



Dynamic Routing 101

Title Goes Here



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Agenda



Before You Get Started



Minimum Setup



Configure Routing Constraints



Let's Build a Route



Review the Results

Before You Get Started

Geocodes



1. Assure that your customers are Geocoded correctly.
2. To re-geocode your customers you can go to Utilities>Batch Geocoding



Batch Geocoding

This utility will update an accounts longitude and latitude for mapping based on the address.



Batch Geocoding

Branch: * 1 - Implementation Team Training Status: * 11 Stutuses Selected

Subdivision: Nothing selected City:

Zip Code: Nothing selected

Regeocode

Cancel Process

Estimated Man Hours

1. Update Price Charts (Settings>Price Chart Setup)
2. Run the Update Estimated and Average Man Hours Utility



Run the Update Estimated and Average Man Hours Utility

Price Chart Setup

Available:

Add Details: All

Branch:

Description:

Task Description:

Special Description:

Price Per Unit (Min):

Estimated Man Hours:

1	Qty	Rate	Estimated Man Hours (24 Hours)
1	50	10	500
2	100	10	1000
3	150	10	1500
4	200	10	2000
5	250	10	2500
6	300	10	3000

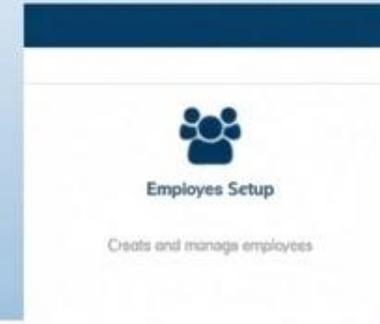
Note: Do not include drive time in the Estimated Man hour estimate, Dynamic Routing will calculate the drive time during the optimization process.

Employee Setup



1. Individual Employee Setup can be done by going to Settings>Employee Setup>Route/Production Settings

2. If multiple employees have the same settings the Routing Constraints Quick Setup can be used. (Settings>Routing Setup>Routing Constraints Quick Setup)



Day	Start	Stop
Mon	7:00 AM	8:00 PM
Tue	7:00 AM	8:00 PM
Wed	7:00 AM	8:00 PM
Thu	7:00 AM	8:00 PM
Fri	7:00 AM	8:00 PM
Sat	7:00 AM	8:00 PM
Sun		

Vehicle:

Trucking Color:

Days/Week Start Location:

Preparation Time (minutes):

Days/Week End Location:

Clear Out Time (minutes):

Maximum Daily Revenue:

Vehicle Setup



The setup of individual vehicles can be accomplished by going to Settings>Product Setup>Equipment & Vehicle Setup.



Multiple Vehicles have the same settings? No problem, go to to (Settings>Routing Setup>Routing Constraints Quick Setup)

Interactive Walkthrough

Helpful information is located on the bottom of the home screen. You can click the **I** with the green circle to access this walkthrough.

Dynamic Routing Interactive Walkthrough

The screenshot displays the Service Assistant interface. At the top, there are three notification cards: Call Log Notifications (1), Payment Entries (0), and Production Entries (0). Below these is a grid of action buttons: Customer Search, Add Customer, Add a Payment, Add Production Entry, Run a Report, and Go to Scheduler. On the right side, there is a 'Your Information' panel for Katie Gallagher and a 'Printing' panel with options like Print an Invoice, Print an Estimate, Print a Statement, Print a Letter, and Print Coupons. A green arrow points from an information icon (a green circle with an 'i') at the bottom right of the home screen to a 'Resources' sidebar. The sidebar lists various setup and usage options: Financial Setup, Customer Setup, Product Setup, Program Setup, SA5 Usage, Dynamic Routing, and Code Sandbox (Custom Module). A green arrow also points to the 'Dynamic Routing' option in the sidebar.

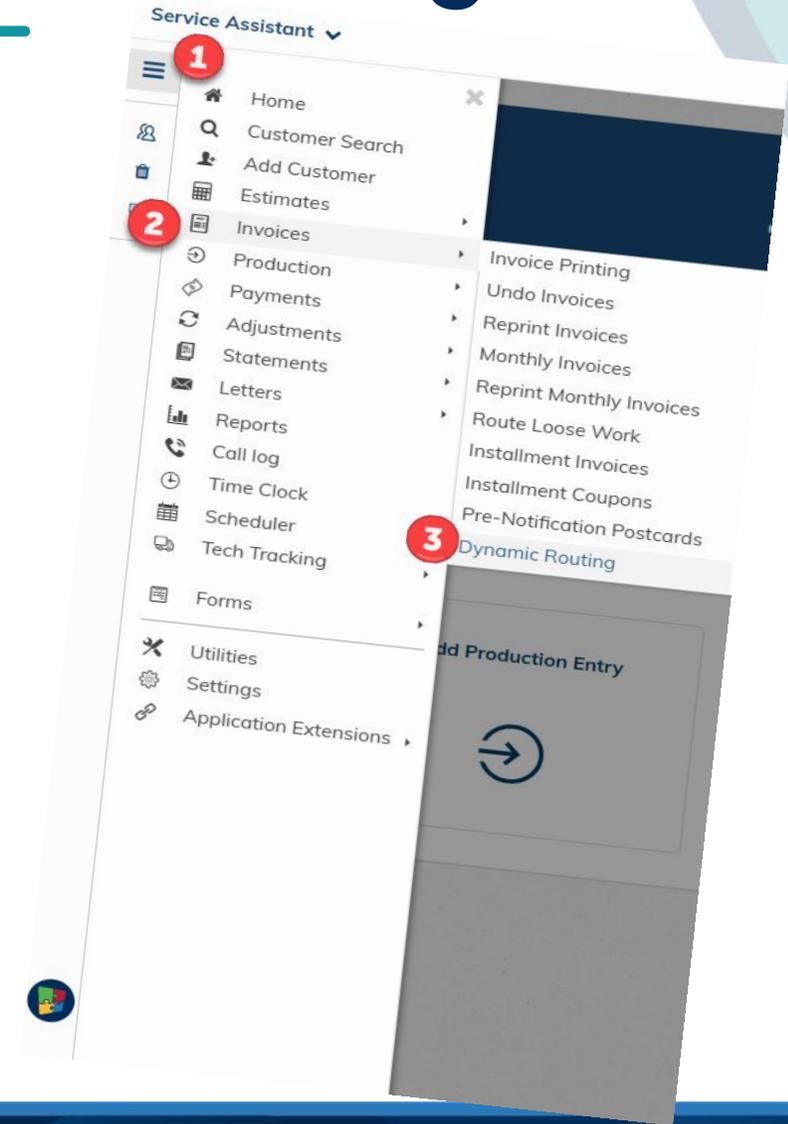
Building a Route

Accessing Dynamic Routing

1. From your Home Page hover over the Hamburger Menu.

1. Hover over Invoices.

1. Select Dynamic Routing



Dynamic Routing Dashboard

1 General Rules and Constraint Reminders

General Rules
Constraints

2 General Selections

Branch
Employee
Assigned Date
Honor Same Side of Street Routing
Honor Employee Route Assignment

3 Route Settings Override

Route Settings Override

4 Services

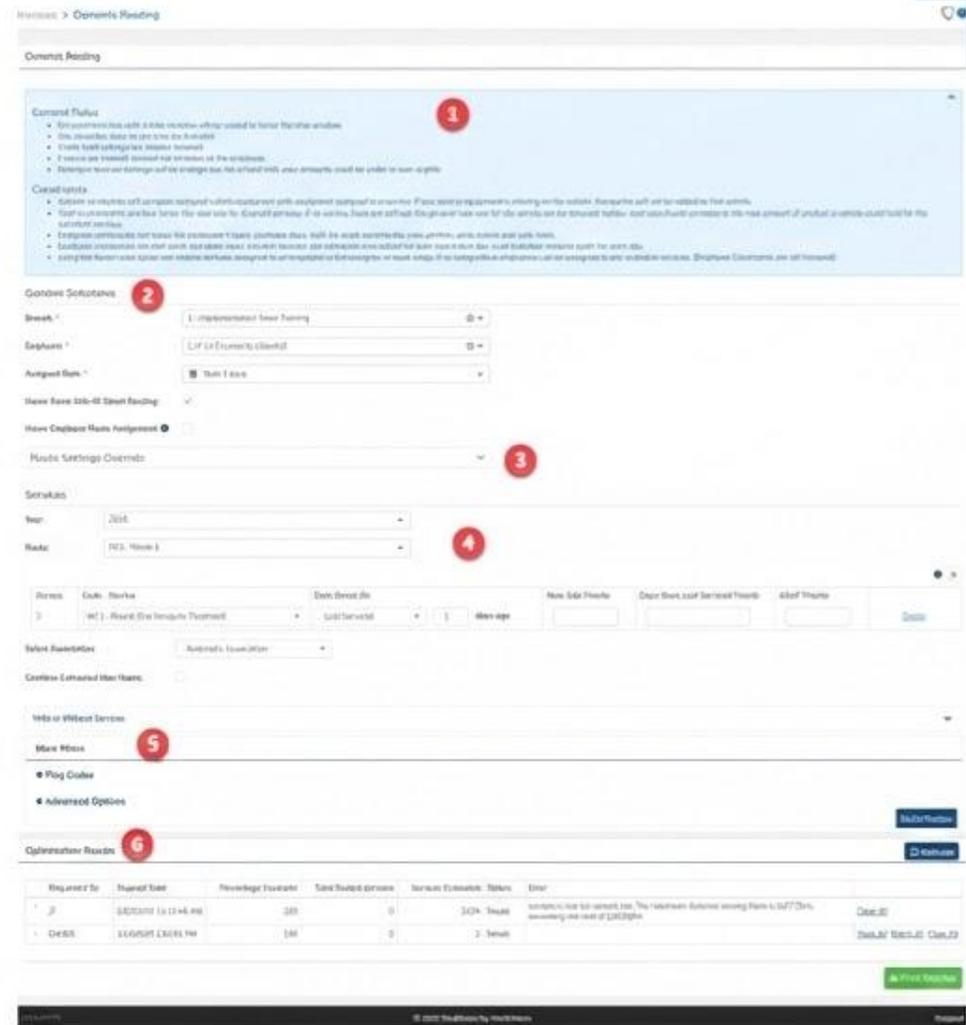
Year
Route
Add Services
Date Based On
New Sale Priority
Days Since Last Serviced Priority
ASAP Priority

5 More Filters

Flag Codes
Advanced Options

6 Optimization Results

Optimization Results



The screenshot shows the 'Currents Pending' dashboard. It includes a 'Current Status' section with a list of items, a 'Golden Solutions' section with dropdown menus for 'Break', 'Sequence', and 'Assigned Date', a 'Route Settings Override' dropdown, a 'Schedule' section with 'Year' and 'Route' dropdowns, a table of 'Items' with columns for 'Item Code', 'Service', 'Item Description', 'New Sale Priority', 'Days Since Last Serviced Priority', and 'ASAP Priority', a 'Filter' section with 'Filter' and 'Advanced Options' buttons, and an 'Optimization Results' table with columns for 'Requested To', 'Request Date', 'Percentage Complete', 'Task Requested', 'Service Estimated', 'Status', and 'Error'.

General Rules and Constraints

Invoices > Dynamic Routing



Dynamic Routing

General Rules

- Promised services with a time window will be routed to honor the time window.
- Any available days on services are honored.
- Credit Hold settings are always honored.
- If crews are created, choose the foreman as the employee.
- Minimum revenue settings will be a target but not a hard limit, your amounts could be under or over slightly

1

Constraints

- Vehicle constraints will compare assigned vehicle equipment with equipment assigned to a service. If any service equipment is missing on the vehicle, the service will not be added to that vehicle.
- Vehicle constraints will also honor the max size for selected services. If no service sizes are defined, the general max size for the vehicle will be honored. Ideally, max size should correlate to the max amount of product a vehicle could hold for the specified services.
- Employee constraints will honor the employee's hours, available days, skills for what services they can perform, and service max size limits.
- Employee constraints will also honor the depot start and end location, the additional time added for start and end of day, and individual revenue goals for each day.
- Using the honor route option will restrict services assigned to an employee to the assignee in route setup. If no assignment, employees can be assigned to any available services. (Employee Constraints are still honored)

This is great section to refresh our knowledge of the rules and Constraints. If needed this section can be minimized.

Service Constraint

Constraints



Vehicle constraints will compare assigned vehicle equipment with equipment assigned to a service. If any service equipment is missing on the vehicle, the service will not be added to that vehicle.



Vehicle constraints will also honor the max size for selected services. If no service sizes are defined, the general max size for the vehicle will be honored. Ideally, max size should correlate to the max amount of product a vehicle could hold for the specified services.



Employee constraints will honor the employee's hours, available days, skills for what services they can perform, and service max size limits.



Employee constraints will also honor the depot start and end location, the additional time added for start and end of day, and individual revenue goals for each day.



Using the honor route option will restrict services assigned to an employee to the assignee in route setup. If no assignment, employees can be assigned to any available services. (Employee Constraints are still honored)

General Selections



Branch

Select the branch or branches that you want to route for.



Employee

Employee(s) that will perform the work.



Assigned Date- This is the date(s) that the job should be completed.



Honor Same Side of Street

Routing- Dynamic Routing will route on the same side of the street when possible.



Honor Employee Route

Assignment - This will honor if specific routes are assigned to a certain employee.

General Selections

2

Branch: *

1 - Implementation Team Training

Employee: *

2 of 33 Employees Selected

Assigned Date: *

Next 3 days

Honor Same Side Of Street Routing:



Honor Employee Route Assignment: **i**



Route Settings Override



- Route Settings Override will let temporarily override settings that you have in either the Company/Branch Settings or the employee settings.
- This will allow you to adjust routes for instance for weather, more to make up for rainy days and less if it rains.

Route Settings Override 3

Start Time:

End Time:

Preparation Time (minutes):

Close Out Time (minutes):

Minimum Daily Revenue:

Maximum Total Service Size:

Services

Services

Year:

Route:

4

Service	Cods - Service	Date Based On	New Sale Priority	Days Since Last Serviced Priority	ASAP Priority	
3	<input type="text" value="MOI - Round One Moxigata Treatment"/>	<input type="text" value="Last Serviced"/> <input type="text" value="1"/> days ago	<input type="text"/>	<input type="text"/>	<input type="text"/>	Delete

Select Association:

Combine Estimated Man Hours:



Year - This should be the current service year.



Route - Select a specific or multiple routes for the service(s) that you will select next.



Add Services – You can add one or multiple services by using the + sign on the right side of the Services selection.

Services Continued



Date based on – When Last Serviced is selected, enter the number of days since the service was last completed to identify when to start including services in the search. When Scheduled Date is selected, click the drop-down to choose a specific date or date range to identify when to start including services in the search.



Days Since Last Serviced Priority: Enter the number of days since services were last serviced. Note: When a service was last serviced more than the number of days identified, it is given higher optimization priority than other services.

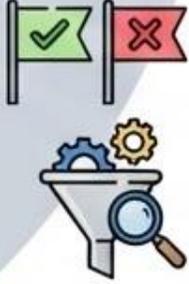


New Sale Priority: Enter the number of days since services were newly sold. Note: When a service was sold more than the number of days identified, it is given higher optimization priority than other services.



ASAP Priority: Enter the number of days since services were identified as ASAP. Note: When a service was marked ASAP more than the number of days identified, it is given higher optimization priority than other services.

More Filters



- Flag Codes – Can be used to exclude or include customers with a certain flag code
- Advanced Options – are used to narrow down your search results more.

More filters **5**

– **Flag Codes**

With:

Without:

– **Advanced Options**

Customer Information	▼	Preferences	▼
Documents	▼	Size Source	▼
Letters	▼	Subdivision	▼
Letters (Master Documents)	▼	NPS	▼
Docile	▼		

[Build Routes](#)

Let's Build a Route!

Questions?

Session Feedback

We appreciate your feedback and attendance

-  Login to the event mobile app
-  Add this session to your schedule
-  Click survey
-  Give it a rating 1-5 stars

