 1 Two Year Comparative Analysis**
Margin by product or customer	**4 → 30 On-Line Sales/Margin Drill Down**, **6 → 3 → A**
Route sales and profit	**4 → 31 Route Summary**, **4 → 32 Route Gross Profit**, **6 → 8 → 36 Route Net Margin**

Question	Report
Which customers on a route never buy a product	**6 → 1 → 7**
Chain stores together	**4 → 15 Chain 5 Week Unit Trend**, **4 → 34 Chain Store Summary**, **6 → 3 → 9 Quarterly Chain Sales**
Damaged product by reason	**4 → 36**, **6 → 8 → 39** (by route)
New and lost customers	**6 → 2 → 8 New Business**, **6 → 2 → 9 Lost Business**
Did a promotion work?	**6 → 8 → 22** (by product), **6 → 8 → 23** (by customer), **6 → 3 → B** (13-week promotion history)
Is a route balanced across the week?	**6 → 8 → 16 Seven Day Sales by Customer**
Credits by reason	**4 → 80 → 25 Credit Breakdown Report**
Sales for accounting, and sales tax	**4 → 35 Sales Accounting Report**, **4 → 37 Tax Summary Report**
Butterfat for federal order reporting	**6 → 8 → 60 Butterfat Report**, **61 Recap**
What is on order for a date, by product or route	**6 → 6 → 2**, **6 → 6 → 3**

Daily operating reports

Report	Where
Portal orders for a date	**1 → 73**
Suggested order review	**1 → 75**
Customers with no order	**1 → 9 Load Control by Route**
Routes ready to load, and overloads	**1 → 34**, **1 → 11**
Product short when ordering	**1 → 43 Demands Not Met**
Orders cut after loading (fill rate)	**1 → 48**

Report	Where
Code dates expiring	**7 → 40**
Driver activity and proof of delivery	**2 → 61**
Daily balancing after settlement	**2 → 60 → 1 Daily Transaction Summary**

Profit, returns and crates

Three tools show where money leaks out after the sale: stores that cost more to deliver than they earn, product that comes back stale, and crates and racks that never come back.

Profit by stop

4 → 40 Profit by Stop (also **6 → 2 → E**) shows, for each store over a date range (the last four weeks unless you key dates):

Column	Meaning
Sales, Returns	What was delivered, and what was credited back
Cost of goods, Rebates	Product cost of what was delivered, and rebates credited
Margin, Margin %	Sales less returns, cost of goods and rebates
Min/stop	Average minutes of the truck's day this store takes
Delivery cost	The store's share of the route's daily cost
Profit, Per delivery	Margin less delivery cost, in total and per visit
Avg order	The store's average order after returns
Break-even order	The order size at which the margin just covers the delivery cost

A store's delivery cost is the route's **daily cost** (Route Master) shared over the route's stops by how much of the day each takes: the drive in from the stop before, plus the minutes at the stop, with the drive back to the depot shared the same way. A store far off the route, or slow to unload, carries more.

Stores are listed worst first. **LOSS** means the store loses money after delivery; **THIN** means profit under 5% of sales. Select a store to see its products and its cost per visit on each route and weekday.

What to do with a LOSS store: deliver less often, set a minimum order at its break-even order, add a delivery charge, move it to a route that passes nearby (Route balancing), or review its prices. Keep each route's **daily cost** on the Route Master up to date (driver pay, truck, fuel, insurance per day); every figure here depends on it.

Returns and stale analysis

4 → 41 Returns and Stale Analysis (also **6 → 1 → R**) shows product that came back as a share of what was delivered, over a date range.

- **By**: S by store, P by product, R by route (with its driver), W by reason.
- Columns: delivered, returned, return %, **out of code** (stale) and stale %, damaged, fresh returns, the amount credited, and the product cost lost.
- **HIGH** marks anything at or above the flag percent (5% unless you key another).
- A **weekly trend** for the last 13 weeks shows whether returns are rising or falling.
- **Warehouse dumps** lists damaged, spoiled and expired product thrown out in the warehouse over the same dates.

Out-of-code returns mean the store is getting more than it sells. Select a store to see each product's stale returns per delivery against its standing order, and the cut that matches.

Cutting stale standing orders

1. Open **1 → 91 → 32 Stale Order Cuts**.
2. Key the customer and the dates, then Enter.
3. For each product: delivered, out of code, stale %, stale returns per delivery, the standing order by weekday, and **Cut by**: the average stale return per delivery, rounded down to whole cases for case-up stores.
4. Press **F10** twice to take that amount off every weekday of the store's standing order. The change is logged in the maintenance log.

Suggested orders already allow for returns, so stores that order on the portal or by phone see the lower amount there too.

Crates and racks

VeriDistro keeps a running count of the crates, racks and dollies at every store.

Setting up

1. **5 → 13 → 70 Container Types**: one line per type (for example CRATE, Milk crate, 5.00), with the value a store is charged for one it loses.
2. On the **Product Master**, set **Container** on each product that goes out in one (one container per case).

How the count moves

- **Out**: when a route is final settled, the containers that went with each ticket's delivered cases are added to the store's count automatically.
- **Back**: the driver keys how many were picked up at each stop in the driver app (the app shows how many the store holds).
- **Office**: **2 → 70 Container Entry** keys pickups without the app, extra drops and corrections. **F5** shows what the store holds.

Watching and collecting

- **2 → 71 Container Balances**: every store holding containers, most first, with the value, what went out and came back over the last four weeks, the return %, the last pickup and days since. **CHASE** marks a store with nothing picked up in 14 days or less than 80% coming back. Key a number in Holding more than to see only big balances.
- **2 → 72 Container History**: one store's every movement with a running balance, to show the store.
- **2 → 73 Containers by Route**: by route and day, left at stores against picked up. A route that keeps bringing back far less than it leaves is where containers are being lost.
- **Charging for lost containers**: on **2 → 70**, key the customer, the container and the quantity in **Charge lost**, then press **F10** twice. The store's account is charged at the container value and its count goes down by that many.

Daily flash, forecast, loading and store notices

Daily flash email

Every morning the owner gets a one-page email about the day before, compared with the same weekday a week earlier: sales, margin, returns, out-of-code units, tickets, cash and product over/short by route, stops delivered outside their window, skipped stops,

payments posted and how many orders are already in for the next day.

- To set it up, open Location Control and fill in **FLASH EMAIL TO** (one or more addresses, with commas between) and **FLASH HOUR** (the hour, Eastern time, it goes out; 6 = 6 AM).
- To see it on screen any time, go to Main menu **4 → 42 Daily Flash** and key a day. **F10** twice emails it right away.
- Each day's flash is sent only once. Email must be set up (see Administration) for it to leave the building; until then it waits in the Email Outbox.

Production and purchasing forecast

Main menu **4 → 43** (also **7 → 43**) looks at the next 7 delivery days. For each day it adds the orders already on file and, for every scheduled store that has not ordered yet, its suggested order. It then compares that with warehouse on hand and open purchase orders.

- **Need by day** shows ordered and suggested units per day.
- **By product** shows the day each product runs out (falls below its minimum), what to buy or make, the vendor, and the date to order by (runs-out date less the vendor's lead days). LATE means that date has already passed.
- **To buy or make** totals it by vendor.
- **F10** twice makes one purchase order per vendor for the BUY lines, due the day before the stock runs out. Review them in Purchasing before sending.

Store emails when the office changes an order

When someone in the office changes, cancels or adjusts an order for a store that orders online, the store gets an email listing each product that changed (was → now), with the reason for an order adjustment. Only stores with a portal sign-on get it, sent to their portal and Mail-To addresses. Changes the store makes itself on the portal get the usual confirmation instead. To turn it off, set **EMAIL OFFICE CHANGES** to N in Location Control.

Delivery windows by day of the week

Some stores have different hours on some days (for example, the dock opens later on Saturday). Main menu **1 → 77 Delivery Windows by Day**:

1. Key the customer and press Enter.

2. For a day with different hours, put **Y** under Own window and key Opens and Closes (HHMM). Y with no times means any time that day. N means the usual window from the Customer Master.
3. Press Enter to save.

Routing, route balancing, the dispatch board, the driver app and the portal all use the window for that day.

"Truck is close" notices

On the same screen, set **Text when truck is close** to Y and key the store's **Text phone**. On a delivery day, once the driver finishes the stop before, VeriDistro works out when the truck should arrive. When that is within **NOTIFY MINUTES** (Location Control, default 30), the store gets one message that day: a text if texting is set up, otherwise an email.

Scanning cases onto the truck

Loaders or drivers can scan each case as it goes on the truck.

- **In the driver app**, open the **Load** tab. Scan with a hand scanner (it types into the box), key the number, or tap **Scan with camera** on phones that support it. Set How many first for a stack of the same item. **Take back** removes the last scan of that barcode.
- **At the office**, use Main menu **1 → 78 Load Scan** with a USB hand scanner: key the route, press Enter, then scan.
- A case barcode counts a full case; a unit UPC counts one. Each scan shows how many are left of that product.
- The app beeps and shows red for a product that is not on the load, too many, or an expired code date. It shows orange when an older code date is still in the warehouse (pull that first).
- **1 → 79 Load Check** (also **2 → 74**) shows every route's progress and the problem scans.
- Each product needs its UPC on the Product Master. Scanning needs a signal (warehouse wifi).

Paying invoices online

Once online payment is turned on, stores see **Pay balance** on the portal's Invoices tab, and can tick invoices to pay just those. They pay on Stripe's secure card page and come back to the portal. The payment posts to A/R by itself, applied to the invoices they picked, and

the store gets a receipt email. **CARD FEE %** in Location Control adds a card fee to what the store pays (0 = none). Main menu **4 → 44** (also **3 → 45**) **Online Payments** lists every payment started on the portal and its A/R reference.

The Today page, search and customer cards

The menus, option numbers and function keys all work exactly as before. These are extra ways to get around.

- **Today.** Switched off for now: after you sign on you land on the main menu. The Today page and the cards mentioned in this manual come back when it is turned on again.
  - The top row is the day's checklist: orders for tomorrow, load sheets, release, dispatch, route settlement, day end. Each step shows whether it is done, still to do, or waiting on something, and clicking it opens that screen.
  - Below are to-do cards for your job. Order clerks see stores not ordered, orders from email and text, and credit holds. Dispatchers see loading and maintenance. Settlement sees unsettled routes and timesheets. A/R sees collections and bank files. Owners see yesterday's numbers and the exceptions.
  - Click any line to open it, and press F3 for the main menu. To start on the menu instead, set it in **My Settings** (main menu SET).
- **Search (Ctrl+K)** from any screen finds stores by name, number, city or phone; products; tickets; purchase orders; vendors; and screens by name, for example "profit by stop". Use the arrow keys, then Enter.
- **Customer card.** Clicking a store anywhere opens its card on the right: balance, past due, weekly sales trend, route and days, delivery window, terms, coming orders, recent deliveries, open issues, crates and equipment at the store, and notes. The buttons start a new order, take a payment, log an issue or print a statement. Esc closes it.
- **Reports.** Click a column heading to sort. Reports with many lines have a filter box above them.
- **Green screen** (top right) switches to the classic green-on-black look.

QuickBooks, documents, service and fleet

QuickBooks Online

VeriDistro sends each business day to QuickBooks after day end. Set it up once under **ADM → 25 QuickBooks**:

1. Press **F6 Connect**, sign in to Intuit and pick the company.
2. Open **ADM → 26 Account Mapping**. For each account code in the Route Account file, key the QuickBooks account number or full name. **F5** lists the QuickBooks accounts.
3. Back on the QuickBooks screen, choose how to send:
    - **S (summary):** one journal entry a day. A/R stays in VeriDistro.
    - **D (detail):** each customer's invoices, payments and credits go to QuickBooks. Customers and products are created there as needed.
4. Key a **start date** so older days are not sent.

In both modes, purchase order receipts go to QuickBooks as vendor bills, so vendors are paid from QuickBooks.

Each day is sent once. If a day changes later, for example a back-dated payment, it is sent again as an update. **F7** sends now and **F8** sends one day. **ADM → 27 Send Log** lists every document and any problem.

Driver hours: on **2 → 75 Driver Timesheets**, **F10** sends the week to QuickBooks as time entries for QuickBooks Payroll.

QuickBooks Desktop

ADM → 28 QuickBooks Desktop Export makes an .iif file of the daily journal entries and vendor bills. Import it in QuickBooks Desktop under File → Utilities → Import → IIF Files. For this to work:

- The Route Account file's account codes must match the QuickBooks Desktop account names.
- Add a customer named "VeriDistro Customers" in QuickBooks Desktop first.

Documents by email

- **3 → 46 Email Documents** emails invoices, statements or dunning letters as PDFs.
    - Each customer's address comes from Email/Fax Control (method EMAIL).

    - Put Y in "Use Mail-To email" to also reach customers that have no Email/Fax Control line.
    - Enter shows who will get one; **F10** sends.
- **40 → 50 Email Purchase Order** sends a PO to the vendor as a PDF and marks it printed.
- **1 → 80 Stores Not Ordered Yet** lists call-in and online stores with no order for a delivery date. **F10** emails each one a reminder. To send reminders automatically before the cutoff, set REMIND ORDERS = Y and REMIND HOURS in Location Control.

Order checks

Order entry now also checks:

- **Customer minimum order in dollars:** a warning, or a stop if Location Control MINIMUM ORDER = stop.
- **Product maximum per order:** stops the order.
- **Unusual quantities:** a warning when a quantity is several times what the store usually takes on that weekday.
- **First time a store orders a product:** a warning.

If a customer has PRICE BY ORDER DATE = Y, they pay the price on the day the order was taken.

Customer service log

- **1 → 81 Customer Service Entry** records a complaint, request or comment by type, with a product, a ticket and a follow-up date. Close an entry with what was done.
- **4 → 45 Customer Service Log** lists open entries and follow-ups that are due.

Bank payment import

3 → 47 Bank Payment Import reads a CSV file from the bank or lockbox. Each payment is matched, in this order:

1. by the invoice or ticket numbers it mentions
2. by the customer number or name
3. by an open invoice for exactly that amount

Payments already posted are marked DUPLICATE. Key a customer on any unmatched line, or SKIP to leave it out, then **F10** posts the matched payments to A/R.

Vendor scorecard and bills of lading

- **40 → 51 Vendor Scorecard** grades each vendor A to D on on-time deliveries, fill rate and quality problems, and shows price differences. Note quality problems at Purchase Receipt Entry, in the new Quality problem column.
- **1 → 82 Bill of Lading** prints a straight bill of lading for a route's load or a branch transfer, with cases, pallets, weight, carrier, trailer and seal.

Driver time clock

Drivers tap **Clock in**, **Start break**, **End break** and **Clock out** at the top of the Stops screen. Punches work with no signal.

- **2 → 75 Driver Timesheets** shows each driver's week: hours, breaks, overtime after Location Control OVERTIME AFTER (40), and road hours from first to last stop. CHECK marks a day with a missing clock-out.
- **2 → 76 Time Punch Correction** adds or corrects a punch. A reason is required, and every change is logged.

Assets and fleet

Trucks, coolers and other equipment are set up and tracked on the Warehouse menu (7):

- **7 → 50 Asset Master** lists trucks, trailers, coolers, freezers, racks and other equipment. For trucks, use the Route Master TRUCK number as the asset id.
- **7 → 51 Asset Entry** records fuel, repairs, service and inspections, and moves equipment to or from a store. Drivers also log fuel from the driver app's Truck tab.
- **7 → 52 Work Orders** opens and closes repair and service jobs. Closing one adds it to the asset's history.
- **7 → 53 PM Schedule** sets maintenance tasks every so many miles or days. A service entry with the same task resets the count.
- **7 → 54 Fleet Cost and Maintenance** shows miles, MPG, fuel and repair cost, cost per mile, and what maintenance is overdue or due soon.
- **7 → 55 Equipment at Stores** shows each cooler's store, its rent, what the store bought since it was placed, and payback weeks.
- **3 → 48 Equipment Rental Billing** bills each store's monthly equipment rent once a month.

Insights and AI

These features use VeriDistro's own numbers and work without anything extra:

- **Smarter suggested orders.** Suggested orders adjust the 8-week average for the store's own trend, the weather forecast at the depot, promotions and holidays. School customers get no suggestion on days marked "Schools closed" in the Calendar. Each suggestion shows why and a likely range. Location Control SUGGESTED ORDERS = basic turns this off.
- **4 → 52 Forecast Accuracy** grades both methods every week against what sold.
- **4 → 51 Exception Watch** is also in the daily flash. It flags stores that nearly always order but haven't, drivers drifting short, products whose returns jumped, prices keyed far from normal, stores whose sales fell, and accounts over their credit limit.
- **3 → 49 Collections Priority** ranks past-due accounts by who to call first.
- **4 → 54 Route and Delivery Day Suggestions** finds stores that would cost fewer road miles on another route or another delivery day.
- **4 → 53 Price and Margin Advisor** shows cost increases and store-products under the target margin (Location Control TARGET MARGIN %). **F10** drafts the new schedule prices as pending Mass Price changes. Nothing changes until they are applied there.

These features use Claude, Anthropic's AI. They are off until ANTHROPIC_API_KEY is added to the App Service settings (Anthropic bills by use; **ADM → 41 AI Status** shows how much was used):

- **4 → 50 Ask VeriDistro**: ask about sales, stores, routes, returns and money in plain English. Answers come only from VeriDistro's data.
- **1 → 83 Orders from Email and Text** reads orders that arrive by email or text, including "same as last time plus 2 cases".
  - Sources: the orders mailbox (Microsoft 365) and texts to the Twilio number. You can also paste a message.
  - The office checks each draft; **F10** makes the order through normal order entry and tells the store.
- **40 → 52 Vendor Invoice Reader** reads a PDF or photo of a vendor invoice, matches it to the PO and receipts, and lists differences: billed more than received, price above the PO, received but not billed.
- **3 → 52 Collections Helper** drafts a polite, specific past-due email for you to edit and send.

- **Ask about this stop** in the driver app answers questions such as "where is the receiving door?" from the store's notes and history.
- **Daily flash** starts with a short plain-English summary.

AI only reads and drafts. Orders, prices, payments and customer emails change only when someone in the office approves them.

Order tuning, crates, cost to serve and the cold chain

These tools go after the costs that quietly eat a distributor's margin: out-of-code returns, crates that never come back, stops that cost more than they earn, and product that got warm on the truck.

Order tuning

Out-of-code product comes back on the **next** delivery, so a return picked up on Monday belongs to Saturday's drop. VeriDistro matches every out-of-code return to the drop it came from and looks at each weekday separately. A store that returns whole milk after most Saturday drops gets a smaller Saturday, not a smaller week. The other way round, a weekday where the store keeps taking more than its standing order, with nothing coming back, gets a bigger one.

1. Open **1 → 91 → 33 Order Tuning** (it is also on the Today page as *Standing orders to tune*).
2. Each line shows the store, product, drop day, the standing order now and the new amount, how many drops it looked at, and about how much it is worth a week: product cost saved for a CUT, margin added for a RAISE. The Why column says what was seen.
3. Key **1** next to a line to apply it or **4** to reject it, then press Enter. Set *Tell the store* to Y to email the store what changed.
4. Applying changes only that weekday of the standing order. Case-up stores always move in whole cases.

F5 recalculates from the latest deliveries; F7 opens **Returns by Drop Day** (1 → 91 → 35), the evidence for one store. A change that was just applied or rejected is not proposed again for four weeks, and after a change only the drops since it count.

1 → 91 → 34 Tuning Results (also 4 → 48) measures every applied change: out-of-code units per drop before and after, units avoided, money saved at cost, and whether sales held up. WORKING means fewer stale returns (or more sold, for a raise); NO CHANGE means returns did not drop; SALES DOWN means the store now sells noticeably less on

that day; TOO SOON means there has been no drop of that weekday since. The header shows the running rate a week and a year. **TUNING WEEKS** in Location Control sets how many weeks of drops it looks at (8 unless you change it).

Crate limits, charges and chase letters

Crates going out with delivered cases are counted at final settlement and pickups come from the driver app, as before (see Container Balances, 2 → 71). Three more screens close the loop:

- **2 → 78 Container Limits and Charges.** Set a default limit for each container type (how many any store may hold) and, if needed, a store's own limit. The screen lists every store over its limit. F10 (twice) charges those stores for the containers above the limit at the container value, as a misc charge on their account. When charged crates come back, the store is credited automatically, so the charge works like a deposit.
- **2 → 79 Container Chase Letters.** One email to each store flagged CHASE in Container Balances (nothing picked up in 14 days, under 80% coming back, or over its limit), listing what it holds and asking for it back. Stores with no email are listed so you can call. F10 (twice) sends.
- **The driver app** shows each store's limit and, when it is over or nothing has come back in two weeks, *Ask for at least N back*. The printed ticket shows crates left, picked up and what the store now holds, and every invoice lists the containers at the store.

Depot and processor crates

2 → 80 Container Stock Entry records the depot side: a physical **COUNT** in the warehouse, crates in from a processor with a load (**FROM_VENDOR**), empties sent back (**TO_VENDOR**), and crates **BOUGHT** or **SCRAPPED**. **2 → 81 Container Reconciliation** then adds up every crate you are responsible for (owed to processors plus bought, less scrapped) and where each one is: in the depot, at stores, or charged to a store. The difference is **Missing**, with its value, and the balance with each processor is shown underneath. Key a fresh depot count to see it as of today.

Cost to serve

4 → 46 Cost to Serve (also 6 → 2 → F) is a full profit and loss for every store over the dates, worst first. On top of product margin (sales, returns, cost of goods, rebates) and delivery cost (the route's daily cost shared by each stop's part of the day), it charges:

- **Crates kept:** containers left and not returned or charged, at their value.

- **Money owed:** the store's open balance times the money rate, for the days in the period, plus how many days it takes to pay.
- **Order taking:** office-keyed orders times the office order cost. EST means estimated: a store with no standing order and no orders on file is assumed to phone in each delivery.
- **Issues:** customer issues logged times the issue cost.
- **Equipment:** depreciation of coolers and racks at the store, less the rent billed for them.

The last column says what would fix a store that loses money or runs thin: fewer deliveries, a minimum order or delivery fee (with the amount), Order Tuning for high returns, chasing crates, or tighter terms. The three rates, **MONEY RATE %**, **OFFICE ORDER COST** and **ISSUE COST**, are in Location Control.

4 → 47 Cost to Serve What-if (or select a store in Cost to Serve) tries dropping one or more delivery days, for example WED or TUE,SAT. The dropped day's product moves to the delivery before, at the **Keep %** you expect the store to keep buying from you. Each visit's cost is the truck time it really adds: the drive in and out less the direct drive between its neighbors, plus the minutes at the stop. A day where the store is the only stop saves the whole truck day. The header shows profit a week now and after, and the difference a year. A bigger drop sits longer, so watch Returns by Drop Day after a change.

The cold chain

Every delivery can carry its product temperature, and trucks can be watched all day.

- **In the driver app,** each stop has a *Product temperature* box. The driver probes a product and keys it, or taps **Read sensor** for a Bluetooth thermometer (most low-cost probes that use the standard Bluetooth temperature service work, on Android phones with Chrome). Over the limit needs a note. Left blank, the truck logger's reading closest to the delivery (within 15 minutes) is used.
- **Truck loggers.** Set up each logger in **2 → 84 Temperature Sensors** (also 7 → 57): an id, the truck, the device id the logger sends, and its low and high limits (28 and 41 °F unless you change them). Loggers send readings to VeriDistro's temperature feed, which stays off until the TEMP_INGEST_KEY setting is added in Azure. Any logger or gateway that can send a webhook works.
- **Excursions.** A truck above its high limit (or below its low one) for **TEMP ALERT MINUTES** (30 unless you change it) opens an excursion. It shows on the Today page and is emailed once to **TEMP ALERT EMAIL** (both in Location Control). Close it in

Temperature Sensors with a note of what was found and done.

- **Reports. 2 → 82 Temperature Log** (also 2 → 94 → 43) shows one truck's day: readings by hour, excursions, and every delivery with its temperature and where it came from, flagged OVER or DURING EXCURSION. **2 → 83 Temperature Excursions** (also 4 → 49) lists every excursion, open ones first. The existing Temperature Report still lists delivery temperatures for a date range.
- **On paper.** Every invoice prints the product temperature on each ticket. Tickets keyed in the office get the logger reading at final settlement. **TEMP LIMIT F** in Location Control sets the delivery limit (41 unless you change it).

Fuel and DEF

Fleet costs now include diesel exhaust fluid (DEF) next to fuel.

- **Drivers** log fuel and DEF together in the driver app (Truck tab): gallons and total for each, odometer and station. Either one alone is fine.
- **The office** keys DEF in **7 → 51 Asset Entry** with entry type DEF, gallons and cost, the same as fuel.
- **7 → 54 Fleet Cost and Maintenance** (also 2 → 77) shows, per truck: miles, fuel gallons, MPG and price a gallon, fuel cost, DEF gallons, price and cost, **DEF % of fuel**, fuel plus DEF and their cost a mile, repairs and service, total cost and cost a mile. A table underneath gives fuel and DEF by month, and the header totals fuel, DEF and fuel plus DEF a mile for the fleet.
- Diesel engines with SCR usually use 2 to 3 gallons of DEF per 100 gallons of fuel. **NO DEF** flags a truck with fuel but no DEF logged; **CHECK DEF** flags under 1% or over 6%, which means missed entries, a leak, or a sensor problem.

Reefer units

Each truck's refrigeration unit is its own asset, so its hours, fuel and service are kept apart from the truck's.

- In **7 → 50 Asset Master** set it up with type **REEFER**, **On truck** (the truck it is mounted on), its **Hour meter**, and **Fuel from**: TRUCK when it draws from the truck's tank (key **Reefer gal/hr**, for example 0.45), or OWN when it has its own tank.
- **Hour meter readings:** the driver keys the reefer's hour meter at the end of the day in the driver app (Truck tab), or the office keys an entry of type **HOURS** in **7 → 51 Asset Entry**. A reading lower than the last one is refused.

- **Fuel and service:** a reefer with its own tank is fueled with a FUEL entry on the reefer unit. Service and repairs are keyed on the unit, with its hour meter reading.
- **Maintenance by hours:** in **7 → 53 PM Schedule** give a task an **Every hours** interval (for example REEFER service every 1,500 hours for type REEFER). Maintenance due shows hours now and hours left, and flags DUE SOON within 10% of the interval.
- **7 → 54 Fleet Cost and Maintenance** has a *Reefer units* table: hour meter, hours run, hours a day, where its fuel comes from, gallons and fuel cost, service, cost an hour, and the next service. For trucks whose reefer draws from the truck tank, the reefer's gallons are taken out of the truck's fuel to give **Road MPG**.

Fuel use check

7 → 59 Fuel Use Check (also 2 → 89 and 4 → 56) compares fuel bought with miles driven, fill by fill, to catch waste and theft. Each fill covers the miles since the fill before it; when the reefer runs off the truck's tank its gallons for those hours are taken out first. A truck's **normal MPG** is the middle of its fills over the last six months. A fill is flagged:

Flag	Means
OVER TANK	more gallons than the tank holds (set **Tank gallons** in Asset Master): fuel went somewhere else
SOON AFTER	a big fill only a few miles after the last one
LOW MPG	under 80% of the truck's normal: siphoning, long idling, a leak, or fuel for another vehicle
OFF DAY	bought on a day the route did not deliver
SAME DAY	a second fill the same day
PRICE HIGH	over 10% above the fleet's usual price a gallon
CHECK ENTRY, NO ODOMETER, ODOMETER JUMP	a reading to check, usually a keying mistake

The truck table shows gallons expected from the miles (and reefer hours) at normal MPG, the difference, and the **suspect** gallons and dollars on flagged fills. **POSSIBLE LOSS** marks a truck whose suspect gallons are more than 3% of what it bought. Select a truck to see every fill. Fills to look at from the last two weeks are on the Today page.

Tolls and E-ZPass

1. In **7 → 50 Asset Master** key each truck's **E-ZPass tag** number (as it prints on the statement) and **Toll class** (the class the truck should be charged, for example 2 for a two-axle box truck).
2. Download the statement or transaction history from the E-ZPass account as a CSV (NY or NJ) and import it in **2 → 85 E-ZPass Statement Import**. Payments and fees in the file are skipped, and importing the same file twice adds nothing.
3. Each toll is matched to the truck by tag or plate, then to the route and that day's driver, and checked:

Flag	Means
OFF DAY	the route did not run that day (day off, holiday, or no deliveries)
OFF HOURS	outside the driver's punches that day, or outside the route's start time plus its maximum hours
WRONG CLASS	charged as a different vehicle class: the tag was used in another vehicle, such as a car
NEW PLAZA	a plaza this truck has not used in 90 days
DUPLICATE	the same plaza and amount twice within 3 minutes: dispute it
BY MAIL	billed by plate because the tag was not read (costs more): check the tag is mounted
NO TRUCK	the tag or plate is not on any truck

4. **2 → 86 Toll Review** lists flagged tolls. Key **1** OK (business use), **2** question the driver, **3** driver to repay, **4** dispute with E-ZPass, or **5** reopen, then press Enter. Options 3 and 4 need a note.

2 → 87 Toll Report shows tolls by truck, route, driver or plaza: amount, a week, per mile, by mail, off duty, wrong class, flagged, to review, driver to repay and disputed. **2 → 88 Toll Detail** lists every toll. Tolls are part of each truck's total cost and cost a mile in Fleet Cost and Maintenance.

DOT truck inspections (DVIR)

Drivers file their pre-trip and post-trip inspections on the tablet, and VeriDistro keeps them as legal records under 49 CFR 396.11 and 396.13. Electronic reports and signatures are allowed (49 CFR 390.32). Have your safety advisor confirm the setup fits your operation.

In the driver app

- **Pre-trip.** The Stops screen asks for the pre-trip before the driver leaves. If the last report for the truck listed defects, the driver sees each one and how it was certified, and ticks that they reviewed it (396.13). The driver marks every item OK, Defect or N/A. The 11 items the rule requires come first: service brakes, parking brake, steering, lights and reflectors, tires, horn, wipers, mirrors, coupling devices, wheels and rims, and emergency equipment. Then come windshield, leaks, exhaust, gauges, seat belt, cargo doors and liftgate, and the reefer. A defect needs a note and can take a photo; **Out of service** marks it unsafe to drive. The driver keys the odometer (and reefer hours), states whether the vehicle is satisfactory, types their name and signs on the screen.
- **Post-trip** works the same way at the end of the day (Truck tab).
- **Out of service.** A defect marked out of service opens a work order. The truck cannot be reported safe, and the driver app shows it as out of service, until the office certifies the repair.
- **Show last report** (Truck tab) displays the last report with its signatures, for a roadside inspector.
- Reports are saved on the tablet with no signal and sent when there is one.

In the office

- **2 → 92 Inspection Review** (also 7 → 60) lists defects waiting for certification and recent reports. Key a report number to show it, ready to print. To certify a defect, key its number, **R** (repaired) or **N** (repair not needed), the name of the person certifying, and what was done, then press F10. The truck can then be reported safe. **F8** runs the integrity check.
- **2 → 93 Inspection Reports** lists every report and defect over the dates.
- **2 → 95 Inspection Compliance** (also 7 → 61) shows, for every day a route delivered, whether the pre-trip and post-trip were filed. It also shows whether the sealed records are intact and how long they are kept.

- The Today page shows open defects (out of service first) and trucks out today with no pre-trip.

How the records stay legal

- A report is written once. The database refuses any change or deletion, and so does a certification once made. A correction is a new report.
- Every report, driver review and repair certification is sealed with a SHA-256 hash chained to the record before it. The integrity check recomputes every seal, so a change made outside VeriDistro (directly in the database, say) shows as ALTERED, with the report number.
- Reports are kept at least **KEEP INSPECTIONS DAYS** (Location Control; 1,095 days, three years, unless you change it). The rule requires three months.
- Each record shows the driver's name, sign-on, the time, the location from the tablet, the odometer and the signature.

The Linux terminal

VeriDistro comes with a Linux Mint terminal that opens in a browser tab, for data conversion, exports, scheduled jobs and reporting with SQL. It is a separate small server: it cannot see VeriDistro's database directly, and everything it does in VeriDistro goes through the `vd` command, as the person who signed in.

Getting in

1. **The administrator** signs in at the terminal's address (**Administration → 50 Linux Terminal** opens it) and adds each person with `sudo vd-adduser NAME`, giving them a first password. They choose their own at first sign-in. `sudo vd-deluser NAME` removes someone (their files are kept aside), and `vd-users` lists everyone.
2. **Each person** creates a personal access token in **Administration → 51 Command-line Access**: key a name, press Enter, and copy the token. It is shown only once.
3. In the terminal, type `vd login` and paste the token. `vd whoami` shows who you are signed on as.

A token acts with your own sign-on and role, so you can do from the terminal exactly what you can do on the screens. Tokens last up to two years and can be revoked any time on the same screen. Driver and store sign-ons cannot have one. Files in your home folder are kept; everything else on the terminal resets when it restarts.

The vd command

Command	What it does
`vd today`	your Today page as text
`vd programs fuel`	reports you can run, with titles (here, those about fuel)
`vd report VDFLASH date=2026-11-09`	runs a report; `--csv` gives CSV and `--out FOLDER` writes one file per table
`vd export customers > customers.csv`	a master file as CSV (customers, products, routes, terms, price_rates and more)
`vd import products products.csv`	checks a load file; add `--load` to load it
`vd migrate ~/import`	checks every conversion file in a folder together, in load order; `--load` to load
`vd pricecheck invoices.csv`	prices old invoice lines here and lists the differences
`vd sql "select ..."`	read-only SQL (administrators and managers); `vd tables` lists what you can query
`vd mail --to a@b.com --subject "..." file.csv`	emails a file through VeriDistro's outbox
`vd cron`	examples of scheduled jobs

Converting data from the old system

This is the main use at cutover.

1. Export each file from the old system, as CSV or as a plain file transfer.
2. Turn each export into a clean load file with `vd-prep`. It handles EBCDIC (`--ebcdic`), fixed-width records (`--layout` file with NAME START LENGTH for each field, N for numbers and D for dates), any delimiter, trailing minus signs and dates. It can rename columns (`--rename CUSNO=CUSTNO`) and keep only some (`--keep`). `--head 5` previews.
3. Name each file after what it holds (products.csv, customers.csv, prices.csv and so on; `vd migrate --help` lists the names and columns) and put them in `~/import`.

4. `vd migrate ~/import` checks them all together, in load order, and saves nothing. Each run writes a full result file next to the data.
5. Fix what it reports, check again, then `vd migrate ~/import --load`.
6. Run `vd pricecheck` on a sample of old invoices until every line matches.

Scheduled jobs

`crontab -e` sets jobs to run on a schedule, in Eastern time. They are kept when the terminal restarts. `vd cron` shows ready-made examples:

- the daily flash saved as CSV every morning
- a nightly backup of the customer, product and price files
- a weekly cost-to-serve report emailed to the office

Email goes through VeriDistro, so it needs VeriDistro's mail server set up.

SQL

`vd sql` runs one query at a time, read-only, for up to 20 seconds, and returns at most 1,000 rows by default (`--limit` to change). It cannot change anything or see sign-ons, passwords, tokens or the QuickBooks keys. Every query is recorded in the maintenance log with who ran it.

Close-dated offers

Product that will not sell before its code date is offered at a discount to the stores that sell it fastest, instead of being dumped.

Where: Main menu 1 → 85 Close-Dated Offers (also 7 → 62). Results: 1 → 86 or 4 → 59. The Today page shows a **Close-dated product** card.

What the screen shows. Every lot within a few days of its code date, with:

- **Will sell**: what the next deliveries are expected to take, oldest code first. It uses the orders already on file, or the usual amount for that weekday where orders are not in yet.
- **At risk**: what is left of the lot on its code date.
- **At cost**: what dumping it would cost.

Lots marked SELLS need nothing.

Making an offer

1. Key **1** next to the lot and press Enter.
2. VeriDistro lists the stores on the next delivery that sell that item, fastest first. Stores whose out-of-code returns of the item are over 15% are left out, because the product would only come back. It suggests a quantity for each store.
3. Change the delivery date, the discount % (the usual one is CLOSE-DATED OFFER % on Location Control) or the units to move, and press Enter to recalculate.
4. Set a store to N to leave it out.
5. Press **F10** to send the offer. Each store gets an email.

What the store sees. A **Deals for you** card on the home page of online ordering, until the order cutoff for that delivery. The store chooses how many and taps **Add to my delivery** or **No thanks**. What it takes goes on a separate deal ticket (PO DEAL and the offer number) at the deal price. The price holds on the delivery ticket, the driver app, the invoice and settlement, even if the office later changes the quantity.

Answers by phone. On the offers list, key **5** next to the offer, then **1** to accept for a store (key the quantity) or **4** for declined. Key **4** on the offers list to withdraw an offer; tickets already taken stay.

Results. Units sold instead of dumped, the discount given, and the product cost kept out of the dumpster.

Milk price pass-through

Each month USDA announces the Class I skim and butterfat prices. Fluid milk costs move with them. VeriDistro works out the change per product, applies each price schedule's terms, and tells every store what changes.

Where: Main menu 5 → 8 Price Menu:

- 70 Class I Milk Prices
- 71 Milk Price Pass-Through
- 72 Milk Price Terms by Schedule
- 73 Pass-Through History

Every month

1. When the announcement comes out (around the 20th, for the next month), open **Class I Milk Prices**.

2. Key the month as MMYY, the Class I skim price ($ per hundredweight) and the butterfat price ($ per pound) for your order and zone. Press Enter. The screen shows the Class I price at 3.5% and the change from the month before.
3. Press **F6** for **Milk Price Pass-Through**. Key the month and press Enter. You see the change in each product's milk cost, then each schedule's price now, the part passed on, and the new price.
4. Set **Update product cost** and **Email the stores** to Y or N.
5. Press **F10** twice to apply. New dated prices start on the effective date (blank = the first of the month). Each store on a changed schedule gets an email listing the items that go up or down, and by how much.

Terms by schedule (72). Each base price schedule passes the change on one way:

- **PASS**: all of it
- **PCT**: a share
- **CAP**: all of it, but no more than a set amount per unit in a month (chain contracts)
- **FIXED**: nothing until a date (school bids)
- **NONE**: never

Schedules not set here use MILK PRICE TERMS on Location Control.

Which products. Products with MILK CLASS 1 on the Product Master. Fluid milk is Class I. Cream and cultured products are priced under other classes and are not changed. The milk in one unit is quarts ÷ 4 × 8.6 lb, valued at the skim and butterfat prices at the product's butterfat %.

Processor promotions and claims

When a processor pays back per case or unit on a deal, VeriDistro works out what the deliveries earned, builds the claim with every ticket line, sends it, and follows it until it is paid.

Where: Main menu 40:

- 53 Processor Promotions
- 54 Promotion Claims
- 55 Promotion Claims Report (also 4 → 60)

The Today page shows a **Processor promotion money** card.

Adding a deal (53). At the top of the screen key:

- the vendor, a name, and the processor's deal number
- one product or a whole category
- the deal dates
- the amount per CASE or UNIT
- how many days after the end claims are accepted
- optionally, only certain stores

Press Enter. Returns and credits come off the units.

Claiming. Key **1** next to a deal. It builds a claim for everything earned and not claimed yet, through yesterday. Each delivery line goes on one claim only, so building again later picks up only the new deliveries.

Sending and following up (54). On Promotion Claims:

- **2** emails the claim to the vendor (vendor email on the Vendor Master), with a file of every delivery: date, store, ticket, product, units.
- **3** records a payment or credit memo. Key the amount, with the reference in the note. A short payment shows SHORT PAID.
- **4** marks a claim denied (key why).
- **6** downloads the claim file.

Claims sent over 45 days ago and not paid show OVERDUE.

The report shows, per deal: earned, claimed, paid, owed and still to claim. **CLAIM NOW** means money is unclaimed and the claim deadline is within 14 days. **MISSED** means the deadline has passed.

Store credit requests

Stores report a problem with a delivery in online ordering, with a photo, instead of calling. The office decides, and the driver checks the product at the next delivery.

What the store does. On the home page of online ordering (or from a delivery ticket), the store taps **Report a problem**. It chooses the item (from its last two weeks of deliveries), how many, and what was wrong (damaged or leaking, out of code on arrival, short), then takes a photo and sends it. No photo is needed for a short delivery. It cannot ask for more than the ticket had.

Where the office works. Main menu 1 → 89, 2 → 14 or 3 → 53, Store Credit Requests. The Today page shows a **Store credit requests** card. Click a photo to open it full size.

- **1 Approve** with Pick up **Y**: the request appears at the store's next stop in the driver app. The driver checks the product and keys how many were really there. The credit goes on that ticket at the store's credit price, and the product comes back on the truck. If the driver keys 0, the request is marked NOT FOUND.
- **1 Approve** with Pick up **N**, or **3 Credit now**: the credit goes to the account right away. Use this for product thrown away or a short delivery.
- **4 Reject**: key why. The store sees the note.

The store is emailed every decision and sees the status of each request in online ordering.

Driver credit and cash check

This compares each driver's credits and cash with the other drivers over the same weeks. It shows where to look, not that anything is wrong.

Where: Main menu 2 → 16 or 4 → 58, Driver Credit and Cash Check. The Today page shows a **Driver credits and cash** card.

Who drove each day comes from Route Driver by date, or else the route's driver. Out-of-code credits follow what the store sells, so the checks use damaged credits and fresh returns, the ones the driver decides on.

Flags

- **HIGH CREDITS**: at least 1.5 times the drivers' median share of sales, and $50 or more above it.
- **STORE PATTERN**: at one store, this driver's credits are at least double that store's credits with other drivers and the fleet's.
- **CASH SHORT**: short at settlement on 3 or more days, or $50 or more in all.
- **PRODUCT SHORT**: $100 or more of product missing at check-in, on 3 or more days.
- **CHANGED AFTER SIGNING**: credits added to a ticket after the store signed for it.

Select a driver for the detail: the stores that stand out, the days short, tickets changed after signing, and every credit.

Customers at risk

A store rarely says it is leaving. It buys less, drops items, stops a delivery day, or goes quiet. This compares each store's last 4 weeks with the 8 weeks before them.

Where: Main menu 1 → 88, 3 → 54 or 4 → 57, Customers at Risk. The Today page shows a **Customers at risk** card.

Signs

- **SHRINKING**: buying 15% or more less a week.
- **LOST ITEMS**: items bought in 6 of the 8 earlier weeks and not in the last 3.
- **DROPPED DAY**: a delivery day taken in 6 of the 8 earlier weeks and not in the last 3.
- **GONE QUIET**: nothing in 10 days from a weekly store.

Complaints and credit requests add weight. HIGH and WATCH stores show first, with what the account is worth a year and what would be lost if nothing changes. New stores and school stores in the summer are left out.

After you follow up, key **1** next to the store with what was done (called, visited, price offered) and press Enter. It is saved as a note on the customer, and the store stays off the list for the days given (28 unless changed). Set **Show followed-up** to Y to see them all. Click a store number for its customer card.

Truck loading plan

Where each stop's product goes in the truck, so the driver never has to dig.

Where: Main menu 1 → 87 or 2 → 17, Truck Loading Plan. Key the route and delivery date and press Enter.

How it plans

- The truck is loaded in reverse delivery order. The last stop goes in first, at the nose, and the first stop is at the door.
- Frozen product goes in the frozen bays at the nose.
- Each bay has a left and a right side. A stop fills one side and then the other, so the weight stays even.
- The heaviest cases go on the bottom.

The screen draws the truck bay by bay, numbered by stop, with cases and weight in each spot. It warns when cases do not fit, the load is over the route's weight limit, or one side is much heavier. **F6** prints the loading sheet. The driver app shows each stop's bay (for example BAY 3L 3R) on the stop list and at the stop.

Set-up:

- Asset Master: LOAD BAYS and FROZEN BAYS for each truck (8 and 0 if not set).
- Route Master: the case limit.
- Product Master: TEMP ZONE (COOLER, FROZEN or DRY).

A side holds the route's case limit ÷ (bays × 2) cases.

Emergency reserve

Chosen trucks carry extra product for special or emergency deliveries. Which trucks carry it, and what goes in it, can change with the day of the week and for any single date.

The weekly plan: 1 → 62 Emergency Reserve Plan. Key a route, then units per product for each weekday (Mon–Sun), and press F10. A route with nothing on a day carries no reserve that day. The reserve is loaded on the route's driver account (Route file), so the route must have one.

One date: 1 → 61 Emergency Reserve for a Day. It lists every route carrying a reserve on the date:

- **PLANNED**: from the weekly plan, not built yet.
- **BUILT**: on the load; it can still change.
- **LOADED**: on the truck.

Change a quantity, key a new product and quantity, or key a route under *Add a route* to carry a reserve that day only, then F10. A quantity of 0 takes a product off. The plan itself doesn't change. Once a route is loaded, change its truck with Load Adjustment instead.

Reserves are built from the plan at Day End for the next two days, and at release if still missing. The load sheet shows the reserve as **EMERGENCY RESERVE (LOAD BY THE DOOR, NOT FOR REGULAR STOPS)**.

Sending an emergency delivery: OE is followed on the main menu by **EM Emergency Delivery** (also 1 → 60).

1. Key the store and press Enter. The reserve trucks out today are listed nearest first, with how far each is (from the driver app's last position), stops done, and what is left in its reserve.
2. Key 1 by a truck and press Enter.
3. Key how many of each product to send, a note to the driver and the store's PO if any, then press F10.

The driver sees it at the top of the route marked **EMERGENCY** within two minutes, with your note, and the phone buzzes. It's priced, ticketed and billed like any delivery. A cash store pays the driver as usual. You can't send more than is left on that truck.

Settlement: nothing new. The reserve counts as loaded, emergency deliveries as sold, and what's left is in the end-of-day truck count. The reserve itself is never billed.

Tuning the reserve: 1 → 63 (or 2 → 19) **Emergency Reserve Usage** shows loaded, used and brought back, by date, route and product. Products that keep coming back can come off the plan; products that run out can go up.

Accounting controls

- **Apply Credits (3 → 55).** Unapplied payments, credit memos, crate and store credits and credit tickets are applied to the oldest open charges, so aging and reminders show what's really owed. This happens on its own after final settlement, miscellaneous billing and rebates. Use the screen for older items: Enter previews, F10 applies. The balance never changes.
- **Books closed thru (Location Control).** Nothing can be posted, re-dated or changed in amount on or before this date. It moves forward on its own as each day is sent to QuickBooks, so the two never disagree. An administrator can set it by hand.
- **Cash tickets.** Each one is recorded with a matching payment (cash paid to the driver). When a cash store's credits are more than its delivery, the difference stays on its account as a credit. The driver doesn't pay it out.
- **Voided tickets** can't be keyed until they're un-voided in Ticket Control.
- **No price, no settlement.** Final settlement stops if any delivered or credited product has no price, and names the ticket and product. Fix the price file, then settle.
- **Credits** are priced at what the store paid: deal and volume discounts are taken off the credit, as they were off the sale.
- **Route Account file.** The GL journal uses SALES_TAX, CARD_FEE (card fees customers pay online) and CARD_COST (what the card processor keeps). Check that their account numbers match your chart of accounts.

Administration

These are the office manager's jobs: sign-ons, company-wide settings, codes, the holiday calendar, email, and checking who changed what.

Users

ADM → 1 User Profiles lists every sign-on. Select one to change it, or key a new user name to add one.

Field	Notes
User	2 to 10 letters or digits
Name	The person's name
Role	admin, manager, orders, dispatch, settlement, ar, operator, readonly, driver or customer (see Getting started)
Initial menu	The menu the person lands on after signing in
Driver route	Drivers only: the route the driver app opens
Email	Store sign-ons: where order confirmations go
Stores	Store sign-ons: the customer numbers they may order for
Active	N blocks the sign-on immediately
New password	Blank keeps the current one. Setting one signs the person out everywhere

When someone leaves, set Active to N rather than deleting the sign-on, so their history keeps their name. If someone forgets a password, key a new one here and give it to them; they can change it on **ADM → 30**.

Company and location settings

- **5 → 2 → 1 Company Control**: name, address, phone and the header printed on reports and tickets.
- **5 → 2 → 2 Location Control**: the depot name, the default price schedule, how promotions combine with prices, how far back credits are priced, whether being over the credit limit warns or stops order entry (off, warn, stop), finance charge minimums, the next ticket number, and the store portal settings (cutoff time, lead days, days ahead, message). The business date is shown here but changes only through Day End.
- **5 → 2 → 3 Sales Tax** and **4 A/R Terms**.

- **5 → 1 Code File Maintenance**: the lists of codes used throughout, such as credit and damage reasons, adjustment reasons, order-change reasons, note types, customer types and load groups (LOADGROUP).
- **5 → 65 Holiday Maintenance**: holidays and whether trucks run.
- **7 → 92 → 16 Branch/Warehouse File Maintenance**: each branch's address and map location (the depot for routing).

Email for order confirmations

VeriDistro sends email through your own mail system. Until it is set up, confirmations wait in **1 → 74 Email Outbox**. To set it up, your IT person adds these settings to the VeriDistro web app in Azure (App Service → Environment variables):

Setting	Example
SMTP_HOST	smtp.office365.com
SMTP_PORT	587
SMTP_USER	orders@yourcompany.com
SMTP_PASS	that mailbox's password
SMTP_FROM	Your Company Orders <orders@yourcompany.com>

For Microsoft 365, the sending mailbox must have authenticated SMTP turned on. Once the settings are saved, waiting email goes out within a minute, and the Email Outbox shows each message as SENT.

Who changed what

ADM → 2 Maintenance Log Search (also **5 → 66**) lists every change to customers, products, prices, routes, orders, settlements and settings: who, when, which screen, and the values before and after. Search by user, file, key or date range.

Backups

The database is backed up automatically every day and kept for 35 days. There are no backup or restore steps for staff. To recover something, contact your IT support with the date and what was lost.

Loading data from the old system

The tools for bringing customers, products, prices and open receivables over from the previous system are on **ADM → 10** and **ADM → 11**, and opening receivable balances on **OPR → 10 Load A/R Balances**. These are used once at changeover by your IT support.

Troubleshooting and common questions

Problem or message	What to do
SIGN ON REQUIRED, or the screen goes back to sign-in	Your sign-in expired after 16 hours, or your password was changed. Sign in again
USER … IS NOT AUTHORIZED TO THIS FUNCTION	Your role cannot change this. Ask the office manager
A screen looks old or a new option is missing	Press Ctrl+Shift+R (Cmd+Shift+R on a Mac) once to load the latest version
EVEN CASES REQUIRED	The customer is case-up or the product is case-only. Key a multiple of the case
NOT AUTHORIZED FOR THIS CUSTOMER	The product is blocked for this customer on **5 → 13 → 58 Customers Product Maintenance**
OVER CREDIT LIMIT	Warning only, unless Location Control is set to stop. Talk to A/R; see **3 → 31**
CUSTOMER NOT SCHEDULED FOR …	Warning only; the order still saves. Check the delivery days if this is now a regular day
ORDER … IS LOADED (or RELIEVED)	The order is on the truck. Use Order Adjustment Entry or settlement instead
LOAD SHEET ALREADY PRINTED	Use **1 → 91 → 91 → 44 Order Adjustment Entry** with a reason
DAY END NOT ALLOWED. ROUTES NOT FINAL SETTLED	Final settle the routes listed, then run Day End again
DAY END ALREADY RUN FOR …	Day End has already closed that date; nothing to do

Problem or message	What to do
A store says it cannot order online	Check the cutoff has not passed, the store's sign-on is active and lists that store, and the load sheet has not been printed
A store did not get a confirmation email	Check **1 → 74 Email Outbox**: no mail server yet, FAILED with a reason, or no email on the sign-on or Mail-to record
A truck is not on the dispatch map	The driver has not opened the app, the phone has no signal, or location is turned off for the browser
The map says it could not load	The office computer cannot reach the map service. Check the internet connection
Route Optimization leaves a stop out	The stop has no location. Use **1 → 71** (F6, or key it)
Drive times look like straight lines	The road service was not reachable; the screen says so. Try again later
A code-dated product shows NO CODE on the load sheet	There is stock with no code date (from before lot tracking, or a count difference). Check **7 → 40**
Lot Adjustment says the lot has only so many on hand	Key no more than the lot's on-hand from **7 → 40**
Route balancing says a route is still over	No other route has room that day. Add a route, raise a truck limit or max hours, or cut the load

Common questions

Can I change an order for a day that is already closed for the store? Yes. Office order entry is not limited by the portal cutoff, only by whether the order is loaded.

Why does the suggested order differ from the standing order? The suggestion follows what the store actually sold that weekday, after returns and shorts. A big difference (marked CHECK) usually means the standing order needs updating.

What happens to tomorrow's orders if Day End is not run? Nothing is lost. Standing orders for the next days are simply not built until Day End runs, and the business date stays the same.

How do I see who changed a price or a customer? ADM → 2 Maintenance Log Search.

Where is the paper copy of a ticket? 2 → 91 → 96 → 33 Print Ticket From History, or open it from the customer's history. Driver app deliveries also have their signature on **2 → 62**.