Route Schedules

02/20/2025 2:08 pm CST

Overview

To set up routing effectively, you'll need to define GeoZones, configure service settings, and build a route schedule. This guide walks you through each step, from creating GeoZones to assigning services and scheduling appointments. Follow these instructions to streamline your route management and ensure efficient scheduling.

This article will review:

- Setting Up Your Routes
- Scheduling with Routes
- FAQs

Setting Up Your Routes

Step 1. GeoZones

To use routing, you'll need to first define a set of GeoZones that will ultimately define where on the map you'll be going on which days of your route schedule. For example, say you have a service that you deliver weekly. Using Maps, you'll create GeoZones for each day of the week.



Step 2. Service Settings

In **Control Panel > Services** make sure you have at least one service that has the **Scheduling Mode** set to either **Route Schedule** or **Subscription**.

	Optional ad hoc template to use
	Scheduling
Scheduling Mode	Subscription
Service Role*	Service
Skills	Carpet wash DryWall

You will also need to configure the **Recommended Interval** and **Total Visits** on the service details page. This will influence how the route is built. Learn more about **Subscription Style Service** settings here.

Step 3. Build the Route Schedule

Back on the Services Grid, click the Route Schedules button in the top right .



Here you can create a brand new route schedule or duplicate an existing schedule.

Route Schedules					
1					
Add	Name	Active	Base Date	End Date	Services
Edit Report Duplicate	2019 Season	Yes	Sat, Apr 13, 2019	Tue, Dec 31, 2019	Barrier Spray, Route Schedule Test, Tree Treatment
Edit Report Duplicate	2021 Season	Yes	Mon, Jan 4, 2021	Fri, Dec 31, 2021	Barrier Spray, Recurring Service with promo pricing, Route Schedule Test
Edit Report Duplicate Delete	2022 Season	No	Tue, Jan 4, 2022	Sat, Dec 31, 2022	Barrier Spray, Recurring Service with promo pricing, Route Schedule Test

When creating a Route Schedule from scratch, complete the following steps:

- 1. Name your Route
- 2. Choose a Base Date (start date) for the season. An End Date is optional.
- 3. Select which **Services** you'd like to include in this Route by checking the boxes. Notice the Intervals next to each service those are dictated by the **Recommended Interval** that you previously set on each service details page.
- 4. Click and drag the **GeoZones** for each service onto the day of the week you want to complete those appointments.
- 5. Click **Add** at the bottom of the page to save the route.

Add a Route	Schedule									
Name*	2025 Season									
Active										
Base Date*	03/01/2025									
End Date										
Services	Include	Name			Intervals	Ge	oZones			
		Barrier Spray	- 2 Weeks		14		My Territory			
		Bug Service (S	ubscription)		21					
		Green Pool Cle	eaning		2		My Territory	tin South Austin		
		Monthly Maint	lenance		30		My Territory	tin South Austin		
		Recurring Service			14 My Territory North Austin South Austin					
		Tree Treatment			30					
		Weekly Mainte	mance				My Territory	tin South Austin		
Cycle Length	210									
Schedule	Sa	turday	Sunday		Monday		Tuesday	Wednesday	Thursday	Friday
	0	0	1	0	2	0	³ South Austin × ⁹	4 North Austin × 2	5 My Territory X	6 South Austin 🗙 9
	7	0	8	0	9 My Territory	3	10 North Austin X	¹¹ North Austin × ²	12 0	¹³ South Austin × ⁹
	14	0	15	0	16	0	17 0	18 North Austin 🗙 2	19 0	20 South Austin 🗙 9

If you accidentally drop it in the wrong spot, click the x, removing it and repeat the process to drag it to the correct spot. Clicking and dragging will only move it for that one specific date, it will not readjust the entire sequence of appointments. You **CAN** drag and drop if you want to adjust a single day (i.e., you know the team will not be working that date).

Cycle length is the minimum number of days that has to pass before the entire calendar route schedule can start over. It will calculate automatically if you have the **Recommended Interval** and **Total Visits** configured for your services, but it can also be manually adjusted, just like the **End Date**.

Scheduling with Routes

When scheduling appointments, as soon as you select a service that is related to a route schedule, you will see a calendar view that lets you adjust the default scheduling of the appointments. We look at the service and the contact's GeoZone(s) to determine which day(s) of the route schedule cycle you'll be in their area.

Subscrip	otion A	ppointm	nents					
Confirm the su	bscription o	appointment	dates. You	ı may a	add new dates l	by clicking or remove	e existing dates b	by clicking the X.
0	ptions	Include ac	ld-ons on (all app	ointments?			
Route Sch	nedule	2025 Lawn	Routes 🔻					
,					0/07/0005			
r	Range	3/1/2025		to	9/27/2025			
Date	Details	;			Dur	Subtotal	Tax No	ites
¢ <u>2025-03-05</u>						\$0.00	\$0.00	
< <u>2025-03-19</u>						\$0.00	\$0.00	
< <u>2025-04-02</u>						\$0.00	\$0.00	
< <u>2025-04-16</u>						\$0.00	\$0.00	
< <u>2025-04-30</u>						\$0.00	\$0.00	
< <u>2025-05-14</u>						\$0.00	\$0.00	
< <u>2025-05-28</u>						\$0.00	\$0.00	
x <u>2025-06-11</u>						\$0.00	\$0.00	
× <u>2025-06-25</u>						\$0.00	\$0.00	
× <u>2025-07-09</u>						\$0.00	\$0.00	
× <u>2025-07-23</u>						\$0.00	\$0.00	
× <u>2025-08-06</u>						\$0.00	\$0.00	
Saturday	Sunday	, I	Monday		Tuesday	Wednesday	Thursday	Friday
Mar 1	2		3	0/1	4	5 Barrier Spray – 2 Weeks 🖋 🗙	6	7
}	9	1	0		11 🗖	12	13	14
5	16	1	7		18	19	20	21

FAQs

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.