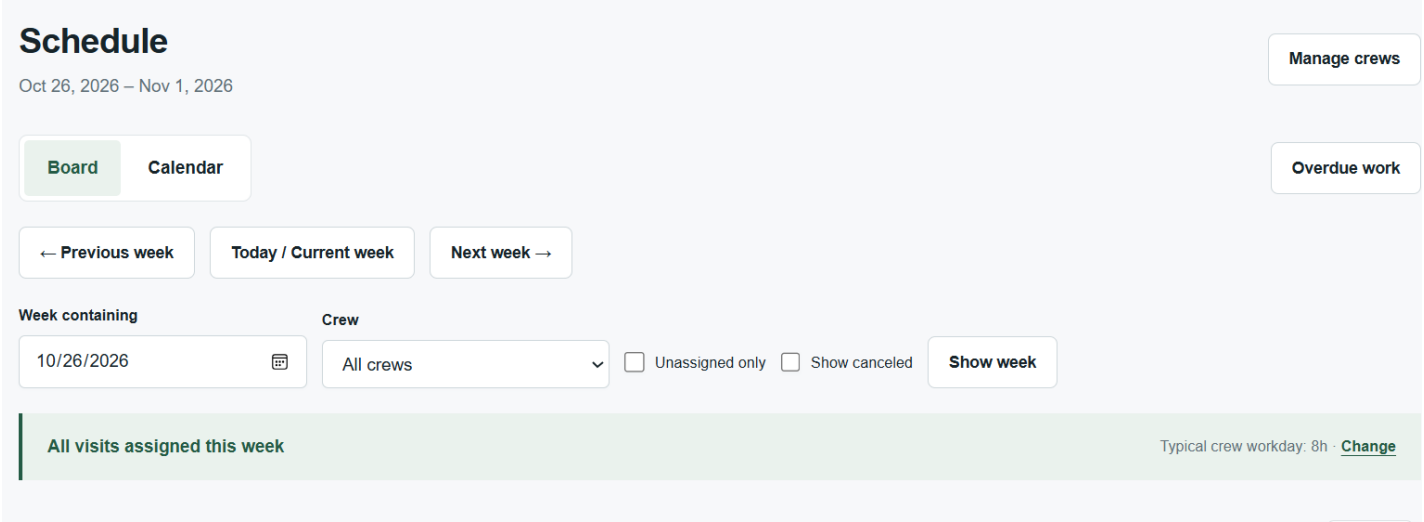
Scheduling Crews & Optimizing Routes

Assign scheduled visits to active crews, then plan each crew's route for one day at a time.

Assign work on the board

1. Create active crews in Crews if needed. Make sure the service is Active and has generated visits.
2. Open Schedule and choose Board. Set Week containing and the Crew filter, then select Show week. Unassigned only helps find work needing a crew.
3. For a visit, choose its crew and select Apply. For a batch, select visit checkboxes, choose the crew in the batch control, then select Apply.
4. Use the up/down arrows to order stops within a crew's day where available. Started or completed work has restrictions.



The board's week and crew filters. Calendar is another view of the schedule.

What to expect: Assigned visits appear under the selected crew and day. Check capacity warnings before sending the crew out.

Scheduling Crews & Optimizing Routes

Optimize one daily route

5. In Settings, enter Default Route Start, choose whether to Return to start after the last job, and select Save route settings.
6. On the Schedule board, find one crew's day and select Optimize Route. Property locations and routing setup must be available.
7. Check the saved order and estimated driving. Use Optimize Again only when you want to recalculate that daily route.



A saved daily route with driving estimates; the private start address is removed.

What to expect: Optimization applies to one crew and day, not the whole week. Without return to start, the final job stays last. Started work may prevent optimization; follow the on-screen message.