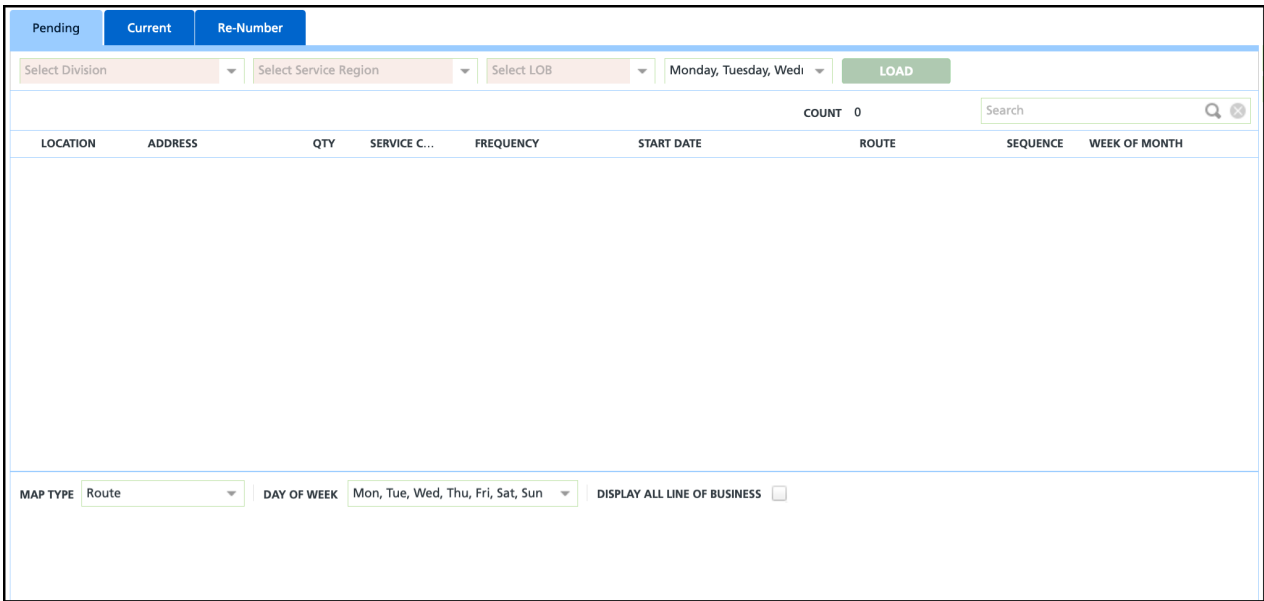# Route Management Basics

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Pathway: *Operations > Route Management*

The Route Management tool is used to manage new and existing stops on a route and should be included in daily operation activities. This article details the functionality and purpose of each tab in Route Management.

> **i** Service Locations do not display upon open. Use the filtering options provided and select Load the screen.

Permissions

The following permissions are required to view and use the Route Management screen:

Permission ID	Permission Name
87	Route Management

Pending Tab

The Pending tab shows stops that haven't been assigned to a route yet and provides the functionality to assign and post stops to a route. The Pending screen includes an interactive map that will display upon selection of a service location.

Pending Tab Field Descriptions

Field	Description
IMPORTANT: The Pending tab must be reviewed on a regular basis.	
Filter Selections	
Select Division	Filters to only displays routes of the selected division.
Select Service Region	Filters to only display routes of the selected service region.
Select LOB	Filters to only display routes of the selected line of business.
Day of Week	Filters to only display the routes running for the selected day of the week.
Load	Loads all service locations (not assigned to a route) based on the filter selections.
Service Location Details	
Location	Displays the name and ID of the service location.
Address	Displays the address for the service location.
Qty	Displays the quantity of equipment requested. Equipment type is referenced under the Service Code column for the location.
Service Code	Indicates the type of waste the equipment holds.
Frequency	Indicates the pickup frequency requested and preferred days of the week.
Start Date	The requested start date for service.

Field	Description
Route	Displays a drop down list of routes to select and assign to a pending service location. The system will provide a suggested route to assign, and will also include an "Others" list of routes that can be assigned. If a location has a frequency greater than 1x per week, each scheduled service must have a route assigned to 'Post' the record.
Sequence	If the route will be sequenced, enter the sequence number here. ✅ Use the *Current* (tab) to view/modify sequences for all locations on a route.
Week of Month	For customers who are monthly, or on a bi-weekly schedule, select the week of the month the location will be serviced.
Post	Posts the pending service location to a route. If a location has a frequency greater than 1x per week, each frequency must have a route assigned to 'Post' the record. ℹ Once a location has been posted, the location will no longer display in the Pending tab.

Pending (Tab) Interactive Map Overview

Use the interactive map in the Pending tab to assist in identifying the optimal route for adding a pending service location. Apply filters and review nearby routes to streamline the process.

Load the Map

Display the map by selecting a location from the upper grid. Use the features of the map to help determine the best route to add the selected service location to.

Map Details

Field/Filter Tool	Description
Map Type	Controls how the pins are labeled on the map. • Route: Displays the stop's sequence on the route inside the pin. • Service Frequency: Displays the next week # / frequency inside the pin. • Equipment Type: Displays the route inside the pin.
Day of Week	Apply a **Day of Week** filter to match the service location's requested pickup day in comparison to nearby routes. Switch between the days of the week to determine optimal placement of the stop on a route.
Display All Lines of Business	Option to display all lines of business.
Location Pins	New Location: Displays as a red pin. Select to view its details. Existing Locations: Displays in the color matching the route. Select a pin to view its details.

Current Tab

The Current tab displays stops currently assigned to a route. Features of the Current tab provide users the ability to quickly edit route assignment, sequence stops and change start dates.

Field Descriptions

Field	Description
Filter Selections	
Select Division	Filters to only displays routes of the selected division.
Select Service Region	Filters to only display routes of the selected service region.
Select LOB	Filters to only display routes of the selected line of business.
Route	Filters to only display the service schedule of the selected route(s).
Day of Week	Filters to only display the routes running for the selected day of the week.
Interactive Features	
Load	Select Load to view current service schedules based on the filter selections made.
Edit	Option to edit service schedules for one to multiple locations. Select the check box for the location(s) you would like to edit and select Edit.
Map	Displays an interactive map of the selected locations. Select the check box for each location you would like included in the map.
Route Summary	Select Route Summary for a more detailed looked at route balances to help prevent an uneven distribution of services to any single route.
Excel (Icon)	Exports the information on the Current tab to an Excel spreadsheet.
Service Location Details	
Location	Displays the location of the service.
Qty	Displays the quantity of equipment requested. Equipment type is referenced under the Service Code column for the location.

Field	Description
Service Code	Indicates the type of waste the equipment holds.
Freq/Next SVC	Displays the location's frequency of pickup and the date of the next service.
Route	Displays the route the location is assigned to.
Seq	Displays the sequence the location is on the route. ✅ Using the SEQ field here provides a reference of sequences for other locations.
DOW	Displays the day of the week the location is scheduled to receive services.
New Route	Interactive field used to assign a new route to a location.
New Seq	Interactive field used to change the location's sequence on the route.
New Start Date	Interactive field used to change the start date of service. *Example: If the locations is being added to a new route, enter the start date here.*
New Week	Displays the new A/B week for a location.

Current (Tab) Interactive Map Overview

The interactive map in the "Current" tab displays stops along a route. Users can utilize the map's interactive features to make changes to the route for one or multiple locations simultaneously.

Load the Map

From the Current tab screen, select each of the locations you would like to see represented on the map and then select the Map button. The Current Route Map will load in a pop up screen.

Map Details

Field/Filter Tool	Description
Map Type	Map based on the following options: • Route • Day of Week • Service Code • Material • Next Service Day
Marker Clustering	Auto-groups locations that are in close proximity to one another and displays a total count for the area.
Day of Week	Select to display routes by specific day(s) of the week.
Week Offset	Select to only display A day routes, or B day routes.
Frequency	Select to display routes based on their pickup frequency.
Next Scheduled Date	Select to display routes for a specific date.
Radius Tools	Draw or circle a radius around targeted locations and right-click to edit only the locations within the radius. To remove, right-click within the radius and select 'Remove Shape'.
Map/Satellite Toggle	Toggle between Map or Satellite views.

	Zoom	Zoom in or zoom out of an area.
	Legend	Provides a color legend to identify routes.

Current Routing Screen

Double-click within the row of a current location to access the Current Routing screen. This screen displays details of the location's current route, a map showing the location along with pins of other locations on the same or different routes, and provides the option to change the route for the selected location.

Re-Number Tab

Use the Re-Number tab in Route Management to re-number stop sequences. Stops with a current sequence of '0' are not included in sequence re-numbering.

Field Descriptions

Field	Description
Filters	
Division	Filters to only display the routes of the selected division.
Day of Week	Filters to only display the routes running for the selected day of the week.
Fields and Features	
Load	Loads routes onto the screen based on the filtering options selected. By default, the Re-Number screen does not automatically load upon open and requires Load to be selected.
Select Routes (Check Box)	Check box to include the route in sequence re-numbering. If all routes should be included, select the header check box.
Day of Week	Displays a numeric value to identify the day of the week for the route. 1- Monday 2- Tuesday 3- Wednesday 4- Thursday 5- Friday 6- Saturday 7- Sunday
Stops	Indicates the number of stops the route includes.
Quantity	Indicates the total service quantity across all stops.
View Map	Displays the route on a map.
Sequence Gap	Establishes the sequential order for stops on the route. Stop with a current sequence of '0' will not be included in sequence renumbering. *Example: If 4 is entered, stops on the route will be sequenced as 4, 8, 12, 16 and etc.*
Re-Number	Renumbers the selected routes using the Sequence Gap entered.

Related Articles

Pending (Tab) - Review and Assign Stops to a Route
Current (Tab) - Modify a Route
Re-Number Route Sequences