

# Export and Import - Route Management

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Pathway: [Operations > Route Management \(Current tab\)](#)

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.

The screenshot shows the 'Current' tab in the Route Management interface. The 'EXPORT' button is highlighted with a red box. Below it, a table displays route data with columns for Record Id, Site Service Id, Site Id, Site Name, Site Address Line 1, Site Address, Site City, Site State, Site Postal C, Site Full Post, and Site.

Record Id	Site Service Id	Site Id	Site Name	Site Address Line 1	Site Address	Site City	Site State	Site Postal C	Site Full Post	Site
1	712264	176565	49153001	Studio A	1231 Oakley Ct	Osceola	WI	54020	54020-4359	
2	712265	176570	49437001	Kwik Trip	100 Ridge Rd	Osceola	WI	54020	54020-7506	(7)
3	712266	176562	49451001	Watershed Cafe	99 N Cascade St	Osceola	WI	54020	54020	
4	712267	176568	49162001	Cascade Nutrition	201 N Cascade St	Osceola	WI	54020	54020	
5	712268	176563	49232001	Caribou Cafe	112 Chieftain St	Osceola	WI	54020	54020	
6	712269	176564	49433001	Subway	402 N Cascade St	Osceola	WI	54020	54020	(7)
7	712270	176569	49121002	Wild Winery	37242 Wild Mountain Rd	Taylors Falls	MN	55084	55084	
8	712271	176567	49121001	Wild Mountain	37200 Wild Mountain Rd	Taylors Falls	MN	55084	55084	
9	712272	176566	49447001	Fawn Doe Rosa	2131 US-8	Saint Croix F	WI	54024	54024	(7)

## Permissions

The following permissions are required to use the Export and Import features in Route Management:

Permission ID	Permission Name
87	Route Management
445	Import/Export Current Routes from Route Management <i>Note: If a user does not have this permission, the Import/Export buttons are hidden from view.</i>

## File Layout and Import Requirements

### Non-Edit File Fields

The following fields **should not** be modified for import. If a site is included in the file but has no changes, **do not** remove it—leave it as-is to ensure accurate processing.

**Important:** The system uses the Record ID to map updates back into Route Management. **Do not make any changes to the Record ID field**, as this will prevent accurate mapping and may cause import errors.

Field	Description	Changes here map back upon import
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<b>Record ID</b>	The unique ID essential for identifying the record and is critical for successfully importing updated records back into the system. Any changes to this field in the import file will compromise the accuracy of the import.	<b>DO NOT EDIT THIS FIELD</b>
<b>Site Service ID</b>	The ID associated to the service for the site. This is also displayed in the site's Active Services.	No
<b>Site ID</b>	The ID associated to the site the routing service applies.	No
<b>Site Name</b>	The name of the site.	No
<b>Site Address Line 1</b>	This is the <b>primary street address</b> and usually includes: Street number and name, apartment, suite, or unit number (if space permits).	No
<b>Site Address Line 2</b>	This is an <b>optional field</b> used for <b>additional address information</b> that doesn't fit in Line 1, such as: Apartment, suite, unit, floor, or building details.	No
<b>Site City</b>	The city where the site is located.	No
<b>Site State</b>	The state where the site is located.	No
<b>Site Postal Code</b>	The five digit postal or ZIP code for the site.	No
<b>Site Full Postal Code</b>	The complete version of a postal or ZIP code used in a mailing address.	No
<b>Site Phone</b>	Displays the phone number for the site.	No
<b>Site Latitude</b>	The geographic latitude coordinate of the site's location.	No
<b>Site Longitude</b>	The geographic longitude coordinate of the site's location.	No
<b>Business Hours</b>	The designated days and times during which a business or service location is open and available	No
<b>Access Information</b>	Details that describe how to access the site for servicing.	No
<b>Service Note</b>	Notes added to the active service that are visible on the customer service screen and the driver app.	No
<b>Service Days</b>	The designated days the site is serviced.	No
<b>Service Day Hours</b>	The designated time frame for servicing the site on the service days.	No
<b>Qty</b>	Displays the quantity of equipment that is serviced.	No
<b>Service Code</b>	The service code that applies to the record.	No
<b>Service Code Name</b>	The name of the service code that applies to the record.	No
<b>Equipment Type</b>	Displays the equipment type ID to identify the equipment that will be serviced.	No

<b>Equipment Type Name</b>	Displays the equipment type's name associated to the ID.	No								
<b>Material Type</b>	Displays the material's ID to identify the material type expected to be serviced.	No								
<b>Material Type Name</b>	Displays the material type's name associated to the ID.	No								
<b>Line of Business</b>	Displays the line of business the site's service falls under.	No								
<b>Bin Size</b>	Displays the size of the bin that will be serviced.	No								
<b>Estimated Service Time</b>	The estimated amount of time it will take the driver to service the site. Applies to route optimization.	No								
<b>Estimated Volume</b>	The estimated amount of material that will occupy the bin. Applies to route optimization.	No								
<b>Frequency</b>	The frequency of how often the site is serviced.	No								
<b>Schedule Started</b>	Identifies when servicing first began for the site.	No								
<b>Next Service Date</b>	Displays the next date the route is scheduled to be serviced on.	No								
<b>Next Service Week</b>	The next numbered week of the year when the site is scheduled for service.	No								
<b>Day of Week</b>	Indicates the day of the week the site is currently serviced, represented numerically. <table border="1" data-bbox="427 1093 1008 1249"> <tr> <td>1= Monday</td> <td>5= Friday</td> </tr> <tr> <td>2= Tuesday</td> <td>6= Saturday</td> </tr> <tr> <td>3= Wednesday</td> <td>7= Sunday</td> </tr> <tr> <td>4= Thursday</td> <td></td> </tr> </table>	1= Monday	5= Friday	2= Tuesday	6= Saturday	3= Wednesday	7= Sunday	4= Thursday		No
1= Monday	5= Friday									
2= Tuesday	6= Saturday									
3= Wednesday	7= Sunday									
4= Thursday										
<b>Week of Month</b>	For monthly services, identifies if current service happens on the first, second, third or fourth week of the month.	No								
<b>A/B Week</b>	Indicates whether the site is currently serviced on an A week or B week in the pickup rotation.  <b>SQL Logic:</b> A or B Week is determined based on base date of 01-01-2012 this week was considered as A week with the SQL formula CASE WHEN ABS (datediff (week,'01-01-2012', TheDate))/2=1 then 'A' else 'B' end). TheDate value for any day of selected week , formula will return A or B value.	No								
<b>Route Id</b>	Displays the current service route for the site. The Route ID is automatically assigned by Navusoft when the route is created.	No								
<b>Route Name</b>	Displays the name of the route associated with the route ID.	No								
<b>Seq</b>	Displays the site's current sequence on the route for servicing.	No								

## Editable File Fields

The following fields are included in the export file and will be mapped back into Navusoft for the route record if a new value is entered. If there are no changes for a record, leave these fields blank—the system will automatically skip them.

File format requirement to upload changes in: CSV

Field	Description	Changes here map back upon import
New Route	Enter the <b>ROUTE ID</b> of the new route.	YES
New Seq	Enter the new sequence number where the site should appear on the route.	YES
New Start Date	<p>Enter the start date for the routing change. This date determines both the effective start date and the corresponding day of the week the service will be assigned to (e.g., 5/26/2025 is a Monday; 5/27/2025 is a Tuesday).</p> <p><b>Other notes:</b> If the site is serviced on an A/B schedule, consider which week (A or B) the new start date falls into to ensure the routing change aligns correctly with the alternating service cycle.</p> <p><b>SQL Logic:</b> A or B Week is determined based on base date of 01-01-2012 this week was considered as A week with the SQL formula CASE WHEN ABS (datediff (week,'01-01-2012', <b>TheDate</b>))/2=1 then 'A' else 'B' end). <b>TheDate</b> value for any day of selected week , formula will return A or B value</p>	YES
New Week	This field is required for monthly services. Enter as: <i>First, Second, Third, or Fourth</i> . Leave null/blank for non monthly service types.	YES

## Process to Edit and Import a Change

Follow the steps outlined below to edit the export file and import the changes back into Route Management, where they can be posted to the route.

### Export and Edit

The screenshot shows the 'Current' tab selected. The 'EXPORT' button is highlighted with a red box and a red circle labeled '2'. A red arrow points from the 'EXPORT' button to the 'IMPORT' button in the next screenshot. The interface includes a table with columns: SITE, QTY, SERVICE CODE, FREQ / NEXT SVC, ROUTE, SEQ, DOW, and NEW ROUTE. Two rows are visible, representing different trash services at different locations.

1. From the **Current** tab, apply filters to display the sites you want to edit, then click **Load**.
2. Once the results have loaded, click **Export** to download the data as a .csv file.
3. In the exported file, make only the necessary changes by entering new values in the following fields (leave the fields blank if no changes are needed):
  - New Route
  - New Seq
  - New Start Date
  - New Week
4. After completing your edits, **save the file to your computer as a .csv** so it can be imported back into Route Management.

## Import and Post

The screenshot shows the 'Current' tab selected. The 'IMPORT' button is highlighted with a red box and a red circle labeled '3'. A red arrow points from the 'IMPORT' button to the 'IMPORT NAVUSOFT ROUTE CHANGE' popup window. The popup window has a 'SELECT FILE' field with the path 'C:\fakepath\routeUpdateDateTest.cs' and a 'BROWSE...' button. Below the file selection is an 'IMPORT' button. The background table is partially visible, showing the same data as the previous screenshot.

1. From the **Current** tab, click the **Import** button and select the appropriate file format. The **Import Navusoft Route Change** popup will appear.
2. Upload your edited file, then click **Import**. This will display a Message popup indicating the route change import has started. Click **OK**.

- **IMPORTANT:** Do not click out or navigate away from the screen while the import is processing.
3. Once the import is complete, the affected records will display. Review the **New Route**, **New Seq**, **New Start Date**, and **New Week** columns to ensure the changes are correct.
  4. Click **Post Routing Change** at the bottom of the screen. A confirmation popup will summarize the changes. Click **Yes** to post the updates.

**Important Import Notes:** A change to **Record ID** can only be submitted one time, once a change has been posted, the record id is ended and a new record id is assigned, changes can not be reversed.

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## Related Articles

[Route Management Overview](#)

[Current Tab - Modify a Route](#)

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