SPP 302: Routing, Scheduling, & Assigning Work Using Service Pro Web Mapping

SPP 300: Route Organization · https://milo.masseyservices.com/docs/spp-302-routing-scheduling-assigning-work-using-service-pro-web-mapping-2/

Section: Route Organization
Subject: Routing, Scheduling, & Assigning Work Using Service Pro Web Mapping
Approved by: Adam Jones
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Policy Owner: VP Director of Quality Assurance

Policy

One of the primary duties of the service manager is to organize and assign a full day’s work every day to every team member under their supervision. The service manager will organize their own schedule to allow for daily review, rescheduling, and fine-tuning of service routes. The goal is to maximize every team member’s productivity.

Each team member will be assigned their next day’s work during the afternoon check-in session. This daily assignment process will ensure all customers are serviced on time and the individual team member’s level of productivity will meet or exceed minimum company productivity standards.

PROCEDURE

The three steps to organizing and scheduling work are:

1. Geocoding Accounts
2. Route Organization
3. Scheduling the Route

Geocoding Accounts

Geocoding is the process of assigning global positioning satellite coordinates to accounts. Geocodes are represented as latitude and longitude coordinates that belong to the account location. These latitudes and longitudes are located in Service Pro on the “Site Details” screen. Visual Route, which is our scheduling software, uses these
geocodes to accurately plot the services on a map. For Visual Route to plot every scheduled service, you must ensure that all accounts are assigned geocodes.

Visual Route will identify those accounts without assigned or incorrect geocodes and correct missing geocodes when the search data is accessed. Visual Route will then identify all accounts that Google was not able to locate to rooftop accuracy. A prompt will load noting the number of addresses corrected using the Visual Route database. Once in Visual Route, the system will identify individual addresses that are not automatically corrected. At this point the team member will open the service way point for each address, select fix address to the right of the zip code in the address line, then save all newly geocoded accounts by selecting the Save button before exiting the program. Once these steps are completed, the team member will run the Ungeocoded Accounts to verify all accounts have correct geocodes.

Route Organization

Route organization is the process by which accounts are grouped into individual service routes. Fully productive service routes are created by considering topographic and man-made boundaries. The system used to define these routes is the Visual Route software accessed from Service Pro. This software is used to:

- Create a new route from the existing routes.
- Modify an existing route.

To start the routing process:

1. Log into ServicePro and select “Routing.” (See Figure 1.)

Figure 1. Routing link.

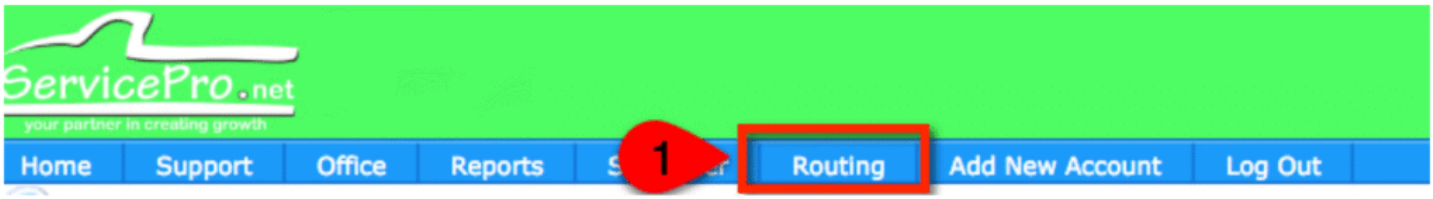


Figure 1.

2. Choose the “Service/Routes by date” dropdown menu. (See Figure 2.)

3. Click on “Assign routes.” (See Figure 2.)

Figure 2. Visual Route menu.



Figure 2

4. Select “Get WOs by date range.” (See Figure 3 for steps 4-8.)

5. Enter the start and end dates.

6. Set IN WP to “No” and Financial Hold to “No.”

7. Choose the Service Center.

8. Select the routes you wish to evaluate. They are listed as Service Center number – route number. For example, Route 30 in GreenUP Orange (02) will be listed as 002-30. (See Figure 3.)

9. To select categories to work with, click on “Category.” (See Figure 4.)

10. Check the boxes for each service type relevant to the routes you are evaluating, such as monitoring for bait, or the recurring option to load all recurring services. You may also filter specific events by selecting the
checkbox next to the desired event(s). Once the selections are made, click on the “X” or click outside the menu to proceed.

11. To enable adjustments to confirmed appointments, check the “Allow confirmed service route change” box at the bottom of the page. Leave it unchecked if you do not wish to modify confirmed

appointments.

12. Click “Get Services.”

Figure 3 “Arrange routes” fields and Figure 4 “Category” dropdown menu.

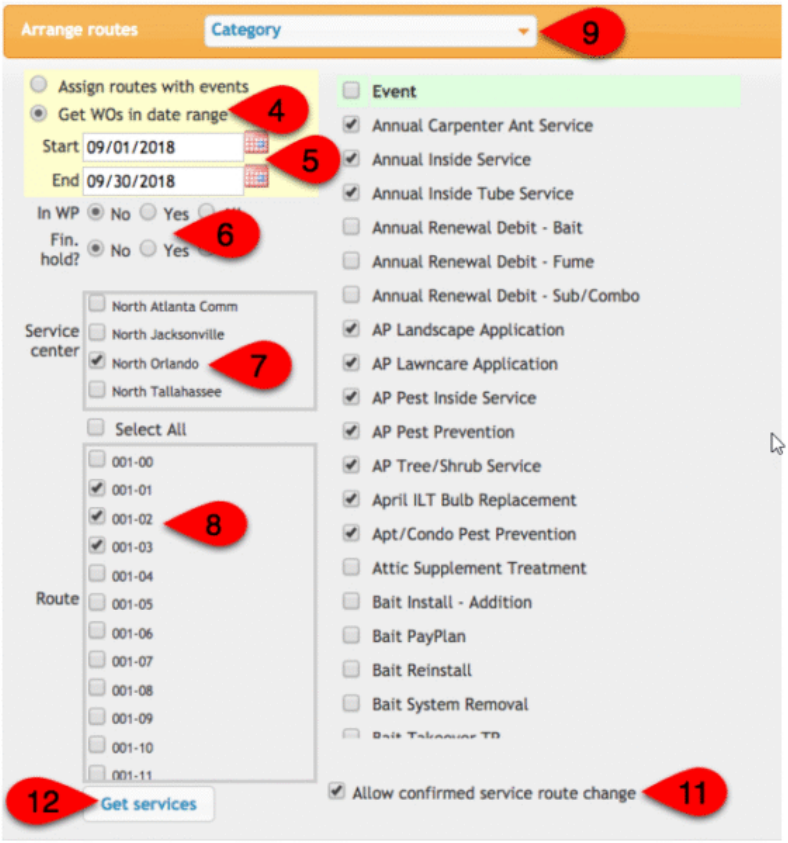


Figure 3

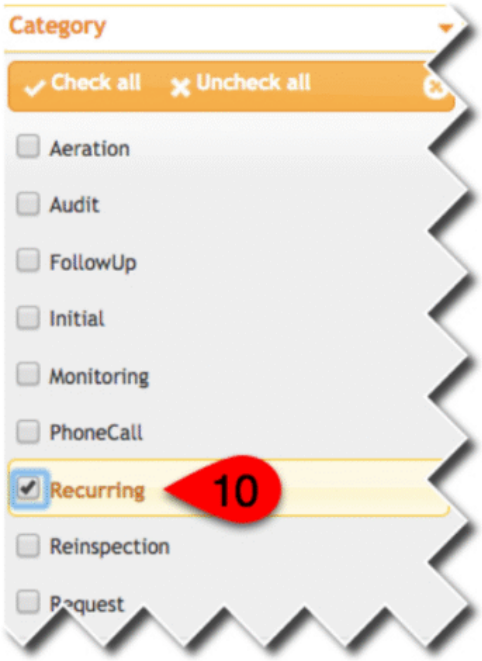
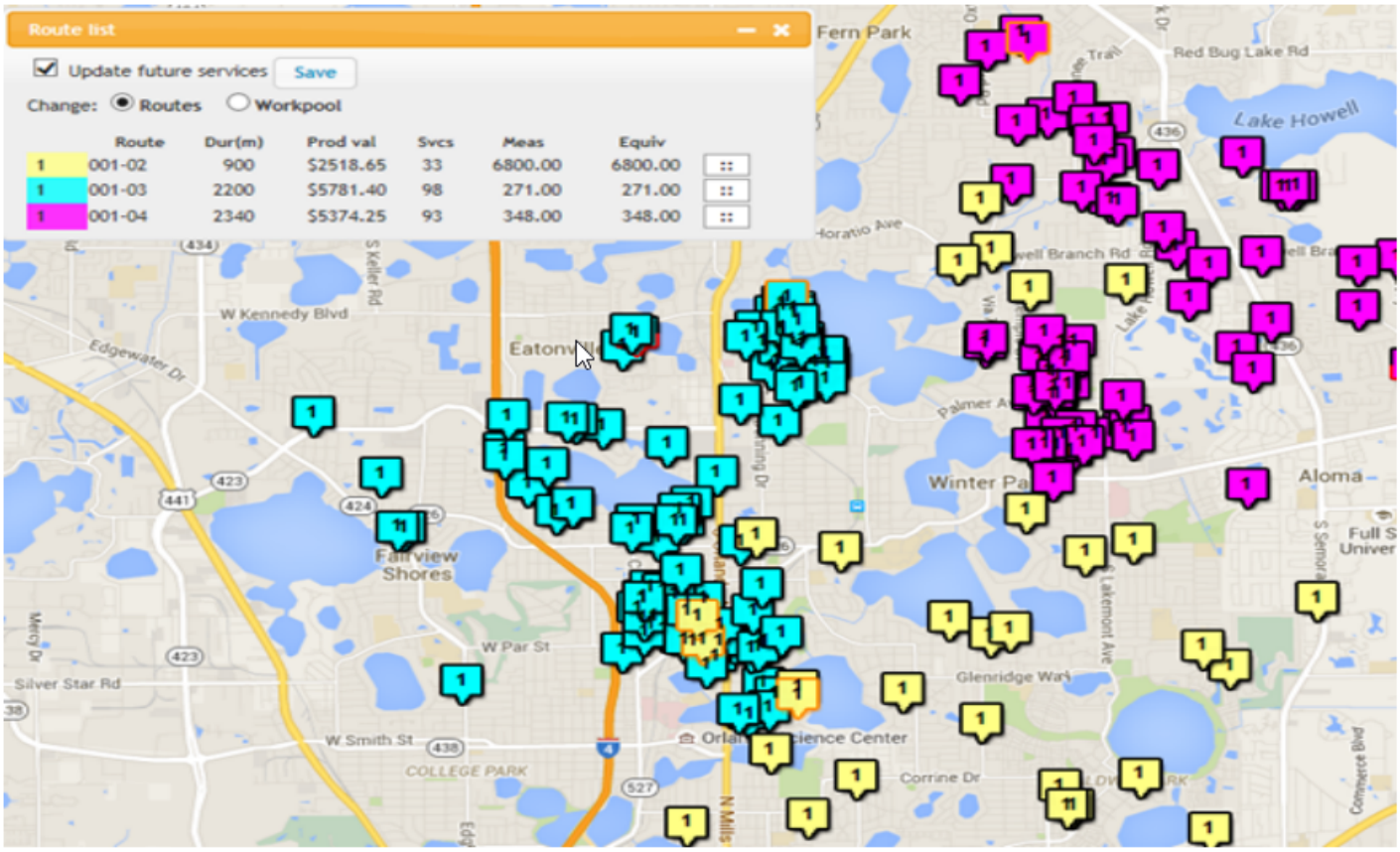


Figure 4

Figure 5. Route map.



Changing Accounts from One Route to Another

To change an account(s) from one route to another, follow the steps outlines below:

1. Select the receiving route from the “Route List” located at the top left of the screen.

Figure 6. Route list.

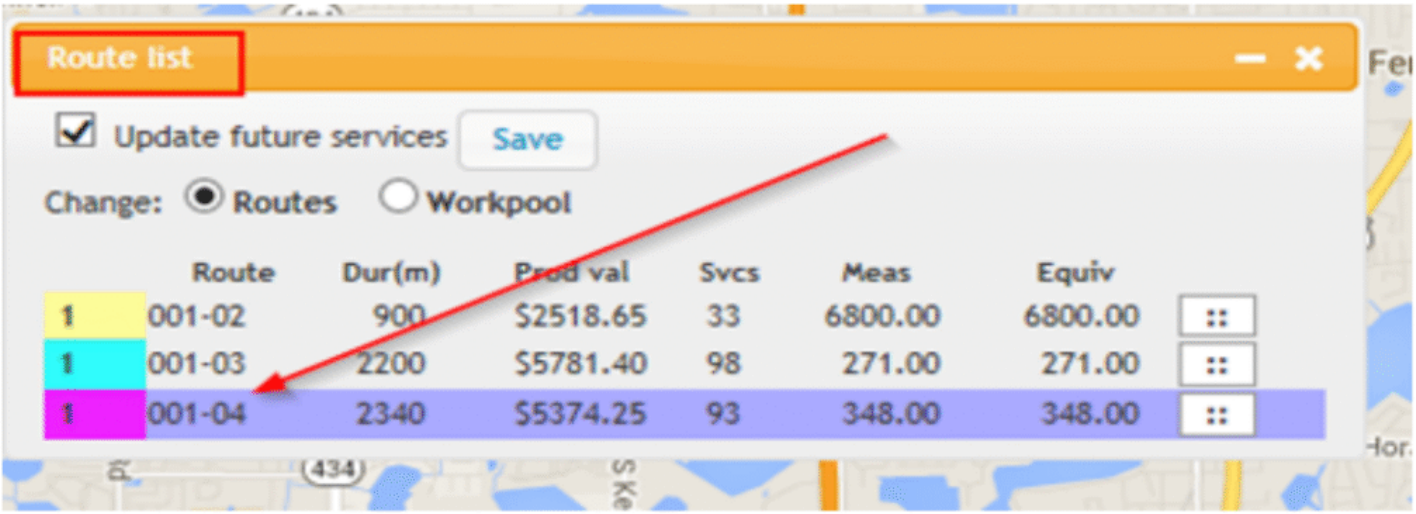


Figure 6

2. Select a range of waypoints to modify the route by holding down the Shift key and dragging the mouse around the desired area to remap. This action will draw a box around the waypoints you wish to modify.
The waypoints within the box will automatically update to the selected route, and their color will change accordingly.

To change a single service, tap the waypoint to open it, then select the colored waypoint at the bottom of the box to assign it to the new route.

3. To apply these changes, check “Update future services” and click “Save” under File or above the route list on the left-hand side, below the orange bar. (See Figure 6 on the previous page.)

The assigned revenue to each route updates in real-time as changes to assignments are made. This allows users to verify whether route modifications meet company productivity standards. If the changes have not been saved, the Route list header will display *NOT SAVED* as shown in Figure 7.

Figure 7. Route list *NOT SAVED* header.

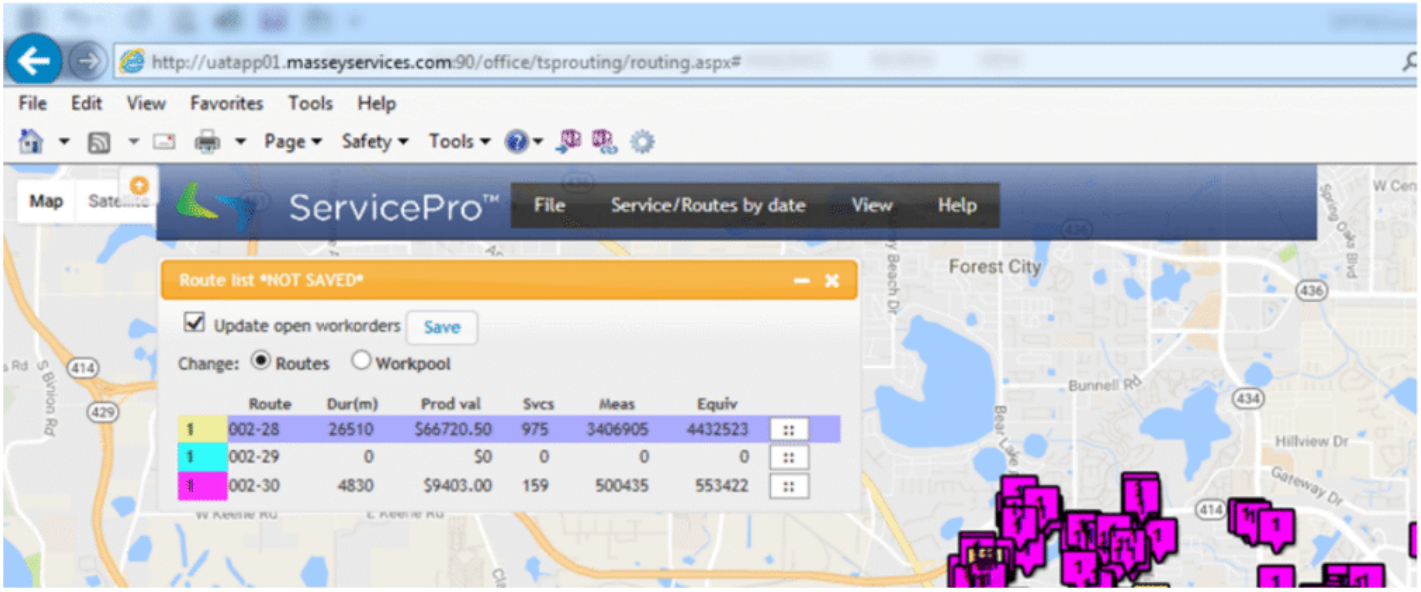


Figure 7

Scheduling the Route

Scheduling is the process of efficiently organizing each day’s work for a route by minimizing drive time between stops. The service manager must organize each day to achieve maximum productivity for each team member.

The first step in scheduling is to print the current month's "Production to Do in Detail by Route with Price report from Reporting Services on the Intranet. The report will be used as a reference point to compare changes made during scheduling.

Accounts scheduled for the same day or multiple accounts geocoded to the same address will be displayed as a waypoint with a black and red outline. Confirmed appointments are indicated by an orange border. The dates for confirmed appointments cannot be modified through Visual Route.

To start the routing process, please See steps 1 through 12 under Route Optimization, which can be found earlier in this procedure, and then proceed with the instructions below:

1. For any waypoints with a black and red border, select the waypoint to review and confirm the services are associated with the same account and address. If the waypoint displays different accounts, the addresses must be corrected accordingly. (See Figure 12.)
    a. Open each service waypoint and select "Fix Address" located to the right of the ZIP code in the address line.
2. Check the work order date in the information box to ensure the services are scheduled on the same date.
3. Once the map and way points are loaded, utilize the map to group individual accounts scheduled for the same day to maximize productivity and minimize drive time between services.
4. Do not reschedule an account for more than 5 days beyond its current date. However, it is permissible to move an account more than 5 days forward if the customer is notified and has given consent.

Figure 8 Visual route mapping example.

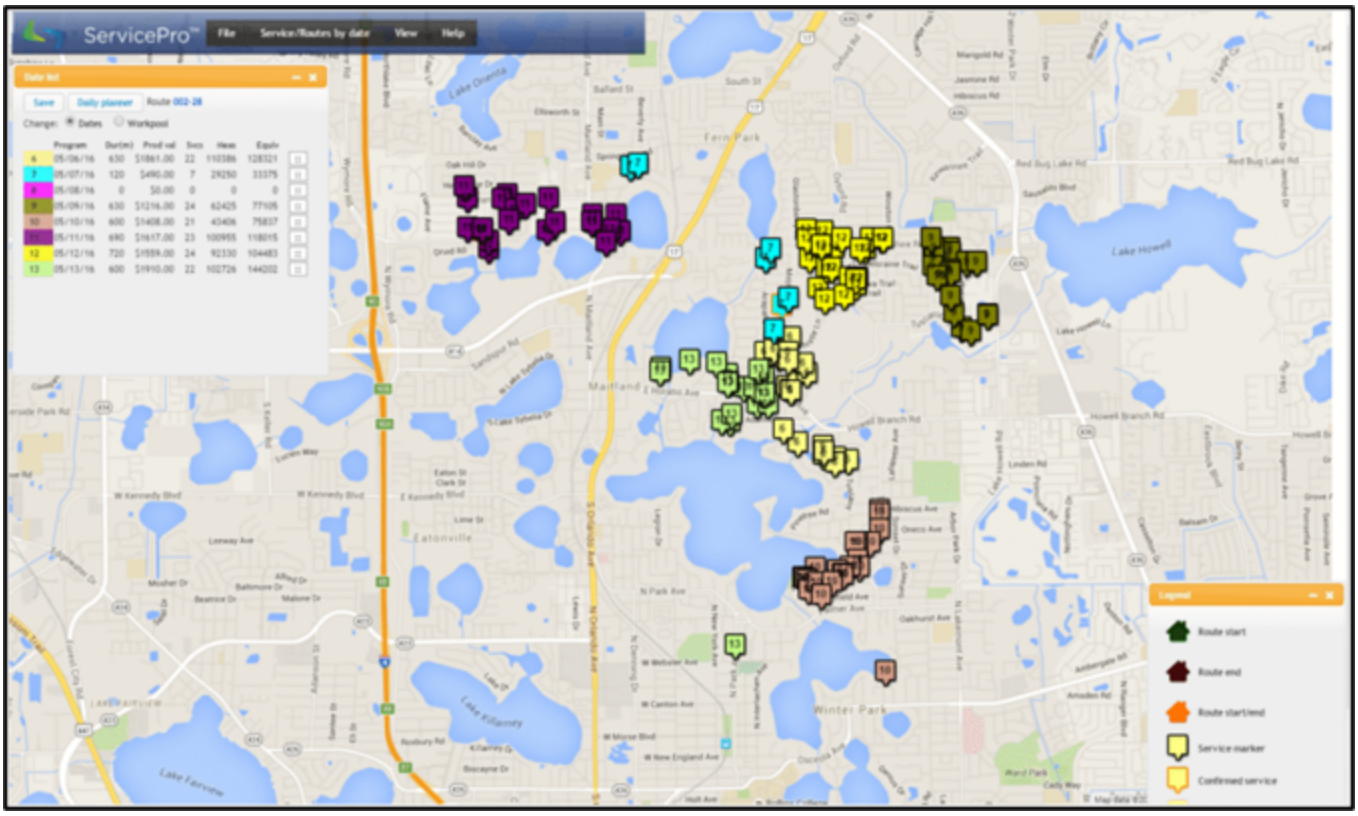


Figure 9 Map legend.



Changing Service Dates

To reschedule a service to a different date, follow the steps outlined below:

1. Select the desired new date from the “Date list” located on the left side of the screen. (See Figure 10.)
2. Select a range of waypoints to modify the date.
3. Hold down the Shift key and drag the mouse around the services to be rescheduled. This will draw a box around the waypoints you wish to change. The waypoints within the box will automatically update to the selected date, and their color will change accordingly.
4. A dialog box will appear asking if you would like to update only the selected service or include future services. (See Figure 11.)
    1. Choosing “Selected service” will update only the earliest service on the pushpin.
    2. Choosing “Future services” will update the earliest service on the pushpin and all subsequent services.
5. Select the appropriate option for the scheduling session. This step must be completed for each service that has been moved.

Figure 10. Date list.

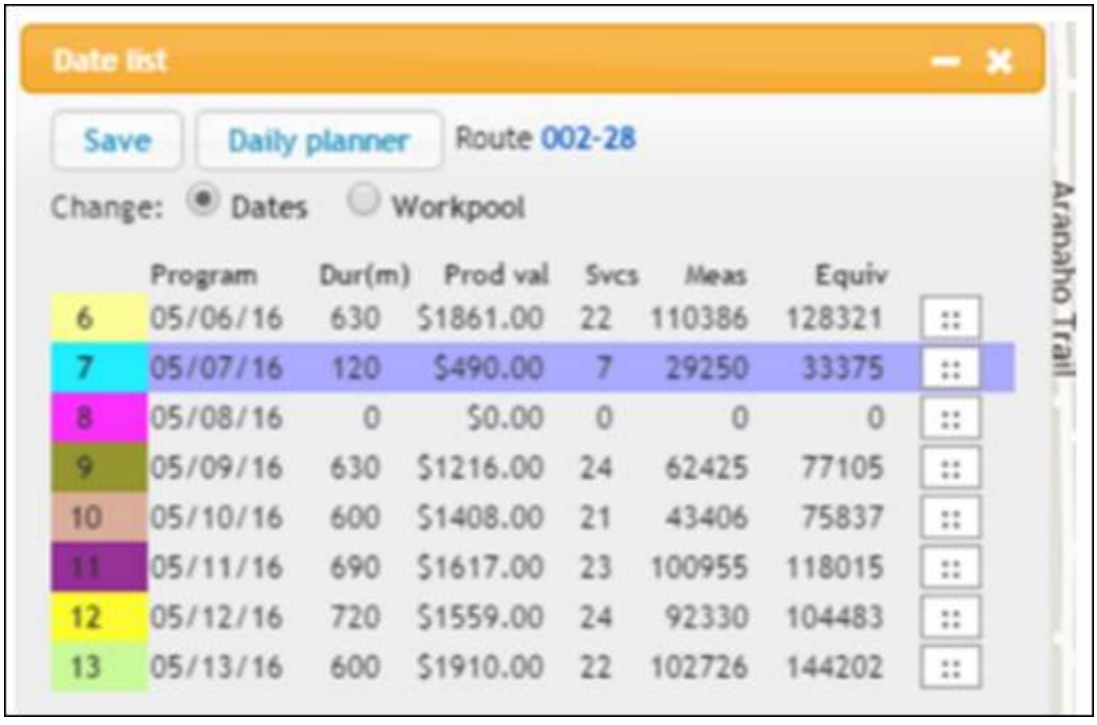
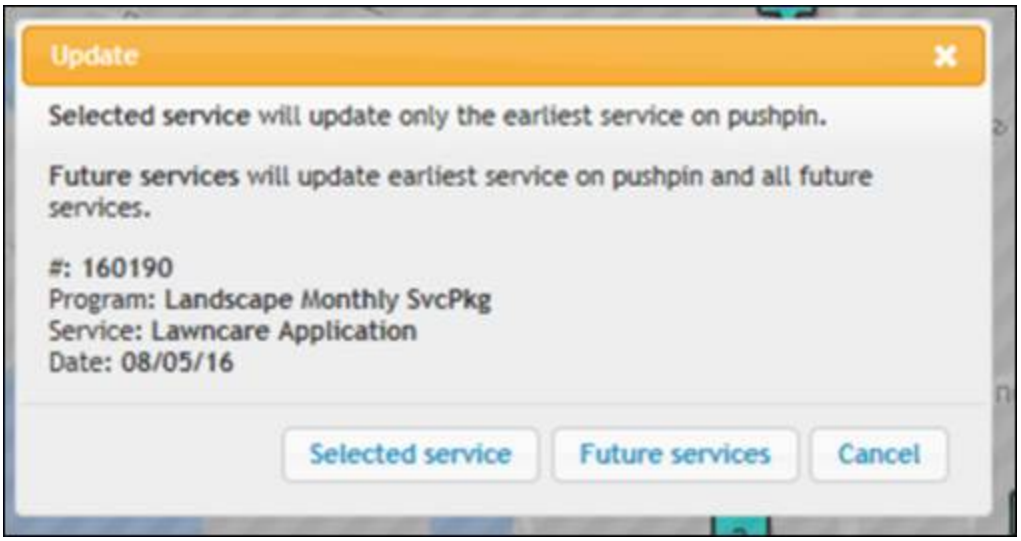


Figure 11. Dialog box.



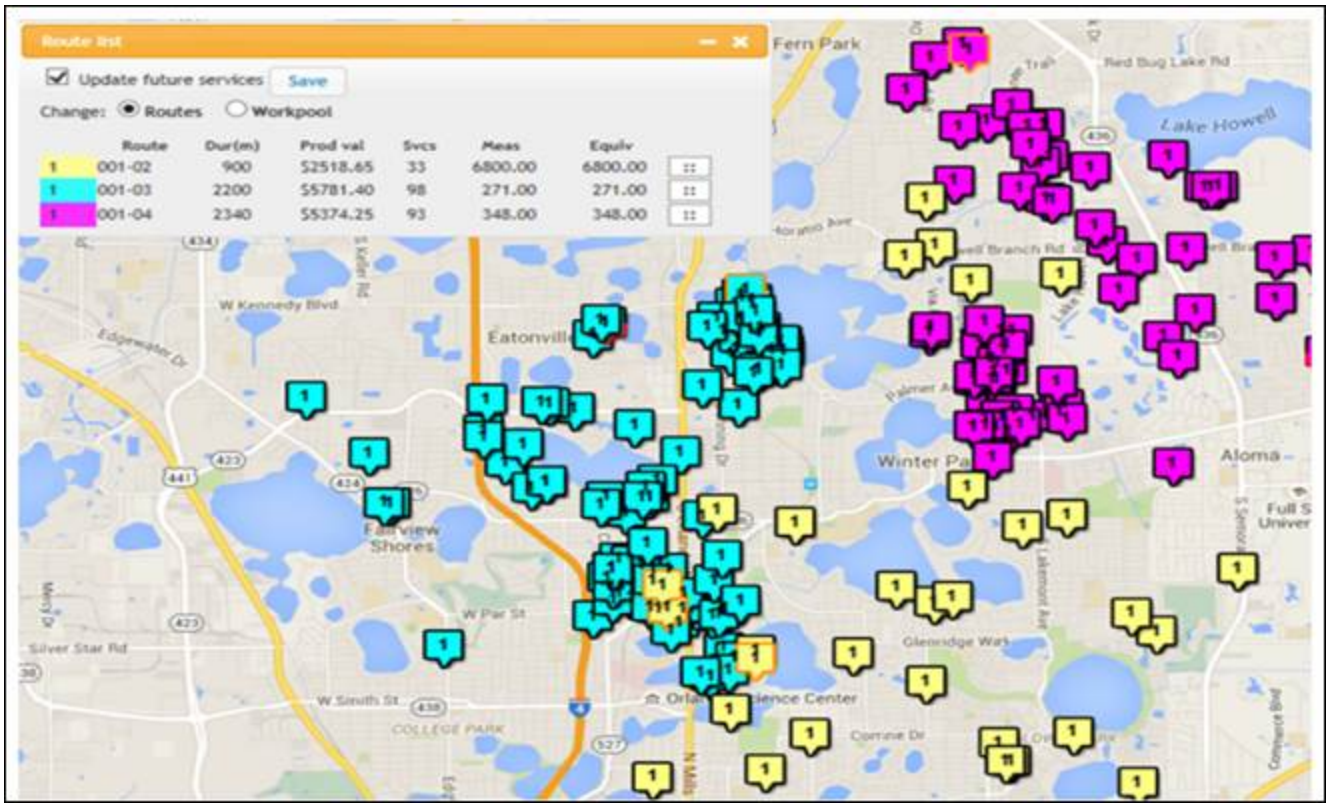
6. To modify individual service dates, select on the waypoint you wish to update.

7. In the “Date list,” choose the new date by selecting the corresponding row.

8. Return to the waypoint account information and click on the date field at the bottom. The user will be prompted to choose whether to update only this service or all subsequent services.

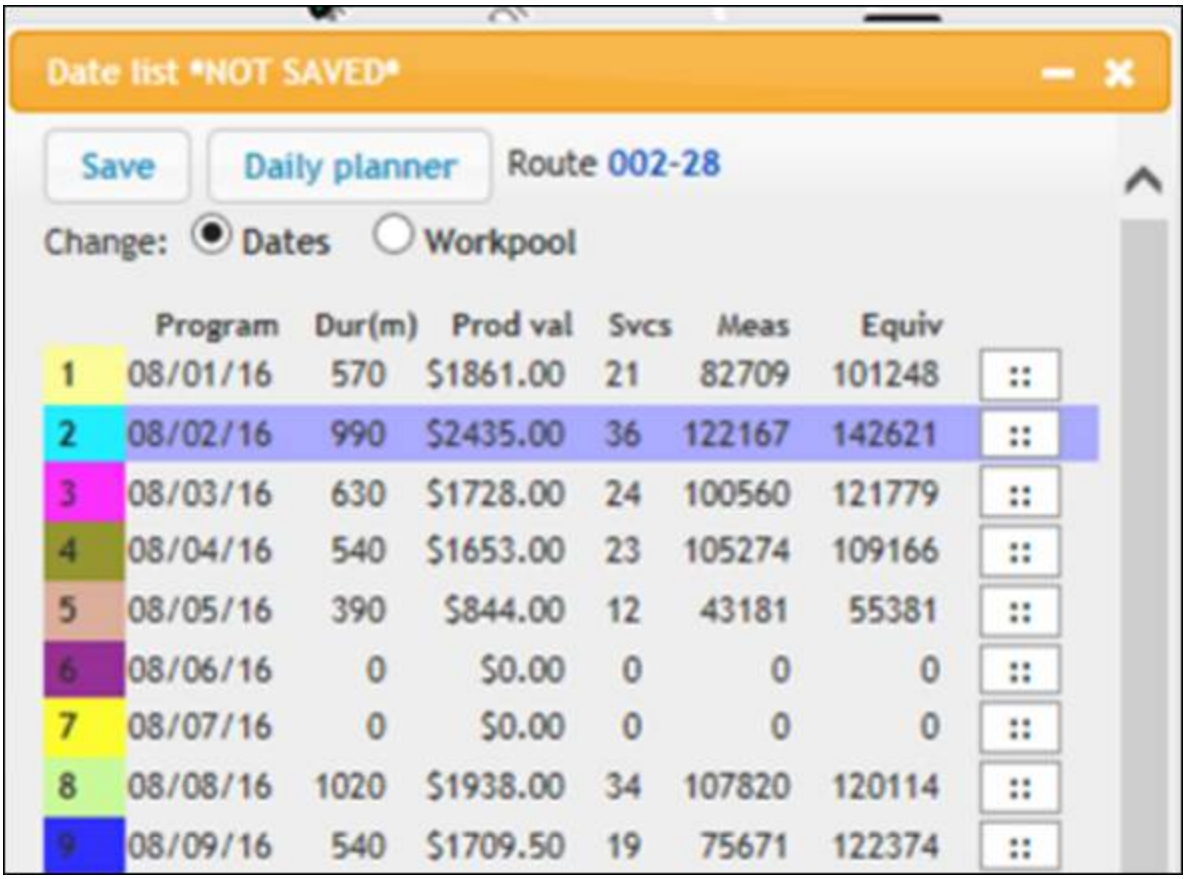
9. Click “Save” to confirm and apply your changes, located under the File menu or above the date list on the left side, below the orange bar.

Figure 12. Map with route list.



The assigned revenue, measurements, and measurement equivalents update in real time for each date as you modify the assignments in the “Date list”. This enables the user to assess whether the changes made to the routes and dates align with company productivity standards. If an assignment has not been saved, *NOT SAVED* will appear to the right of the “Date list” header.

Figure 13. Date list with *NOT SAVED* in the header.



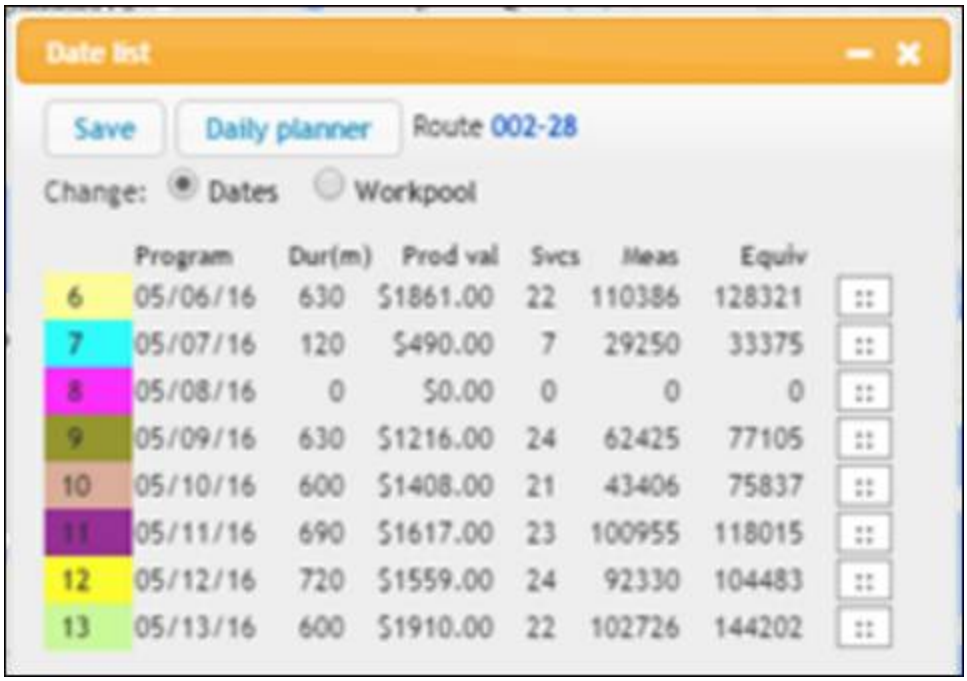
Optimizing the Route

After services are mapped, the service manager will utilize the daily planner to review an appointment, update addresses, or reschedule services to ensure each route is optimized.

To access the daily planner, follow the steps outlined below:

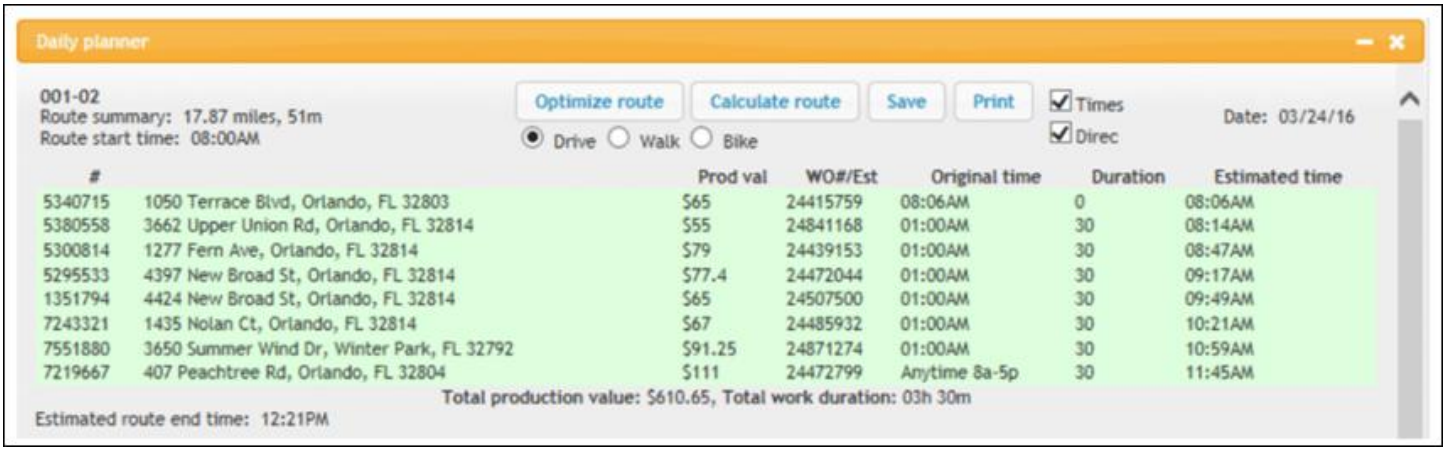
1. Once the routing is complete, choose a date from the date list and click on “Daily planner.” (See Figure 14.)

Figure 14. Date list.



2. The route for the selected date will appear to the right of the “Date list” box. The window will present four options: optimize route, calculate route, save, and print.

Figure 15. Daily planner screen.



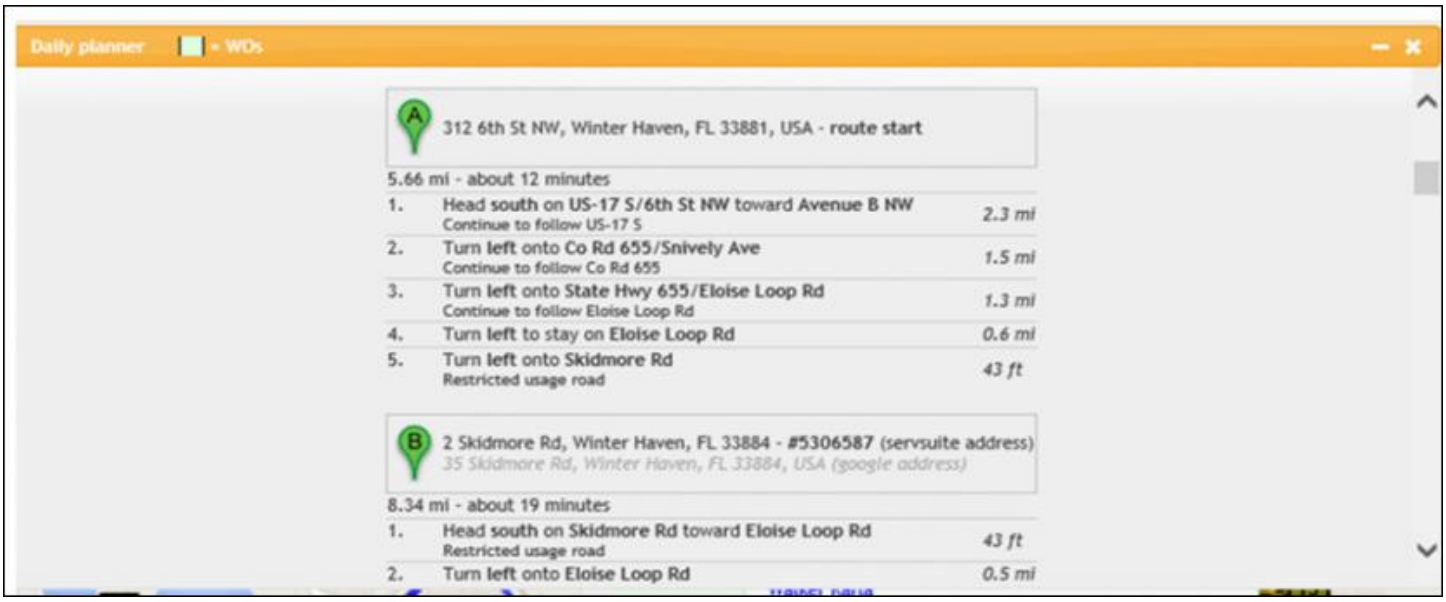
3. To optimize the route, select the “Optimize route” option. The appointments will be rearranged in the most efficient drive time order based on the closest waypoint to the assigned service center. (See Figure 16.)

a. If a more efficient route is identified, appointments can be selected on and dragged to adjust the sequence accordingly.

b. Select “Calculate route” to estimate the total drive time, miles and duration.

4. Scrolling down will display a list of directions for each stop, including estimated drive time and distance. (See Figure 16.)

Figure 16. Daily planner showing driving instructions.



5. Click “Save” to confirm and apply your changes.

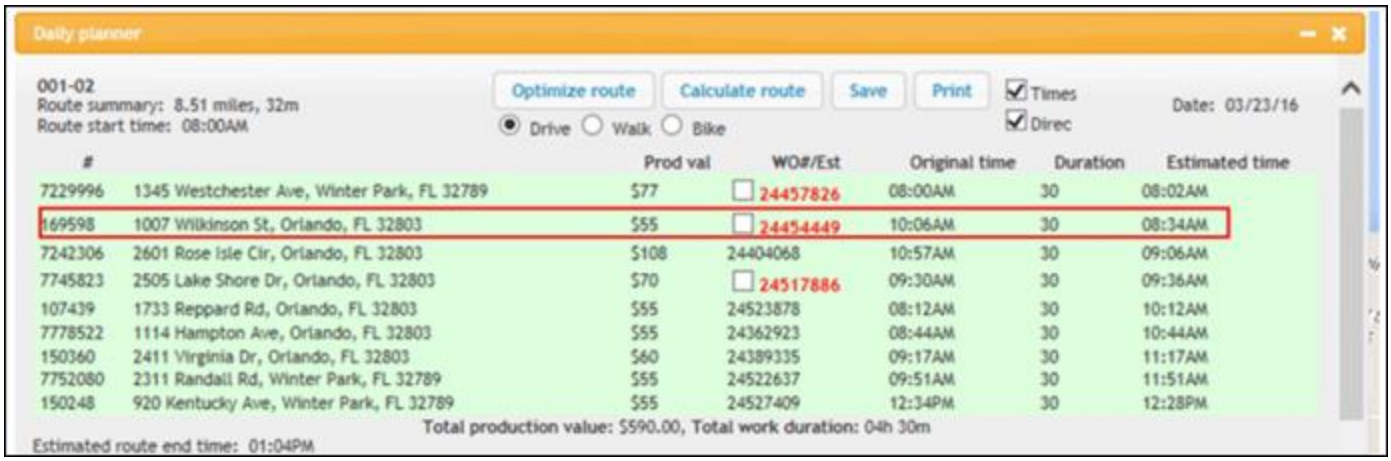
6. Print the report for each team member. The “Daily planner” will display an optimized list of stops and directions for the day. The appointments will appear in stop order on the handheld devices once they are synchronized.

Optimizing with Confirmed Appointments

To optimize when the route has confirmed appointments, follow the steps outlined below:

1. Confirmed stops will display as red, bold numbers on the daily planner route optimizer, with a checkbox preceding the account number. (See Figure 20.)

Figure 27. Daily planner with confirmed appointments.



2. Selecting “Optimize route” without checking the box will cause the software to disregard the confirmed appointment time. For example, a confirmed time of 10:06 AM will still be scheduled, but the optimizer will suggest 8:34 AM as the optimal time for the appointment (Refer back to Figure 20.)

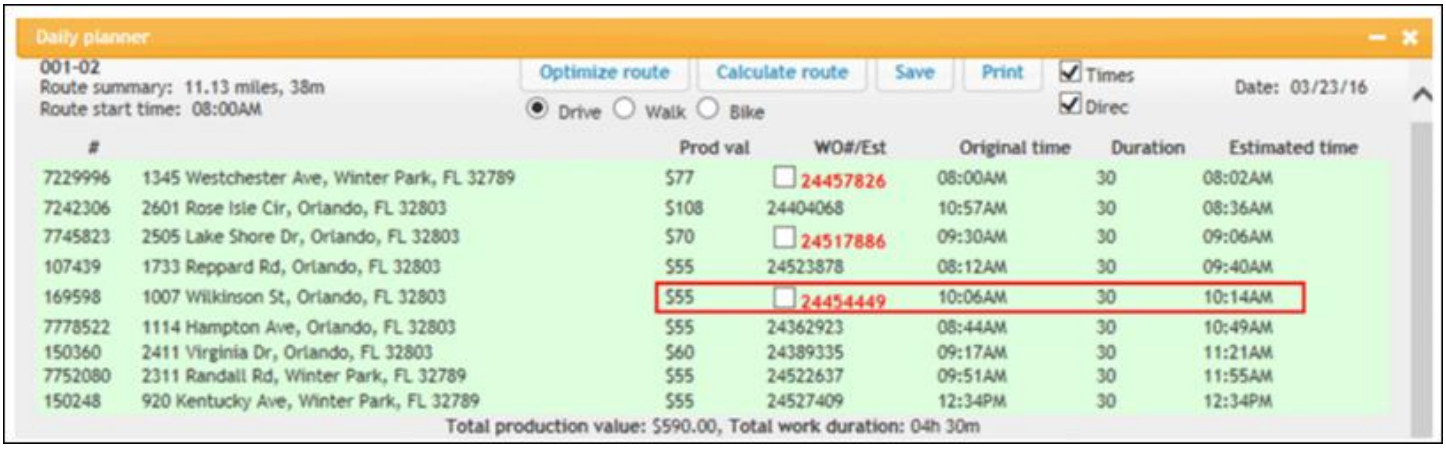
3. To keep the new time, check the box next to the confirmed appointment and click “Save”. This action will unconfirm the appointment and update its time to the optimized schedule.

4. If you need to move the appointment closer to the original confirmed time, select and drag the appointment then click “Calculateroute.” The system will recalculate and display the updated stop times.

5. Repeat steps 2-4 until all appointments fall within the desired time range. If an appointment is optimized at the exact scheduled time, it will appear in green.

6. Click “Save” to confirm and apply the changes.

Figure 21. Daily planner with confirmed appointments.



Assigning Work

Work is to be assigned daily during check-in. Around 3:00 PM, after the previous day's work has been posted, the service manager will log into Service Pro and open Visual Route. To start the routing process, please See steps 1 through 12 under Route Optimization, which can be found earlier in this procedure, and then proceed with the instructions below.

1. Accounts scheduled for the same day or multiple accounts geocoded for the same address will be displayed as a waypoint with a black and red outline. To correct this, open the individual service waypoint and select "fix address" to the right of the zip code in the address line.
2. Any accounts not previously serviced should be rescheduled for the next day, if logistically feasible. If not, assign the account to another day that week. No account should be scheduled more than five days beyond the originally planned service date. This may require catching up on some accounts on Saturday. Once completed, ensure no accounts are scheduled before today's date.
3. After evaluating and adjusting the next day's work, optimize that day's routes within the daily planner feature for all assigned routes for each team member.
4. Once the routes have been evaluated, adjusted, and optimized, click "Save" to confirm and apply your changes.
5. Generate and print the report for each team member. The "Daily planner" will display an optimized list of stops and directions for the day. The appointments will appear in stop order on the handheld devices once they are synchronized.
6. Print the Coversheets and Daily Assigned Worksheets for the following day's work. The optimization process will determine the most efficient sequence of stops for performing services. This will create a complete work packet ready for assignment during today's check-in.
7. Use the optimized route information during the afternoon check-in to compare with the order of completed work. Identify any discrepancies and address them with each team member as necessary to maintain optimal routing efficiency.

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