

Route Management (Operations) - Enhanced Map Filtering & Route Suggestions by Material Type (21852 / 21853)

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Two new features have been introduced to schedule services faster and smarter based on Material Type. One feature is a configuration setting that affects Route Management and limits the suggested routes based on the Material Type of the pending service. The other feature is a filter that displays all sites on the Nearby Map interface when adding a new service or limits the sites displayed by Material Type of the service being added.

Match Material Type Configuration for Route Assignment

With the **Match Material Type when suggesting or automatically assigning Route** configuration, the system will suggest routes that match the Material Type of the service being scheduled. This affects both methods of assigning routes: Automatic Routing and Route Management route selection.

The suggested routes are based on the Material Type rather than proximity alone, preventing the system from suggesting a trash-only route for a recycling service simply because the trash truck is nearby.

This configuration is set at the **Line of Business** level.

- **Enabled** - the system suggests routes based on standard proximity and location logic and **only if**:
 - the route has at least one scheduled stop with a matching Material Type,
 - or the route has a blank or unassigned Material Type.
- **Disabled** - the system suggests routes based on standard proximity and location logic regardless of Material Type.



When the pending service Material Type is blank or Null, the system suggests routes without any Material Type restrictions, regardless of whether the setting is enabled or disabled. It will behave the same as if disabled.

To enable:

1. Go to set *Setup > Services > Line of Business*
2. Set **Match Material Type when suggesting or automatically assigning Route** to "Yes."

The screenshot shows the 'Line of Business Setup' form. The 'UPDATE LINE OF BUSINESS' section is active, showing various configuration options. The 'MATCH MATERIAL TYPE WHEN SUGGESTING OR AUTOMATICALLY ASSIGNING ROUTES' option is highlighted in yellow and set to 'Yes'. Other options include 'ENABLE USES OIL COLLECTION', 'ENABLE PROACTIVE ROUTE STATUS DRIVER CHECK', 'ENABLE MANIFEST PROCESSING', 'ENABLE MANIFEST GROUP WEIGHT ROUNDING', 'ENABLE ACTIVE DISPATCH', 'ENABLE CHARGE CODE WASTE CODES', 'ENABLE CHARGE TYPE DEFAULT CHARGE CODES', 'ENABLE BIC REPORTING', 'ENABLE LABOR TRACKING', 'ENABLE WORK ORDER ESTIMATED QUANTITY', and 'AUTOMATIC ROUTING & SEQUENCING'.

Pathway: *Setup > Services > Line of Business*

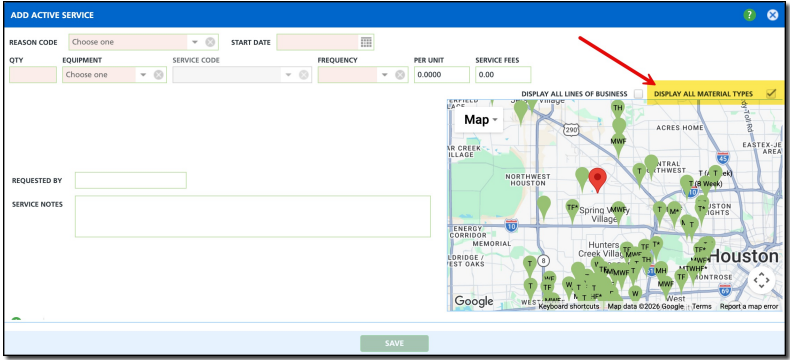
Display All Material Types Map Filter when Adding Services

When adding a new service, the Nearby Map is used to identify neighboring service locations and their service day(s). However, not all sites are serviced for the same material types, making it difficult to find the best/appropriate service day(s). The option to filter the map further narrows the results to display only sites with a

matching material type for better route placement.

The **Display All Material Types** filter is now available as a checkbox just above the map.

- **Checked** - the nearby map displays qualifying nearby sites regardless of Material Type.
- **Unchecked** - the nearby map displays only those sites containing services that match the Material Type associated with the service code being added..



Pathway: Customer Service > Add Active Service



Smart Defaults: The default state of the Display All Material Types checkbox automatically aligns with your Line of Business setting by defaulting to the opposite value (e.g., if Material Matching is enabled for the LOB, the map defaults to hiding sites that do not have a matching material type).

LOB setting: Match Material Type when suggesting or automatically assigning Route	What the user will see: Default for "Display All Material Types" checkbox on map
Enabled	Filter is Unchecked
Disabled	Filter is Checked