

# Routes



If you take the time to setup your Routes carefully, PestaRoo's Route system will save your company far more money than the cost of PestaRoo. A day spent in this setup will pay long-term dividends. Although there are several ways to use Routes, the approach that follows is the most common and effective.

## Introduction

Routes are natural clusters of your customer's locations. By providing service to many customers in a given route on the same day, you dramatically reduce your driving time and your fuel consumption. Our goal with Routes, is to know in advance where you are going to be, and on what days you going to be servicing clients. Once setup, a given Route will appear in your Schedule Book on a consistent and regular basis. When a customer calls, one click will show you the next time you will be in their area. So Routes allow you to easily schedule where you will be each month. Once your framework of routes is established, it is easy to schedule your occasional jobs around your regular work. This support doc explains the setup and use of Routes in PestaRoo.

## Create Routes

From Home Page >> Value Lists, click on 'Routes' and then the "+" button up in the button bar, to create a new Route. Most PestaRoo companies will need between 10 and 20 routes. Having more than 20 is only typical for companies with 5 or more technicians. A Route is a compact area where you have enough customers to keep a technician busy for most of a day. You will want to name each Route by the name of its community or region. For example, "Austin NE" or "Centerville". Note that Routes describe the areas where your customers are most densely located. You should expect that some of your customers will live outside your specified routes.

## Cluster Monthly Prescheds via Grid

Almost every Pest Control company has a sizable fraction of their customers on a regular schedule. In PestaRoo, these are called PreScheds. To set up the rough framework of Routes, use those PreScheds that are Monthly. In most cases, you will already have your Monthly accounts clustered. The goal is to place each of those clusters on a four week month grid. PestaRoo uses the fact that almost every month has 4 Mondays, 4 Tuesdays, 4 Wednesdays, etc. So, we put each cluster on that grid. Those clusters will be on the same position each successive month. From Home Page >> Reports we have a convenient printout called "Blank Route Grid" that gives you a worksheet to put each cluster in the month until all of them are assigned. You will want to print out a grid for each technician. Remember though, we are using the grid only to establish the rough framework for your routes.

## Add Quarterly and Annual PreScheds to Grid

Complete this process as you had Monthlies, making sure to line up your Quarterlies and Annual Prescheds with the Routes already established for your Monthlies. With Step 2 and 3, we are just trying to determine a rough outline of where we go on what days.

## Adjust Prescheds

Next we must go through your PreScheds, one by one, and adjust each one so that it conforms to the Grid. In each case, we will be using the

'Optional Placement' fields. These are the fields that cause the PreSched to land on a specific date on the Schedule Book. So in each case, we'll be verifying that the PreSched fields, 'Week #' and 'Day' (and Technician) correspond to what you have laid out on the Grid.

## Maintenance

At the start of each month, and this important, you will go through your Daily Schedule Book into the future, setting the Routes, according to your paper Grid, for each date and technician. In each case you will be setting the "Route" from the drop down list in the upper right.

## Setup Hot Links

From Home Page >> Preferences >> Schedule Book Tab. From here, you can select your top 15 Routes, from the Routes value list. Now, when you go to your Daily Schedule Book you will see these Route Hot Links at the top of the page.

You have now used your existing PreScheds to construct your Routes going forward. Affectively, you have now told PestaRoo what your Routes are, and when you prefer to 'Run' each Route. There are several powerful advantages brought from this effort. First, each time a PreSched triggers, its WO will land on the Route you have selected. But the most important advantage comes when you take phone calls from customers wanting unplanned services....

## Scheduling New Appointments using Routes

Lets pretend you take a call from Mary McDonald. First, as Mary is saying hello and telling you about her pest problem, you would navigate to the Daily Schedule Book. Then you would click on the 'Route Hot Link' for the Route that she lives in. You'll instantly land on a 'Route Schedule' page where you can see all of the future times you are scheduled to go on that Route! And for each date you can even see the Techs name and how full his/her schedule is! Plus, if you click on the blue triangle for the preferred date, the full schedule for that date appears on the left so you can even schedule her appointment from where you are! Our ability to

rapidly schedule a new appointment 'in place' is unmatched in our industry. The more you use it, the more you'll love it!