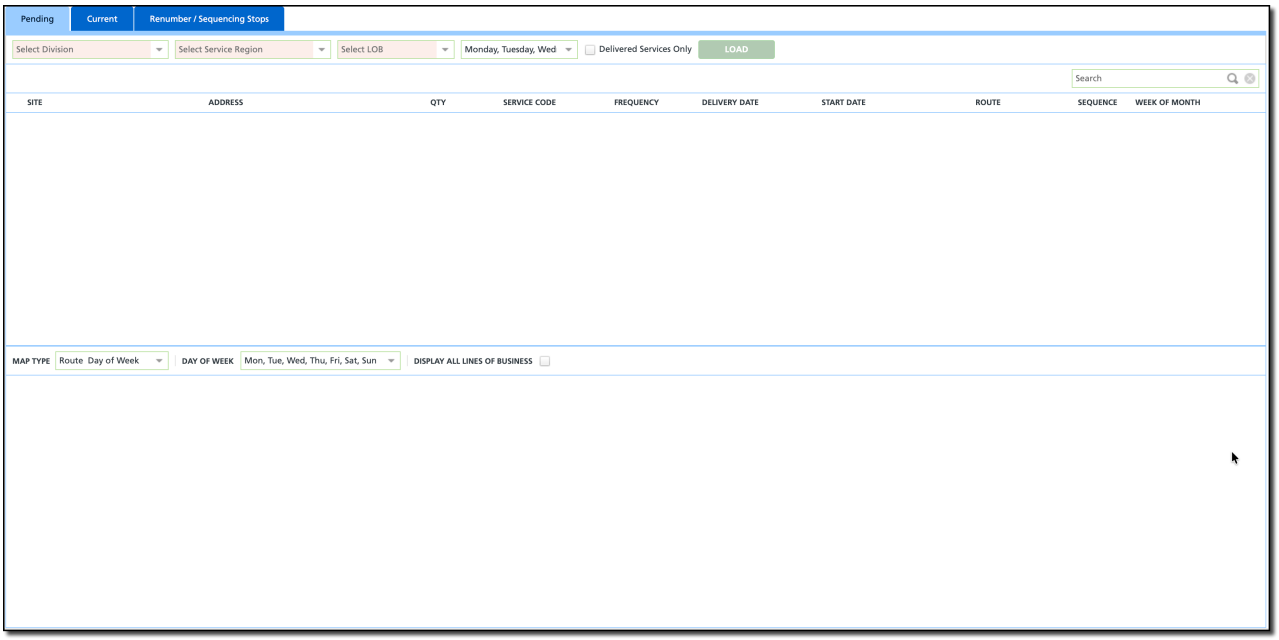
Route Management Overview

Last Modified on 08/21/2026 12:14 pm PDT

Pathway: *Operations > Route Management*

The **Route Management** tool includes three tabs designed to manage both new and existing stops on a route. To ensure no pending stops (scheduled services not yet assigned to a route) are overlooked, this tool should be used as part of daily operational activities. This article details the functionality and purpose of each tab in Route Management.

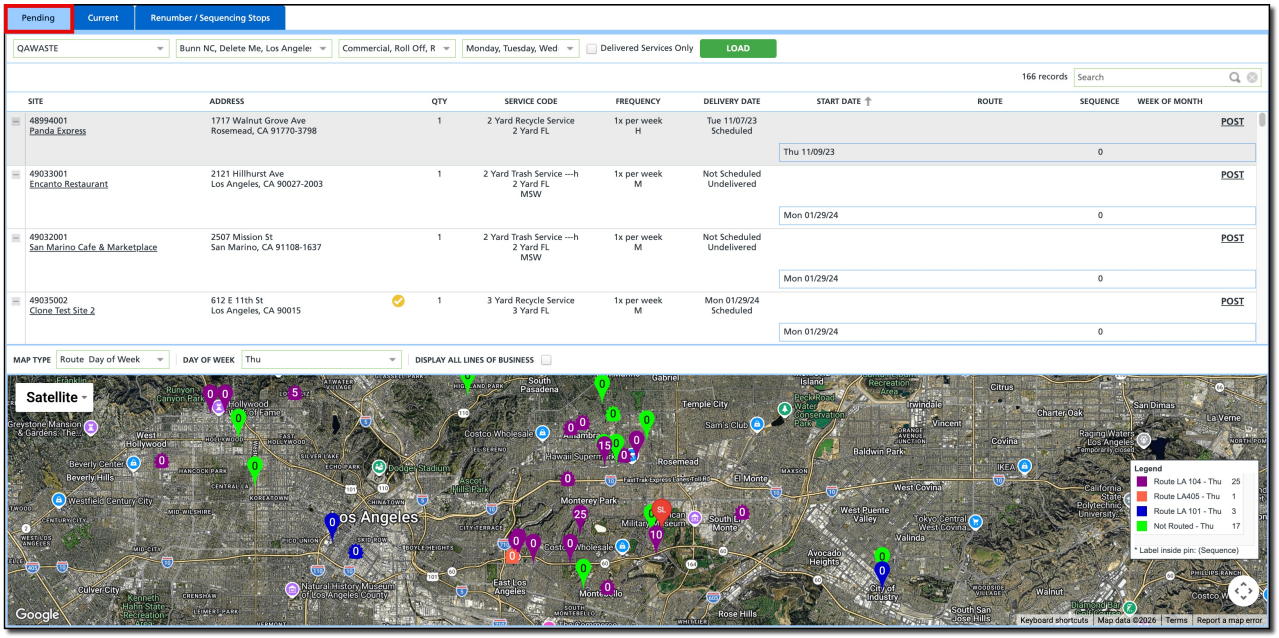


Expand All Sections | Collapse All Sections

Helpful Tip: To search all text using **CTRL**-F, you must first click on the Expand All Sections button.

Pending Tab

The Pending tab shows stops that have not been assigned to a route and provides the functionality to assign and post stops to routes. The Pending screen includes an interactive map that will display upon selection of a site from the upper grid. Stops do not display automatically when the screen is opened. Use the available filters and click **Load** to display the pending stops.



Field Descriptions

Field	Description
Filter Options	
Select Division	Filters to only displays pending stops of the selected division.
Select Service Region	Filters to only display pending stops of the selected service region.
Select LOB	Filters to only display pending stops of the selected line of business.
Day of Week	Filters to only display pending stops assigned to the selected day of the week.
Delivered Services Only	Filters to exclude/hide any services where service equipment has not yet been delivered.
Load	Loads all pending stops (services not assigned to a route) based on the filter selections.
Service Location Details	
Site	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 site.
Service Code	Indicates the type of service the site is receiving.
Frequency	Indicates the pickup frequency requested and preferred days of the week.

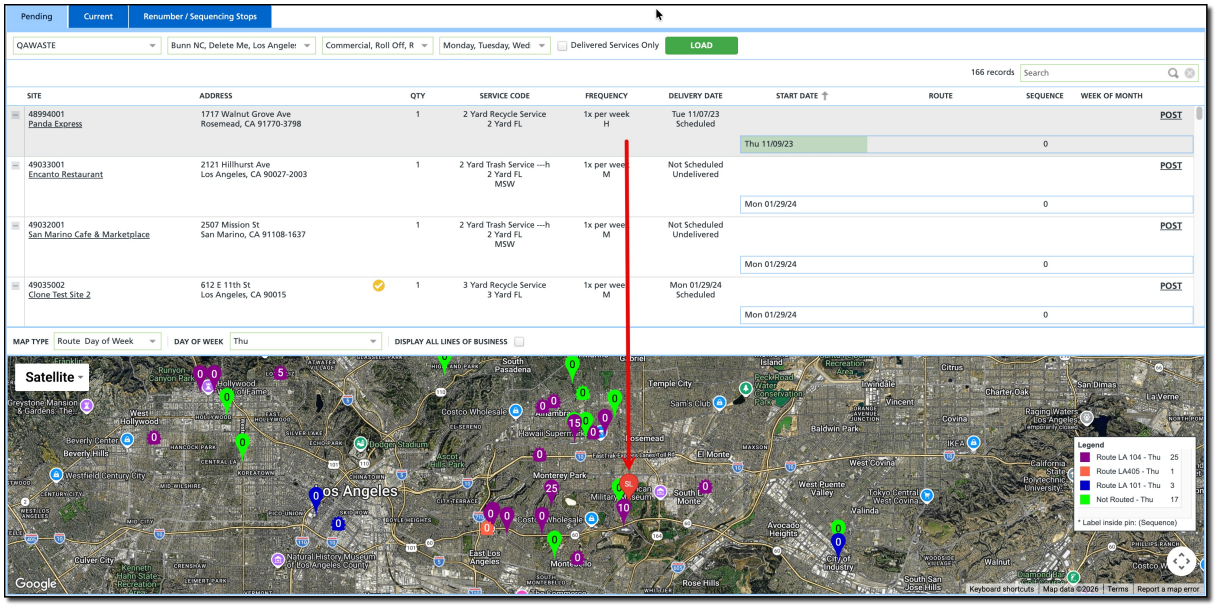
Delivery Date	Displays the delivery status as Scheduled, Delivered, or Undelivered, along with the scheduled or actual delivery date. If no delivery date is provided because the delivery is unscheduled, "Unscheduled" is displayed instead. Equipment ownership is also displayed for customer owned equipment.
Start Date	The requested start date for service.
Route	Displays as a drop down list of routes available for assigning to a pending service location. The system provides a **Suggested** route and an **Others** list of alternative routes that can be assigned. If a location has a service frequency greater than once per week, each scheduled service must have a route assigned before the record can be posted. **Optional Setup:** • The option to have the system automatically route stops to a Suggested route can be enabled following the steps outlined here: Automatic Routing and Sequencing. • The option to have the system further narrow suggested routes and automatic route placement to routes that match on material type can be enabled in *Setup* > *Services* > *Line of Business* > *Match Material Type When Suggesting or Automatically Assigning Routes.*
Sequence	If the stop should have a specific sequence on the route, enter the sequence number here.
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 (button)	Posts the pending service to a route. If a site has a frequency greater than 1x per week, each frequency must have a route assigned to 'Post' the record. Once a service has been posted, the site will no longer display in the Pending tab.

Interactive Map Overview

Use the interactive map on the **Pending** tab to help identify the optimal route for adding a pending service. Apply filters and review nearby routes to simplify and streamline the process. To learn how to review and assign stops to a route from the pending tab, check out the Pending (Tab) - Review and Assign Pending Stops to a Route article.

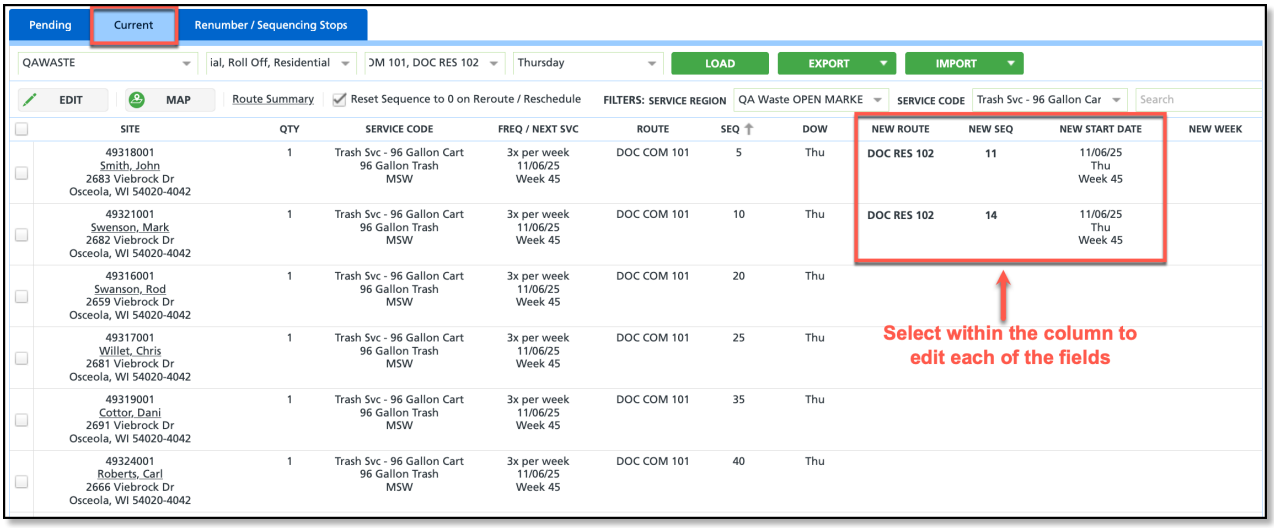
View a Pending Service Location on the Map

Select a site from the upper grid to display its location on the map. Its location is depicted with a larger red SL icon. Use the filter options above the map to help identify the most suitable route to assign the pending service to. Routes can not be applied to the service location from the map and must be added from the Route column in the upper grid.



Current Tab

The Current tab displays stops currently assigned to a route. The **Current** tab allows users to quickly edit route assignments, sequence stops, and modify start dates. Changes made here are permanent for the site. For one-time route changes, make adjustments in **Dispatch** instead.



Field Descriptions

Field	Description
Filter Selections	
Select Division	Filters to only displays sites of the selected division.
Select LOB	Filters to only display sites of the selected line of business.
Route	Filters to only display the sites assigned to the selected route(s).

Day of Week	Filters to only display the sites serviced on the selected day(s) of the week.
Service Region	Further filters results to display only stops within the selected service region. The screen must be loaded with sites before this filter can be applied.
Service Code	Further filters results to display only stops with a matching service code. The screen must be loaded with sites before this filter can be applied.
Interactive Features	
Load	Select **Load** to display the current sites and their assigned routes based on the selected filters.
Export / Import	Use the Export and Import feature to modify routes externally, then import them back into Route Management to post the routing changes in the system. Further documentation including format and file requirements can be reviewed here: Export and Import in Route Management
Edit	Option to edit service schedules for one to multiple sites. Select the check box for the site(s) you would like to edit and select Edit.
Map	Displays an interactive map of the selected sites. Select the check box for each site you would like the map to include.
Route Summary	Select Route Summary for a more detailed looked at route balances to help prevent an uneven distribution of services to a single route.
Reset Sequence to 0 on Reroute /Reschedule	The 'Reset Sequence to 0 on Reroute/Reschedule' feature allows users to control how sequence numbers are handled during route changes or service rescheduling. • **Checked**: Assigning a new route or rescheduling a service will set the **New Sequence** to **0**. • **Unchecked**: Assigning a new route or rescheduling a service will retain the **Current Sequence**.
Service Location Details	
Site	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.
Service Code	Indicates the type of service the site is receiving.
Freq/Next SVC	Displays the site's frequency of pickup and the date of the next service.
Route	Displays the route the site is assigned to.
Seq	Displays the site's position in the service sequence for the route.

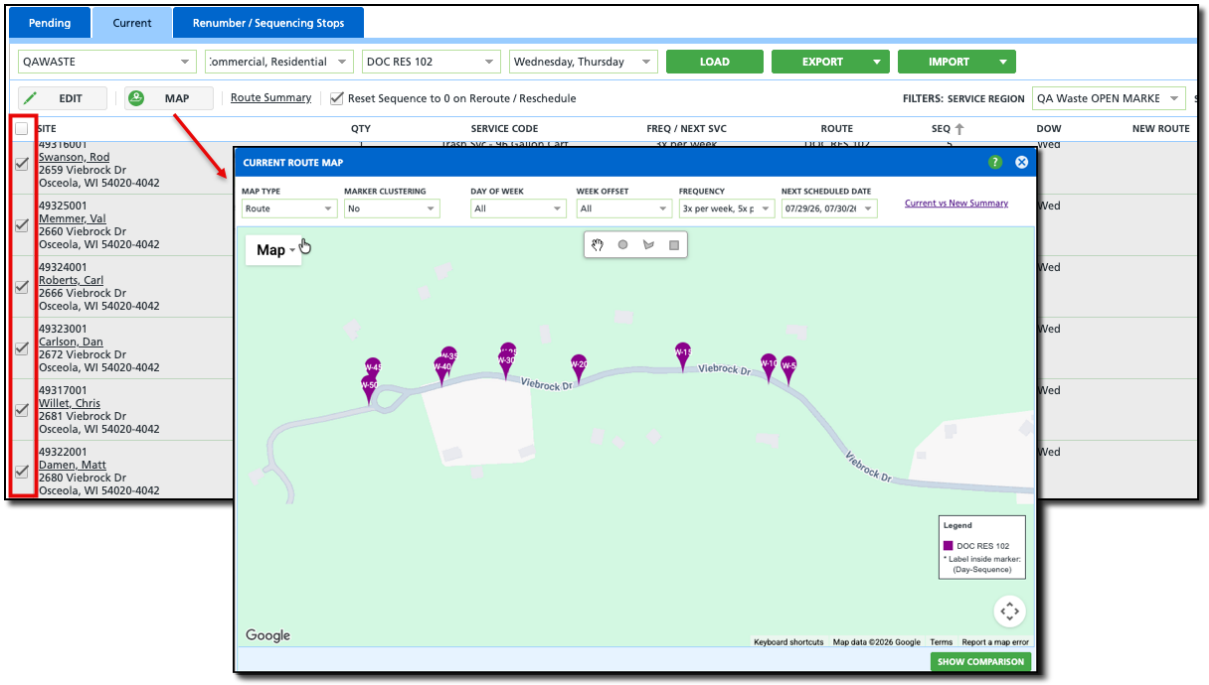
DOW	Displays the day of the week the location is scheduled to receive services.
New Route	Interactive field used to assign a new route to a site for the current service.
New Seq	Interactive field used to change the site's sequence on the current route.
New Start Date	Interactive field used to change the start date of service when a new route or sequence has been assigned. *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 site after a new route has been assigned.

Interactive Map Overview

The interactive map on the **Current** tab shows pin locations for the selected stops, color-coded by their assigned routes. Users can use the map's interactive features to change route assignments for one or multiple locations at the same time. To learn how to modify a route from the current tab, check out the Current (Tab)- Modify a Route article.

Load the Map

On the **Current** tab, select the sites you want to view on the map, then click **Map**. The **Current Route Map** will open in a pop-up window, displaying each site's location with color-coded pins representing their current route assignments.



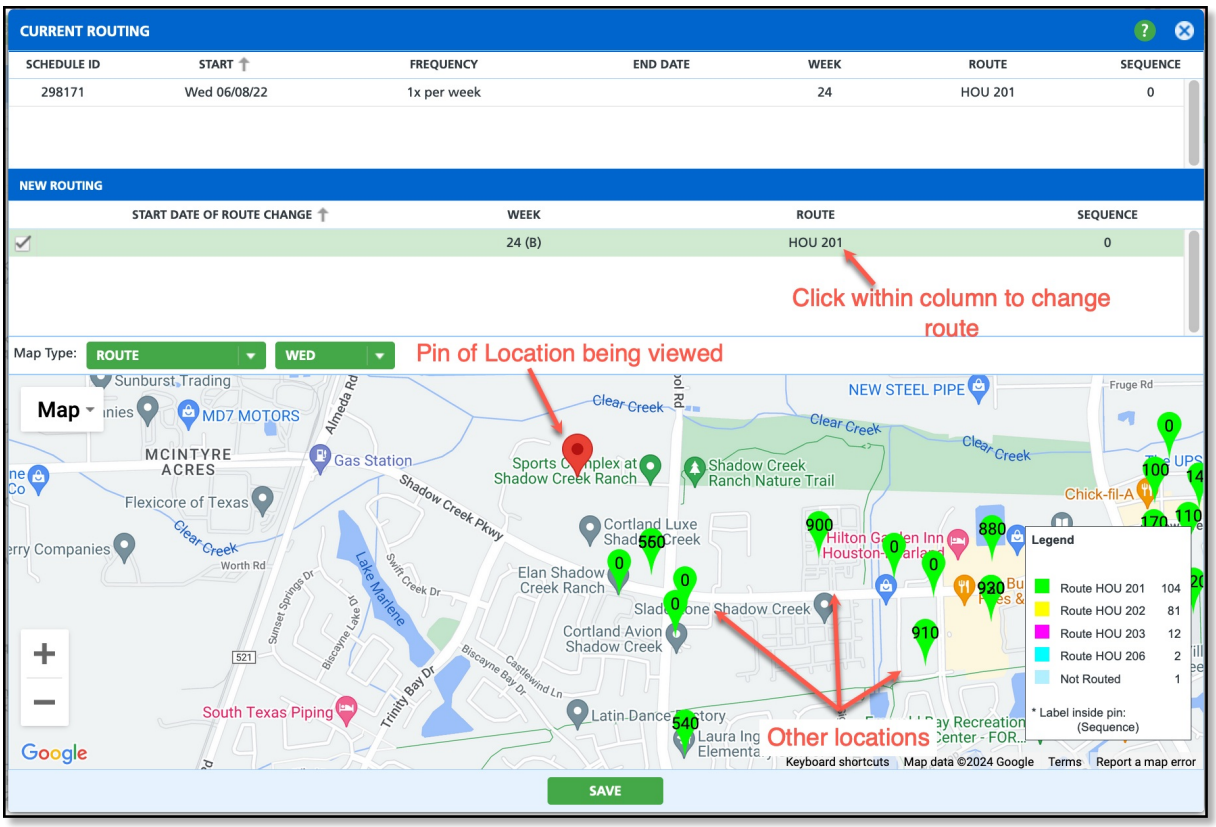
Map Filters

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 sites that are in close proximity to one another and displays a total count for the area.
Day of Week	Select to display sites by specific day(s) of the week they are scheduled for service.
Week Offset	Select to display only sites scheduled for **A Day** or **B Day** servicing.
Frequency	Select to display sites based on their service frequency.
Next Scheduled Date	Select to display sites scheduled for service on a specific date.
Radius Tools	Allows you to edit the servicing of multiple sites by drawing a radius around a target location and using the right-click menu to edit service schedules. To remove a radius, right-click within the radius and select 'Remove Shape.'
Map/Satellite Toggle	Option to toggle between Map or Satellite views.
Zoom	Option to zoom in or zoom out of an area.
Legend	Provided color legend to identify which route a site's servicing is assigned to.

Current Routing

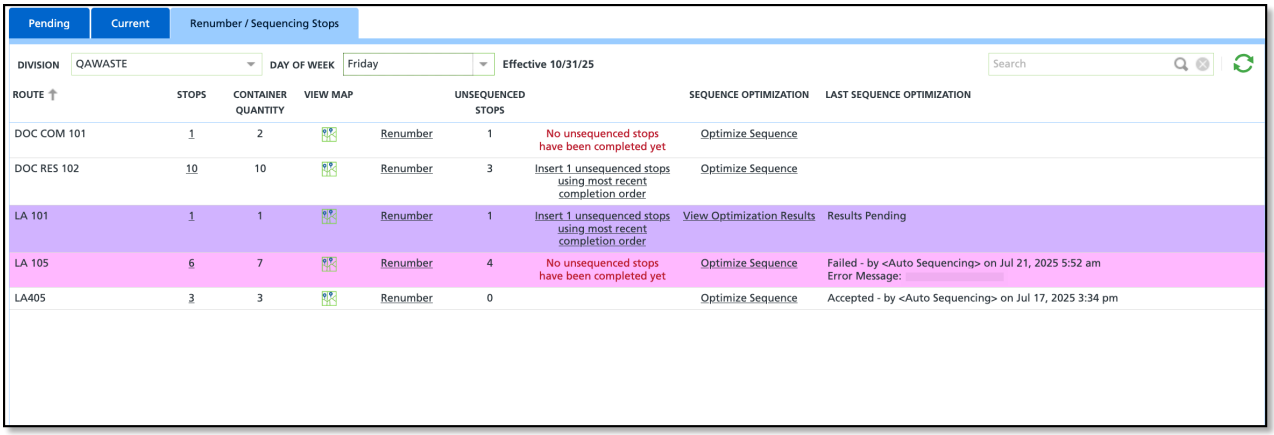
Double-click within the row of a site to access the **Current Routing** screen. This screen displays details of the location's current route, a map showing the location along with pins of other locations on the same or different routes, and provides the option to change the route for the selected location.



Renumber / Sequencing Stops Tab

Use the **Renumber / Sequencing Stops** tab in Route Management to renumber stop sequences and insert unsequenced stops, either manually or using the route optimization feature.

> This screen includes advanced **Route Optimization** technologies to intelligently balance and sequence routes for maximum efficiency. This added feature is designed to reduce drive time, lower costs, and simplify route planning. For additional details, see: *Improve Operations with Route Optimization.*



Permissions

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

Permission ID	Permission Name
87	Route Management

Related Articles

Pending (Tab) - Review and Assign Stops to a Route
Current (Tab) - Modify a Route
Renumber / Sequencing Stops
Export and Import in Route Management
Improve Operations with Route Optimization
Automatic Routing and Sequencing