

# Route Management Overview

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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.



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

The screenshot shows the Route Management interface with the following elements:

- Navigation tabs: Pending, Current, Re-Number
- Filters: Select Division, Select Service Region, Select LOB, Monday, Tuesday, Wedi
- Buttons: LOAD
- Table header: LOCATION, ADDRESS, QTY, SERVICE C..., FREQUENCY, START DATE, ROUTE, SEQUENCE, WEEK OF MONTH
- Footer: MAP TYPE (Route), DAY OF WEEK (Mon, Tue, Wed, Thu, Fri, Sat, Sun), DISPLAY ALL LINE OF BUSINESS (checkbox)

## 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
Current
Re-Number

HOUSTON
HOUSTON OPEN MARKET
Roll Off, Commercial
y, Sunday, Every X Days
LOAD

COUNT 40

LOCATION	ADDRESS	QTY	SERVICE CODE	FREQUENCY	START DATE	ROUTE	SEQUENCE	WEEK OF MONTH
48806001 Navu Waste	1234 Kirby Houston, TX 77098	1	3 Yard Trash S... 3 Yard FL MSW	5x per week M,T,W,H,F				Post
						Mon 02/05/24	0	
						Tue 02/06/24	HOU 206	0
						Wed 02/07/24	HOU 206	0
						Thu 02/01/24	HOU 206	0
						Fri 02/02/24	HOU 206	0
46536001 Java Pour	1234 Schurmier Road Houston, TX 77048-5612	1	2 YD No Wor... 2 Yard FL MSW	1x per week H				Post
						Thu 02/01/24		0
48692001 The Perk	1234 W Fuqua St Houston, TX 77053-6201	1	6 Yard Trash S... 6 Yard FL MSW	2x per week T,F				Post
						Tue 02/06/24		0
						Fri 02/02/24		0

MAP TYPE 
DAY OF WEEK 
DISPLAY ALL LINE OF BUSINESS

## Field Descriptions

Field	Description
<b>Filter Options</b>	
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.
<b>Service Location Details</b>	
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.
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 <i>Current</i> (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. Once a location has been posted, the location will no longer display in the 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.

LOCATION	ADDRESS	QTY	SERVICE CODE	FREQUENCY	START DATE	ROUTE	SEQUENCE	WEEK OF MONTH
48806001 Navu Waste	1234 Kirby Houston, TX 77098	1	3 Yard Trash Service 3 Yard FL MSW	5x per week M,T,W,H,F	Mon 02/05/24 Tue 02/06/24 Wed 02/07/24 Thu 02/01/24 Fri 02/02/24	HOU 206	0	Poster Poster Poster Poster
48920001 Navu Recycling	1111 Washington Ave Houston, TX 77007	1	2 Yard Trash Service 2 Yard FL MSW	1x per week M	Mon 02/05/24		0	
43545002 The Pour	2222 BUSINESS CENTER DR PEARLAND, TX 77584-1953	2	6 Yard Trash Service 6 Yard FL MSW	4x per week M,W,F,S	Mon 02/05/24 Wed 02/07/24 Fri 02/02/24 Sat 02/03/24 Mon 02/12/24		720 840 890 270 720	Poster Poster Poster Poster

## 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.

LOCATION	QTY	SERVICE CODE	FREQ / NEXT SVC	ROUTE	SEQ	DOW	NEW ROUTE	NEW SEQ	NEW START DATE	NEW WEEK
43942011 SHADOW CREEK INVESTORS 1 LLC 11037 SHADOW CREEK PKWY PEARLAND, TX 77584-7406	1	8 Yard Trash Service 8 Yard FL MSW	6x per week 12/09/24 Week 50 (A)	HOU 201	90	Mon	HOU 202	90	12/09/24 Mon Week 50 (A)	
43942011 SHADOW CREEK INVESTORS 1 LLC 11037 SHADOW CREEK PKWY PEARLAND, TX 77584-7406	1	8 Yard Trash Service 8 Yard FL MSW	6x per week 12/04/24 Week 49 (B)	HOU 201	90	Wed	HOU 203	0	12/04/24 Wed Week 49 (B)	
43942005 GCCLL SHADOW CREEK LP 11011 SHADOW CREEK PKWY PEARLAND, TX 77584-7401	1	6 Yard Trash Service 6 Yard FL MSW	4x per week 12/06/24 Week 49 (B)	HOU 201	90	Fri				
44771001 FROST BANK 11201 Broadway St Pearland, TX 77584-9780	1	4 Yard Trash Service 4 Yard FL MSW	2x per week 12/10/24 Week 50 (A)	HOU 201	90	Tue				
43189002 WHATABURGER 1058 11025 SHADOW CREEK PKWY PEARLAND, TX 77584-7401	1	10 Yard Trash Service 10 Yard FL (Ser) MSW	6x per week 12/05/24 Week 49 (B)	HOU 201	100	Thu				
43944001 CHECK FILA 11629 SHADOW CREEK PKWY PEARLAND, TX 77584-7262	1	8 Yard Trash Service 8 Yard FL MSW	6x per week 12/04/24 Week 49 (B)	HOU 201	100	Wed				

## Field Descriptions

Field	Description
Select Division	Filters to only displays routes of the selected division.

<b>Select Service Region</b>	Filters to only display routes of the selected service region.
<b>Select LOB</b>	Filters to only display routes of the selected line of business.
<b>Route</b>	Filters to only display the service schedule of the selected route(s).
<b>Day of Week</b>	Filters to only display the routes running for the selected day of the week.
<b>Interactive Features</b>	
<b>Load</b>	Select Load to view current service schedules based on the filter selections made.
<b>Edit</b>	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.
<b>Map</b>	Displays an interactive map of the selected locations. Select the check box for each location you would like included in the map.
<b>Route Summary</b>	Select Route Summary for a more detailed looked at route balances to help prevent an uneven distribution of services to any single route.
<b>Reset Sequence to 0 on Reroute/ Reschedule</b>	The 'Reset Sequence to 0 on Reroute/Reschedule' feature allows users to control how sequence numbers are handled during route changes or service rescheduling. <ul style="list-style-type: none"> <li>• <b>Checked:</b> Assigning a new route or rescheduling a service will set the <b>New Sequence to 0</b>.</li> <li>• <b>Unchecked:</b> Assigning a new route or rescheduling a service will retain the <b>Current Sequence</b>.</li> </ul>
<b>Excel (Icon)</b>	Exports the information on the Current tab to an Excel spreadsheet.
<b>Service Location Details</b>	
<b>Location</b>	Displays the location of the service.
<b>Qty</b>	Displays the quantity of equipment requested. Equipment type is referenced under the Service Code column for the location.
<b>Service Code</b>	Indicates the type of waste the equipment holds.
<b>Freq/Next SVC</b>	Displays the location's frequency of pickup and the date of the next service.
<b>Route</b>	Displays the route the location is assigned to.
<b>Seq</b>	Displays the sequence the location is on the route. <b>sing the SEQ field here provides a reference of sequences for other locations.</b>
<b>DOW</b>	Displays the day of the week the location is scheduled to receive services.
<b>New Route</b>	Interactive field used to assign a new route to a location.
<b>New Seq</b>	Interactive field used to change the location's sequence on the route.
<b>New Start Date</b>	Interactive field used to change the start date of service. <i>Example: If the locations is being added to a new route, enter the start date here.</i>
<b>New Week</b>	Displays the new A/B week for a location.

## 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.

The screenshot displays a web application interface for route management. At the top, there are tabs for 'Pending', 'Current', and 'Re-Number'. Below these are dropdown menus for 'HOUSTON', 'HOUSTON OPEN MARKET', 'Commercial', and 'HOU 201, HOU 202, F'. A 'LOAD' button and an 'EXPORT' dropdown are also present. A search bar contains '2 Yard Recycle Service'. A 'MAP' button is highlighted with a red box. Below the search bar is a table with columns: LOCATION, QTY, SERVICE CODE, FREQ / NEXT SVC, ROUTE, SEQ, DOW, NEW ROUTE, NEW SEQ, NEW START DATE, and NEW WEEK. The table lists several locations with their respective service codes and frequencies. A 'CURRENT ROUTE MAP' overlay is shown, featuring a map of Houston with various filters: MAP TYPE (Route), MARKER CLUSTERING (No), DAY OF WEEK (All), WEEK OFFSET (All), FREQUENCY (1x per week, 2x p), and NEXT SCHEDULED DATE (03/11/24, 03/12/24). The map shows several green markers representing routes. A legend indicates that green markers represent 'HOU 201' and numbers inside markers represent 'Day-Sequence'.

## Map Details

Field/Filter Tool	Description
Map Type	Map based on the following options: <ul style="list-style-type: none"> <li>Route</li> <li>Day of Week</li> <li>Service Code</li> <li>Material</li> <li>Next Service Day</li> </ul>
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

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.

**CURRENT ROUTING**

SCHEDULE ID	START ↑	FREQUENCY	END DATE	WEEK	ROUTE	SEQUENCE
298171	Wed 06/08/22	1x per week		24	HOU 201	0

**NEW ROUTING**

START DATE OF ROUTE CHANGE ↑	WEEK	ROUTE	SEQUENCE
<input checked="" type="checkbox"/>	24 (B)	HOU 201	0

Map Type: **ROUTE** | **WED** | **Pin of Location being viewed**

**Other locations**

**Click within column to change route**

**Legend**

- Route HOU 201 104
- Route HOU 202 81
- Route HOU 203 12
- Route HOU 206 2
- Not Routed 1

\* Label inside pin: (Sequence)

**SAVE**

## 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.

**Pending** | **Current** | **Re-Number**

DIVISION: CORPUS | DAY OF WEEK: Wednesday | **LOAD**

SELECT ROUTE(S)	DAY OF WEEK	STOPS	QUANTITY	VIEW MAP
<input checked="" type="checkbox"/> COR 101	3	60	62	
<input type="checkbox"/> COR 201	3	120	126	
<input type="checkbox"/> COR 202	3	101	145	
<input type="checkbox"/> COR 203	3	132	169	
<input type="checkbox"/> COR 401	3	244	250	
<input type="checkbox"/> COR DUMPSTER DEL/REM	3	1	5	
<input type="checkbox"/> ALVARO	3	4	4	

SEQUENCE GAP: 4 | **RE-NUMBER**

### Field Descriptions

Field	Descriptions
<b>Filters</b>	
<b>Division</b>	Filters to only display the routes of the selected division.
<b>Day of Week</b>	Filters to only display the routes running for the selected day of the week.
<b>Fields and Features</b>	

<b>Load</b>	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.
<b>Select Routes (Check Box)</b>	Check box to include the route in sequence re-numbering. If all routes should be included, select the header check box.
<b>Day of Week</b>	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
<b>Stops</b>	Indicates the number of stops the route includes.
<b>Quantity</b>	Indicates the total service quantity across all stops.
<b>View Map</b>	Displays the route on a map.
<b>Sequence Gap</b>	Establishes the sequential order for stops on the route. Stop with a current sequence of '0' will not be included in sequence renumbering. <i>Example: If 4 is entered, stops on the route will be sequenced as 4, 8, 12, 16 and etc.</i>
<b>Re-Number</b>	Renumbers the selected routes using the Sequence Gap entered.

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## Related Articles

[Pending \(Tab\) - Review and Assign Stops to a Route](#)

[Current \(Tab\) - Modify a Route](#)

[Re-Number Route Sequences](#)

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