

# PaperRound Manual

## 1 Introduction

### 1.1 What PaperRound Offers

PaperRound is designed to bring the best of the latest technology to Home News Delivery. PaperRound is available either as an internet based web service or as an application that runs on a Windows based desktop or laptop. The major benefits are:

- Simple, easily understood and flexible
- Quickly find a customer and review their account and news deliveries
- Organise and re-organise rounds as needs change.
- Laser or inkjet printed rounds sheets for maximum clarity.
- Multiple options for delivery charges.
- Automatic application of vouchers
- Easy management of holidays.
- Flexible billing. Bill weekly, fortnightly, or monthly. Multiple bill formats
- Invoicing for business customers
- Special support for hotels
- Credit control. Know who owes you money and how much. Chase bad payers
- Manages returns processing
- Management information reports
- Print counter receipts where the computer is in the back office
- Interface to receipt printer

#### Web Version only

- Run anywhere - a shop, an office, or even from home.
- Automatic daily price updates for most publications. No more pricing mistakes.
- Special version for multiple drops at a single business with consolidated invoicing
- Optional ability to allow HND customers to look at their account on the web and enter holiday dates, check bills and check the publications to be delivered. This saves both time and mistakes in the shop
- Electronic goods in processing
- Integrates with Shopmate EPOS if required.

Whether customers are give access to the PaperRound web service is decided by the newsagent on a case by case basis

### 1.2 Computer Requirements

Desktop version      Requires desktop or laptop computer running MS Windows XP or Windows Vista

Web version      On MS Windows requires recent version of Internet Explorer or Mozilla Firefox. On Apple MAC requires Mozilla Firefox

### 1.3 Conventions

Wherever possible fields have a sensible default. This means that in most cases the value does not have to be changed. Where entry of data is essential, the description of the field is shown in red.

### 1.4 Getting Help

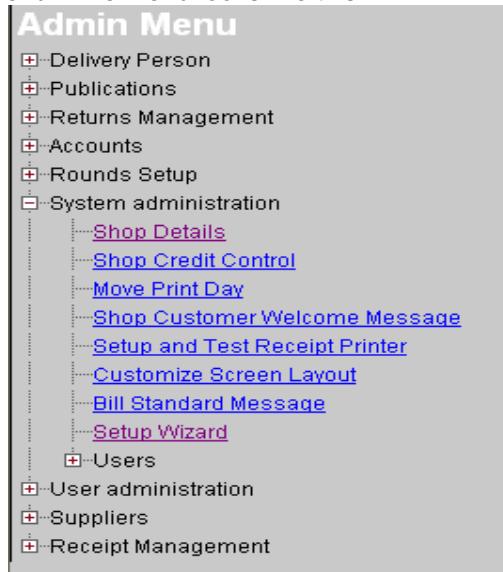
Please contact us by email on [support@paperround.net](mailto:support@paperround.net).

## 1.5 Navigating around the Screen

All the functions of PaperRound are accessed from the row of tabs along the top of the screen.



The Admin screen has a menu on the left side of the screen. Click to expand the menu and to collapse the menu. The menu looks like this:-



In this example the "System Administration" section is expanded.

In this document, navigation to the "Shop Details" function is shown as:-

Admin -> System Administration -> Shop Details

This means, starting from the left first click on the Admin tab, then click *System Administration* and finally click *Shop Details*.

## 2 Getting Started

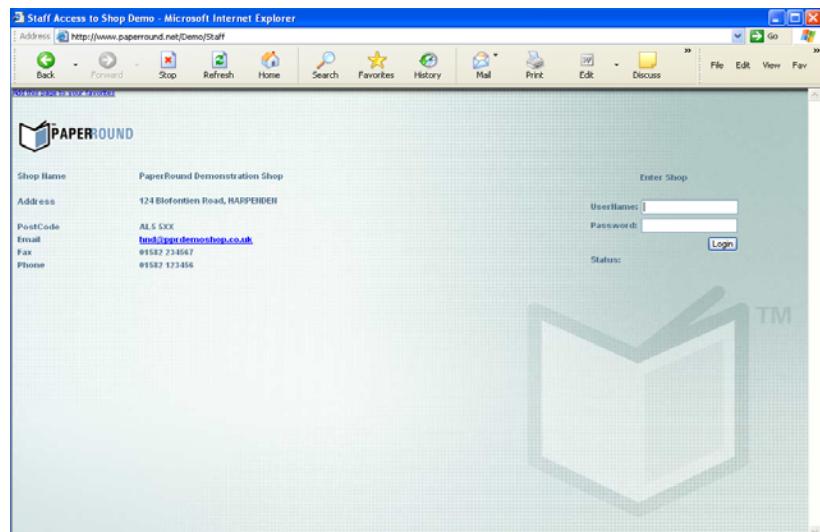
If setting up PaperRound for the first time please login (section 2.1) and then go to Appendix A. This contains a step by step explanation of how to set up PaperRound.

### 2.1 Login

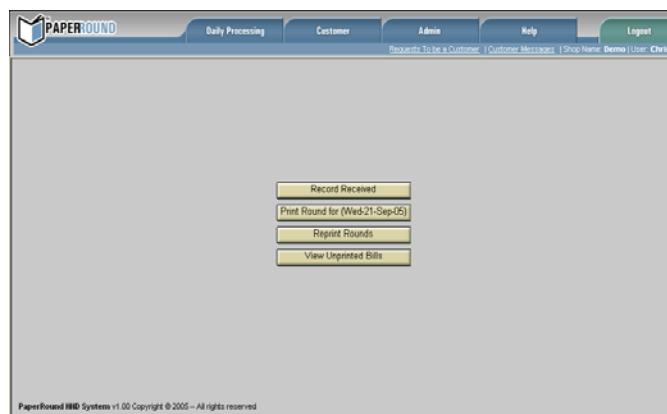
PaperRound requires the use of a recent Internet Browser and version 7 of the Adobe Acrobat Viewer. For a browser, Internet Explorer 6 or higher or the latest version of Mozilla Firefox is recommended.

For web users, to access PaperRound use the URL supplied in our email and use the login ID and password supplied. The login Id will normally be your email address. Desktop users do not need to login.

The login page looks like this:-



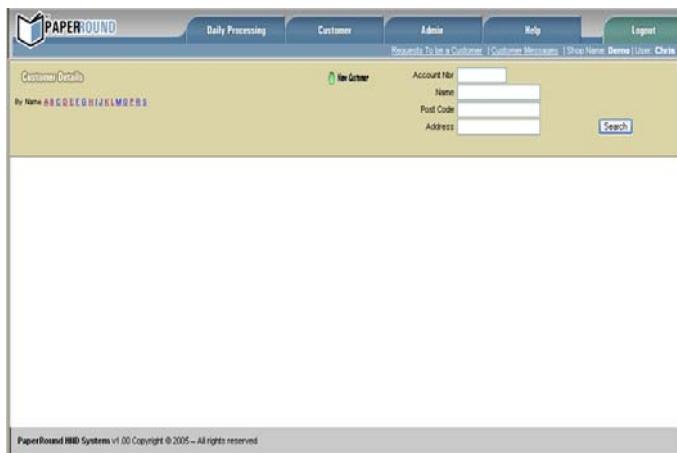
When you login, the screen should look like this:-



The menu options may be slightly different dependent on the day of the week and the current state of completion of the daily processing.

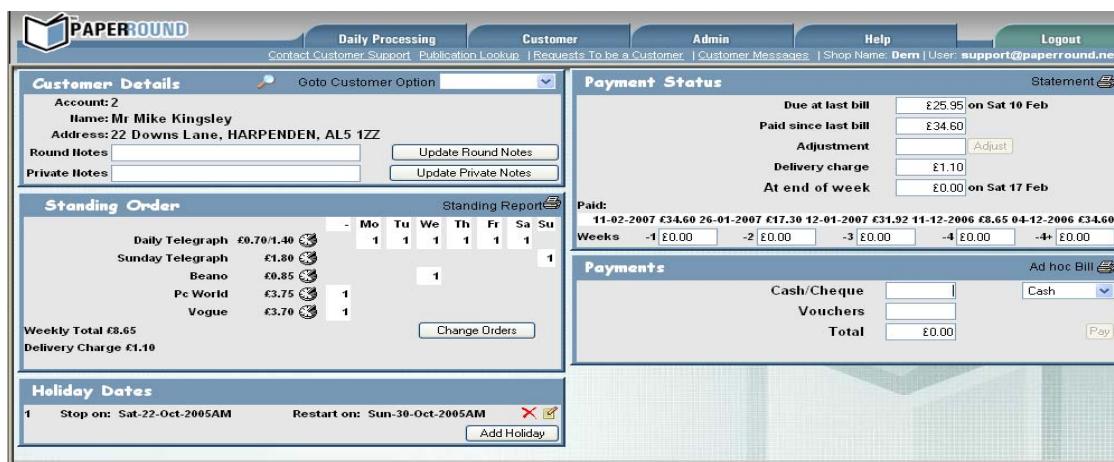
## 2.2 Look at a Typical Customer

Click on the "Customer" tab to display this screen:-



Enter one of (1) account number, (2) all or part of a customer surname, (3) postcode (4) all or part of the first line of the address, then click "Search" or press the <RETURN> key.

This screen will then be displayed.



The screen shows a summary of customer account. This provides all the information that is normally required when dealing with a customer split into 5 panels. (These details are also available on your EPOS system if you integrate PaperRound with EPOS)

#### Customer Details

This shows the account number, customer name and drop address. There are two note fields. The first field is printed against this customer on every rounds delivery report. To change it, edit the field and click on the *Update Round Notes* button. The second note is for internal use only.

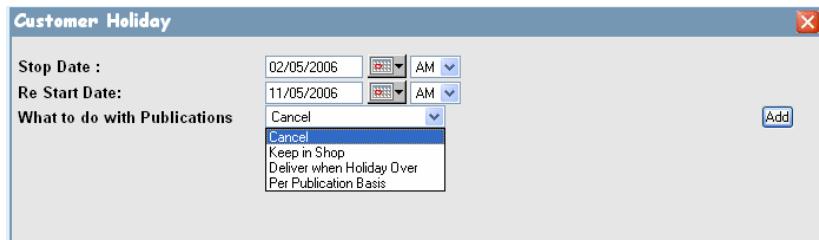
To change the address or other details click on the "Goto Customer Options" and choose "Name & Address" from the dropdown list. For details of how to use the name & address functions, see below.

#### Standing Orders

Shows publications ordered by day of the week. Click on the  icon to see details of pricing of previous issues and the on-sale date of the next issue. To see how to change an order, see below.

#### Holiday Dates

Any number of holiday dates, can be entered. Delete an entry by clicking . Change an existing holiday entry by clicking . You will get :-



For full details of the options for holidays, see below.

#### Payment Status

This panel summarises the customer account. It shows the account position when the last bill/statement was produced, the amount that will be due at the end of the week, the amount paid during the week, any credits and the applicable delivery charge. The bottom of the panel shows the date and amount of the last 5 payments and the age of the debt. (Please note: The content of this panel can be changed in the System Administration section.)

#### Payments

Allows payment by cash and/or voucher. To enter vouchers in advance use the "Goto Customer Options" dropdown and choose "Vouchers"

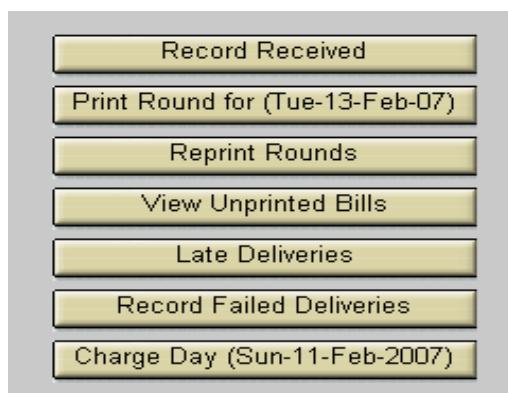
Please note that time has moved on since these screens were included in this document, so the information shown on the screens will have changed.

### 2.3 The Daily Delivery Cycle

You need to click on the "Daily Processing" tab at the top of the page to switch to this set of functions. The core tasks carried out from this page are:-

1. Record publications delivered (some may be automatic)
2. Print rounds sheets (both morning and evening)
3. Record any failure to deliver
4. Charge the deliveries made to customer accounts
5. Print bills (normally once per week)

When you click on the Daily Processing tab, the following screen is displayed.



Only relevant buttons are shown. The number of buttons varies between three and eight dependent on the position in the daily cycle and a number of system settings.

The daily cycle consists of:-

#### Receipting

There are four methods of receipting:-

#### Receipt Publications **without** entering quantities (Web & Desktop)

**Dailies** are automatically receipted and added to the rounds sheet on the day of delivery. **Weeklies** are also automatically receipted and delivered on the receipt or following day using the delivery rule set in the shop details screen (automatic receipting of weeklies may be turned off). All **other frequencies and part works** must be manually receipted and are added to the rounds sheet on the day following receipt.

To manually receipt publications, use one of the following methods:-

- a) Scan the publication barcode
- b) Check the publication in the list of publications due
- c) Search by publication name or barcode.

Scanning the barcode is recommended and a suitable barcode scanner can be supplied. Alternatively, (1) check the item in the list provided (*requires setting in the Stock Control section of the Shop Details screen*), or (2) click on the Find Publication button, enter all or part of the publication name into the "Name" box and click the Search button.

After all the publications have been receipted click the Update button.

#### Receipt Publications **including** quantities (Web only)

Dailies and weeklies are added to the rounds sheets in the same way as the previous option. However the quantity of each publication should also be entered in the Record Receipt function. *Before doing this the stock control flag should be set on in the stock control section of the Shop Details screen.*

#### Automatic use of Electronic Delivery Note (Web only)

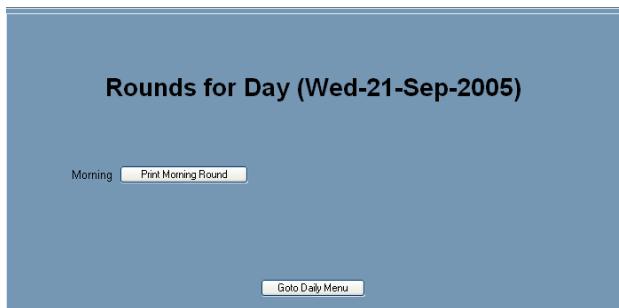
Where an electronic delivery note is available, this is collected and processed automatically. After collection and processing, the list of publications received can be seen by clicking the "Today's Deliveries" button.

#### Use Hand Scanner (Shopmate EPOS only)

A hand scanner is used to receipt all publications including the quantity received. After scanning and uploading the data, the processing is the same as that used for Electronic Delivery notes

#### Print Rounds

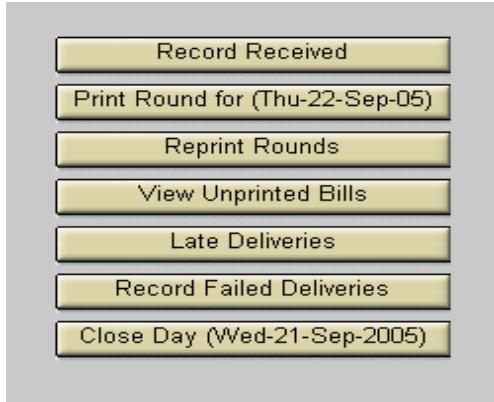
Click on button to print and confirm. When the rounds sheets are ready for printing the screen shows:-



Click on "Print Morning Rounds" and the rounds sheets will be displayed in the Acrobat viewer. Print as required. *Copies of the rounds report are saved and can be reprinted at any time. Rounds sheets can be printed in advance, but will only reflect the status of orders at the time they are printed.*

*If there are evening rounds, these are printed separately.*

After rounds are printed, the menu changes to show more options:-



When delivery of a particular newspaper is late, use "Late Deliveries" to print a list of deliveries still due. To record that no delivery has been made use "Record Failed Deliveries". This option can also be used to record any other problems with deliveries.

Late Deliveries	Prints by round the list of deliveries due for one or more papers.	
Failed Deliveries	Enter all dailies and weeklies that have not been delivered. This stops the publications from being charged to customer accounts. If the publication is expected to arrive the following day, receipt the publication. The program allows the entry of partial deliveries where only some customers have not been supplied.	
<b>Failed deliveries must be entered before the day is charged.</b>		
Charge Day	"Charge Day" is used to add the deliveries made to the customer account. After deliveries have been applied to customer accounts, bills are prepared ready for printing. Use "View Unprinted Bills" to look at the bills and print them.	
<i>There are a number of formats of bill/statement. . You set the format for each customer in the Name and Address screen.</i>		
Daily Totals	The daily totals report shows the daily value of the publications supplied, delivery charged and payment received. To run this report.	
<table border="1"><tr><td>Admin -&gt; Accounts -&gt; Trading Summary</td></tr></table>		Admin -> Accounts -> Trading Summary
Admin -> Accounts -> Trading Summary		
Print Bills	Bills are produced automatically and saved for printing. If there are bills ready for printing, a new menu item "View Unprinted Bills" is shown.	
To reprint bills that have already been printed.		
<table border="1"><tr><td>Admin -&gt; Accounts -&gt; Print Bills</td></tr></table>		Admin -> Accounts -> Print Bills
Admin -> Accounts -> Print Bills		
<i>Past bills for individual customers can be printed from the "Goto" – Bills drop down on the customer summary. The rules for printing of bills are set in the Shop Details Screen. The type of bill is set in the Name &amp; Address details for each customer.</i>		

## 2.4 Billing

PapeRound provides a wide range of billing options to meet the very wide range of demands from newsagents.

Each shop has a billing day of the week. This is commonly Saturday, but can be set for any other day. (change this using the 'Shop Details' program in 'System Administration')

For each customer there are two key settings that control the frequency and style of billing. These are the billing frequency and the billing format. Any combination of billing frequency, bill format and delivery charge can be chosen for each customer.

### Billing Frequency

The options are:-

Weekly	Produced automatically each week as part of the charging process. There are 3 variants. The first prints a bill every week subject to the number of days since the last payment. The second type 'Bill at EOM' produces a bill on the last billing day of the month. The third type 'Bill in Advance' is not run automatically. The billed amount includes the estimated amount due at the next billing day. It is run from the Accounts section of the Admin menu.
Fortnightly	Runs automatically every two weeks.
4 Weekly	Runs automatically every 4 weeks
Monthly	Runs automatically on the last billing day of each month
On Request	Does NOT run automatically. Is run from the Accounts section of the Admin menu. Allows runtime control of the rounds, time since last payment and minimum size of the amount outstanding.
No Statement	No statement is produced

### Bill Format

Each customer can be set a bill format. The choices are as follows:-

Summary	There are three variants. The first type shows the balance for the previous billing day, the charge for publications delivered, the delivery charge and the total now due. The second shows the amount outstanding for each of the last 4 weeks and the total, the third is the same as the second except that the 4 weeks include an estimate for the next week. The bills print 6 to an A4 page.
Detailed	This prints a new row for each item delivered as well as delivery charges, adjustments and payments. An invoice number is printed when the customer is a Business.
Compressed	Same as the detailed format except that daily newspapers for a week are shown in a single row.

### Bills and Rounds Sheets

A reminder to deliver a bill can be printed on the rounds sheet. This is controlled by customer where both the round and day of the week may be set.

Warning: (1) Some rounds sheets layouts do not contain this information, (2) it is possible to select a day which is not consistent with the round. For example delivery can be set for a Sunday and a weekday round. In this case, nothing will print on the rounds sheet.

### Default Values

To save having to set these values every time a new customer is created, default values may be set in the Shop Details part of System Administration.