



## Route Prospect Information Sheet

Company \_\_\_\_\_

Contact \_\_\_\_\_

Decision maker yes no

What is Your Industry (beverage, baked goods, parts, wholesale items, etc.)

Address 1 \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Email \_\_\_\_\_

Website \_\_\_\_\_

Telephone \_\_\_\_\_ Cell \_\_\_\_\_

Fax \_\_\_\_\_

Today's Date \_\_\_\_\_

### Company Information

Estimated Date for Decision? \_\_\_\_\_

Estimated Date for Implementation? \_\_\_\_\_

Are you interested in information regarding financing? yes no

Current Route system \_\_\_\_\_

If you are using a Route system, what hardware do you have in place currently? Do you have any handhelds or printers?

\_\_\_\_\_

Reason for change \_\_\_\_\_

Current accounting system \_\_\_\_\_

Considering change/why?

\_\_\_\_\_

What is your computing environment? Do you have a server? What are the workstations and the operating system on them?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

### Route Information

How many salespeople do you have? \_\_\_\_\_

How many drivers do you have? \_\_\_\_\_

How many routes do you have? \_\_\_\_\_

How many warehouses do you have? \_\_\_\_\_

How many trucks do you have? \_\_\_\_\_

How many invoices per day are generated for each type of Route (Presales, Delivery, or other?) \_\_\_\_\_

Do the sales/delivery people collect money/payments? yes no

Do you want to print invoices in the field? yes no

Would you like to capture the customer signature? yes no

### Driver/Salesperson

Do you want the system to forecast how much product needs to be loaded on the truck each day? yes no

Is the salesperson/driver responsible for truck inventory? yes no

Is it important to reconcile inventory loaded with inventory sold and money collected? yes no

Does the driver offload truck inventory after each day is complete? yes no

Can a salesperson override the price? yes no

Can a salesperson/driver make a sale/delivery to a customer with an past due balance? yes no

## Customer Information

Do customers have an approved list of items? yes no

Would it be easier to process sales if the new system only displayed the items that customers buy? yes no

What payment methods are taken? cash check on account (terms)

Would you like to see outstanding balance information in the field? yes no

Do you have special report needs? For example, commission reports, WalMart reports, or other reports that you have created on spreadsheets or in other ways ? yes no

Do you have a contract pricing of items for certain customers that your driver or salesperson must know? yes no

Do you need to send invoice information through DEX or other EDI methods?  
yes no

Do you take customer or inventory surveys, including marketing surveys? yes no

## Inventory

Do you have product groups/reporting groups? yes no

Do you handle credit invoices in the field? yes no

Is returned inventory resellable or damaged?  resellable damaged neither both

Would barcodes and scanning improve accuracy and eliminate errors? yes no

Do you do Buy one, get one style pricing and promotions? yes no

Do you handle multi-pack items and/or piece count items? yes no

Do you require deposits on your items? yes no

Do you offer promotional pricing with start and end dates? yes no

Do you have pricing across zones/corporate accounts? yes no

