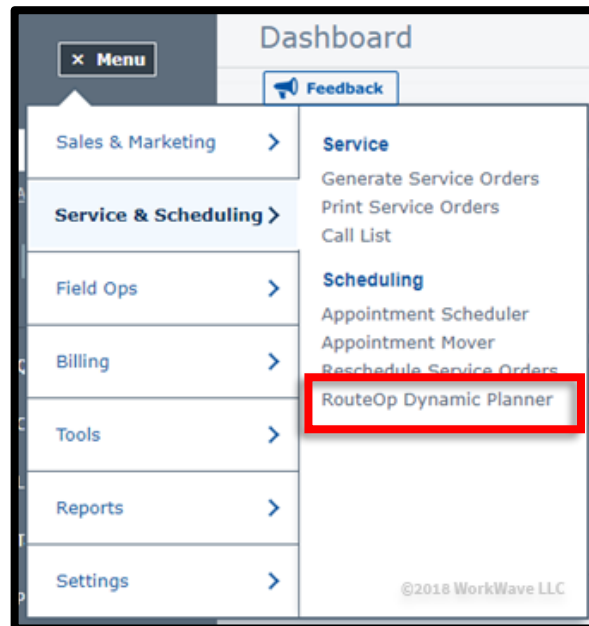


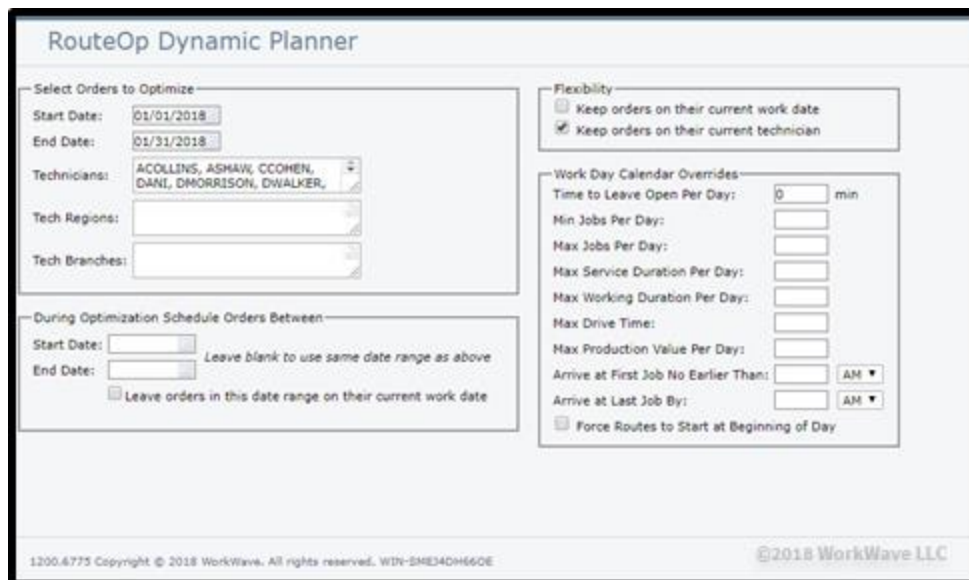
# Dynamic Planner

To use the Dynamic Planner, complete the following steps:

1. On the desktop, go to *Menu > Service & Scheduling > RouteOp Dynamic Planner*.



2. You will have to customize the following options:



- a. **Select Orders to Optimize:** This section will pull in service orders with a Work Date currently in the range for which you are searching. Enter the Start Date, End Date, and Technicians for the month you are optimizing. Tech Regions and Tech Branches are **not required**.
- b. **Flexibility:** Select if you want to keep orders on their current work date/technician or allow them to move based on the eligibility constraints or primary tech/exclude tech rules on the service orders.

Uncheck *Keep orders on their current work date* to allow the orders to move. Keep it checked to only optimize the time and not move the day.

Uncheck *Keep orders on their current technician* to allow the orders to move from the tech to whom they are currently assigned. Keep this option checked if you want the tech's orders to remain on the same tech when optimizing. In the example below, RouteOp is set to allow the work date to be optimized but keep the same tech.

- c. **During Optimization Schedule Orders Between:** Leave blank to optimize to the same date range you are selecting orders from which to optimize. If you need to optimize to different date ranges, fill them in here.

*Leave orders in this date range on their current work date* should be checked if you are moving orders from one date range into a different one and want to ensure that the dates on the orders already in that new date range stay to the day they are currently scheduled on.

- d. **Work Day Calendar Overrides** are used if you want to run this one optimization differently than what you currently have for your Work Day Calendar(s) setup. The table below for explanations of each option.

If you do not need to utilize this section, skip to step 3.

Option	Definition
Time to Leave Open Per Day	<ul style="list-style-type: none"> <li>• The amount of time you want to keep open each day when running the Dynamic Planner so that it leaves availability for new jobs to be scheduled via Best Fit</li> <li>• Not necessary if different techs handle initials, call-backs, reschedules, etc.</li> </ul>



	<ul style="list-style-type: none"> <li>If this number may vary by tech or season, can be left blank here and populated in the Dynamic Planner screen itself</li> </ul>
Min Jobs Per Day	<ul style="list-style-type: none"> <li>Fill in if you want RouteOp to make an attempt to avoid having days with 0 Stops/Jobs</li> </ul>
Max Jobs Per Day	<ul style="list-style-type: none"> <li>Fill in if, as a company, you do not want more than a set number of jobs scheduled in a given day OR</li> <li>If you want to balance your jobs out throughout the month more evenly rather than having each day maximized and other days lighter or possible empty</li> </ul>
Max Service Duration Per Day	<ul style="list-style-type: none"> <li>Total amount of service duration for the entire day</li> </ul>
Max Working Duration Per Day	<ul style="list-style-type: none"> <li>Service Duration Time + Drive Time + Plus Lunch Time (if filled in)</li> </ul>
Max Drive Time	<ul style="list-style-type: none"> <li>Can be used if there is a tech in a large territory where you know you want to keep their drive time to a set amount</li> </ul>
Max Production Value	<ul style="list-style-type: none"> <li>Fill in an amount only if you have a specific production value number around which you plan OR</li> <li>Can be another way you can split your jobs across the month more balanced</li> </ul>
Arrive at First Job No Earlier Than	<ul style="list-style-type: none"> <li>The earliest a job can be scheduled</li> <li>Routing from the tech's starting point to calculate drive time to get there</li> </ul>
Arrive at Last Job By	<ul style="list-style-type: none"> <li>The latest a job can be scheduled</li> <li>Routing drive time to the end point (if applicable)</li> </ul>
Force Routes to Start at Beginning of Day	<ul style="list-style-type: none"> <li><b>Checked:</b> will attempt to start the beginning of the day even if there are constraints on a later order that would cause a gap in the schedule</li> </ul>



- **Unchecked:** will follow the most optimal rules which may result in the day starting later to accommodate an afternoon time window or lunch if a light day

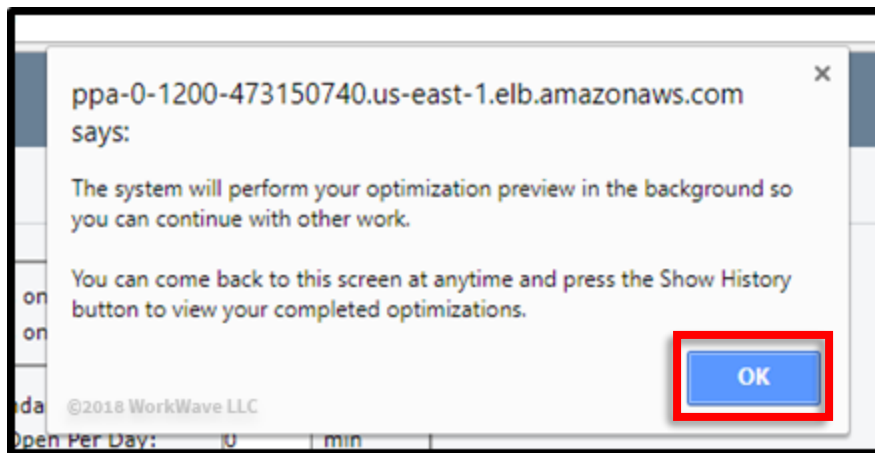
3. After completing the criteria, click the *Preview* button.

The screenshot shows the 'RouteOp Dynamic Planner' interface. At the top right, there are three buttons: 'Show History', 'Preview', and 'Clear'. The 'Preview' button is highlighted with a red box. The interface is divided into several sections:
 

- Select Orders to Optimize:** Includes fields for Start Date (01/01/2018), End Date (01/31/2018), Technicians (ACOLLINS, ASHAW, COHEN, DANI, DMORRISON, DWALKER), Tech Regions, and Tech Branches.
- Flexibility:** Includes checkboxes for 'Keep orders on their current work date' (unchecked) and 'Keep orders on their current technician' (checked).
- Work Day Calendar Overrides:** Includes fields for Time to Leave Open Per Day (0 min), Min Jobs Per Day, Max Jobs Per Day, Max Service Duration Per Day, Max Working Duration Per Day, Max Drive Time, Max Production Value Per Day, Arrive at First Job No Earlier Than, and Arrive at Last Job By.
- During Optimization Schedule Orders Between:** Includes fields for Start Date and End Date, with a note 'Leave blank to use same date range as above' and a checkbox 'Leave orders in this date range on their current work date'.

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This will start the optimization in the background after clicking *OK* to the prompt.



4. The History screen will show the optimization running as well as the last 9 optimizations for historical purposes. You will only be working with the most recent optimization at the top. Click *Refresh* to refresh the status on this screen.

RouteOp Dynamic Planner ©2018 WorkWave LLC

Recent Optimizations:

Date Range	Tech(s)	Start Time	Status
01/01/2018 - 01/31/2018	ACOLLINS, ASHAW, COHEN, DANI, DMORRISON, DWALKER, GONEIL, JDAVIS, KKELLY, KMCDONALD, LHOWARD, MMCCARTHY, MTHOMAS, PPIERSIAK, SMACDONALD	01/21/2018 10:43 AM	In Progress with Warnings <a href="#">Refresh</a>
01/17/2018 - 01/17/2018	KKELLY	01/17/2018 02:47 PM	Completed <a href="#">View</a>
01/17/2018 - 01/17/2018	JDAVIS, KKELLY	01/17/2018 02:46 PM	Error <a href="#">View</a>
01/17/2018 - 01/17/2018	JDAVIS, KKELLY	01/17/2018 02:44 PM	Completed with Warnings <a href="#">View</a>
01/17/2018 - 01/17/2018	KKELLY	01/17/2018 02:43 PM	Error <a href="#">View</a>
01/17/2018 - 01/17/2018	KKELLY	01/17/2018 02:41 PM	Error <a href="#">View</a>
01/17/2018 - 01/17/2018	KKELLY	01/17/2018 02:41 PM	Error <a href="#">View</a>
01/10/2018 - 01/17/2018	KKELLY	01/17/2018 11:50 AM	Completed <a href="#">View</a>
01/10/2018 - 01/17/2018	KKELLY	01/17/2018 11:49 AM	Completed <a href="#">View</a>
12/25/2017 - 12/29/2017	KKELLY	01/12/2018 11:49 AM	Completed <a href="#">View</a>

When clicking *Refresh*, if the optimization is complete, you can click *View* to proceed to the optimization review screen.

RouteOp Dynamic Planner ©2018 WorkWave LLC

Recent Optimizations:

Date Range	Tech(s)	Start Time	Status
01/01/2018 - 01/31/2018	ACOLLINS, ASHAW, COHEN, DANI, DMORRISON, DWALKER, GONEIL, JDAVIS, KKELLY, KMCDONALD, LHOWARD, MMCCARTHY, MTHOMAS, PPIERSIAK, SMACDONALD	01/21/2018 10:43 AM	Completed with Warnings <a href="#">View</a>
01/17/2018 - 01/17/2018	KKELLY	01/17/2018 02:47 PM	Completed <a href="#">View</a>

- On the left side of the screen, you will see the Original section, which is what your orders looked like previously. On the right side of the screen, you will see the Optimized section.

Before committing the optimization, make sure there are no errors or unreachable orders. In this example, there is 1 unreachable that needs to be addressed before you can commit. To review that day, click the *blue link* of the Work Date on the left side of the screen.



### RouteOp Dynamic Planner

Select Orders to Optimize

Start Date:  End Date:   
 Technicians:   
 Tech Regions:   
 Tech Branches:

Flexibility

Keep orders on their current work date  
 Keep orders on their current technician

Work Day Calendar Overrides

Time to Leave Open Per Day:  min  
 Min Jobs Per Day:   
 Max Jobs Per Day:   
 Max Service Duration Per Day:   
 Max Working Duration Per Day:   
 Max Drive Time:   
 Max Production Value Per Day:   
 Arrive at First Job No Earlier Than:  AM  
 Arrive at Last Job By:  AM  
 Force Routes to Start at Beginning of Day

During Optimization Schedule Orders Between

Start Date:  End Date:  Leave blank to use same date range as above  
 Leave orders in this date range on their current work date

KKELLY [Click to see current schedule](#)

Original				Optimized				
Date	Stops	Unscheduled	Service Dur	Stops	Unreachable	Service Dur	Drive Time	Prod. Value
<a href="#">01/11/2018</a>	3	0	06:30	2	1	06:30	00:01	100.00
<a href="#">01/16/2018</a>	1	0	01:30	0	0	00:00	00:00	0.00
<a href="#">01/17/2018</a>	0	1	00:00	0	0	00:00	00:00	0.00
Total:	4	1	08:00	2	1	06:30	00:01	100.00
Grand Total:	4	1	08:00	2	1	06:30	00:01	100.00

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6. After you click the date to view the day with the unreachable, you will see all the orders on that day with associated details.

KKELLY [Click to see current schedule](#)

Original				Optimized				
Date	Stops	Unscheduled	Service Dur	Stops	Unreachable	Service Dur	Drive Time	Prod. Value
<a href="#">01/11/2018</a>	3	0	06:30	2	1	06:30	00:01	100.00

Order	Name & Address	Service	Prod. Value	Eligible Dates		Eligible Times		Optimized		
				Start	End	Start	End	Arrive	Depart	Drive to Next
<a href="#">1313130</a>	Candy Crush 457 Brick Blvd Brick, NJ 08723-6055	BIRD EX	100.00	01/04/2018	01/18/2018			12:28PM	01:58PM	00:01
<a href="#">1313121</a>	Polka Dots 140 Brick Blvd Brick, NJ 08723-7125	CARP	0.00	Locked	Locked			02:00PM	07:00PM	00:00

The following Orders are Unreachable:

<a href="#">1313120</a>	Polka Dots 140 Brick Blvd Brick, NJ 08723-7125	NAC	0.00	01/08/2018	01/14/2018	This order could not be routed				
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You can then click into the order number on the left side to take a closer look. Unreachables can be caused by invalid eligibility dates, conflicting time windows, Work Day Calendar conflicts, and more.



- Once you have reviewed all unreachables and edited/corrected any orders, time blocks, or work day calendars, click *Refresh* to re-run the optimization. Repeat this process until you are ready to commit the results.

NOTE: If you commit an optimization that has unreachable orders, Dynamic Planner will remove the time from the unreachable order and leave the rest of day as-is. If the message mentions locked orders, then all non-locked orders on that day will become unreachable.

**RouteOp Dynamic Planner** ©2018 WorkWave LLC

Buttons: Show History, Refresh, Commit, New Optimization

**Select Orders to Optimize**

Start Date: 01/01/2018  
End Date: 01/31/2018  
Technicians: DANI  
Tech Regions:  
Tech Branches:

**Flexibility**

Keep orders on their current work date  
 Keep orders on their current technician

**Work Day Calendar Overrides**

Time to Leave Open Per Day: 0 min  
Min Jobs Per Day:  
Max Jobs Per Day:  
Max Service Duration Per Day:  
Max Working Duration Per Day:  
Max Drive Time:  
Max Production Value Per Day:  
Arrive at First Job No Earlier Than: AM  
Arrive at Last Job By: AM  
 Force Routes to Start at Beginning of Day

**During Optimization Schedule Orders Between**

Start Date:  
End Date:  
 Leave orders in this date range on their current work date

**DANI** [Click to see current schedule](#)

Date	Original			Optimized				
	Stops	Unscheduled	Service Dur	Stops	Unreachable	Service Dur	Drive Time	Prod. Value
01/01/2018	1	0	00:45	0	0	00:00	00:00	0.00
01/05/2018	2	0	01:30	0	0	00:00	00:00	0.00
01/12/2018	0	0	00:00	1	0	00:45	00:00	106.00
01/19/2018	0	0	00:00	1	0	00:45	00:00	70.35
01/26/2018	0	0	00:00	1	0	00:45	00:00	0.00
<b>Total:</b>	<b>3</b>	<b>0</b>	<b>02:15</b>	<b>3</b>	<b>0</b>	<b>02:15</b>	<b>00:00</b>	<b>176.35</b>
<b>Grand Total:</b>	<b>3</b>	<b>0</b>	<b>02:15</b>	<b>3</b>	<b>0</b>	<b>02:15</b>	<b>00:00</b>	<b>176.35</b>

- Once committed, you are all set!

REMEMBER: For additional setup, training, and usage resources for RouteOp and other topics for FREE, including live webinars and a robust video library, please visit [PestPac University](#).

