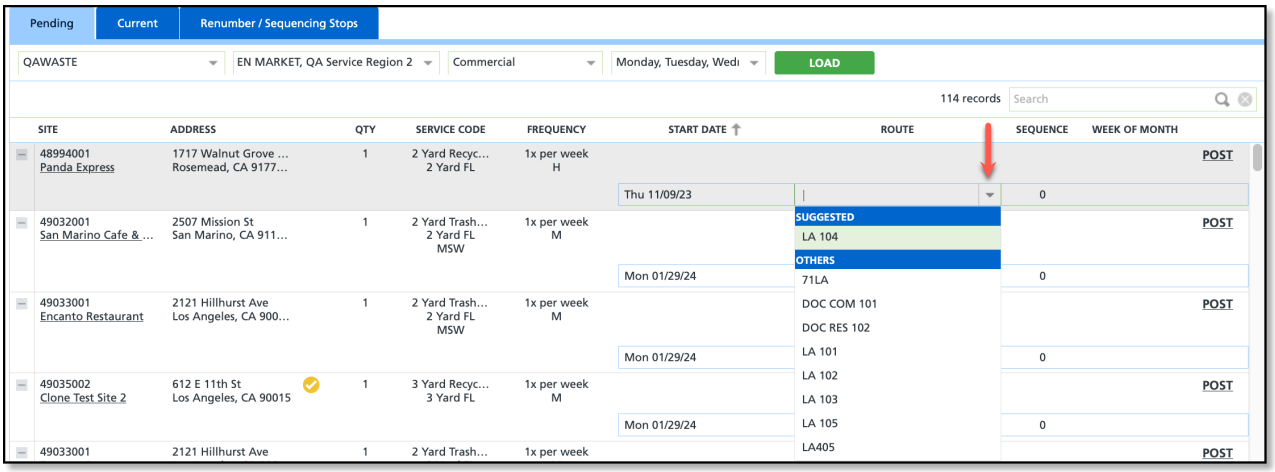
Automatic Routing & Sequencing

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In the **Pending** screen of Route Management, users can review pending stops and assign them the **Suggested** route the system has determined. For lines of business with **Automatic Routing & Sequencing** enabled, route assignment can be streamlined, by automating the assignment of the **suggested route**, and if applicable, the sequencing of stops. If preferred, manual assignment remains available for all lines of business.

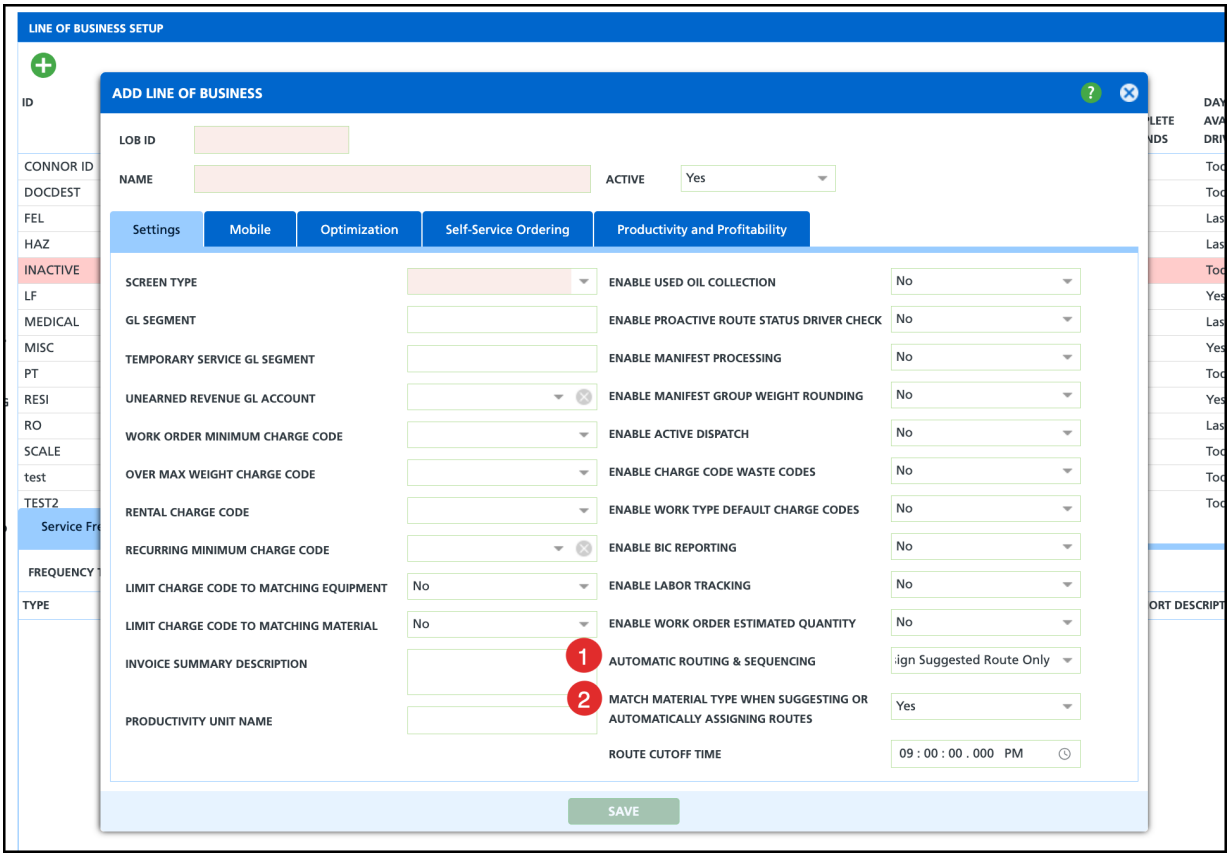
> This feature includes route optimization functionality powered by RouteSmart, a third-party system. While RouteSmart provides the optimization engine, all setup and configuration are managed within Navusoft. Additional information about route optimization can be reviewed here Improve Operations with Route Optimization.



Setup: Line of Business

Pathway: *Setup > Services > Line of Business*

Automatic Route Assignment is configured at the **Line of Business** level. Two settings are available to control how stops are automatically assigned to routes and the criteria the system uses when determining which route to assign.



1. Automatic Routing & Sequencing

Controls whether the system automatically assigns a route to the stop and whether the stop is also sequenced. For that, two options are available:

Assign Suggested Route Only

When selected, this option automatically assigns the suggested route, normally chosen manually from the Pending tab, to the stop. When enabled, assigned stops will have a sequence of “0” on their route and will appear in the Unsequenced Stops column within the Renumber / Sequence Stops tab of Route Management.

Assign Suggested Route & Sequence

This option utilizes RouteSmart, a licensed third-party system, to automatically assign the suggested route and sequence stops in the most optimized order. A RouteSmart license is required to enable this feature. For more information, refer to the Route Optimization documentation.

2. Match Material Type When Suggesting or Automatically Assigning Routes

Controls whether **Material Type**, in addition to proximity, is considered when determining which route is automatically assigned.

Enabled "Yes"

Enabling this setting determines which Route is automatically assigned to the stop based on both **proximity** and **matching Material Types**.

Screens: How Automation Affects Workflow

Pathway: *Operations > Route Management > Pending; Renumber / Sequencing Stops [tabs]*
When Automatic Routing and Sequencing is enabled, workflows on the **Pending** and **Renumber / Sequencing Stops** screens are affected. In both screens, if there is no suggested route available, a route will not be assigned to the stop.

Pending Screen

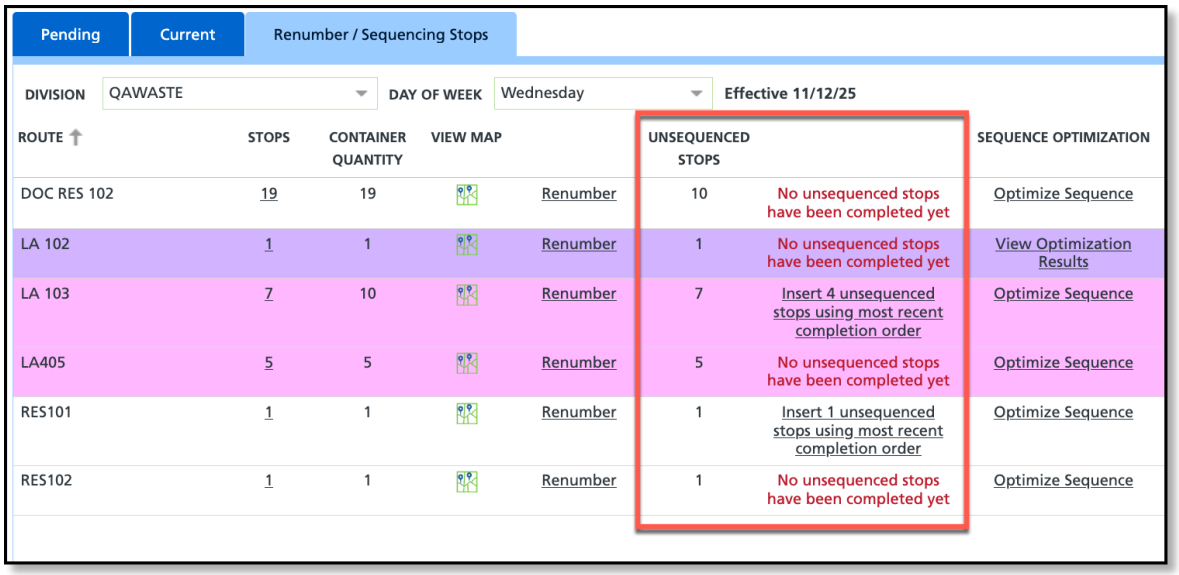
When either option is enabled, adding an active service to a site will automatically assign it to a suggested route, if one is available. Suggested routes are determined by factors such as service day, frequency, and nearby scheduled stops. Because of this automatic suggested route assignment, the site will not display on the **Pending** screen. However, if no suggested route is available for the site, no assignment occurs, and the site will remain on the **Pending** screen until a route is manually assigned.

Renumber / Sequencing Stops Screen

Review the following implications to the Renumber / Sequencing Stops screen if either options is enabled.

Assign Suggested Route Only

When this option is enabled, the suggested route is assigned to the stop with a sequence value of **0**. In the **Renumber / Sequencing Stops** screen, the stop is included in the **Unsequenced Stops** count. As the driver completes the stops, each service can be inserted and sequenced on the route in the order it was completed.



Assign Suggested Route & Sequence

When this option is enabled, the stop is automatically assigned to the suggested route and, if RouteSmart licensing and configurations are enabled in the system, it is sequenced in the most optimized position on the route. No additional action is required for the stop.

Related Articles

Improve Operations with Route Optimization

Pending (Tab)-Route Management
Current (Tab)-Route Management
Renumber / Sequencing Stops