

Optimizing an Individual Service Agent's Route with Route Optimization

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Overview

Route Optimization rearranges appointments already assigned to a Service Agent or team and updates their suggested start times to create a more efficient route with less drive time between stops.

It works with one Service Agent or team at a time and does not assign appointments from the queue.

Not sure whether to use Route Optimization or Fleet Routing? See [Understanding Route Optimization and Fleet Routing](#).

This article will review:

- Optimizing an Assigned Route
- How the Route's Starting Point Is Determined
- Reviewing and Adjusting the Suggested Route
- Troubleshooting Route Optimization
- FAQs

Optimizing an Assigned Route

1. Open the calendar in **Day View**.
2. Select the down arrow beside the Service Agent or team whose route you want to optimize.
3. Select **Optimize**.

[Insert screenshot: Optimize option for a Service Agent or team in Calendar Day View]

4. Review the current route against the suggested route. See [\[Reviewing and Adjusting the Suggested Route\]](#) below.
5. If more than one Service Agent is assigned to any of the appointments, select **Preserve Additional Agents** at the bottom of the page to keep them assigned.
6. Select **Update** to accept the suggested route and apply it to the calendar.

How the Route's Starting Point Is Determined

Route Optimization determines the route's starting point based on the Service Agent's existing schedule.

- **No earlier appointment:** The route begins from the Service Agent's configured starting location and availability.
 - **An earlier appointment is already scheduled:** The route begins from the location and ending time of the most recent appointment before the appointments being optimized.
 - **An earlier appointment is in progress:** The route uses that appointment's actual or projected ending time and location. This information is then used to calculate the start times for the remaining unstarted appointments.
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Reviewing and Adjusting the Suggested Route

The Optimize screen displays your current route and the **Suggested Route** side by side, allowing you to compare them before applying any changes.

Appointments that have already started appear at the top of the suggested route. Unstarted appointments appear below them in their suggested order with updated start times.

You can make additional adjustments before applying the route:

- Drag and drop appointments within the suggested route to change their order.
- Run **Optimize** again to generate another suggestion.
- Select **Preserve Additional Agents** if appointments have more than one Service Agent assigned.

When you are satisfied with the route, select **Update** to apply the changes to the calendar.

[Insert screenshot: Current Route and Suggested Route displayed side by side]

Troubleshooting Route Optimization

Optimize Is Unavailable for a Service Agent

Make sure the Service Agent has their own column in Calendar Day View so they can be included in scheduling.

If **Optimize** is still unavailable, review the Service Agent's settings for:

- Limited hours of availability
- An active time block
- GeoZone restrictions
- Missing scheduled availability

A Service Agent without configured availability will not be available for scheduling on any day.

[Insert screenshot: Service Agent availability and GeoZone settings]

Appointments Are Not Appearing When You Optimize

Route Optimization only works with appointments already assigned to the selected Service Agent or team. It does not pull appointments from the queue automatically.

If an appointment you expected to see is missing, confirm that it is assigned to the correct Service Agent or team on the calendar.

An Appointment Is Unroutable

Unroutable appointments are scheduled visits that the system cannot fit into a route based on the current scheduling constraints. The reason an appointment is unroutable is displayed directly on the appointment, helping you identify what needs to be changed.

Common reasons an appointment is unroutable:

- **Service Agent availability and skills:** No available Service Agents have the required skills that day, either because they are not scheduled to work or do not meet the appointment's skill requirements.
- **Route schedule and GeoZone configurations:** Routes are determined by the overlap of route schedules and GeoZone settings. If only certain days have an available route for a service or GeoZone, the appointment may need to be scheduled on one of those days.
- **Other constraints:** Time windows, specific Service Agent assignments, and active time blocks can prevent the system from finding a valid solution. Conflicting constraints may make an appointment unroutable.
- **Insufficient capacity:** There may not be enough available Service Agents or time on the selected day to accommodate all appointments. Moving the appointment to a day with more availability or fewer competing stops may resolve the issue.
- **Territory and location issues:** The appointment may fall outside the GeoZones or territories assigned to the available Service Agents. A different day may have another Service Agent or route available that matches the appointment's location.

After making the necessary change, run **Optimize** again.

FAQs

Does Route Optimization use appointments from the queue?

No. Route Optimization only works with appointments already assigned to the Service Agent or team. To assign and optimize queued appointments across multiple Service Agents or teams, use Fleet Routing. See [Building and Optimizing Routes with Fleet Routing].

Can I optimize multiple Service Agents or teams at once?

No. Route Optimization works with one Service Agent or team at a time. Use Fleet Routing to assign and optimize appointments across multiple Service Agents or teams simultaneously.

Can I manually change the suggested order?

Yes. Drag and drop appointments within the suggested route before selecting **Update**. You can also run **Optimize** again to generate another suggestion.

What happens when multiple Service Agents are assigned to an appointment?

Select **Preserve Additional Agents** below the maps before selecting **Update**. This keeps all assigned Service Agents on the appointment when the optimized route is applied.
