RealGreen® by WORKWAVE®

The Invoice to Route Playbook: Advanced Invoice Routing - 201

BEYOND SERVICE CUSTOMER CONFERENCE '26

CONFIDENTIAL | workwave.com
Copyright 2026, WorkWave LLC. All rights reserved.

AGENDA

Advanced Routing

Routing & Invoicing

Detail View Functionality

Update Customer and Service

CONFIDENTIAL | workwave.com
Copyright 2026, WorkWave LLC. All rights reserved.

SA5 Advanced Routing

CONFIDENTIAL | workwave.com
Copyright 2026, WorkWave LLC. All rights reserved.

SA5 Advanced Routing

Utilize advanced routing techniques to get more out of Routing Assistant:

Route new and old stops together

Easily apply filters to make more informed decisions

Route and confirm stops with customers

Update customer and service details

Use for prescheduling

Update routes for temporary changes

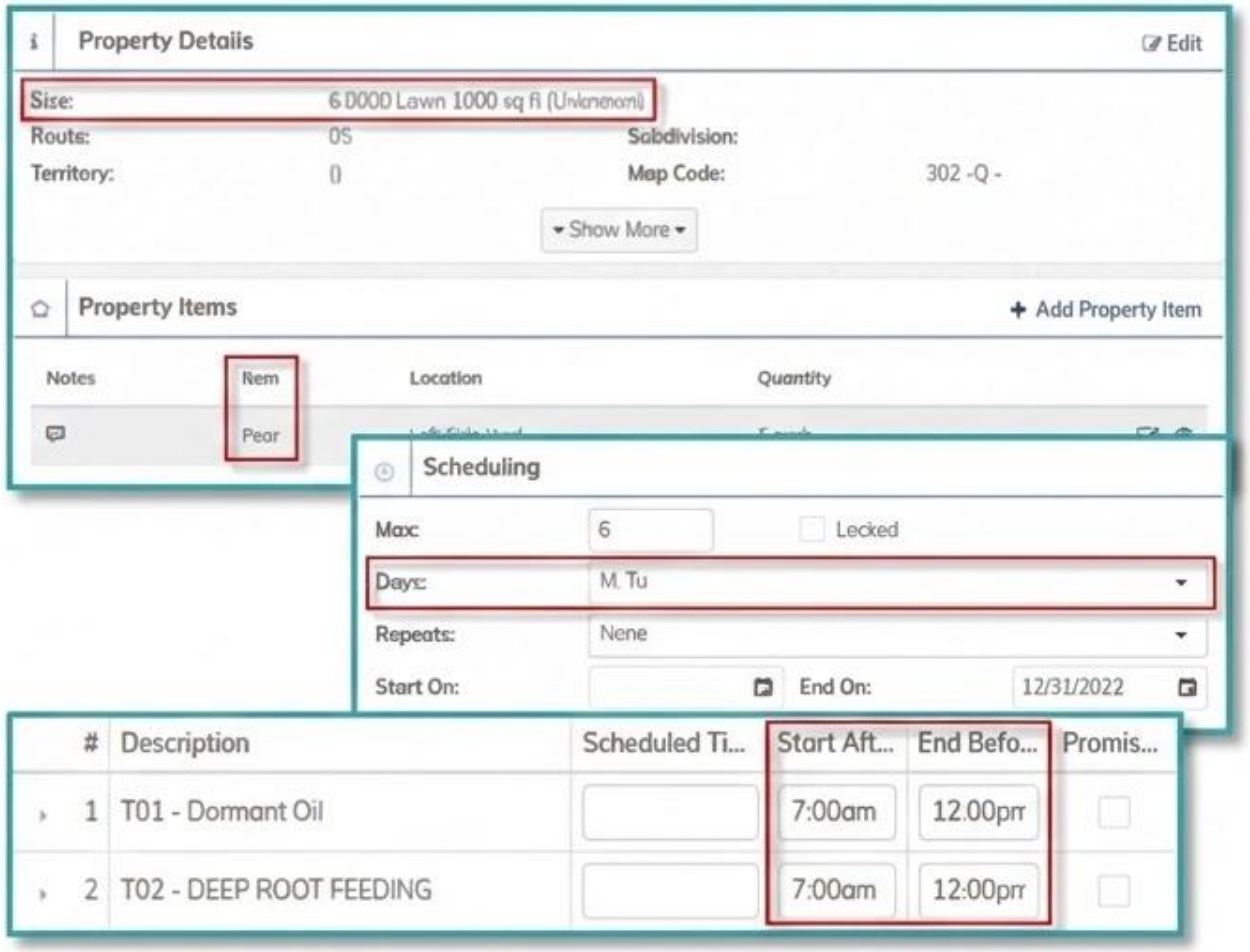
Print maps for tech use

CONFIDENTIAL | workwave.com
Copyright 2026, WorkWave LLC. All rights reserved.

SA5 Advanced Routing

Some advanced routing functionality relies on customer or the customer service details:

- Size
- Property Items
- Acceptable Days
- Time Windows

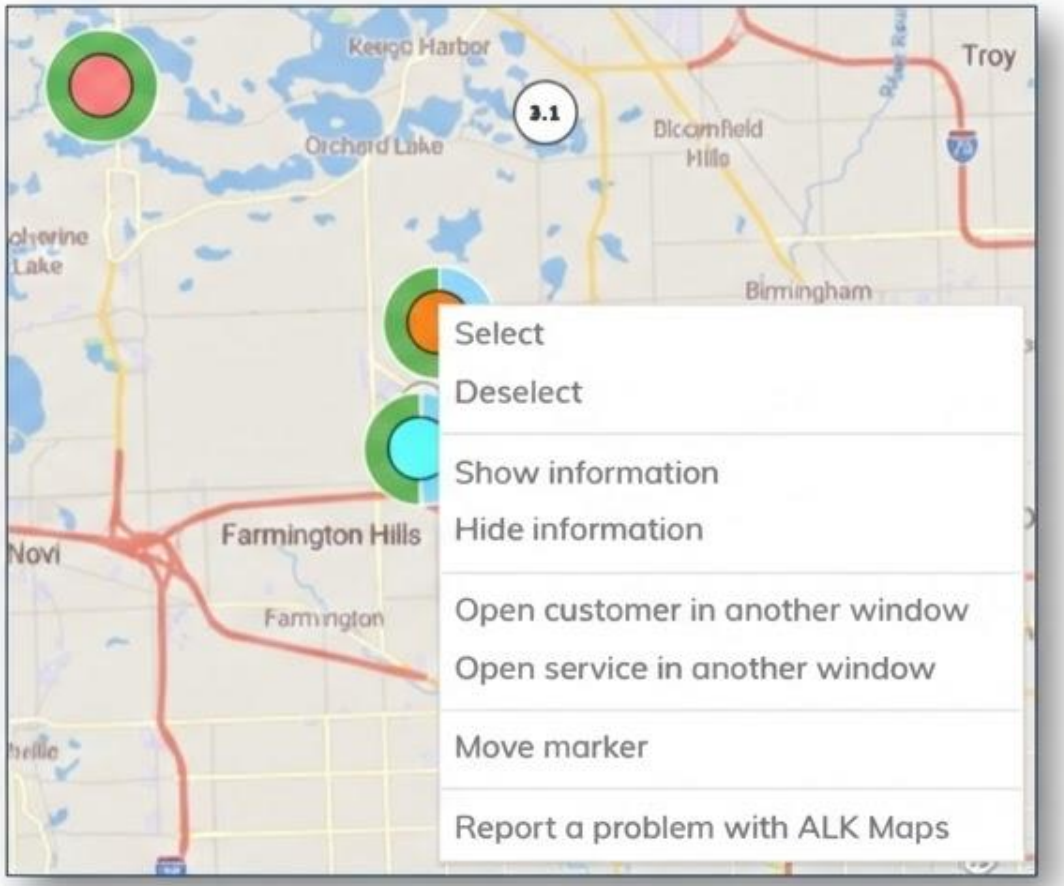


CONFIDENTIAL | workwave.com
Copyright 2026, WorkWave LLC. All rights reserved.

SA5 Advanced Routing

Routing Assistant Right-Click options:

- Select: select single service
- Deselect: deselect single service
- Show Information: show service details for pushpin
- Hide Information: hide service details for pushpin
- Open customer in another window: open the customer in a new tab
- Open service in another window: open the service in a new tab
- Move marker: allows the pushpin to be regeocoded while invoicing
- Report a problem with ALK Maps: report a mapping issue to ALK (one way street, missing street, etc.)



CONFIDENTIAL | workwave.com
Copyright 2026, WorkWave LLC. All rights reserved.

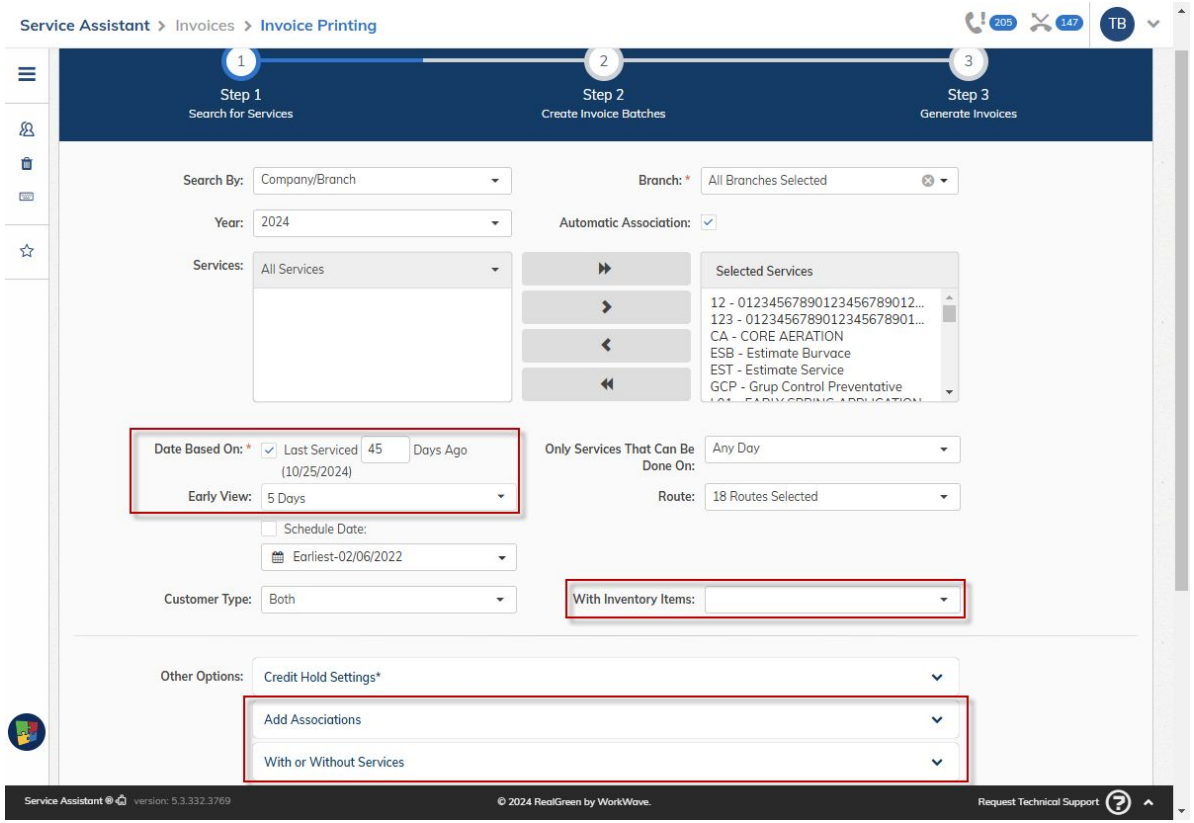
SA5 Routing & Invoicing

CONFIDENTIAL | workwave.com
Copyright 2026, WorkWave LLC. All rights reserved.

SA5 Routing & Invoicing

Advanced Options begin on Step 1 of invoicing:

- Include Early View services
  - Last Serviced + Number of Early View
- Include customers with specific property inventory types
- Use the advanced Association
  - Requires Automatic Association to be unchecked
- Include customers with or without specific services

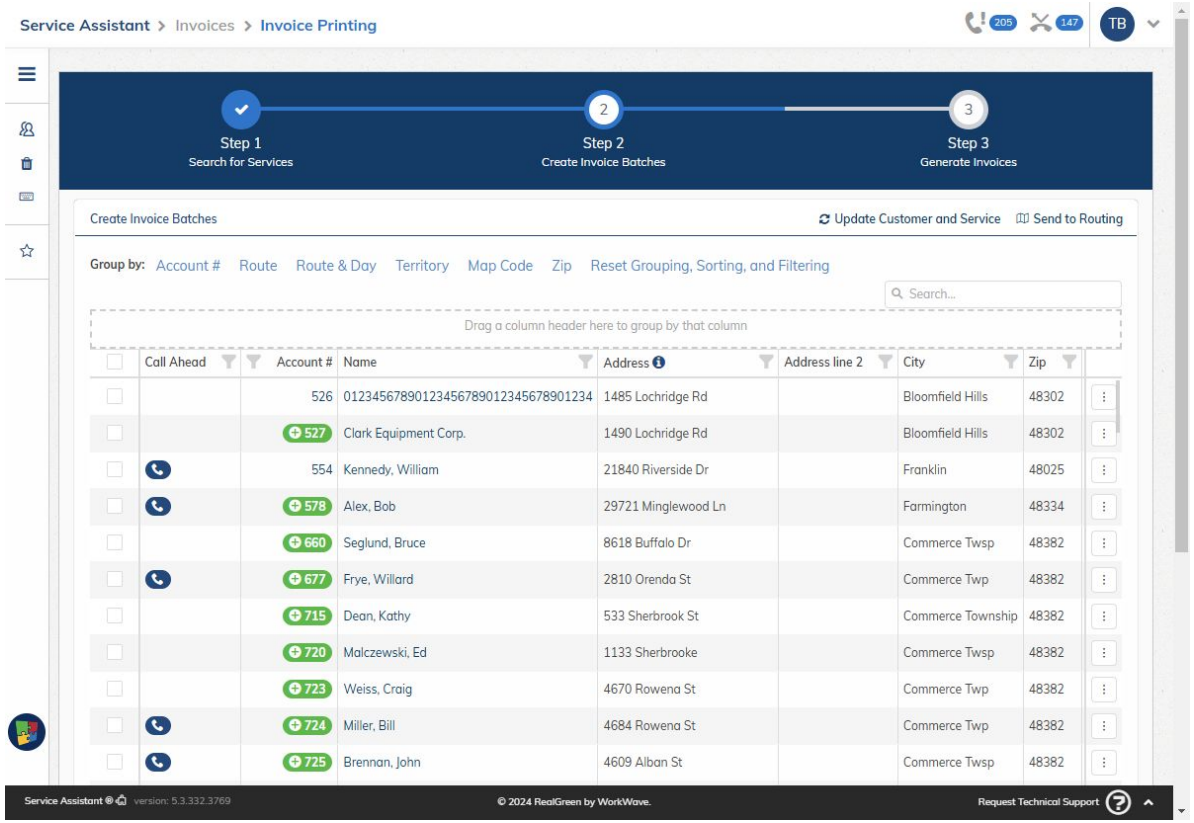


CONFIDENTIAL | workwave.com
Copyright 2026, WorkWave LLC. All rights reserved.

SA5 Routing & Invoicing

Invoicing Step 2:

- Drag and drop column headers to group
- Single-click column headers to sort by that column
- Click the filter icon to filter specific items only in that column
- Currently selected stops will total at the bottom of the grid

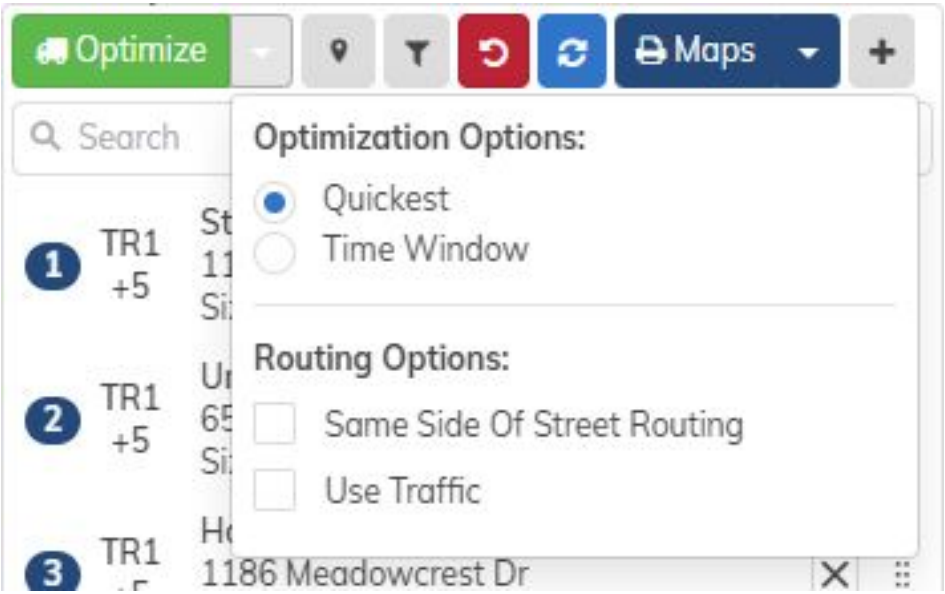


CONFIDENTIAL | workwave.com
Copyright 2026, WorkWave LLC. All rights reserved.

SA5 Routing & Invoicing

Routing Assistant Optimization Options:

- Quickest: route stops by the quickest drive time
- Time Window: route stops by quickest drive time while also honoring the time windows that may exist on services
  - Promise schedule dates and times may be used as time windows
- Same Side Of Street Routing: route stops by quickest drive time while honoring same side of street optimization
- Use Traffic: route stops with historical traffic density in mind
  - Requires an assigned date to work



CONFIDENTIAL | workwave.com
Copyright 2026, WorkWave LLC. All rights reserved.

SA5 Routing & Invoicing

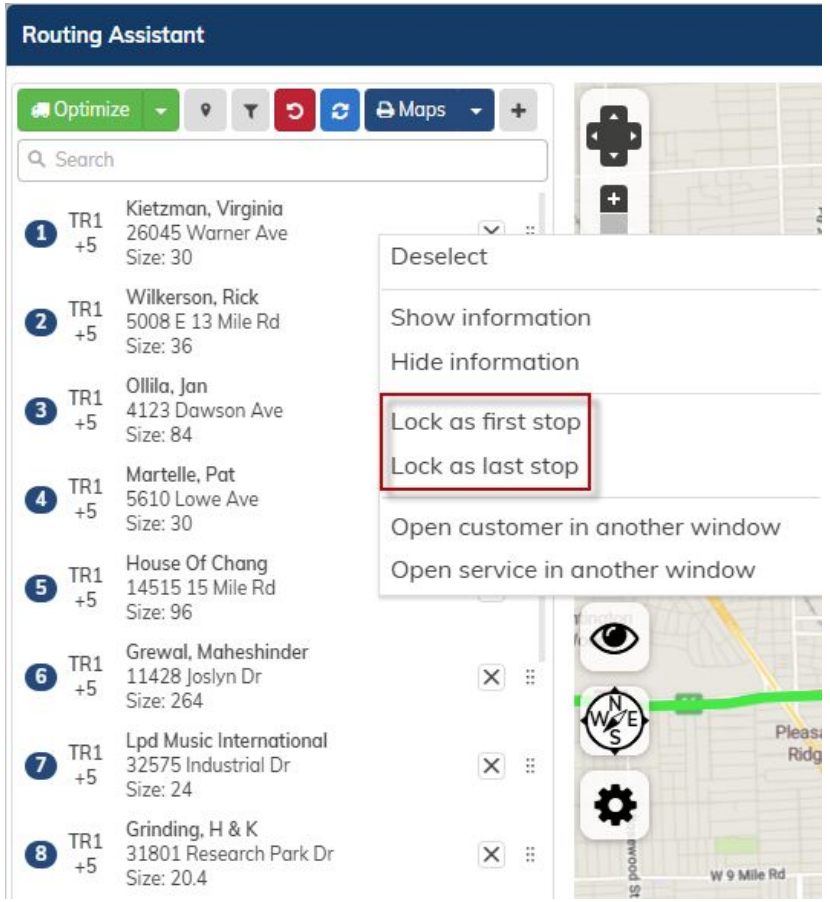
Routing Assistant Lock Stops:

Use the Lock Stops function to set first and/or last stops prior to route optimization. Route optimization will use the selected option with the locked stop(s) in mind.

***Right click the stop in the route list to lock.**

- Lock as first stop: will optimize around this selected stop as the first appointment
- Lock as last stop: will optimize around this selected stop as the last appointment

Both can be used at the same time, and they must be set prior to clicking the Optimize button.

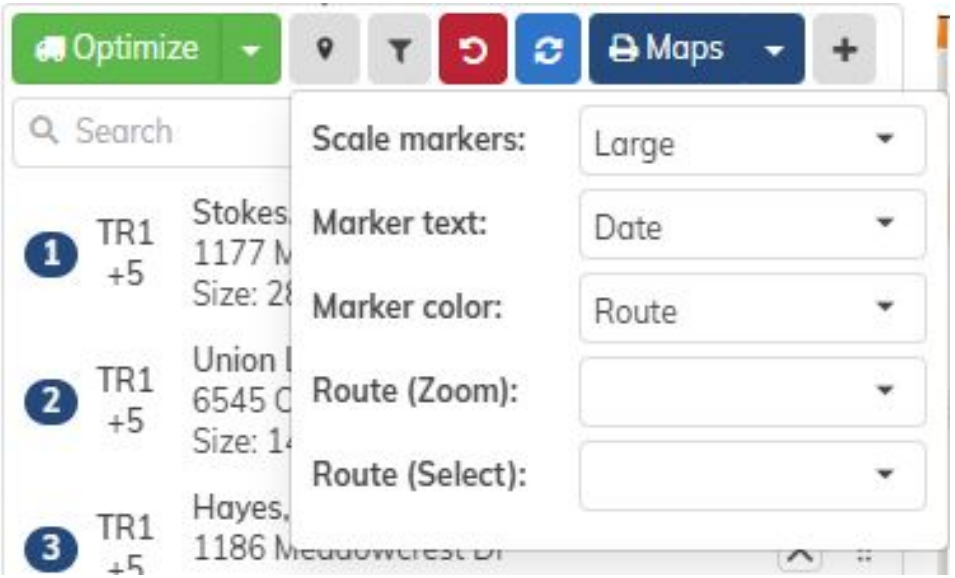


CONFIDENTIAL | workwave.com
Copyright 2026, WorkWave LLC. All rights reserved.

SA5 Routing & Invoicing

Routing Assistant Marker Options:

- Scale Markers: set marker size as Small, Medium, or Large
- Marker Text: set marker text as #Days/Date, DayCode, or Service 1
- Marker Color: set marker color based on Service 1, Route, Map Code, Territory, or Zip/Postal Code
  - Color codes can be assigned under settings, otherwise colors will be assigned randomly
- Route (Zoom): zoom into an area based on dates/types
- Route (Select): select stops based on dates/types

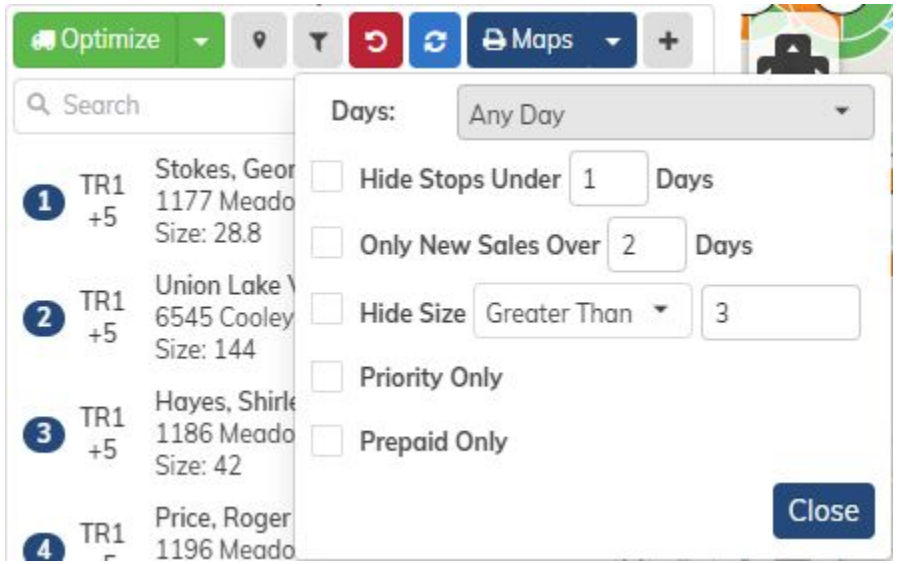


CONFIDENTIAL | workwave.com
Copyright 2026, WorkWave LLC. All rights reserved.

SA5 Routing & Invoicing

Routing Assistant Filter Options:

- Days: select the acceptable service days for the customer
- Hide Stops Under X Days: hide all stops under a specific number of last service days
- Only New Sales Over X Days: show only new sales X number of days past their sold date
- Hide Size: hide service sizes greater or less than a specific value
- Priority Only: display only priority stops
  - New Sales, ASAP, Promised, Past Due
- Prepaid Only: display only prepaid services

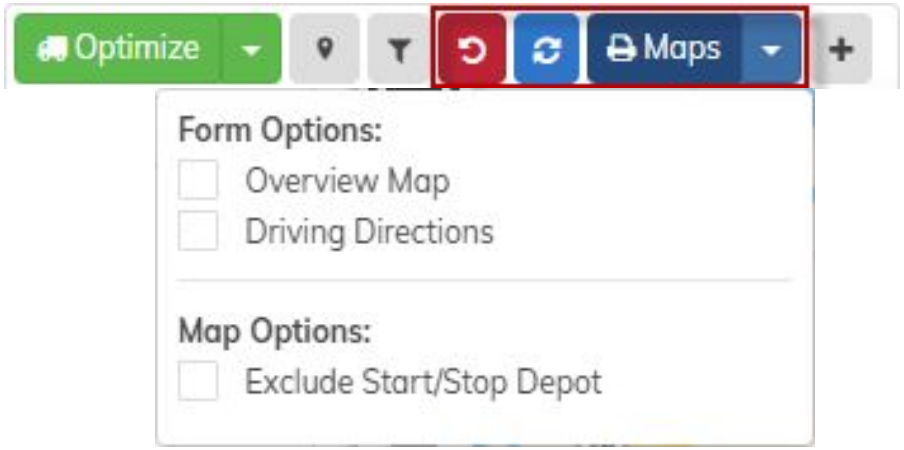


CONFIDENTIAL | workwave.com
Copyright 2026, WorkWave LLC. All rights reserved.

SA5 Routing & Invoicing

Routing Assistant Additional Options:

- Reverse Route: reverse route optimization order
- Update Customer and Service: update selected customer information and/or selected service information
- Print Maps: print maps for the technicians
  - Overview Map: prints an overview driving map of the stops with depot included
    - Exclude Start/Stop Depot: removes depot location from Overview Map
  - Driving Directions: prints turn by turn directions from the depot to each stop, and then back to the depot



CONFIDENTIAL | workwave.com
Copyright 2026, WorkWave LLC. All rights reserved.

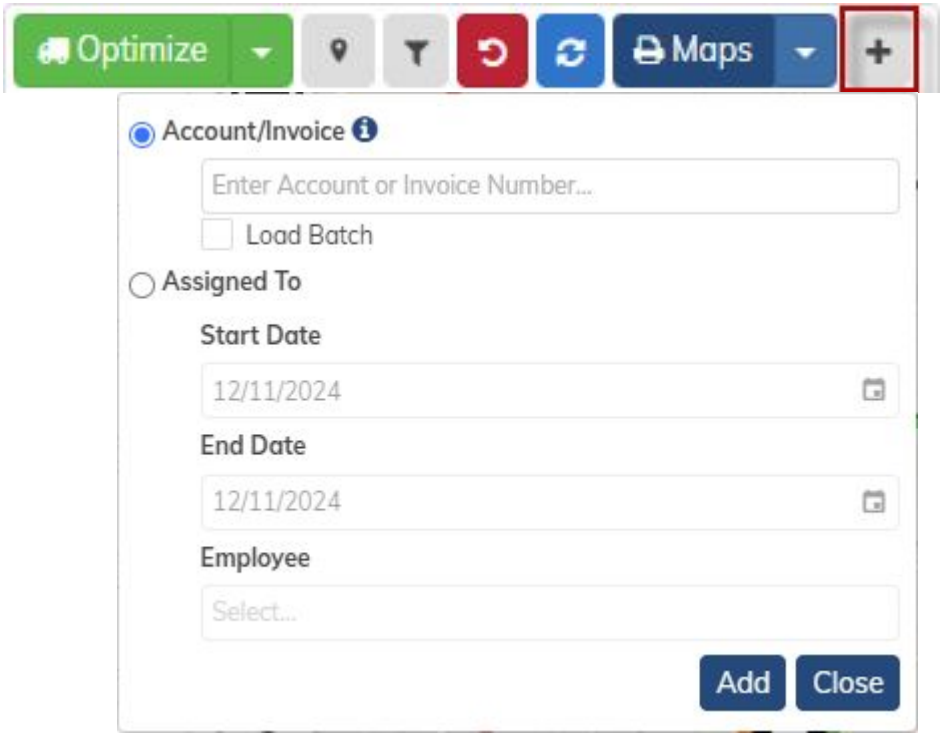
SA5 Routing & Invoicing

Routing Assistant Add Stops:

Use the Add Stops function to add incomplete printed/assigned services to the map along with the current unassigned work. This function bypasses the need for Route Loose Work.

***will not load incomplete printed estimates**

- Account/Invoice: add specific customer accounts or invoices
  - Load Batch: loads all invoices in the same batch
- Assigned To: add invoices by assigned to employees and date range



CONFIDENTIAL | workwave.com
Copyright 2026, WorkWave LLC. All rights reserved.

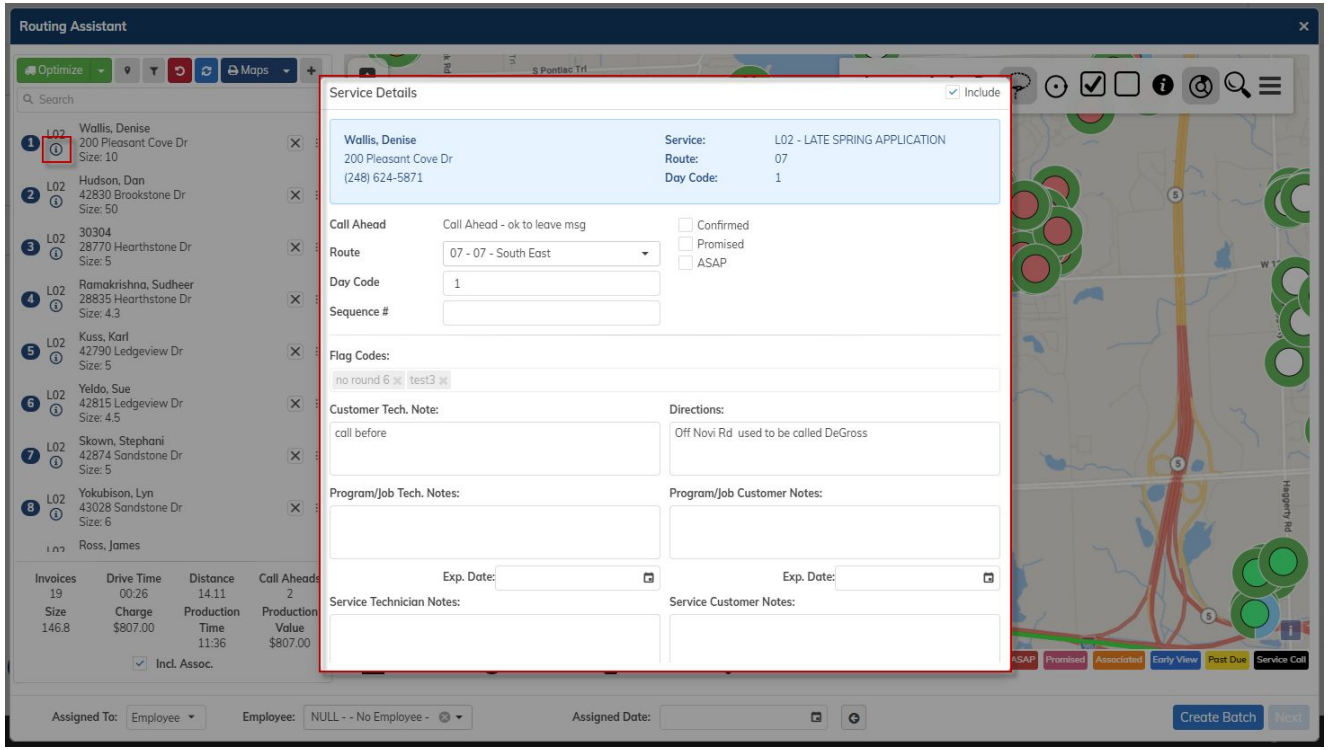
Detail View Functionality

CONFIDENTIAL | workwave.com
Copyright 2026, WorkWave LLC. All rights reserved.

Detail View Functionality

Detail View is available on Step 2 of Invoice Printing, or directly from the route listing in Routing Assistant by clicking the – button. It can be used for a variety of options, including but not limited to:

- Reaching out to call ahead customers prior to batching for confirmation
- Adding program or service level notes to the technicians or customers
- Reviewing customer flag codes

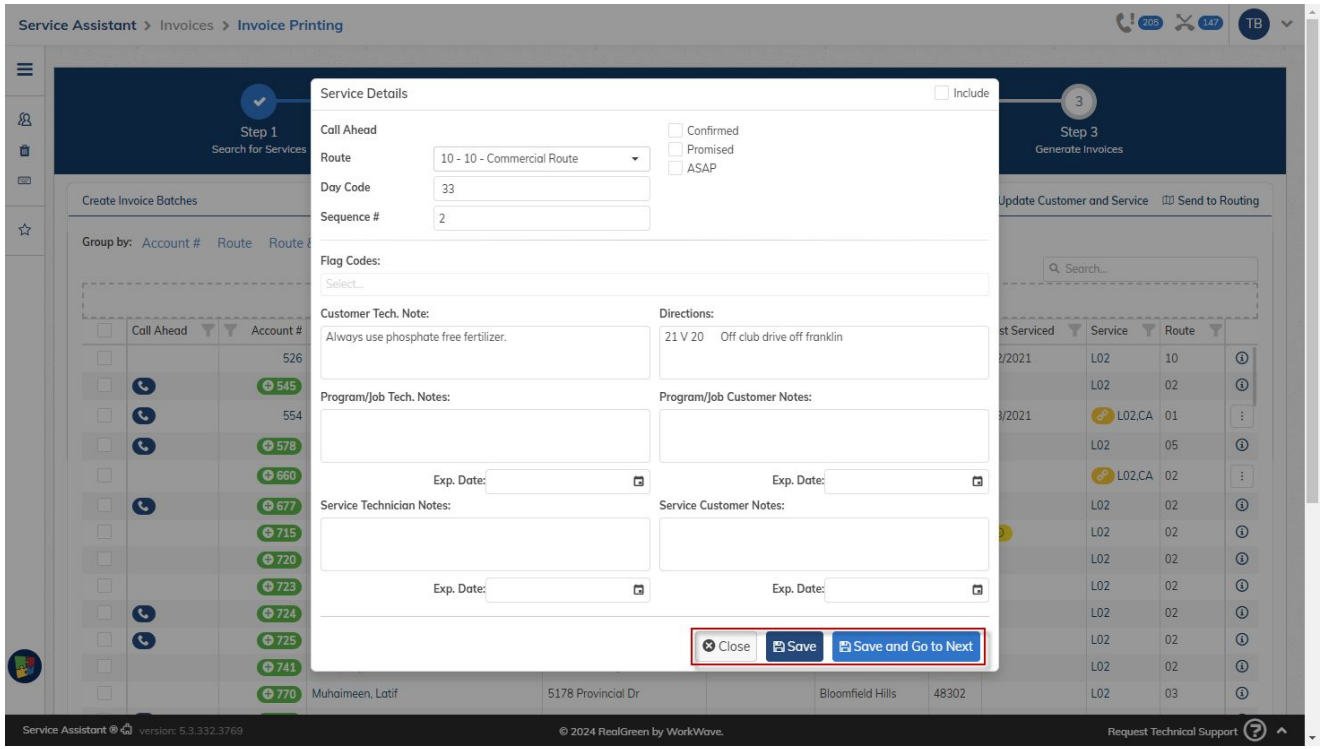


CONFIDENTIAL | workwave.com
Copyright 2026, WorkWave LLC. All rights reserved.

Detail View Functionality

Easily navigate between selected stops from the route list in Routing Assistant or before taking stops to Routing Assistant to review notes/add information:

- Close: close current customer and service without saving changes
- Save: close current customer and service with changes saved
- Save and Go To Next: save changes and move to the next customer or service on the existing customer in instances of association



CONFIDENTIAL | workwave.com
Copyright 2026, WorkWave LLC. All rights reserved.

Update Customer and Service

CONFIDENTIAL | workwave.com
Copyright 2026, WorkWave LLC. All rights reserved.

Update Customer And Service

Update Customer and Service is available on Step 2 of Invoice Printing, or directly from Routing Assistant after selecting services. Access Update Customer and Service by clicking the button.

Location Details

Update various customer and service information for the selected services

Tax Details

Update tax information for customers of the selected services

Scheduling Details

Update scheduled information on the selected services

Other

Remove selected services from the list or map after updating, or update estimated by/assigned to information

CONFIDENTIAL | workwave.com
Copyright 2026, WorkWave LLC. All rights reserved.

Update Customer And Service

Location Details:

- Route: update route on selected services or customers
  - Update **Customer Default Route**: updates the default route on the currently selected customers
  - Update **Route/Day/Sequence**: updates the permanent route, day code, and sequence (current route order) of the selected services
  - Update **Temp Route/Day/Sequence**: updates only the temporary route, day code, and sequence (current route order) of the selected services
  - **Reset Temp Routes to Permanent**: resets the temporary route to the permanent route code
- DayCode: update day code on selected services
- City Name: update selected customer city names
- Update Customer Territory: update selected customer territories
- Update Customer Subdivision: update selected customer subdivisions
- Update Customer Map Code: update selected customer map codes

CONFIDENTIAL | workwave.com
Copyright 2026, WorkWave LLC. All rights reserved.

Update Customer And Service

Tax Details:

- Update Tax Code: update tax code(s) on the currently selected customers
  - ☑ Tax Code 1: updates the Tax Code 1 field on all selected customers
  - ☑ Tax Code 2: updates the Tax Code 2 field on all selected customers
  - ☑ Tax Code 3: updates the Tax Code 3 field on all selected customers
  - Do not Change Tax Code if: ignores changing any of the tax codes if the customer currently has the selected tax code(s)

CONFIDENTIAL | workwave.com
Copyright 2028, WorkWave LLC. All rights reserved.

Update Customer And Service

Scheduling Details:

Update Assigned To: update assigned to field without generating invoices

- **Employee:** sets/updates the assigned employee on currently selected services
- **Crew:** sets/updates the assigned crew on currently selected services

Update Schedule Times from Map: sets/updates the schedule time on currently selected services based on the estimated arrival times from route optimization

***best utilized with calculated estimated production times for services**

Update Schedule Date: sets/updates the schedule date on currently selected services

Update Future Schedule Dates: sets/updates the future schedule dates on currently selected services that use a repeat frequency

Update Repeat: sets/updates repeat frequency on currently selected services

- **Days:** sets/updates acceptable schedule/work days on currently selected services
- **Repeats:** updates repeat frequency on currently selected services
  - Daily, Weekly, Twice Monthly, Monthly, Yearly

CONFIDENTIAL | workwave.com
Copyright 2026, WorkWave LLC. All rights reserved.

Update Customer And Service

Other:

Remove from List

removes selected services from the list selection/map after updating

Update Estimated By/Assigned To

update Estimated By field or Assigned To field (depending on service status) of the currently selected services

***Only updates already generated and assigned work**

CONFIDENTIAL | workwave.com
Copyright 2026, WorkWave LLC. All rights reserved.

Questions?

CONFIDENTIAL | workwave.com
Copyright 2026, WorkWave LLC. All rights reserved.

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

★★★★★

CONFIDENTIAL | workwave.com
Copyright 2026, WorkWave LLC. All rights reserved.