Route Management Overview

Last Modified on 12/05/2024 11:53 am PST

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.

Pending	Current	Re-Number							
elect Division		Select Service I	Region	▼ Select LOB	👻 Monday, Tuesday, We	di 👻 LOAD			
						COUNT 0	Search	(Q, (
LOCATION	ADDRESS	QTY	SERVICE C	FREQUENCY	START DATE	ROUTE	SEQUENCE	WEEK OF MONTH	
P TYPE Rout	e		Mon Tue Werd 1	hu Fri Sat Sun					
AP TYPE Rout	e	T DAY OF WEEK	Mon, Tue, Wed, 1	'hu, Fri, Sat, Sun 👻	DISPLAY ALL LINE OF BUSINESS				
P TYPE Rout	e	T DAY OF WEEK	Mon, Tue, Wed, T	'hu, Fri, Sat, Sun 👻	DISPLAY ALL LINE OF BUSINESS				

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 V HOUSTON OPEN MARKET V Roll Off, Commercial V, Sunday, Every X Days V LOAD							
					COUNT 40	Search	Q, 🛞
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 Route	The second secon	Fue, Wed, Thu, Fri, Sat, Sun 👒	DISPLAY ALL LINE O	DF BUSINESS			

Field Descriptions

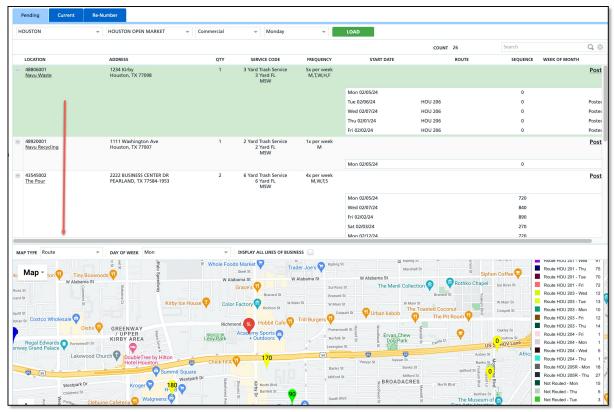
Field	Description					
Filter Options						
Select Division	Filters to only displays routes of the selected division.					
Select Service Region	Filters to only display routes of the selected service region.					
Select LOB	Filters to only display routes of the selected line of business.					
Day of 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					
Qty	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.					
	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					
Route	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.					
	Posts the pending service location to a route. If a location has a frequency greater					
Post	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.



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.

нс	DUSTON - HOUS	TON OPEN MARK	ET, LC 👻 Commercial	- HOU 201, HO	DU 202, F 👻 1es	day, Thursday, Fi	riday 👻	LOAD	EXPORT	▼ IMPORT ▼	
Sta	andard 👻 🖌	É EDIT	MAP Route Su	mmary 🗹 Reset Seque	nce to 0 on Rerout	e / Reschedule	SERVICE CODE	FILTER 8 Yard Tras	h Service, 6 ' 👻	Search	C
	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 <u>GCCLE SHADOW CREEK LP</u> 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		1		
	44771001 <u>FROST BANK</u> 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		ithin the o ach of the	column to edit e fields	
	43189002 <u>WHATABURGER 1058</u> 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 <u>CHICK FIL A</u> 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
Filter Selections	
Select Division	Filters to only displays routes of the selected division.

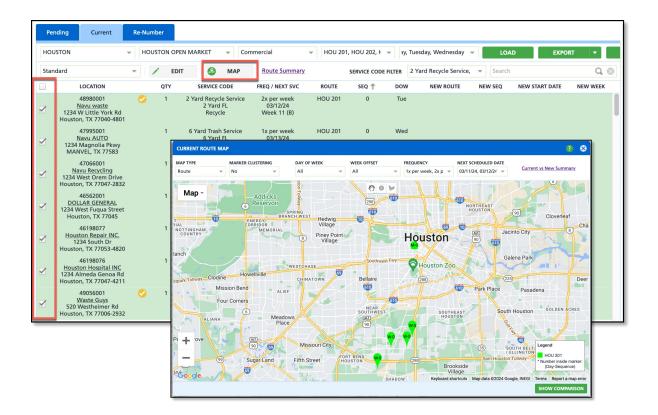
Colort Comrise Design	Eilenste enkedigelen meder of the coloring materia
Select Service Region	Filters to only display routes of the selected service region.
Select LOB	Filters to only display routes of the selected line of business.
Route	Filters to only display the service schedule of the selected 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.
Мар	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.
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.
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.
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. sing 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.

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.

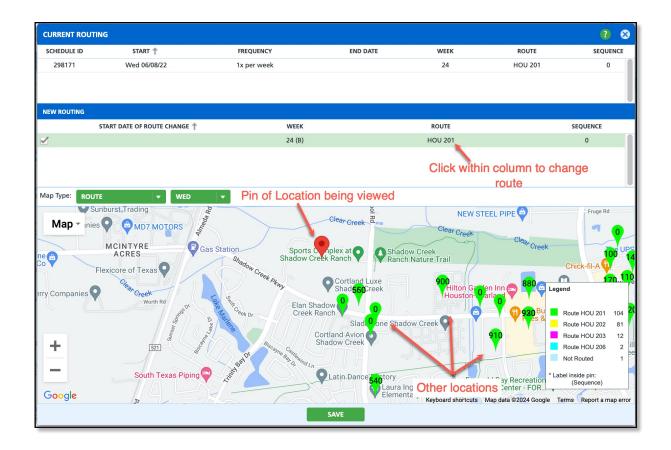


Map Details

Field/Filter Tool	Description
	Map based on the following options:
	Route
	Day of Week
Мар Туре	Service Code
	Material
	Next Service Day
Marker Clustering	Auto-groups locations that are in close proximity to one another and displays a total
Marker Clustering	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	Select to display routes for a specific date.
Date	
	Draw or circle a radius around targeted locations and right-click to edit only the
Radius Tools	locations within the radius.
	To remove, right-click within the radius and select 'Remove Shape.'
Map/Satellite	Toggle between Man or Satellite views
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.



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.

SELECT ROUTE(S)	DA	Y OF WEEK STOPS	QUANTITY	VIEW MAP	SEQUENCE GAP	4 🌲
COR 101	3	<u>60</u>	62	92		
COR 201	3	120	126		RE-NUMBER	
COR 202	3	101	145	92		
COR 203	3	132	169	92		
COR 401	3	244	250	92		
COR DUMPSTER DEL/REM	3	1	5	?		
ALVARO	3	4	4	99		

Field Descriptions

Field	Descriptions
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. <i>Example: If 4 is entered, stops on the route will be sequenced as 4, 8, 12, 16 and etc.</i>
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