



The Invoice to Route Playbook: Advanced Invoice Routing - 201

AGENDA



**Advanced
Routing**



**Routing &
Invoicing**



**Detail View
Functionality**



**Update Customer
and Service**

SA5 Advanced Routing

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

SA5 Advanced Routing

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



Size



Property Items



Acceptable Days



Time Windows

The screenshot displays the SA5 Advanced Routing interface. It is divided into several sections:

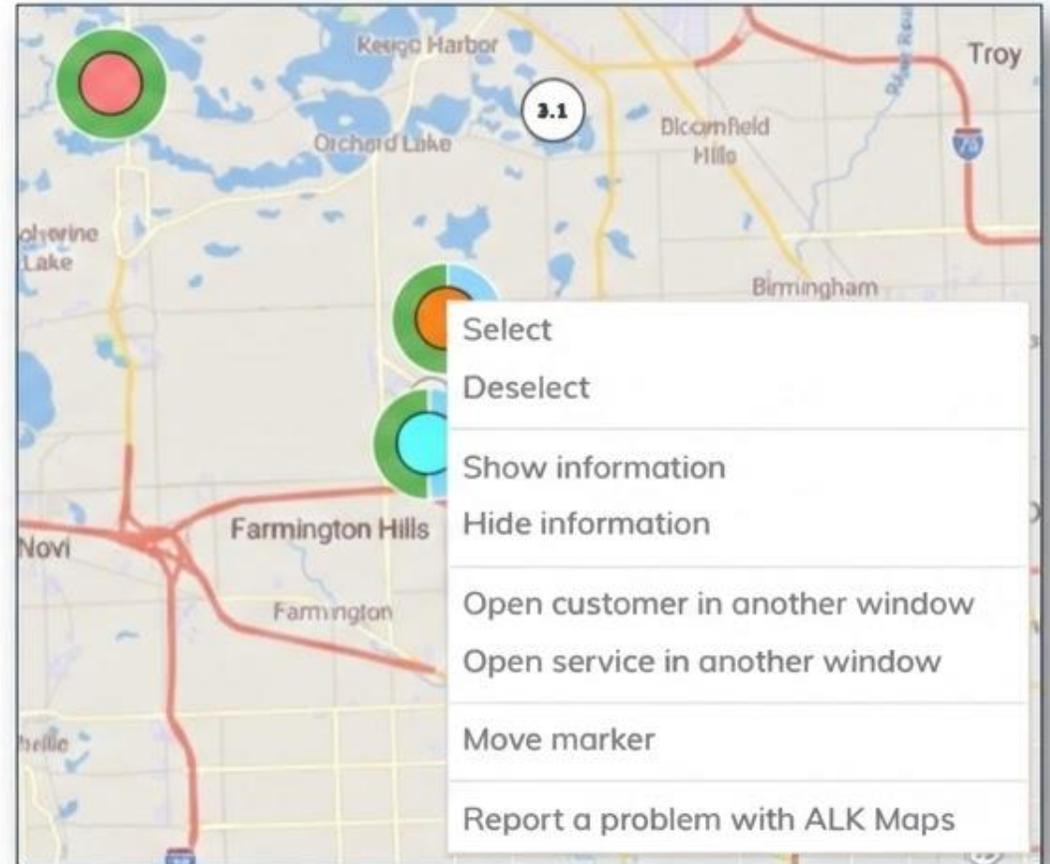
- Property Details:** Contains fields for Size (6 0000 Lawn 1000 sq ft (Unknown)), Routes (05), Territory (0), Subdivision, and Map Code (302-Q-). A "Show More" button is visible.
- Property Items:** Includes a table with columns for Notes, Item, Location, and Quantity. The "Item" column contains "Pear".
- Scheduling:** A pop-up window with fields for Max (6), Days (M, Tu), Repeats (None), Start On, and End On (12/31/2022). A "Locked" checkbox is also present.
- Task Table:** A table with columns: #, Description, Scheduled Ti..., Start Aft..., End Befo..., and Promis...

#	Description	Scheduled Ti...	Start Aft...	End Befo...	Promis...
1	T01 - Dormant Oil		7:00am	12:00pr	<input type="checkbox"/>
2	T02 - DEEP ROOT FEEDING		7:00am	12:00pr	<input type="checkbox"/>

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.)



SA5 Routing & Invoicing

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

The screenshot displays the 'Service Assistant' interface for 'Invoicing > Invoice Printing'. It is divided into three steps: Step 1 (Search for Services), Step 2 (Create Invoice Batches), and Step 3 (Generate Invoices). The current view is Step 1, which includes several search and filter options:

- Search By:** Company/Branch
- Year:** 2024
- Services:** All Services
- Branch:** All Branches Selected
- Automatic Association:**
- Date Based On:** Last Serviced 45 Days Ago (10/25/2024)
- Early View:** 5 Days
- Only Services That Can Be Done On:** Any Day
- Route:** 18 Routes Selected
- Customer Type:** Both
- With Inventory Items:** (Red box highlights this field)
- Other Options:** Credit Hold Settings*
- Add Associations:** (Red box highlights this dropdown)
- With or Without Services:** (Red box highlights this dropdown)

The footer of the interface shows 'Service Assistant version: 5.3.332.3769', '© 2024 RealGreen by WorkWave', and 'Request Technical Support'.

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

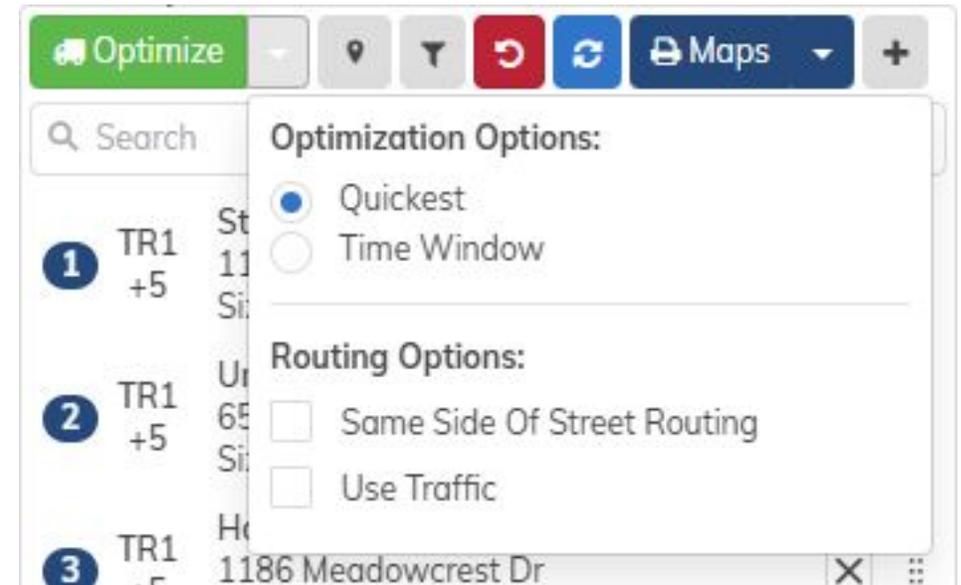
The screenshot displays the 'Service Assistant' interface for 'Invoicing > Invoice Printing'. The top navigation bar shows three steps: Step 1 (Search for Services), Step 2 (Create Invoice Batches), and Step 3 (Generate Invoices). The current step is Step 2, which includes options to 'Update Customer and Service' and 'Send to Routing'. Below this, there is a 'Group by' section with dropdowns for 'Account #', 'Route', 'Route & Day', 'Territory', 'Map Code', and 'Zip', along with a 'Reset Grouping, Sorting, and Filtering' button. A search bar is also present. The main area is a grid of service stops with columns for 'Call Ahead', 'Account #', 'Name', 'Address', 'Address line 2', 'City', and 'Zip'. The grid contains 10 rows of data, each with a checkbox, a 'Call Ahead' icon, and a 'Name' field. The bottom of the grid shows a total for the selected items. The footer includes the version number '5.3.332.3769', copyright information '© 2024 RealGreen by WorkWave', and a 'Request Technical Support' link.

Call Ahead	Account #	Name	Address	Address line 2	City	Zip
	526	01234567890123456789012345678901234	1485 Lochridge Rd		Bloomfield Hills	48302
	527	Clark Equipment Corp.	1490 Lochridge Rd		Bloomfield Hills	48302
	554	Kennedy, William	21840 Riverside Dr		Franklin	48025
	578	Alex, Bob	29721 Minglewood Ln		Farmington	48334
	660	Seglund, Bruce	8618 Buffalo Dr		Commerce Twsp	48382
	677	Frye, Willard	2810 Orenda St		Commerce Twp	48382
	715	Dean, Kathy	533 Sherbrook St		Commerce Township	48382
	720	Malczewski, Ed	1133 Sherbrooke		Commerce Twsp	48382
	723	Weiss, Craig	4670 Rowena St		Commerce Twp	48382
	724	Miller, Bill	4684 Rowena St		Commerce Twp	48382
	725	Brennan, John	4609 Alban St		Commerce Twsp	48382

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



SA5 Routing & Invoicing

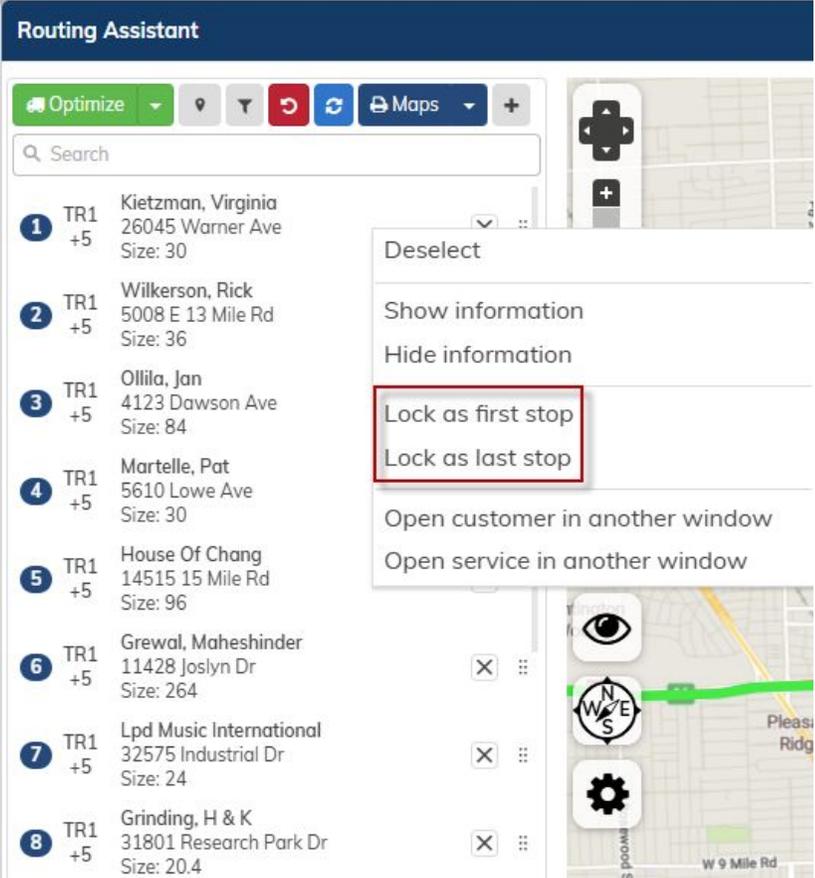
Routing Assistant Lock Stops:

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.



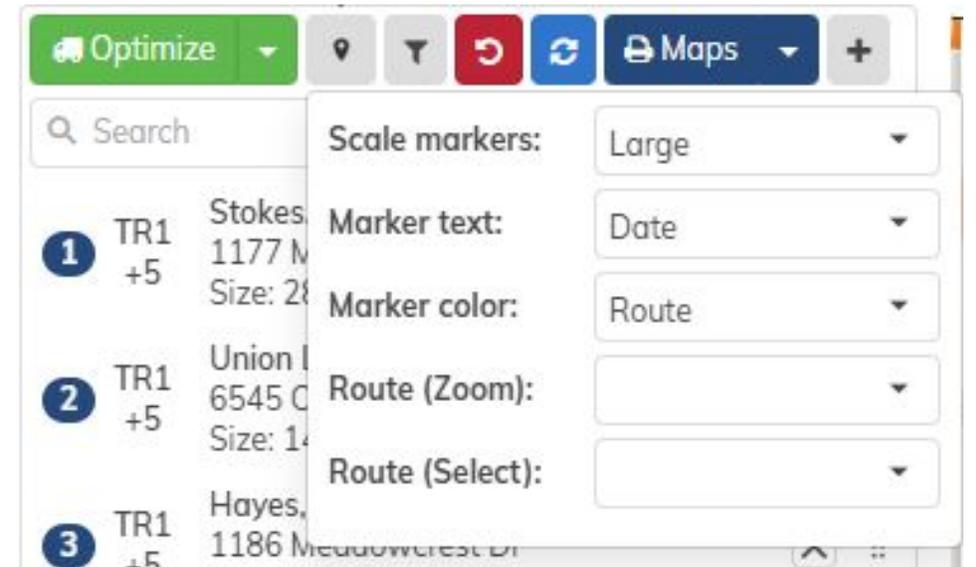
The screenshot displays the 'Routing Assistant' interface. On the left, a list of stops is shown, each with a number in a blue circle, 'TR1 +5', and the customer name and address. Stop 3, 'Ollila, Jan', is selected. A context menu is open over this stop, with 'Lock as first stop' and 'Lock as last stop' highlighted in a red box. Other menu options include 'Deselect', 'Show information', 'Hide information', 'Open customer in another window', and 'Open service in another window'. The top of the interface has an 'Optimize' button and a search bar. The right side shows a map with a green route line.

Stop ID	Customer Name	Address	Size
1	Kietzman, Virginia	26045 Warner Ave	30
2	Wilkerson, Rick	5008 E 13 Mile Rd	36
3	Ollila, Jan	4123 Dawson Ave	84
4	Martelle, Pat	5610 Lowe Ave	30
5	House Of Chang	14515 15 Mile Rd	96
6	Grewal, Maheshinder	11428 Joslyn Dr	264
7	Lpd Music International	32575 Industrial Dr	24
8	Grinding, H & K	31801 Research Park Dr	20.4

SA5 Routing & Invoicing

Routing Assistant Marker Options:

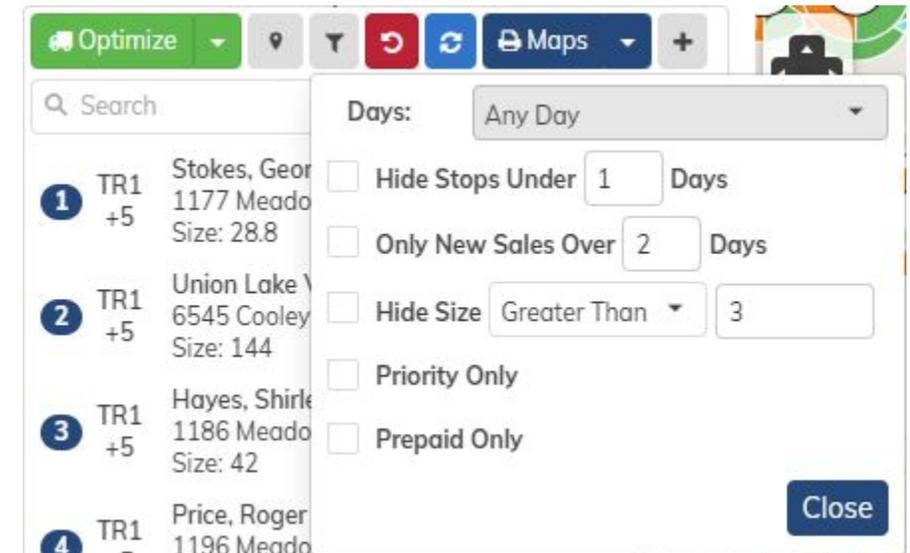
- Scale Markers: set marker size as Small, Medium, or Large
- Marker Text: set marker text as #Days/Date, DayCode, or Service 1
- Marker Color: set marker color based on Service 1, Route, Map Code, Territory, or Zip/Postal Code
 - Color codes can be assigned under settings, otherwise colors will be assigned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



SA5 Routing & Invoicing

Routing Assistant Filter Options:

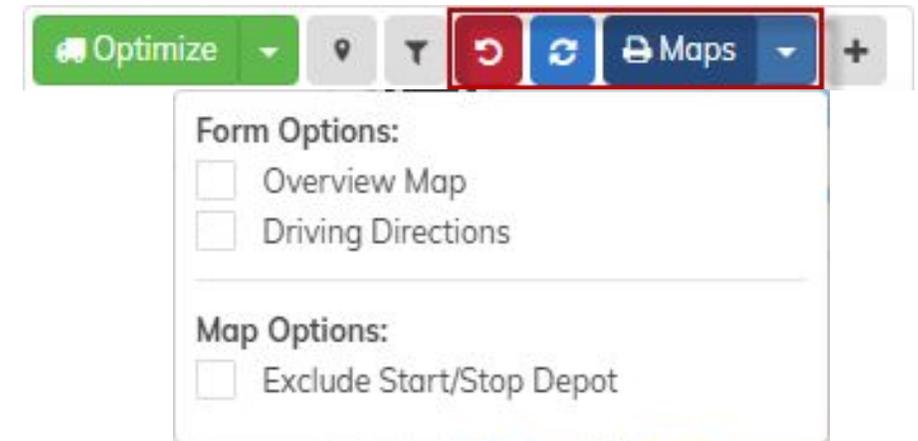
- Days: select the acceptable service days for the customer
- Hide Stops Under X Days: hide all stops under a specific number of last service days
- Only New Sales Over X Days: show only new sales X number of days past their sold date
- Hide Size: hide service sizes greater or less than a specific value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



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



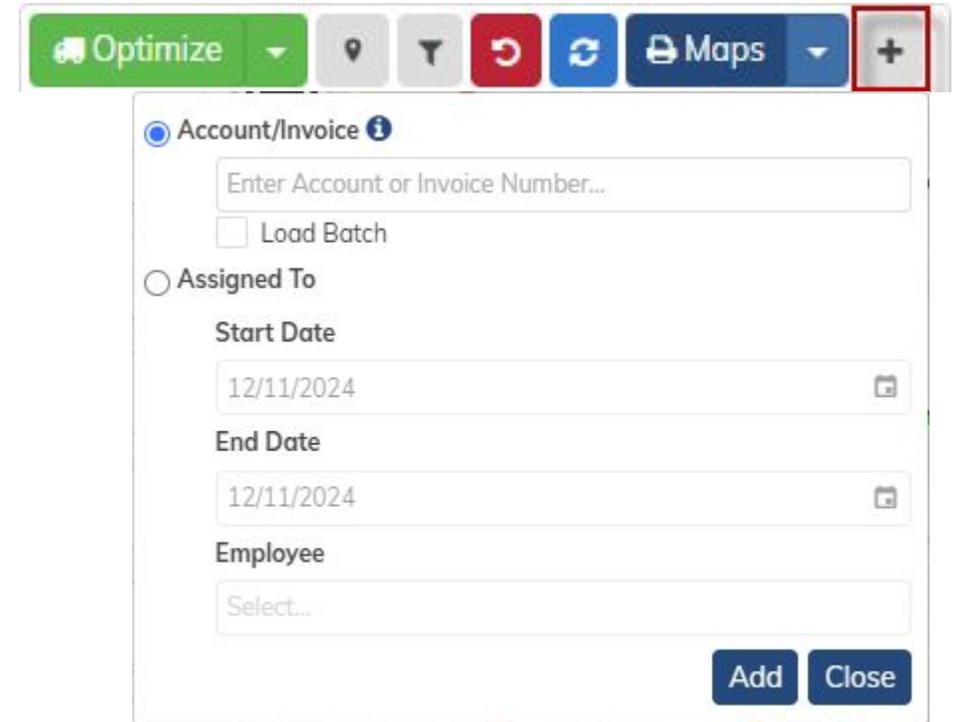
SA5 Routing & Invoicing

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



The screenshot shows a software interface for adding stops. At the top, there is a toolbar with buttons for 'Optimize', a location pin, a funnel, a refresh, a circular arrow, 'Maps', and a plus sign. Below the toolbar is a dialog box with the following elements:

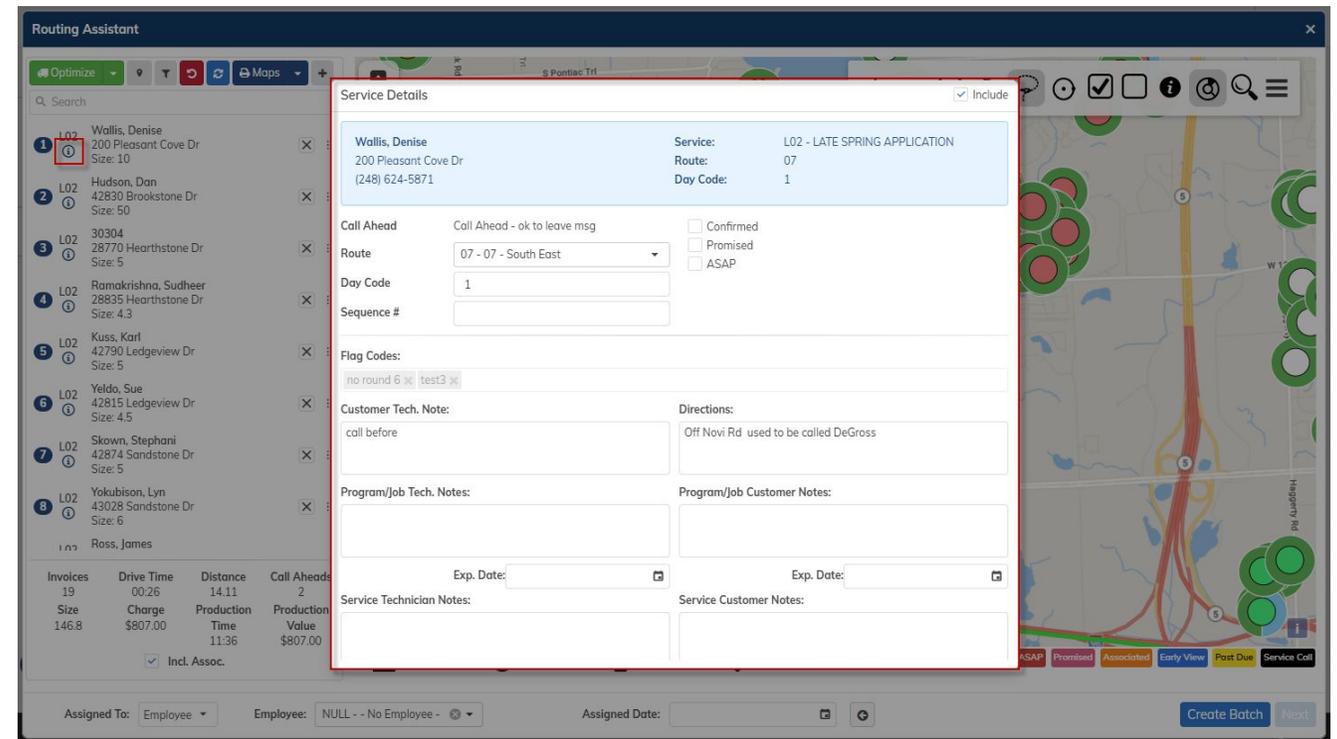
- Account/Invoice ⓘ
- Enter Account or Invoice Number...
- Load Batch
- Assigned To
- Start Date: 12/11/2024
- End Date: 12/11/2024
- Employee: Select...
- Buttons: Add, Close

Detail View Functionality

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:

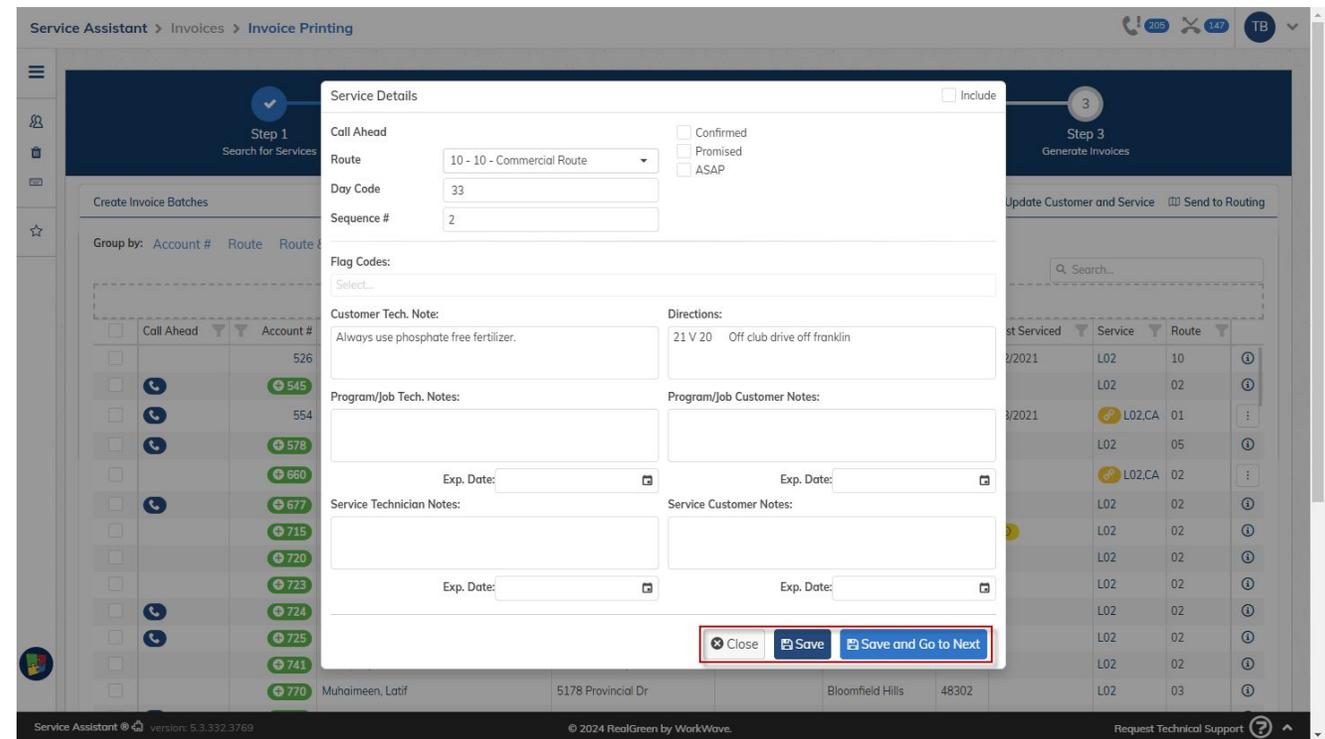
- Reaching out to call ahead customers prior to batching for confirmation
- Adding program or service level notes to the technicians or customers
- Reviewing customer flag codes



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



Update Customer and Service

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

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

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)

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

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**

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

