

Closing Routes - End of Day

Last Modified on 01/23/2023 3:45 pm EST

Pathway: Operations > Dispatch

At the end of the day, the following closing procedures should be considered.

Check Drivers? - Is this just reviewing that the drivers have logged their post-trip?

Verify Routes Are Complete

Routes are considered to be complete when:

1. The driver has completed their post-trip log
 - o After the driver has completed their post trip log the route will display green in Dispatch
 - o A timestamp will display for the route in the Post Trip column
2. There are no stops in the Pending status column
 - o Stops should be reassigned to a different route or scheduled to another day

Review Pending Stops

Review the Pending column for stops the driver was unable to get to for servicing. Select the value to display the Services List of all pending stops for that route. Assign pending stops to a new route if they can still be serviced that day, or reschedule the stop to another day.

Always follow your company's procedures for handling pending stops.

ROUTE	TRUCK	DRIVER	PRE TRIP	POST TRIP	OPTIMIZED	SCHEDULED	SERVICES	PENDING	EXCEPTIONS	DISPOSAL
Thursday Jan 27, 2022 (34 of 54 Completed)										
CDR 101	324	Indra Hernandez	188	122 (88%)	12 (8%)	0	0	1 (100%)	0 (0) Stops	0 (0) Stops
CDR 201	951	Miguel Espinoza	56	56 (100%)	0	0	0	0	2 (15.38) Stops	0 (0) Stops
CDR 202	952	Rudy Espinoza	71	68 (96%)	0	3 (4%)	0	3 (4%)	2 (20.48) Stops	0 (0) Stops
CDR 203	953	Esteban Lorenzo	66	63 (95%)	0	3 (5%)	0	3 (5%)	1 (11.63) Stops	0 (0) Stops
CDR 301	759	Juan Bonilla	9	9 (100%)	0	0	0	0	0 (0.00) Stops	0 (0) Stops
CDR 302	758	Osair Ortega	5	5 (100%)	0	0	0	0	5 (100.00) Stops	0 (0) Stops
CDR 303	750	Aracely Walker	6	6 (100%)	0	0	0	0	4 (13.33) Stops	0 (0) Stops
CDR 304	756	Elias Lopez	6	6 (100%)	0	0	0	0	4 (13.33) Stops	0 (0) Stops
CDR 306	757	Luis Quiroz	4	4 (100%)	0	0	0	0	4 (100.00) Stops	0 (0) Stops

Review the Pending column regularly throughout the day to help keep stops balanced and reduce the chances of having to reschedule stops at the end of the day.

Review Exceptions

In the event a driver arrived at a scheduled stop but was unable to service the location, the location will be given an exception status and included in the route's total Exceptions count.

ROUTE	TRUCK	DRIVER	PRE TRIP	POST TRIP	OPTIMIZED	SCHEDULED	SERVICES	PENDING	EXCEPTIONS	DISPOSAL
Thursday Jan 27, 2022 (34 of 54 Completed)										
CDR 101	324	Indra Hernandez	188	172 (88%)	12 (8%)	0	0	1 (100%)	0 (0) Stops	0 (0) Stops
CDR 201	951	Miguel Espinoza	56	56 (100%)	0	0	0	0	2 (15.38) Stops	0 (0) Stops
CDR 202	952	Rudy Espinoza	71	68 (96%)	0	3 (4%)	0	3 (4%)	2 (20.48) Stops	0 (0) Stops
CDR 203	953	Esteban Lorenzo	66	63 (95%)	0	3 (5%)	0	3 (5%)	1 (11.63) Stops	0 (0) Stops
CDR 301	759	Juan Bonilla	9	9 (100%)	0	0	0	0	0 (0.00) Stops	0 (0) Stops
CDR 302	758	Osair Ortega	5	5 (100%)	0	0	0	0	5 (100.00) Stops	0 (0) Stops
CDR 303	750	Aracely Walker	6	6 (100%)	0	0	0	0	4 (13.33) Stops	0 (0) Stops
CDR 304	756	Elias Lopez	6	6 (100%)	0	0	0	0	4 (13.33) Stops	0 (0) Stops
CDR 306	757	Luis Quiroz	4	4 (100%)	0	0	0	0	4 (100.00) Stops	0 (0) Stops

Reviewing Exceptions For a Route:

The screenshot displays a 'SERVICES LIST' window with a table of service records. The table has columns for ROUTE, SEQ, ORDER NOTE, LOCATION, SCHEDULED DATE, WO#, WO TYPE, SERVICE TYPE, QTY, EQUIPMENT, and PHOTOS. A red arrow points to a row with the note 'Double click within row'. Another red arrow points to a 'PHOTOS' icon in the PHOTOS column, with the note 'Hover mouse to view photo'. Below the table, an 'EDIT SERVICE RECORD' window is open, showing details for a service record. It includes fields for WORK ORDER, QTY, SERVICE CODE, EQUIPMENT, WORK TYPE, ORDER TYPE, and MATERIAL. It also has tabs for Details, Charges, Lab Tests, Attachments, Labels, Labor, and Photos. The Photos tab is highlighted with a red box. At the bottom of the pop-up, there are 'SAVE' and 'CLOSE' buttons.

1. Select the value from the route's Exceptions column to display the Services List. Only locations with an exceptions status for a route populate in the list.
2. Double click anywhere within the row of a location to open the location's work order.
3. Review the Details tab in the work order for driver added information regarding why the stop was unable to be serviced and any pictures the driver has attached.
 - Pictures can also be reviewed from the Services List
4. Follow your company's policy on the process and handling of exceptions.