Route Optimization and Fleet Routing

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Overview

> Route Optimization and Fleet Routing are both add-on services. If you have not purchased them as part of your service**minder** subscription, then you will not be able to use these features. You can purchase them by going to **Marketplace** or speaking with your Brand Admin team for approval.

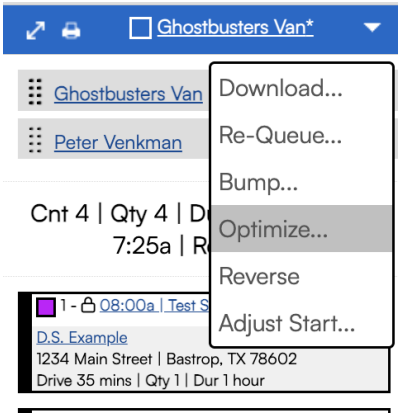
Efficient routing ensures timely service, minimizes drive time, and optimizes resource allocation. This guide covers the key steps for building, optimizing, and committing routes, while also addressing route constraints, confirmation settings, and printing work orders. Whether you're managing a single agent's schedule or coordinating a fleet, these best practices will help streamline operations and improve service efficiency.

This article will review:

- Route Optimization - rearrange appointments for a single agent to optimize drive time
- Fleet Routing - optimize appointments for the day for your entire team/fleet at the same time
- FAQs

Route Optimization

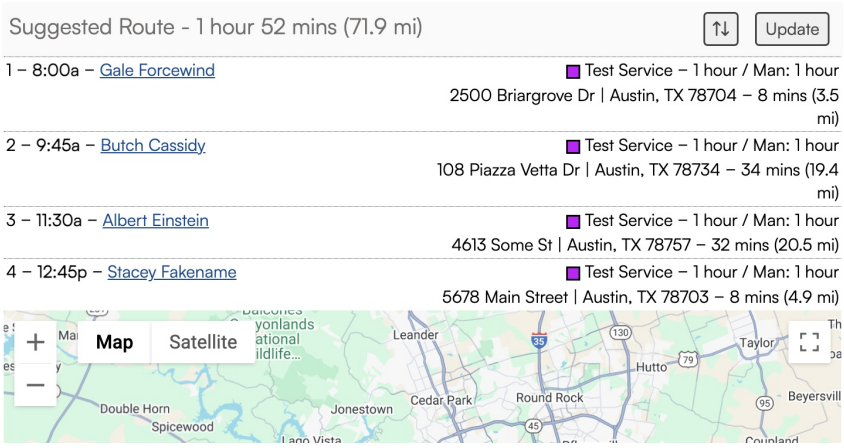
To optimize a service agent or team's route, click the down arrow to the right of their name on the Daily calendar, then click Optimize.



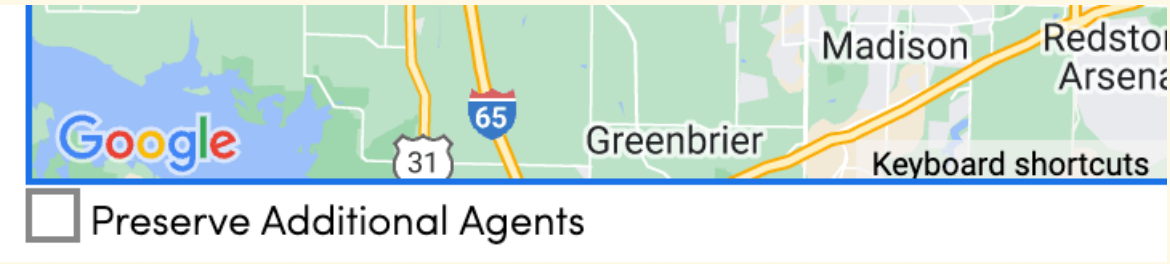
When optimizing a route, the system will default the route's start time to the agent's availability and their starting location. If an appointment on the route is already in progress, the system will update the route's start time to be the actual (or projected) end time of that appointment. That time/location is then used to set the start time of the next and all subsequent unstarted appointments.

On the screen are two columns, the first is the route as is. The **Suggested Route** will be displayed as the second column so you can review it before updating the route. This will show any started appointments at the top, then the

appointments not started with their suggested times in the suggested order.



If you have multiple service agents on the appointment(s), make sure to click the button at the bottom of the page (below the maps) that says **Preserve Additional Agents**.



Once you have reviewed, click **Update** to accept the changes and apply to the calendar.

Unroutable Appointments

Unroutable appointments in ServiceMinder refer to scheduled visits that the system cannot fit into any existing route based on the current set of scheduling constraints.

Key Reasons an Appointment Is Unroutable

1. **Agent Availability and Skills**: If there are no available service agents with the necessary skills on the original day, ServiceMinder cannot assign the appointment. This might be due to agents not being scheduled to work that day, or not meeting the skill requirements for the appointment.

2. **Route Schedule and GeoZone Configurations**: Routes are determined by the intersection of the route schedule and geo zone settings. If only certain routes are available on specific days for a particular service or geo zone, appointments will default to those available days. For example, if Wednesday is the only available route, the system defaults appointments to that day.

3. **Other Constraints**: The system checks for various appointment constraints like time windows, required skills, specific agent assignments, or active time blocks. Too many or conflicting constraints can make it impossible for the routing engine to find a valid solution. Even with explicit constraints disabled, mismatches between the geo zone or route schedule and capacity/time conflicts can still flag appointments as unroutable.

4. **Insufficient Capacity**: Sometimes, the number of available agents or routes on a given day is not enough to

accommodate all appointments. Moving the appointment to another day with greater availability or fewer competing stops can resolve the issue.

5. **Territory and Location Issues**: If an appointment is outside the defined geo zones or territories assigned to agents, it may become unroutable. On another day, a different agent or route may become available that matches the territory constraints, making the appointment routable.

Fleet Routing

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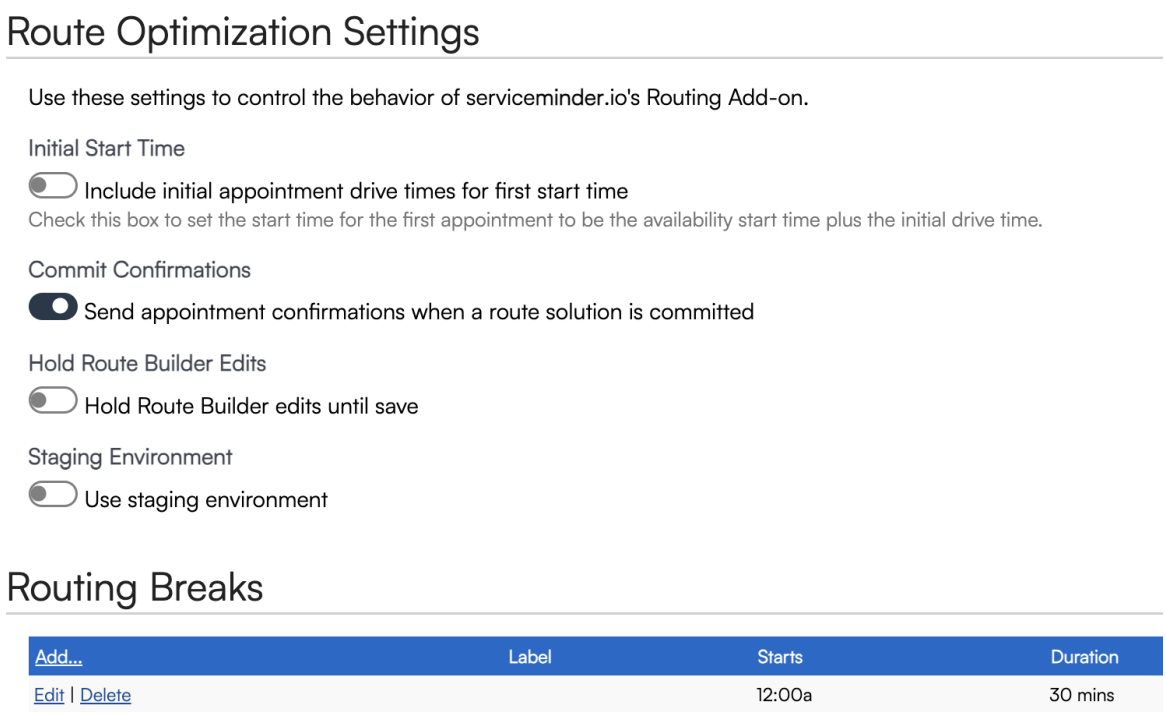
General Settings

To review your general Fleet Routing settings, go to **Control Panel > Tools > Route Settings**. Here, you can find information about your vehicle count in the billing plan and access basic configuration options.

Routing
Manage route settings and monitor usage.



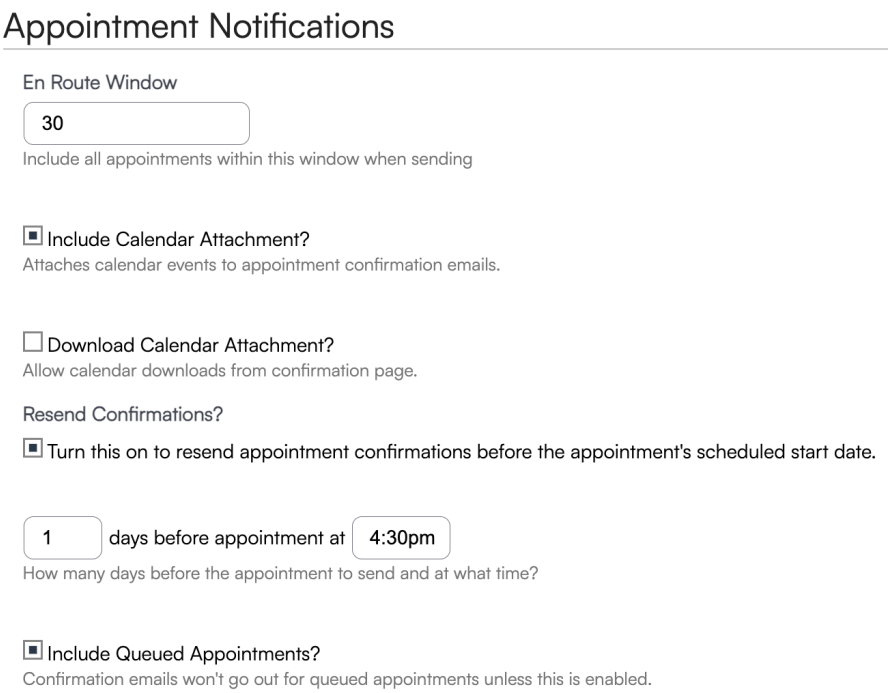
Route Confirmation Settings

Depending how you set up your confirmation settings emails may be sent when you commit routes for the day. In **Control Panel > Route Settings**, if you have **Commit Confirmations** turned off, no emails are sent to customers.

If email reminders are not being sent upon committing a route you have two other options.

1. You can click "**resend confirmations**" after the route is committed to manually send appointment reminders to customers.

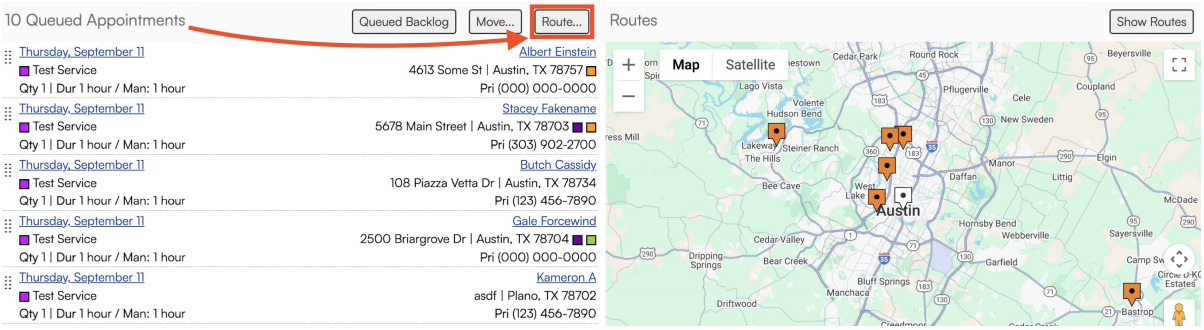
2. You would either have to edit your **Notification Settings** in the **Control Panel** so that emails go out to all queued appointments at a certain time each day automatically. You would need to fill out details for Appointment Notifications. Example image below:



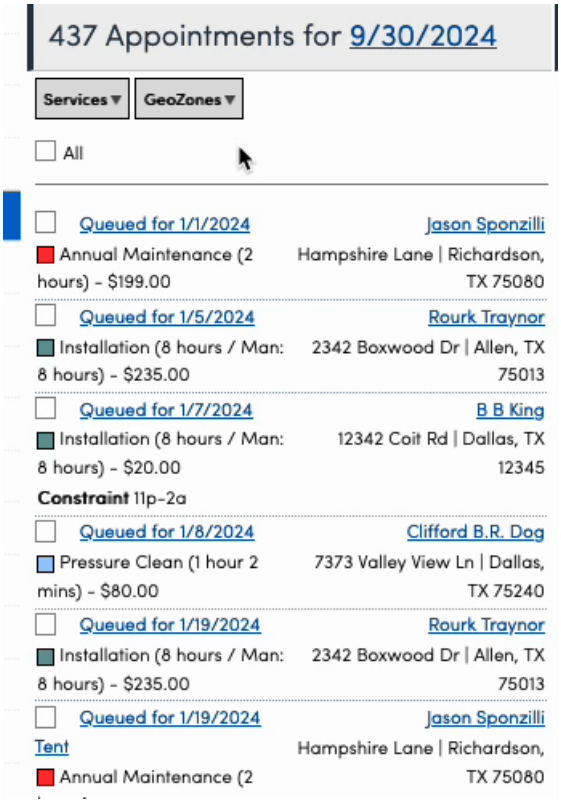
Building Routes

1. In **Day View**, find the **Queued Appointments** list below active agents and teams. If empty, no appointments are awaiting assignment.

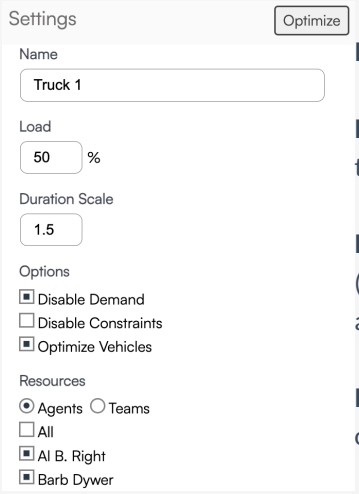
2. Click **Route** to open the **Route Builder.**



3. Select appointments individually or click **All** to select all available appointments. Filter appointments by **Service** or **GeoZones**, if needed.



4. Adjust the following settings:



Route Name: Optional but useful for tracking.

Load: Determines job distribution across agents/teams. (e.g., 100% means the first agent gets all jobs before assigning to another.)

Duration Scale: Adjusts appointment time buffers to account for delays (e.g., traffic, weather). A value of 1.5 would increase the duration of each appointment by 50%.

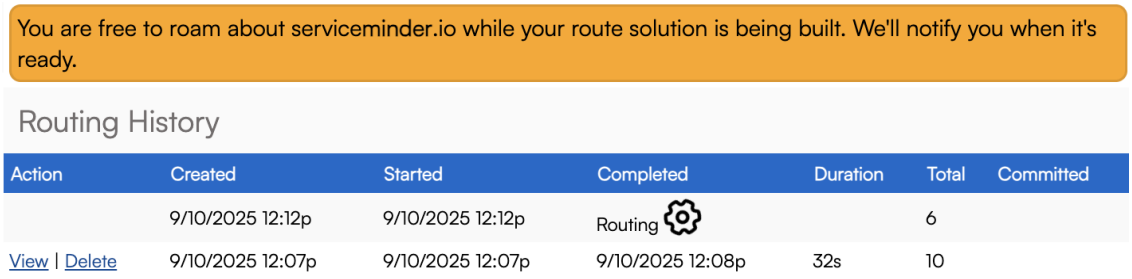
Demand: Controls inventory requirements (e.g., truck needs bug repellant or fertilizer).

Disable Constraints: Allows greater flexibility for scheduling.

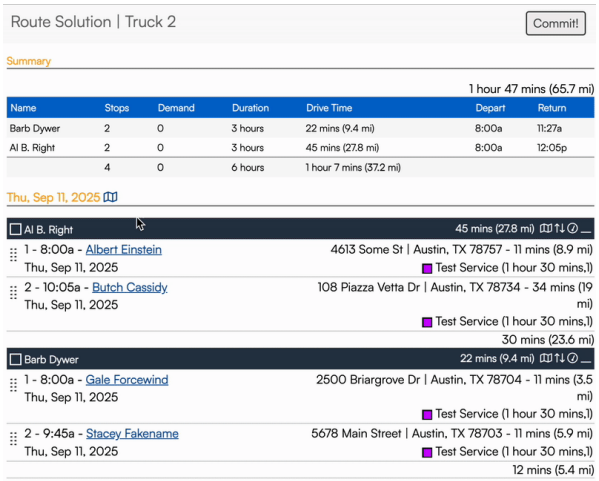
Optimize Vehicles: Create a route with the fewest vehicles possible.

Resources: Assigns appointments to a single agent, multiple agents, or a team.

5. Click **Optimize** to generate an efficient route solution. You will see the message that you are free to roam about serviceminder while your route solution is being built.



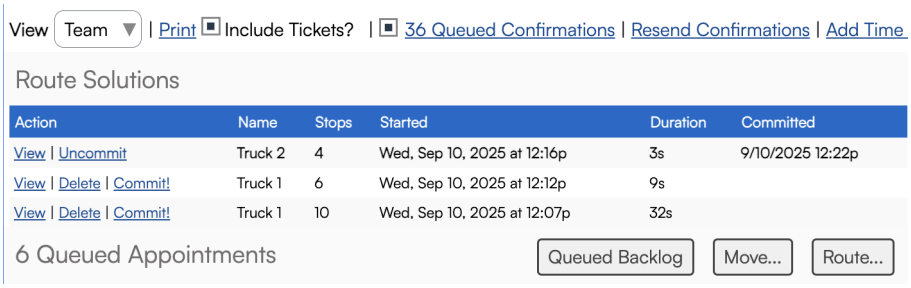
6. Review the optimized route, make manual adjustments as needed (drag and drop stops), then click **Commit** to finalize the schedule. If any appointments in the route conflict with a constraint, it will be highlighted in orange.



7.

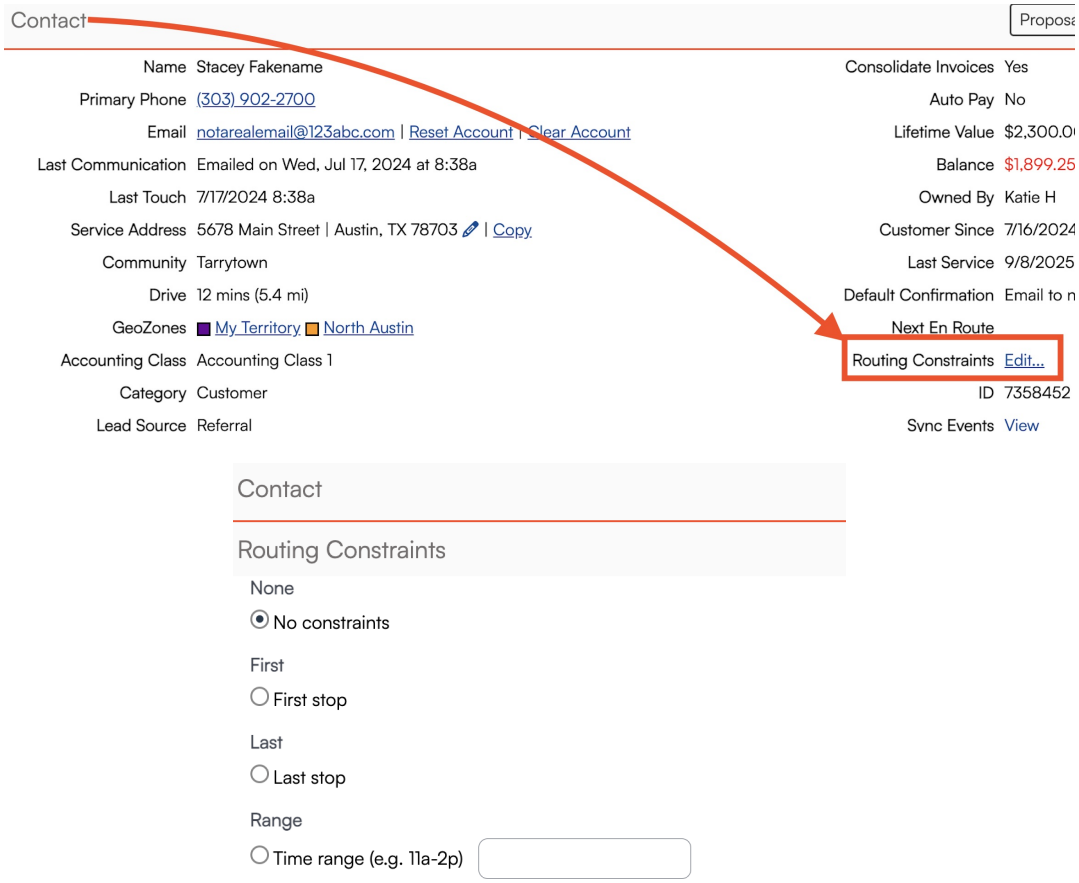
8. Once committed, the route appears on the calendar, and customers receive automatic confirmations (if enabled).

If you back out without committing, do not fear! You will see the suggested route available to view or accept/decline directly on the calendar (be sure you are still on Day View). Based on the example below, you see that someone attempted to route the same appointments many times. It will tell you the name of the route and the **Started** column shows the date that someone made that route.



Route Constraints and Calculations

Routing Constraints limit assignments based on customer preferences or geographic restrictions. Go to the Contact Details Page, expand the information, and click **Edit** next to **Routing Constraints** to configure limitations.



We recommend being sparse with adding constraints. The more limitations on a route, the less efficient it will be when the routing engine runs.

The system will first segment all of the appointments by required **skills** so there is a group that requires no skills and then one group for each required skill. We will then look at the available service agents for the solution and match them to the segments based on their available skills. If you require a skill on a service and have no services agents that have those skills, those appointments will be **unrouteable**. You will see a red banner appear.

The system will then segment by **GeoZones**. Service Agents will be grouped by their GeoZone restrictions and then assigned the appointments in that area. If you have a service agent that has a GeoZone constraint but there are no appointments in those GeoZones, that service agent will not receive any appointments in the solution. Learn more about service agent GeoZone constraints HERE.

Print Work Orders

- To print work orders for all trucks, click **Print** above **Route Solutions**.
- To print for individual trucks, click the **Print Icon** next to each agent/team.

Multiple Starting Locations/Depots

For fleets with multiple warehouses or independent vendors, follow this workflow:

1. In **Day View**, assess **Queued Appointments** and their locations.
2. Use **Route Builder** to:
    a. Select the first geographic area.
    b. Click **Lasso** to highlight stops in that area or filter by **GeoZone**.
    c. Assign the appropriate agents/teams and configure the settings for that route.
    d. Optimize the selection.
    e. Repeat the process for remaining stops.

Each route should be **mutually exclusive** (no stop or team should be assigned twice). Adjust the **Load** setting as needed to balance assignments. Commit routes individually when satisfied.

FAQs

What is Duration vs Drive time?

Duration is the sum of the time on the property form the pricing bands for every service on the route. Drive time is the estimated drive time between appointments. The total route duration is equal to the sum of appointment durations plus the total drive time.

Can you commit multiple routes with the same customers?

NO, you cannot commit multiple routes with the same customers. Once you commit a route, it will appear in the tablets and Contact Details with the time/agents. If the job has not been done, you can uncomplete a route—start again because this day is a mess. Once stops are completed, you may not change them.

What happens when a job is cancelled in the field?

It will appear in the queue. Form there, it can be added back to a scheduled for for the same day, or “bumped to another day and have an email (options) sent to the customer. This is what the MOVE button is for.

Does the route optimize off the daily view calendar (hard scheduled) or does it pull only from the queue for that Route Optimization?

When optimizing for a specific service agent, the Optimize feature works on appointments already assigned to an agent on the calendar; it will not pull in from the queue on its own. Consider Optimize as having to methodologies.

1. You assign and optimize in a single step.
2. You assign appointments to an individual throughout the week and optimize before the agent heads out.

Does routing work differently through serviceminder than through google maps?

We use google for all geocoding. You can also manually adjust the pin locations -- that's the primary reason why when we integrate with a device's navigation app, we're passing coordinates, not necessarily the name of the address. For addresses you have trouble with, definitely look at the location of the pin for that address.*

What is the difference between Fleet Routing/Route Optimization add-ons?

Fleet Routing is best used for cases where you have a large number of appointments and a decent number of technicians. Fleet routing will optimize the stops down to the fewest number of technicians to minimize overall drive time. It's a one-click do-it-all tool. Clients who frequently use Fleet Routing include pest control, irrigation (season startup/shutdown), pool cleaning, etc.

Route Optimization gives you the ability to do the same thing, but at the individual service agent level. Once you've assigned the appointments to the agent, use the Optimize action to sort their stops into an efficient order to minimize drive time.

Route Optimization is a flat rate feature. Fleet Routing varies based on the number of vehicles used in your route solutions. Fleet Routing includes the Route Optimization option as well.

I've been waiting and the wheel is just spinning without anything happening. What should I do?

If you are trying to route appointments and it is taking longer than a few minutes, then try refreshing the page. If the route was able to be created, your work shouldn't be lost. You can view it on the calendar above the queued appointments.

If the route wasn't able to be created at all then there may be something preventing it on the schedule. It could be that there are constraints on the contact and/or agent/team availability that makes it impossible for the system to route. If you are routing a large quantity of appointments, it may take several minutes to generate the route.

How would I fix the agents available so I could optimize and route appointments for them?

If route optimization isn’t working for a particular agent, it’s often because they aren’t active on the calendar. Make sure the agent has their own column in the calendar view so they can be included in scheduling.

If an agent appears unavailable for a given day, check their Service Agent settings. This may be due to limited hours of availability, an active time block, or restrictions based on assigned GeoZones. Click on the agent’s name to review and adjust their settings as needed.

If an agent has no scheduled availability at all, they won’t be available on any day of the week. Review the Service Agents and Subcontractors setup to ensure hours of availability are properly configured.