

What is RouteOp?

PestPac RouteOp uses a proprietary algorithm to help schedule service orders in minutes (instead of hours). You can optimize a month after you've generated as well as instantly schedule or reschedule individual appointments, while still honoring customer requests, constraints, and technician schedules.

You can view an overview of the module, [What Is RouteOp?](#) For additional resources, please visit [PestPac University](#).

Preparing for RouteOp

Service Durations

- Correct and accurate durations on your service orders and setups are required.
- Do NOT include drive time in your durations because RouteOp will calculate drive time for you.
- Default durations can be set in the Services Lookup Table. You can also set required fields in Company Setup.
- To update your existing setup and order durations, go to *Menu > Tools > Data Update Tools > Service Setup & Order Duration Utility*.

Geocodes (Latitude and Longitude)

- Optimization looks at the geocodes, not the physical addresses. They exist on the Location, the Branch, and the Tech Employee address if your Work Day Calendar is set to start or end at the branch or tech home.
- Make sure new locations use proper address formatting and users verify that the geocodes populated.
- If you have existing accounts with incorrect or missing geocodes, you can use [this utility](#) to correct them.

Work Day Calendar(s) (WDC) Lookup Table

- These settings control what availability you want RouteOp to use for your technicians for an average day.
- Note that special rules or restrictions outside of this calendar will be handled separately, so just focus on what the norm is (e.g., techs have Wednesday 7AM meetings, alternating Saturday schedules, Mrs. Smith receives service outside normal business hours).
- Less is more! The fields that are required are:



- Start From
- End At
- Complete Last
- Arrive at End By
- Max Service Duration
- Time Ranges (Make sure these ranges do not overlap and that they cover your entire Work Day Calendar day.)
- You can have 1 WDC assigned to all techs or you can have a different one based on what hours of availability your techs have. Once created, assign it to each RouteOp tech in the Employee lookup table.

Know Your Customer's Special Constraint Needs

- For any customers with set days or times that need to be respected by RouteOp, have that information available for data entry into the RouteOp Constraint fields in each of their service setups.
- Depending on where you are currently storing that information, you can use a Service Setup list report or get that info from your technicians.
- To start using Dynamic Planner (or even Best Fit in some scenarios), you will need to have any special eligibility days or times populated first.
- When you have already started scheduling for the dates you currently want to optimize, you may need to use the Update Constraint Utility under *Reports > All Reports > Service Orders > Output Format: Update Constraints* to ensure that the work already scheduled stays on a specific date and/or time window range.
- RouteOp will only respect the constraint fields when optimizing, not the current work date or work time.

Know the Difference Between Days to Float & Keep Within

- You will set up your overall RouteOp rules either in your Schedule Frequency Lookup Table (most common) or your Services Lookup Table (less common).
 - NOTE: If Schedule Frequency is not set for each Schedule Type in the Schedule Type lookup table, RouteOp will look to see if there is a rule in the Services Lookup Table. If both Schedule Frequency and Service do not have rules, then no eligibility dates will be populated.
- You then decide between using Days to Float or Keep Within.
 - **Days to Float:** looks at the schedule type assigned on the setup and the work date that it generated to and uses the rules of the frequency assigned to that schedule type
 - Be sure that you do not have all your customers on the same schedule (e.g., Monthly 1st Sunday); otherwise, RouteOp will try to optimize everyone around the same time of the month.



- **Keep Within:** disregards the schedule type and instead looks at what day of the month the last service was completed
 - If there is an open order tied to the setup when you generate for the following month, Keep Within will look at the current work date on the open order to calculate the eligibility dates (instead of last service date).
 - NOTE: If using frequencies that are more frequent than monthly, Keep Within is **not recommended**.
 - Example: If an order was generated to January 25th but was last completed on the 9th and there are no open orders currently tied to that setup, Days to Float would optimize it around the 25th, but Keep Within would optimize it around the 9th.

Schedule Frequencies

- Ensure your Schedule Frequencies lookup table is up to date and that you have a schedule frequency assigned to every Schedule Type in your Schedule Types lookup table.

Time Blocks

- Use these only for times techs are not available to work that are normally part of the tech's Work Day Calendar (e.g., time off or meetings).
- Set up ahead of time prior to optimizing.

Prep Your Staff

- After RouteOp is turned on, new fields will appear that users should not use until implementation and training are complete.
- Make sure field techs are aware that RouteOp is going to put set times or time windows, if this is something they were not currently used to seeing.
- Have your techs let you know about any customer constraints that you may need to be aware of for setup purposes.

Dynamic Planner, Best Fit, and Single Day

For details on each scheduling option, please click the hyperlinked headings below.

[Dynamic Planner](#)

- Initially used after you have generated service orders for the upcoming month



- Optimizes all the work available while looking at order constraints, eligibility dates, time windows, Work Day Calendars, time blocks, and the geocode to optimize and calculate drive time
- If *Work Day Calendar Overrides* is populated, RouteOp will override your technicians Work Day Calendar lookup rules for that optimization.
- Used each month before you start using Best Fit to schedule new and reschedule existing service orders
- Used throughout the month to re-optimize, change techs, or account for tech churn or scheduling emergency needs
- Note: Proper utilization of order constraints is important to ensure jobs are not re-optimized outside a date range or time window in which they need to be.
- Orders are not optimized until you click the *Commit* button; once you commit, you CANNOT undo.

Best Fit

- Reschedule existing service orders or schedule new one-time, call-back, initial, or other service orders based on the service orders that are already scheduled
- If you want to use Best Fit in a month for which you have work manually scheduled, you may need to run the Update Constraint Utility under Menu > Reports > Service Orders prior to using Best Fit.
- Note: Proper utilization of order constraints is important to ensure jobs do not get re-optimized outside of a time window for the day they are currently on. Best Fit will re-optimize the day you are moving an order from as well as the day to which you are moving an order.
- The *New Order* button on the Appointment Scheduler is intended to Best Fit a new customer calling in that has not been added as a customer yet. If you require a contract or an account to be set up first, then you would not use this option.

Single Day

- Used from the Appointment Scheduler, Single Day allows you to see the optimized day for a single tech/day at a time.
- This option can be used for tightening up an already optimized day or for instances where you need to manually place an order but want to ensure the rest of the orders are still optimized. It does NOT move work to a different work day but puts in a more optimal driving sequence.
- Note: Proper utilization of order constraints is important to ensure jobs do not get re-optimized outside of a time window for the day they are currently on.

