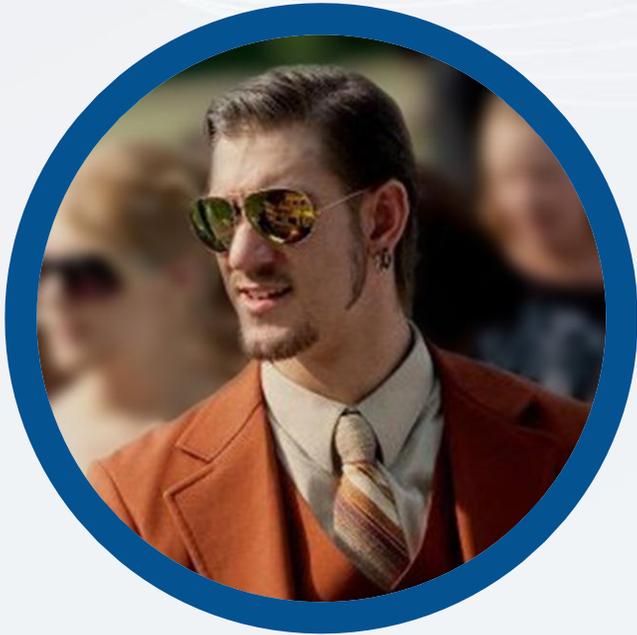




**See Your Routes,
Own Your Markets:**
Visual Route Designer

See Your Routes, Own Your Markets: Visual Route Designer



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Agenda

- Routes and Default Logic
- Route Setup
- Using Visual Route Designer (VRD)
- Copy And Change Routes Utility
- Route Troubleshooting

SA5 Routes and Default Logic

SA5 Routes and Default Logic

What are Routes?

Routes in Service Assistant can mean a variety of things depending on how a company operates and their business model:

- Employee
- Vehicle
- Territory
- Sales Territory
- Day of the Week (although typically this would be Day Code)
- Generic Use (for smaller or new companies)

SA5 Routes and Default Logic

Default routes can be assigned to both customers and services as needed. If no default routes are assigned to services, the services added to a customer will use the route assigned to the customer.

Route defaults follow a hierarchy:

1. Visual Route Designer defaults in SA5
2. Visual Route Designer defaults in SA4 (if applicable)
3. ZIP/Postal Table (for customer routes)
4. Manually assigned

SA5 Routes and Default Logic

ZIP/Postal Setup

Assigning default routes to the ZIP/Postal Setup is the easiest way to have routes applied to customers and services. This works well if:

- All services fall under the same route
- Each ZIP/Postal code is a single route only

Zip Code	City	State	Tax Code 1	Tax Code 2	Tax Code 3	Area Code	Route	Territory	Branch	
48012	Birmingham	MI	1 - Sales Tax (6%)			248	02		south - Super Green	 
48017	Clawson	MI	1 - Sales Tax (6%)			248	07	S1	south - Super Green	 
48024	Farmington	MI	1 - Sales Tax (6%)			248	04		south - Super Green	 
48025	Franklin	MI	1 - Sales Tax (6%)			248	05		south - Super Green	 
48025	Franklin	MI	1 - Sales Tax (6%)				02		east - Precision Land Maintenance	 
48034	Southfield	MI	1 - Sales Tax (6%)			248			east - Precision Land Maintenance	 
48043	Mt. Clemens	MI	1 - Sales Tax (6%)			810	03		south - Super Green	 
48067	Royal Oak	MI	1 - Sales Tax (6%)			248	09		south - Super Green	 
48068	Royal Oak	MI	1 - Sales Tax (6%)			248	08		south - Super Green	 
48069	Pleasant Ridge	MI	1 - Sales Tax (6%)				02		south - Super Green	 
48070	Huntington Woods	MI	1 - Sales Tax (6%)			734			south - Super Green	 
48072	Berkley	MI	1 - Sales Tax (6%)			248	02		south - Super Green	 
48073	Royal Oak	MI	1 - Sales Tax (6%)			248	03		south - Super Green	 
48075	Southfield	MI	1 - Sales Tax (6%)			248	05		south - Super Green	 
48076	Southfield	MI	1 - Sales Tax (6%)			248	06		south - Super Green	 
48083	Troy	MI	1 - Sales Tax (6%)			248	03		south - Super Green	 
48084	Troy	MI	1 - Sales Tax (6%)			248	04		south - Super Green	 
48089	Warren	MI	1 - Sales Tax (6%)			810	09		south - Super Green	 

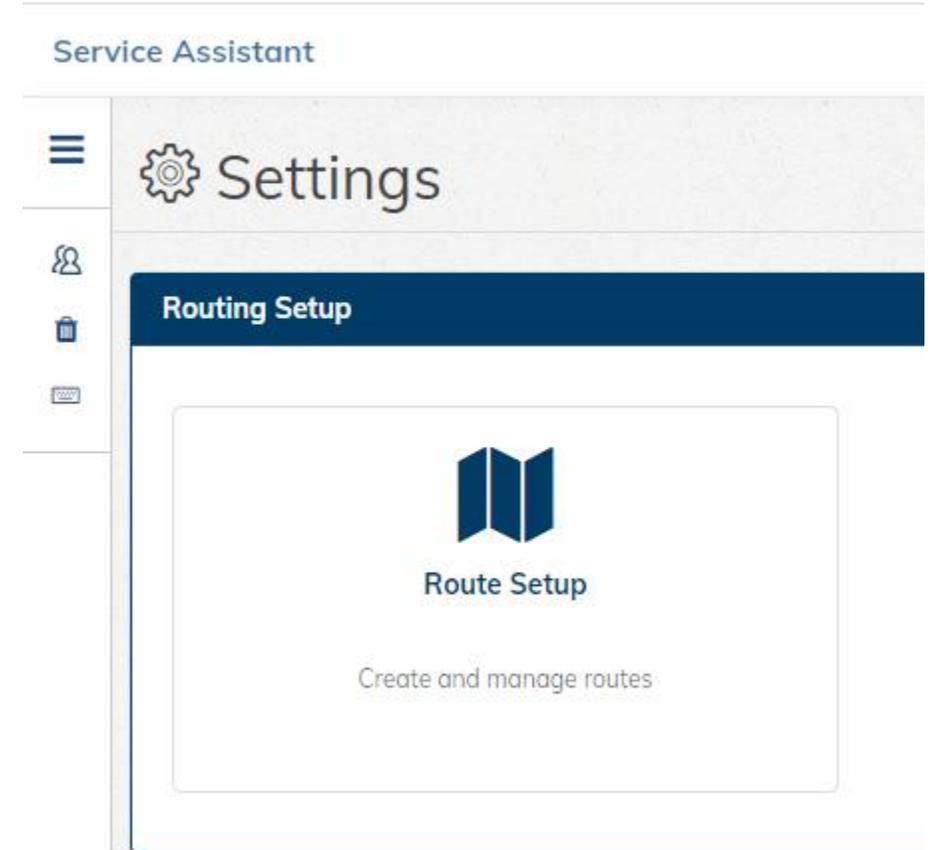
Route Setup

Route Setup

Route Setup can be found under Settings > Route Setup

For Visual Route Designer to work, routes first need to be created under Route Setup.

It is highly recommended to color code routes to better visualize route territories in Visual Route Designer.



Route Setup

Route Setup allows you to add a variety of options to each route:

- Default Assigned Technician
- Default Assigned Crew
- Branch
- Work Week
- Start/Stop times
- Start/Stop location
- Available services
- Color (Important when using VRD)

The screenshot shows the 'Route Setup' interface in the Service Assistant application. The breadcrumb trail is 'Service Assistant > Settings > Route Setup'. The current route is '02 - North Central'. The interface is divided into several sections:

- Route Setup:** Includes fields for Code (02), Description (North Central), Available (checked), Assigned Employee (None), Assigned Crew (Select...), Branch (south - Super Green), Work Week (M, T, W, Th, F), Text Color (#000000), and Background Color (#D60000).
- Routing Assistant Settings:** Includes Start of Day (12:00 AM), End of Day (12:00 AM), Latitude (0.00000), and Longitude (0.00000).
- Quick Fit Route Limits:** Includes Max Stops and Max Total Size.
- Programs & Special Jobs:** A table with columns for Code and Description. It lists: LC (Lawn Care), SC (SERVICE CALL), and two TS (Unknown) entries.

The footer of the application shows 'Service Assistant version: 5.3.330.3766', '© 2024 RealGreen by WorkWave', and a 'Request Technical Support' link.

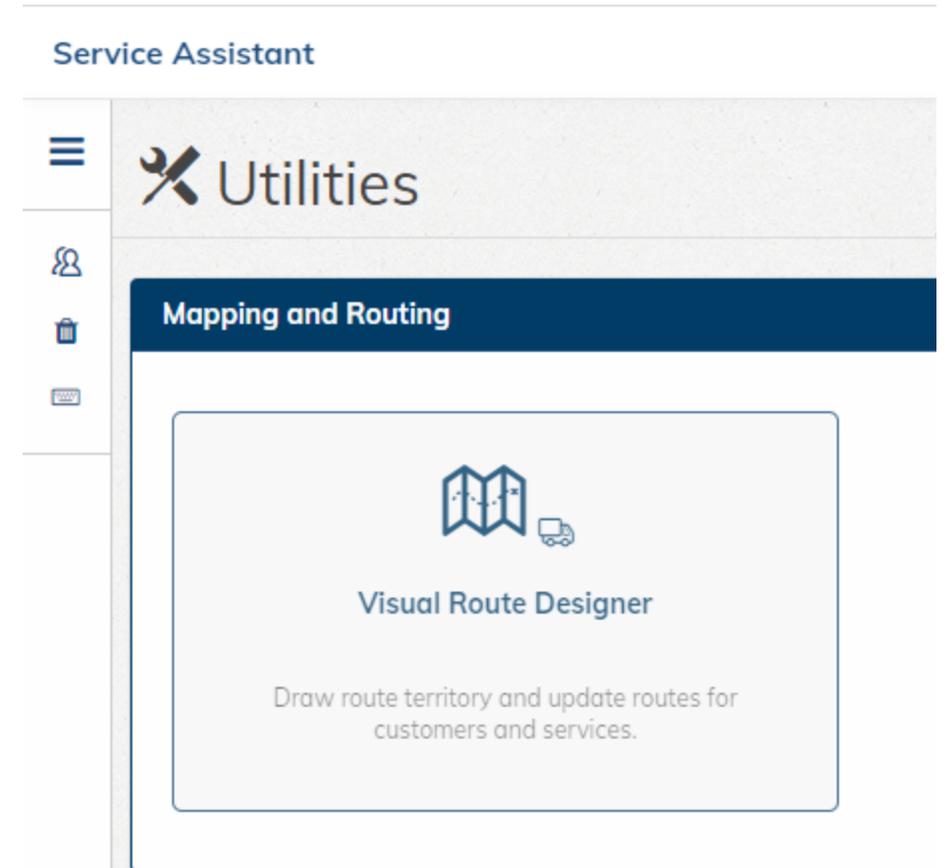
Using Visual Route Designer (VRD)

Using Visual Route Designer (VRD)

What is Visual Route Designer (VRD)

Visual Route Designer is a utility that allows users to set different default customer routes, and different default service routes based on the geolocation of the customer. This works well if:

- Customer and service routes need to be different
- Different services have different routes for the same customer
- ZIP/Postal codes are too dense and cannot use the same routes
- Default routes are based on geographical boundaries and not ZIP/Postal areas



Using Visual Route Designer (VRD)

Customer Default Route Configuration:

- Branch: assign routes by branch as needed
- Customer Type: assign routes by residential only, commercial only, or both
- Show Markers: needs to be set to Customers
- Zip Codes: select certain ZIPs (defined by customers in the already selected branches)
- Service Year: select service year (uses the selected year for service pricing)
- Clear/Copy: can be used to clear defaults (clears settings from both SA4 and SA5) or copy route information from one program type to another

The screenshot shows the 'Visual Route Designer' interface within the 'Service Assistant' application. The breadcrumb trail is 'Service Assistant > Utilities > Visual Route Designer'. The interface includes a sidebar with navigation icons and a main configuration area. The configuration area contains the following fields:

- Branches:** A dropdown menu set to 'All Branches Selected'.
- Customer Type:** A dropdown menu set to 'Both'.
- Show Markers:** A dropdown menu set to 'Customers'.
- Zip Codes:** A dropdown menu set to '8 of 333 Selected'.
- Service Year:** A dropdown menu set to '2021'.
- Clear/Copy:** A dropdown menu set to 'Select...'.

At the bottom of the configuration area, there is a green 'Run' button and a blue 'Apply Changes' button. The top right corner of the interface shows a user profile icon with 'TB' and a notification bell icon with '18'.

Using Visual Route Designer (VRD)

Services Default Route Configuration:

- Branch: select all or only the desired branches
- Customer Type: choose residential, commercial, or both
- Show Markers: must be set to Services
- ZIP Codes: choose all or selected ZIPs as needed
- Program/Job Type: select all or desired job types (may need tweaking in settings)
- Clear/Copy: can be used to clear defaults (clears settings from both SA4 and SA5) or copy route information from one program type to another

Branches:	All Branches Selected	Zip Codes:	8 of 333 Selected
Customer Type:	Both	Service Year:	2021
Show Markers:	Services	Program / Job Type:	All Selected
Clear/Copy:	Copy Default Program/Job Route		
Copy From Program / Job Type:	F - Pesticide Free Lawn Care	Copy To Program / Job Type:	Nothing Selected

Using Visual Route Designer (VRD)

Visual Route Designer:

- The map will load zoomed out to display all geolocated customers
- Gridlines can be disabled as needed, but they are used to improve performance
- Zooming in will display actual customer locations on the map
- Route territories drawn while zoomed out will honor actual customer locations
- Totals of selected numbers appear in the lower left

Service Assistant > Utilities > Visual Route Designer

Options

Visual Route Designer

Disable Gridlines: Overlap Mode: Snap To

Routes:

Search

Select All

None-No Route Assigned (Size: 25.00 ft²/1000)

01-North East (Size: 9303.05 ft²/1000)

02-North Central (Size: 11337.00 ft²/1000)

03-North West (Size: 10166.50 ft²/1000)

04-Mid East (Size: 664.60 ft²/1000)

05-Mid Central (Size: 1014170.11 ft²/1000)

Update: Nothing selected

Route: 01 - North East

Only Permanent Route Scheduled

Within # Days:

Update Selected Markers

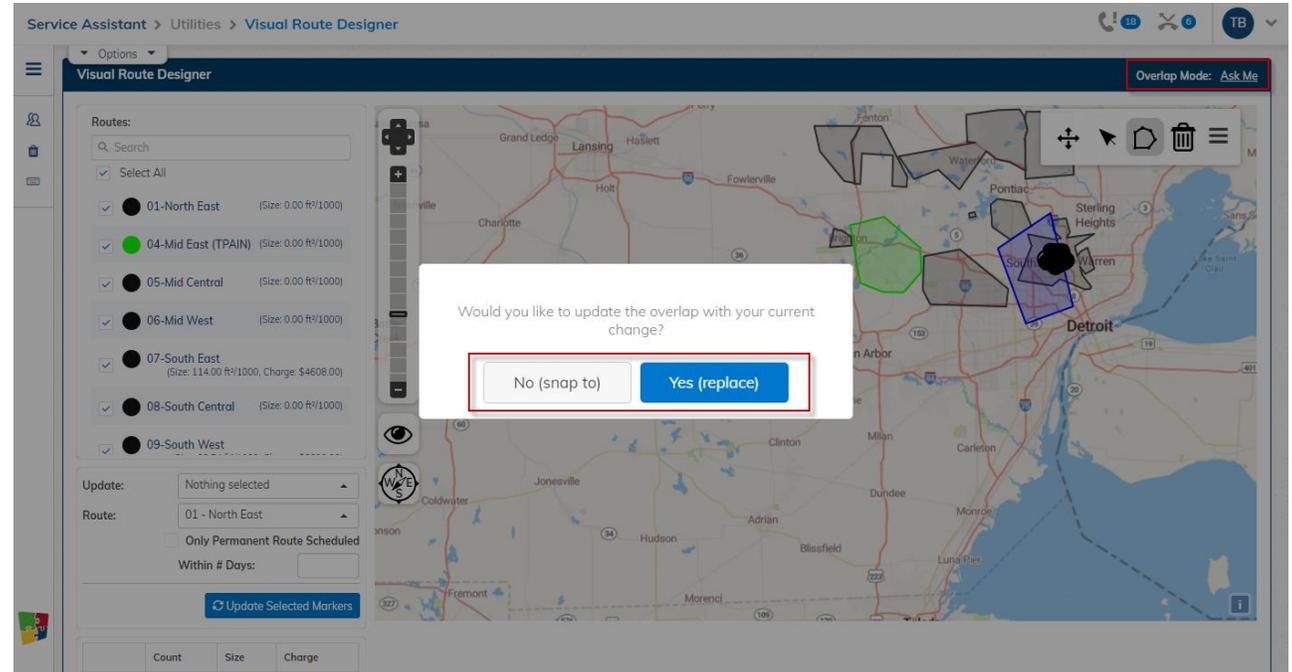
Count	Size
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Service Assistant version: 5.3.330.3766 © 2024 RealGreen by WorkWave. Request Technical Support

Using Visual Route Designer (VRD)

Drawn routes on visual route designer can be snapped to or overwritten to ensure there are no gaps. Defaults can be controlled in the upper right:

- Ask Me: choose either Snap To or Replace every time
- Snap To: overlapping new shape will snap to the border of the already existing overlapped shape
- Replace: draws over the previously drawn shape



Using Visual Route Designer (VRD)

The screenshot displays the VRD interface with two selected routes: 'R02-Route 2' (green square) and 'VIP-V' (orange square). A dropdown menu is open, showing options: 'Select All', 'Deselect All', 'Default Customer Route', 'Active Customers', and 'Canc./Est. Customers'. Below the menu, the 'Update:' dropdown is set to 'Nothing selected' and the 'Route:' dropdown is set to 'VIP - VIP'. There is an unchecked checkbox for 'Only Permanent Route Scheduled' and a text input field for 'Within # Days:'. A blue button at the bottom reads 'Update Selected Markers'.

Customer Route Update Options:

- Default Customer Route
 - Updates the selected route area but only applies to customers added after set
 - *This does not impact any existing customers
- Active Customers
 - Updates the route on any active customers that reside within the newly created route area
- Canc./Est. Customers
 - Updates the route on any cancelled or estimate status customers in the newly created route area

Using Visual Route Designer (VRD)

The screenshot shows the VRD interface with a dropdown menu open. The dropdown menu contains the following options: Select All, Deselect All, Default Service Route, Active Programs/Jobs, Canc./Est. Programs/Jobs, and Day Code. Below the dropdown menu, there are fields for 'Update:' (Nothing selected), 'Route:' (B1 - Branch Test 1), and a checkbox for 'Only Permanent Route Scheduled'. There is also a text input field for 'Within # Days:'. At the bottom, there is a blue button labeled 'Update Selected Markers'.

Service Route Update Options:

- Default Service Route
 - Updates the selected route area but only applies to newly added services after the update
- Active Programs/Jobs
 - Updates the route on any active service that resides within the newly created route area
- Canc./Est. Programs/Jobs
 - Updates the route on any cancelled or estimate status jobs in the newly created route area
- Day Code
 - Updates any impacted service with a newly defined Day Code
 - ***Does not set a default Day Code, only updates existing services**
- Only Permanent Route Scheduled
 - Only updates the permanent route on services scheduled within X number of days, leaves temporary route as the original route

Copy And Change Routes Utility

Copy And Change Routes Utility

The Copy And Change Routes utility can be used to mass update routes after either portion of Visual Route Designer have been run (Customer or Service).

The utility can also be used to change one route to another if it is a one-to-one change, although this will not impact defaults for new sales.

The screenshot shows the 'Copy And Change Routes' utility interface within the Service Assistant application. The breadcrumb navigation at the top reads 'Service Assistant > Utilities > Copy And Change Routes'. The interface includes a sidebar with navigation icons and a main content area with the following fields:

- Branch:** south - Super Green
- Customer Type:** Both
- Action:** Copy Customer Route to Program/Job
- Program/Job:** (None)
- Year:** 2022
- Only Replace if Blank:**

Below these fields is a 'More filters' section with a '+ Flag Codes' button. At the bottom of the form are 'Cancel' and 'Update' buttons. The footer of the application displays 'Service Assistant version: 5.3.330.3766', '© 2024 RealGreen by WorkWave', and 'Request Technical Support'.

Copy And Change Routes Utility

Available Options:

- Copy Customer Route to Program/Job: copies customer route to selected programs/jobs for the selected season
 - Option to only replace route if currently blank
- Copy Program/Job Route to Customer: copies selected program/job route from the selected season to the customer route
 - Option to only replace route if currently blank
- Copy Program/Job Route to Program/Job: copies route from selected program/job to another selected program/job in the selected season
 - Option to only replace route if currently blank
- Replace Customer Route: change selected customer route to another selected route
- Replace Program/Job Route: change selected program/job route from a selected season or range of seasons to another selected route

Route Troubleshooting

Route Troubleshooting

If service routes or customer routes are not defaulting correctly, there are a few steps that can be taken to ensure that proper routes are being assigned:

- If you are an old SA4 user, the route defaults from SA4 will still apply if a territory has not been set up in the SA5 Visual Route Designer utility
- If just the SA4 defaults need to be cleared, they need to be cleared from SA4 first (this will not impact SA5 Visual Route Designer defaults)
- Does the customer have a geocode or are they geocoded to the correct location
- Is the route available for the service(s) in question
- Is the route assigned to the correct ZIP/Postal code

Session Feedback

- Login to the Event Mobile App
- Add this session to your schedule
- Click Survey
- Give it a rating 1-5 stars

Questions?

**Sign up on 2/4
and receive 20%
off your ticket!**

 **BEYOND SERVICE**
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**SEE YOU IN
NEW ORLEANS!**

Sunday, January 31, through
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