

FleetLink Route System

previously known as
Route Management System (RMS)



User Guide

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About This Document



This document references version 3.20 Route Management System Software.

It is intended as an instructional aid for the FleetLink Route Management System (RMS) training presentation. The material presented here introduces the RMS and explains its general concepts, tasks, and work flows with the aim of getting users started using the system.

 The FleetLink RMS is an evolving application, with new features and enhancements introduced with each new version. As such, your installation may vary somewhat from the content presented in this guide in terms of appearance and functionality.

Potential impact of these differences may be particularly important when importing data into your system.

 **ALWAYS REFER TO THE MOST RECENT VERSION OF THE FleetLink Route Management System User Guide (FULL MANUAL) FOR INFORMATION CONCERNING RULES FOR IMPORTING DATA.**

What is the FleetLink Route Management System ?

The FleetLink Route Management System is a web-based solution that supports dispatch operations for:

- Residential cart delivery and maintenance
- Residential waste collection service
- Commercial waste collection service.
- Graffiti Cleaning service

Using the FleetLink Route Management System, you can:

- Maintain inventory of carts
- Maintain cart assignments and status
- Maintain lists of trucks and drivers required to provide the services
- Manage Customer Subscriptions
- Create and maintain routes that will be used to deliver services
- Import route data from a CSV file
- Generate routes based on GeoZone screens
- Create add-ons, extras, and on-demand tasks
- Assign routes to trucks and drivers
- Initiate the wireless delivery of electronic route sheets to the FleetLink Mobile system
- Support normal dispatch operations such as re-assigning service stops to different trucks

- Export data to support reporting and analysis

In addition, the FleetLink Route Management System (RMS) supports full integration with customers' back-office Customer Care and Billing Systems, enabling communication and synchronization between the two systems, and supporting special considerations such as rates for bundled services and for usage of shared containers.

Why Use this Solution?

The FleetLink Route Management System takes the theory of optimizing route efficiencies and combines that with FleetLink Mobile's real-time fleet tracking and turn-by-turn driver direction to ensure that vehicles actually use those routes that minimize the distance, the amount of fuel used, or the amount of time required to accomplish their assignments.

By using the FleetLink Route Management System to create more efficient routing, you can realize benefits in terms of:

- reduced fuel consumption
- increased profitability
- improved service delivery
- improved vehicle utilization
- decreased travel time.

The FleetLink Route Management System can be deployed as a stand-alone dispatch solution or integrated with your existing back-office system to manage your routing. The application features the capability to import all the necessary data in comma-separated-value (CSV) files to populate your database and get you started quickly and easily.

The screenshot shows the FleetLink RMS interface with a navigation bar at the top containing buttons for Routes, Inventory, Customers, Reference Data, GeoZones, Reports, Users, and Help. Below the navigation bar is a 'List of Routes' section with a search bar and a table of route data. The table has columns for Name, Mod. date, Truck, Work Group, Route Group, Service date, Frequency, Material, and Update GeoLocation. A diagram overlaid on the screenshot illustrates the data flow: 'Company back office system' (Operations) provides 'Imported CSV data' (Route stops, Carts/containers, Combined data, Customer data, Reference data, GeoZones) to 'Route assignments', which are then used by 'FleetLink Mobile WasteApp' on a mobile device and a truck.

Name	Mod. date	Truck	Work Group	Route Group	Service date	Frequency	Material	Update GeoLocation
01TIM	2016-02-28 20:00:49 333	1151				Monday	TRSH	<input type="checkbox"/>
02TIM	2016-03-03 20:00:39 72	1151				Friday	TRSH	<input type="checkbox"/>
03TIM	2016-03-03 20:00:39 72	1151				Friday	TRSH	<input type="checkbox"/>
04TIM	2016-03-02 20:00:44 603	1144				Thursday	TRSH	<input type="checkbox"/>
4					02-May-2016	Sunday	RECY	<input type="checkbox"/>
10					11-May-2016	Once	TRSH	<input type="checkbox"/>
16					02-May-2016	Once	RECY	<input type="checkbox"/>

Getting to Know RMS

Logging In

To log in to the FleetLink Route Management System:

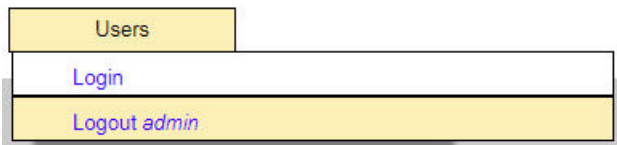
1. Open a browser window and navigate to the URL provided by your computer system administrator
The FleetLink Route Management System login screen displays.

2. Enter your user name and password in the text fields provided, and then press Login.

You can choose a division now or after you have logged on.

Logging Out

- Select Logout from the Users menu.



User Interface (UI)

The FleetLink Route Management System user interface is a tabbed interface that comprises all the menus required to manage your routes.

Controls and information are contained in a static area and a dynamic area.

Static Area

The upper area of the UI is the static area, which remain displayed on the UI at all times.



- Functionality is categorized according to the following menus:

- [Routes](#)
- [Inventory](#)
- [Customers](#)
- [Reference Data](#)
- [GeoZones](#)
- [Reports](#)
- [Users](#)
- [Help](#)

Dynamic Area

The lower area of the UI is where dynamic information and form data for the currently selected menu option is displayed.

The screenshot shows the 'List GeoZones' interface. On the left is a map of the United States with the Atlantic Ocean labeled. On the right is a table with the following data:

Geo Zone Name	Description	Actions
TestTest	My Test GeoZone District m02	🔍 🗑️ ✖️
AlexTest2	Test AlexTest2	🔍 🗑️ ✖️
Superstition-S	South of Superstition Freeway	🔍 🗑️ ✖️
My-new-geozone	Demo GeoZone	🔍 🗑️ ✖️
TestGZ12	MOBILE-184	🔍 🗑️ ✖️
RMS-638		🔍 🗑️ ✖️
test	test	🔍 🗑️ ✖️
testgeozone		🔍 🗑️ ✖️
testgeozone		🔍 🗑️ ✖️
testqa		🔍 🗑️ ✖️
geozone_test	test regression	🔍 🗑️ ✖️
testgbg	ReTesting	🔍 🗑️ ✖️
testbay	abcd test	🔍 🗑️ ✖️

Total Items: 71

Menus

The screenshot shows the top navigation area of the interface. It includes the FleetMind logo, the user 'admin', the current division 'COSC', and the 'Enable Street Sweeping' checkbox. The navigation bar contains buttons for Routes, Inventory, Customers, Reference Data, GeoZones, Reports, Users, and Help. The version number '3.12.0' is displayed in the top right corner. A welcome message 'Welcome to Route Management System 3.12.0' is shown at the bottom of the navigation area.










Pull-down menus represent the static part of the user interface, i.e., they are displayed at all times on every screen of the UI.

To navigate using the pull-down menus:

- Click on the desired tab, and then choose a menu option from the displayed list





Routes Menu

The Routes menu provides the tools you need for managing your routes.

Routes	
	Edit Last Previewed Route
	Routes and Stops
	Route List OCT/19
	Print Routes
	Completed Stops OCT/19
	Unscheduled Stops
	Close Routes
	Search Stops
	Add Route
	Import Route Stops
	Export Routes and Stops

Menu Option	Function
Edit Last Previewed Route	Returns you to the Edit screen for the last route that you viewed or edited. Due to the close inter-dependency of the various types of data involved in route management, you may find yourself navigating back and forth among various menus, e.g., Routes, Reference Data, etc. This menu option is provided as a quick navigation tool. Similar shortcuts are provided on the other menus of the user interface.
Routes and Stops	Displays a list of all your routes in the FleetLink Route Management System.
Route List Current Date	Displays a list of all your routes for the current day.
Print Routes	Displays a list of all routes and enables you to print selected ones to a HTML file.
Completed Stops	Displays a list of stops that have been completed for the current day.
Unscheduled Stops	Displays a list of stops that are not scheduled on any route.
Close Routes	Provides Dispatch personnel the facility to close routes and ensure that stops that have not been serviced will be re-routed.
Search Stops	Displays a form where you can enter search criteria and search for a specific customer location.
Add Route	Lets you add a route to the FleetLink Route Management System.
Import Route Stops	Lets you import data collected from (or exported by) your back-office (dispatch) system.
Export Route Stops	Lets you export Combined Data for your routes and cart/container inventory for migration to another platform. The output is a text file (CSV) which can be opened and processed using Microsoft Excel.

Inventory Menu

Inventory	
	Search Containers
	Search Associations
	Add New Container
	Import Carts/Containers
	Generate Carts/Containers

Menu Option	Function
Search Containers	Lets you locate an item in your inventory of carts and containers. By specifying your search criteria using the text fields and menus, you can locate the cart or container and display the Edit Cart/Container screen, where you can edit its properties, and determine whether it is associated with a customer location.
Search Associations	Lets you locate associations between carts in your inventory and the customer locations to which they are assigned.
Add New Container	Lets you add a new cart or container to the system manually.
Import Carts/ Containers	Lets you import cart/container data from a file, as well as export your container inventory. The most efficient way to define cart/container data is to import a comma-separated-values (CSV) file that you have prepared off-line (or have generated using your back-office system or other software) and formatted according to the criteria defined.
Generate Carts/ Containers	Enables you to generate a series of consecutive serial numbers and RFID codes for carts and containers. Carts/Containers are generally imported from an external data file. (See Import Carts/Containers.) However, this function can be used to generate up to 5000 carts at a time, with sequential serial numbers.

Customers Menu

The Customers menu provides the tools you need for managing your customer information.

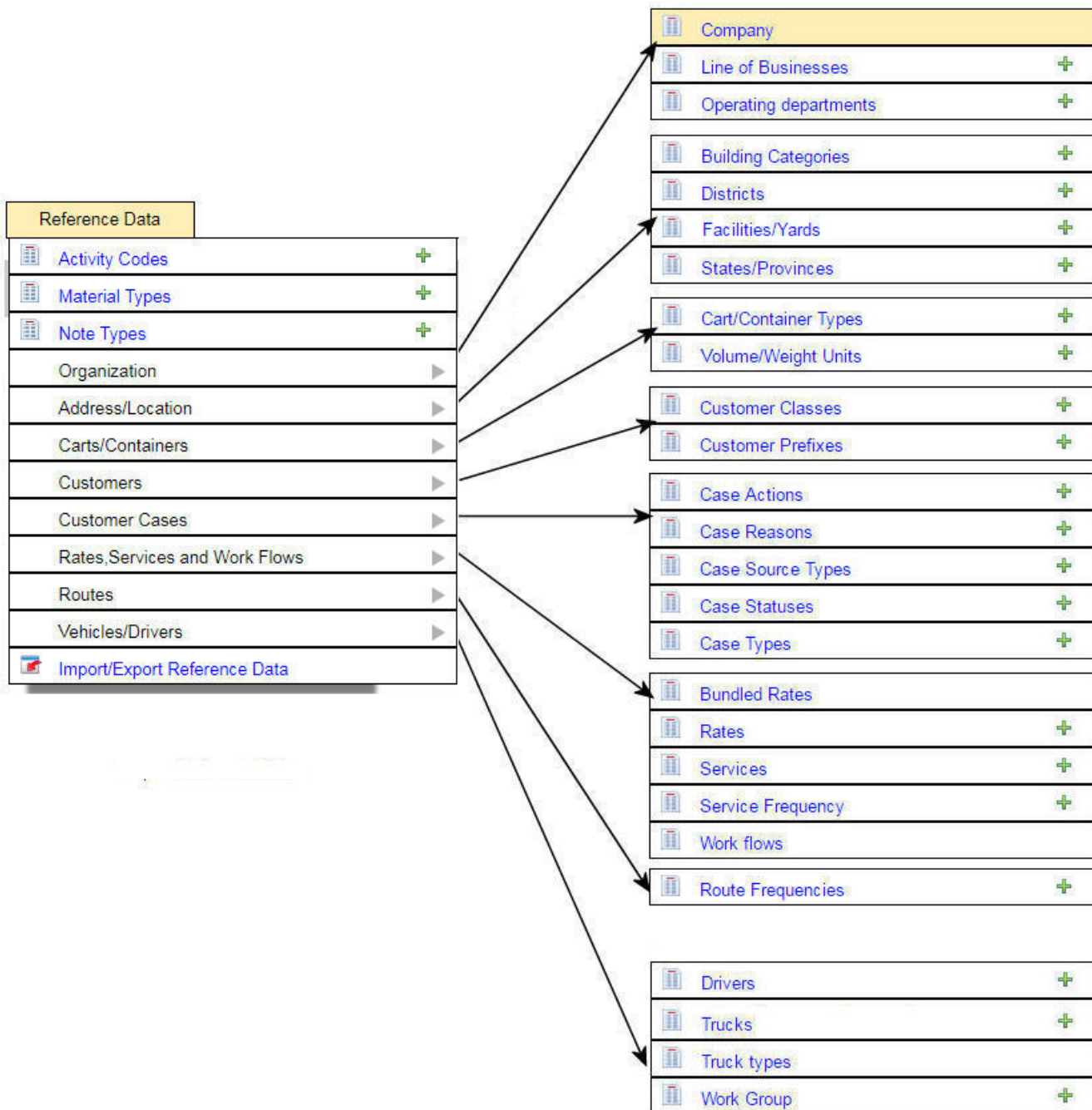
Customers	
	Search Customers
	Add New Customer
	List of Not GeoCoded Customers
	List customer cases
	Import Customer
	Import/Export Customer Documents
	Unsubscribed Customers

Menu Option	Function
Search Customers	Lets you locate a customer in your list of customers.
Add New Customer	Lets you add a new customer to the FleetLink Route Management System.
List of Not GeoCoded Customers	This features is provided as part of the GeoCode Management billable option. See GeoCoding Non-GeoCoded Customer Addresses for details.
List Customer Cases	This features is provided as part of the CSR Dashboard option.
Import Customer	Lets you import customer data in a text (CSV) file.
Import/Export Customer Documents	Lets you import customer documentation in a text (CSV) file for viewing within the RMS, and export that information from the RMS to a CSV file.
Unsubscribed Customers	This feature is provided as part of the CSR Dashboard option. It enables Customer Service personnel to search, view and export data for customers who have unsubscribed from service within a selectable time frame.

Reference Data Menu

The Reference Data menu provides the tools you need to manage Reference Data for your RMS.

Reference Data defines the real-world entities and their properties for your business, and represents information that is available for use by all routes in your system.






Menu Option	Function
Activity Codes	Defines the codes that indicate the completion status for stops on your routes; they are completion codes that are included in the activity master list that is sent to the mobile. Examples include Completed (normal completion), UTS (unable to service)—bin not out, access blocked, cart misplaced, and so on.
Material Types	Specifies the types of disposal material for your business. Examples include Recyclable Materials, Compostable Yard Waste, Organics, Garbage, and so on.
Note Types	Refers to the codes defined in the Note Type Codes (NTC) master list that is sent to the mobile units. These codes are used to define lists of recipients for messages sent between the mobiles and the server
Company	Defines the properties of your company. Used primarily for Customer Service Report generation, Company reference data has the following hierarchy: <ul style="list-style-type: none"> • Company • Region • Division • Site • Service Area
Lines of Business	Specifies the types of waste management services for your business, and hence, the functionalities offered on the FleetLink Mobile WasteApp user interface. The standard FleetMind LOBs are Commercial, Industrial, Residential, and Cart Delivery.
Districts	Specifies the geographic areas serviced by your business.
Facilities/Yards	Facilities Specify the Disposal Facilities utilized by your business . Information includes contact information and Facility location, which the application can translate into geographic coordinates for use by the FleetLink Mobile WasteApp. Yards identify the Truck Yards utilized by your business.
States/Provinces	Specifies the U.S. states and/or Canadian provinces serviced by your business.
Carts/Containers	Specifies the types of waste receptacles used by your business, and hence, the cart/ container types displayed on the calls list and menus of the FleetLink Mobile WasteApp user interface.
Customer Classes	Provided as an optional data element for integration with a company's billing system. Examples include school, business, government, residential. You associate a Customer Class with a customer via the Edit Customer screen.
Customer Prefixes	Any alphanumeric string that is meaningful to your business for purposes of sorting or categorization of customers. Customer Prefixes are used to make customers linkable/ groupable, and may be used in the future for billing purposes
Case Actions	The actions that can be taken to process or resolve a Customer Case.
Case Reasons	Predefined descriptions of the case that the Customer Service Representative will be able to select from a pull-down menu when entering or editing a case.
Case Source Types	Identifies sources of Customer Cases. Examples may include email, telephone, web interface, driver.

Menu Option	Function
Case Statuses	Indicates the current state of a customer case within the CSR's work flow. Three statuses are predefined in the CSR Dashboard: <ul style="list-style-type: none"> • Open - Unassigned • Open - Assigned • Closed
Case Types	Indicates the nature of the customer case, as different types will determine the course(s) of action and may be accorded different priorities. Examples include complaint, work order, information request.
Bundled Rates	Special discounted rates available to customers who subscribe to a package comprising multiple service subscriptions.
Rates	Rates charged to customers for subscribed services.
Services	Specifies the types of waste management services provided by your company and, hence, the service types displayed on the calls list and menus of the FleetLink Mobile WasteApp user interface.
Service Frequency	Specifies the frequency with which services are rendered at a Customer Location, for example, Daily, Twice a Week, On-Demand.
Work Flows	The sequence of actions performed in order to render a service.
Route Frequencies	Defines the frequency with which your routes are run.
Drivers	Defines the personnel authorized to drive the vehicles in your fleet.
Trucks	Defines the vehicles used on your routes.
Truck Types	Defines the purposes of the vehicles used on your routes.
Work Groups	Collections of vehicles working as a team to complete work assigned to them.

GeoZones Menu






The GeoZones menu provides the tools you need to view, edit, import, and export GeoZones in RMS.

GeoZones	
	List GeoZones
	Export GeoZones
	Import GeoZone

Menu Option	Function
List GeoZones	Displays a list of all GeoZones in RMS. List items can be selected and edited.
Export GeoZones	Enables you to export RMS GeoZones in the form of a CSV file containing polygon coordinates.
Import GeoZones	Enables you to import GeoZones into RMS in the form of a CSV file containing polygon coordinates.

Reports Menu

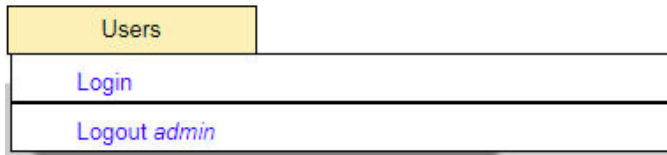
The GeoZones menu provides the tools you need to view, edit, import, and export GeoZones in RMS.

Reports	
	Rolloff Revenue/Disposal Charges
	Billing Charges
	Prospects
	Audit Trail Log
Customer Service Reports 	

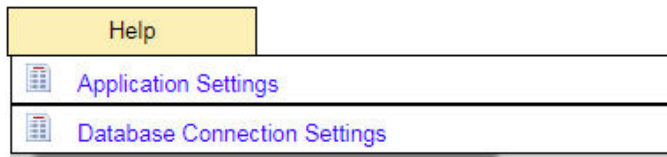
Menu Option	Function
Rolloff Revenue/Disposal Charges	Tracks the history of roll-off revenue and disposal costs per material for each disposal facility.
Billing Charges	Tracks the history of billing charges for services provided.
Prospects	Displays a list of all prospective (non-active) customers and services in the Route Management System.
Audit Trail Log	Enables you to query and view operations performed on the RMS database(s) over a range of dates, and by whom (RMS user name) the operations were done.
Customer Service Reports	Enables you to generate Curbside CSR and Multi-Family CSR reports.

Users Menu

The Users menu simply provides a quick means to log into and out of the RMS.



Help Menu



The Help menu enables you to configure system-related parameters and RMS database settings.

Menu Option	Function
Application Settings	Enables you to specify various system parameter values and configure the color scheme used on the RMS user interface.
Database connection settings	Enables you to specify database URL, test the connection with the database, and view log files.

Preliminaries - Data Preparation and Migration

As is the case with any software application, it is the integrity of the data entered into a system that determines its level of success (or failure).

The data migration process includes planning, preparing for, and performing the data migration from your existing back-office/dispatch system to the FleetLink Route Manager.

The FleetLink Route Management System features data import capabilities that can give you a head start with setting up your system, minimizing the need for time-consuming manual data entry and its inherent potential for error.

In addition, FleetMind offers value-added assistance with migration of your data. Using data migration tools, FleetMind can combine your imported data and manipulate it for use in the FleetLink Route Management System.

See [Generating Combined Data](#).

In general terms, getting the most from your FleetLink Route Management System will involve two phases:

1. **Initial Setup:** This phase begins immediately, and involves assembling the data from your current back-office/dispatch system and migrating it to the route management system, defining the necessary data elements (Reference Data) used by the application, and generating your routes.
2. **Optimizing Route Sequencing using Vehicular Data:** This phase occurs after your deployment has been in place long enough (usually within two weeks) to collect "real-world" data using FleetLink Mobile, analyze the data collected using FleetLink Reports, and make the necessary improvements to the sequencing of your routes.

Phase 1 - Initial Setup

Creating or Importing GeoZones

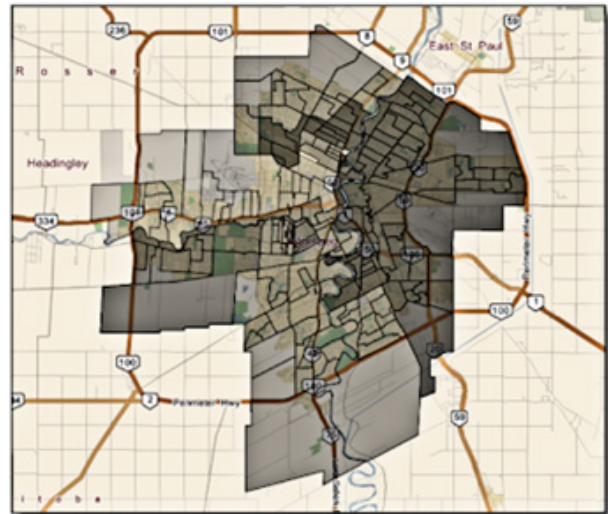
GeoZones are user-defined geographical zones of the earth that can be used for a variety of purposes, including shipping, taxation, and route management.

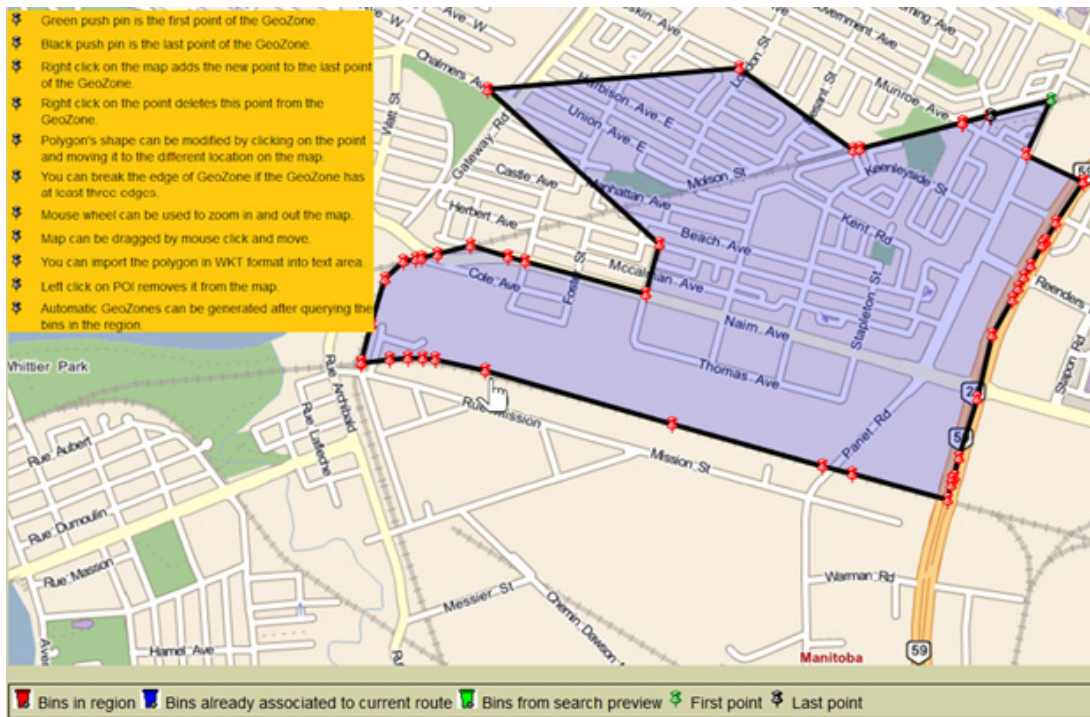
GeoZones play an important role in the FleetLink Route Management System. Not only do they provide a convenient graphic representation of your operating territory, they can be used by the system to create your routes and rebuild them as you add stops or fine-tune property coordinates.

You may already have GeoZone files on hand, if your current dispatch system uses them. If so, you can easily import them into the FleetLink Route Management System as .wkt (well-known text) files.

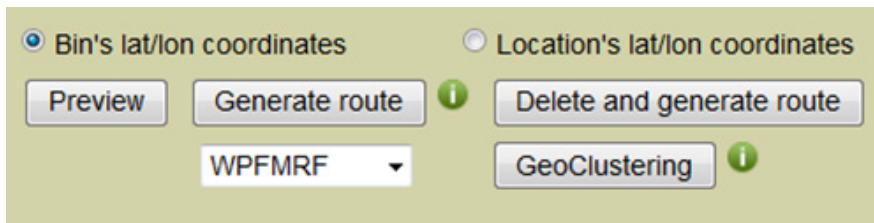
Alternatively, you may be able to acquire GeoZone files or city street geometry/Geographic Information System (GIS) data through your local municipal government offices.

Once you have imported GeoZones, you can edit them as required in the FleetLink Route Management System by "drawing" them on the user interface.





The application's GeoZone management features enable you to generate routes, populating them with assignments whose property coordinates are within the defined area.



! Generated routes are not optimally sequenced. The application provides a feature (Geoclustering) that will sequence the route based on the stops' proximity to a given reference point, for example, your company's yard.

Note, however, that such sequencing will yield consecutive stops on alternating sides of the street—not an efficient sequence for residential service, where (normally) one side of the street at a time is serviced.

Fine tuning of your route sequencing can be done easily after your new system has been in place for a sufficient time to perform a meaningful data analysis, for example, an analysis of how your drivers are actually running their routes.

Using FleetMind-Generated Location Reference File

FleetMind can provide, as a value-added extra, a service that generates a reference file that increases the reliability of a cart/container's starting point (latitude and longitude). This enhanced level of accuracy may have a significant impact on the optimization of your route(s), as the coordinates for delivery of a cart (e.g., curb) may differ significantly from those in which it is serviced (e.g., alley).

If the optimal servicing coordinates cannot be determined easily, then the property centroid may be used as a reference.

These coordinates can be adjusted later, as required.

The FleetLink Route Management System provides options that will update the cart's coordinates and other associated data (RFID, serial number) when the lift is performed.

The screenshot shows the 'Add Route' interface. It features a form with the following elements:

- Name**: Text input field.
- Route Frequency**: Dropdown menu.
- Service Date**: Text input field with a calendar icon.
- Truck**: Dropdown menu.
- Work Group**: Dropdown menu.
- Material**: Dropdown menu.
- Operating Department**: Dropdown menu.
- Container Type**: Dropdown menu.
- GeoZone**: Text input field with a dropdown arrow.
- Not Linked**: Text input field.
- Temporary**: Text input field with a dropdown arrow.
- Update Rfid**: Text input field with a dropdown arrow.
- Update Geolocation**: Text input field with a dropdown arrow.
- Update #Serial**: Text input field with a dropdown arrow.
- Message**: Text input field.
- Save Route**: Green button.
- Satellite view**: Map showing a city street grid with various road markers.

Using Company-Generated Location/Inventory Reference File

The source of this information is your current back-office/dispatch system, and will include the types of material, container location, and container size.

A combination of this data is used to establish the Service Codes master list. Where walk-up service is provided, Driver Notes indicating the container's location (curb, alley, back yard) can be included in the call information on the FleetLink Mobile unit.

! Carts/containers have associated serial numbers and RFIDs, usually assigned by the manufacturer providing their delivery. The FleetLink Route Management System can rebuild the RFID database based on the data collected during lifts.

Generating Reference Data

Reference Data can either be entered manually or, optimally, imported into the FleetLink Route Management System as a comma-separated value (CSV) file.

! **IMPORTANT:** All reference data must be created/imported into the system before you import any Combined Data, which includes assignment-specific details such as containers, customer locations, and services.

When importing Combined Data:

Any data item in the Combined Data that corresponds to a Reference Data element must first be defined in the Route Management System's Reference Data prior to import or errors will be generated stating what is missing and needs to be added.

Missing reference data list

Line of Businesses	Building Categories	States/Provinces	Volume/Weight Units	Cart/Container Colors	Cart/Container Types	Material Types	Services
Blank field	Blank field	Blank field	Blank field	Blank field	Blank field	Blank field	Blank field

File No file selected

Verify Mode Verify the file without updating the database

Start date format yyyy-MM-dd

End date format yyyy-MM-dd

Any missing Reference Data will result in entries being rejected and gaps in routes.

1. The spelling must be an exact match.
2. Capitalization must be an exact match—the relationship between Combined Data and Reference is case-sensitive.
3. The maximum field size must not be exceeded.

Generating Combined Data

Once you have generated Location reference data and Inventory reference data, you can combine this data using various programming tools used to manipulate CSV text file formats.

Manipulation of this data includes:

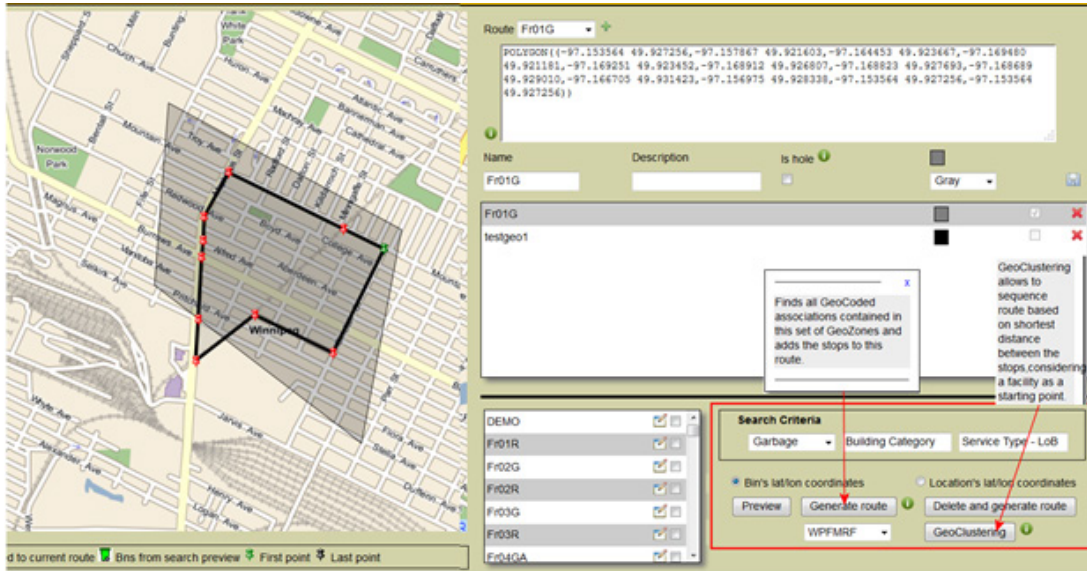
- Parsing the source address (Civic Number, Street Address, Unit Number) to enable the generation of a unique location key and facilitate assignment generation.
- Determining the appropriate container location (either Curb or Alley) LAT/LON; replacing with property centroid when deemed appropriate.
- Generating the appropriate Service Code for each stop.
- Maintaining current route sequencing (if available), and updating entries when required.
- Consolidating a Cart Serial Number to RFID inventory.

Though the FleetLink Route Management System imports CSV files—usually generated in Excel—using a data migration application such as FileMaker can resolve unique data problems more reliably.


 For rules on importing Combined Data, see [Rules for Importing Combined Data](#), which describes the properties for all data fields.

Generating Routes using GeoZones


Once you have created or imported GeoZones, you can generate routes in the FleetLink Route Management System using the Edit List of GeoZones features.



When generating routes, you can define the profile for the first route (for example, container types such as Cart, list of Building Categories, list of Services) and reuse the profile for subsequent routes. By doing so, you can quickly regenerate the entire suite of GeoZone-derived routes.

 Specify the location's coordinates (property centroid) when generating a route to ensure that the stops are placed in the correct route—if container location is used, those containers located near route boundaries may end up in the wrong routes.

You then use the GeoClustering option to generate a sequence based on proximity of each stop using your yard's coordinates as the starting point.

 Using this approach will yield a proximity-based sequence that will likely cause consecutive stops on opposite sides of the street. A reliable fix is to have your drivers use Proximity Mode or Autopilot Mode during the first few weeks of your deployment, analyze the actual data collected, and make the necessary improvements to the sequence.

Phase 2 - Optimizing Route Sequencing using Vehicular Data

Resequencing Based on Driver's Execution of Route

The FleetLink Route Management System provides a mechanism to edit and save the sequence of a route, for example, as it has been executed by the driver.

This feature is accessible while viewing/editing a route status on the List of Routes interface.

The screenshot shows the 'Edit Route Mo02RB' interface. It features two maps: 'Route Before' and 'Route After', both showing a route with stops marked by red and yellow icons. To the right, there is a 'Resequencing Method' dropdown menu set to 'Select...', a 'Resequencing' button, and a red error message: 'BackendWebservices is do...'. Below this is a table with the following data:


Sequence	Address
1	1000 JESSIE AVE, Winnipeg, MB
2	1001 JESSIE AVE, Winnipeg, MB
3	1001 WARSAW AVE, Winnipeg, MB
4	1002 DORCHESTER AVE, Winnipeg, MB
5	1002 JESSIE AVE, Winnipeg, MB
6	1003 JESSIE AVE, Winnipeg, MB
7	1003 WARSAW AVE, Winnipeg, MB
8	1004 JESSIE AVE, Winnipeg, MB
9	1005 JESSIE AVE, Winnipeg, MB
10	1005 WARSAW AVE, Winnipeg, MB

At the bottom of the interface, there is a legend: a green dot for 'first point', a red square for 'normal stop', and a yellow square for 'several stops'. The total number of items is listed as 507.

ATTENTION

In order for this mechanism to yield effective results, the driver must be diligent, ensuring that lifts are recorded for the correct address and validating RFID assignments (where applicable).

Reviewing Historical Breadcrumb Data using FleetWeb

 The success of this procedure assumes that the driver has selected the route he was working on at logon. Otherwise, you will need to identify for each day which truck actually ran each route.

The FleetWeb application's breadcrumb data enables you to identify a specific day that corresponds to how a route should be run. Using an intermediate tool such as SQL Studio, and a FleetWeb data table for the desired truck and day, you can export this data to a CSV file and, in turn, import it into the FleetLink Route Management System.

Options for refining your route sequencing using FleetWeb include:

- Identifying Route Segments based on Start and End Addresses
- Matching Property Centroids to Closest Driver Breadcrumb

Option 1 - Identify Route Segments based on Start and End Addresses

A route can be broken down into a series of street segments, where a segment represents an uninterrupted list of addresses on the same street until a turn is made into a new street.

- By determining the addresses at the beginning and end of the street segment, you can establish whether they are odd or even addresses, and in which direction the sequencing needs to be established—low to high or high to low.
- By establishing the latitude and longitude of each new street block at the point where the truck turned, you can get the starting and ending addresses for each street segment from the Telogis NAVTEQ data.
- Once the start and end addresses of each street segment have been established, along with the ODD/EVEN and INCREASING/DECREASING civic numbers, you can sequence every stop within each street segment, reviewing each entry one at a time based on the address and not the latitude and longitude.

Option 2 - Match Property Centroids to Closest Driver Breadcrumb

Matching is done based on the property centroid located closest to the breadcrumb.

The breadcrumb sequence is used to assign a sequence number to every stop in the route.

If a street is only serviced in one direction, the assumption can safely be made that this is an alley, and both sides need to be serviced as part of the sequencing. Stops that cannot be matched are given a sequence number of 0 or 1, and thus flagged for review.

Preparing Reference Data Off-line

What is Reference Data?

Reference data is specific to your enterprise. It defines the properties for your business and represents information that is available for use by all routes in your system.

Defining reference data is the starting point for your project. The most efficient way to define reference data is to import a comma-separated-values (CSV) file that you have prepared off-line (or have generated using your back-office system or other software) and formatted according to the criteria defined for each type of data.

Preparing data from your existing dispatch system is the first step in getting started with the FleetLink Route Management System. Once prepared, the data can be entered manually or stored in a comma-separated-value (CSV) file so that you can import large amounts of data in a single operation.

The following sections describe the information you will need to define Reference Data .



IMPORTANT FILE FORMAT NOTE

1. The first two rows of your CSV files are ignored! Do not enter valid data here!
2. Field format and sequence are critical to successful import. Use the CSV samples here as a reference.

Material Types

◀ ▶ **Edit Material AL**

Material Type

Name:

Sequence:

Description:

Disposal Rate:

Unit of Measurement:

Dispatch Type:

Save Material Type

Data Fields

Data Item	Data Type	Max. Field size	Mandatory	Notes
Material type	alphanumeric	10 Must not contain spaces.	Yes	A unique identifier indicating the type of waste material collected at a route stop, for example, Garbage, Recycling.
Sequence	numeric	5 digits (maximum value 32767)	Yes	Determines the order in which the list is presented to the driver.
Description	alphanumeric	20	Yes	A meaningful description for the material type. Do not include a comma in this or any other description field.
Disposal Rate	alphanumeric	N/A		Cost per unit for disposal of material
Unit of Measurement	alphanumeric	10		Reference Data element
Dispatch Type	alphanumeric	20	Yes	Reference Data element (Line of Business)

Excel/CSV File Format

	A	B	C	D	E	F
1	#Material					
2	name	description	sequence	disposalChargeAmount	unitTypeId	dispatchTypeAutold
3	C	CARDBOARD ONLY	10			1
4	A	ASBESTOS - NON-HAZAR	20			1
5	D	ASBESTOS - HAZARDOUS	30			1
6	W	WOOD	40			1

Note Types

◀ ▶ **Edit Note MA**

Note Type

Name:

Sequence:

Description:

Dispatch Type:

[Save Note Type](#)

Data Fields

Data Item	Data Type	Max. Field size	Mandatory	Notes
Name	alphanumeric	10 Must not contain spaces.	Yes	A unique identifier indicating the recipient group for notes from mobile.
Sequence	numeric	5 digits (maximum value 32767)	Yes	Determines the order in which the list is presented to the driver.
Description	alphanumeric	20	Yes	A meaningful description for the note type.
Dispatch Type	alphanumeric	20	Yes	Corresponds to Line of Business reference data element

Excel/CSV File Format

	A	B	C	D	E
1	#Note				
2	name	description	sequence	dispatchType	
3	RMS1486-test	sequence 1		1 COMM	
4	RMS1486-test	sequence 2		2 RESI	

Lines of Business

◀ ▶
Edit Line of business *RESI*

Line of Business

Name:

Description:

Data Fields

Data Item	Data Type	Max. Field size	Mandatory	Notes
Line of Business Name	alphanumeric	20 Must not contain spaces.	Yes	A unique identifier indicating the type of waste collection, for example, CDLV for Cart Delivery, FL for Commercial Front-Load.
Description	alphanumeric	128	Yes	A meaningful description for the line of business, for example, Commercial, Industrial, Residential, Cart Delivery.

Excel/CSV File Format

	A	B	C
1	Line of business		
2	name	description	
3	RESI	Residential	
4	COMM	Commercial	
5	IND	Industrial	
6	CDLV	Cart-Delivery	
7	TLOB1	Test LOB 1	
8	lob3	lob3	

Customer Classes

Data Fields

Data Item	Data Type	Max. Field size	Mandatory	Notes
Line of Business Name	alphanumeric	20 Must not contain spaces.	Yes	A unique identifier for the Customer Class.
Description	alphanumeric	50	Yes	A meaningful description of the Customer Class, for example, Municipal Government.

Excel/CSV File Format

	A	B	C	D
1	Customer Class			
2	name	description		
3	FGOV	Federal Government		
4	SGOV	State/Provincial Government		
5	MGOV	Municipal Government		

Route Frequencies

◀ ▶ **Edit Frequency Tuesday**

Route Frequency

Name:

Frequency: Weekly Even Weeks Only Odd Weeks Only Every Other Week Monthly

Day Of Week: Sun Mon Tue Wed Thu Fri Sat

Data Fields

Data Item	Data Type	Max. Field size	Mandatory	Notes
Name	alphanumeric	40 Must not contain spaces.	Yes	Defines how often a route is run. Choose a meaningful (unique) identifier, for example, EveryFriday, or DailyWeekDay.
Sunday - Saturday	numeric (1 or 0)	1	Yes	Must be 1 or 0 to make up the service provisioning frequency code. No column can be left blank.
Every week	numeric (1 or 0)	1	Yes	Radio button: determines whether route is run weekly. Must be 1 or 0.
Even weeks only	numeric (1 or 0)	1	Yes	Radio button: determines whether route is run only on even weeks. Must be 1 or 0.
Odd weeks only	numeric (1 or 0)	1	Yes	Radio button: determines whether route is run only on odd weeks. Must be 1 or 0.

Excel/CSV File Format

1	A	B	C	D	E	F	G	H	I	J	K	L	M
2	name	sunday	monday	tuesday	wenesday	thursday	friday	saturday	evenWee	oddWeek	type	weekNum	weekDay
3	Once	0	0	0	0	0	0	0	0	0	0	1	
4	Sunday	1	0	0	0	0	0	0	0	0	0 W		
5	Monday	0	1	0	0	0	0	0	0	0	0 W		
6	Tuesday	0	0	1	0	0	0	0	0	0	0 W		
7	Wednesd.	0	0	0	1	0	0	0	0	0	0 W		

Service Frequencies

Add Service frequency

Service Frequency

Name

Description

On-Demand On-Demand Capable

frequency: Daily Weekly Monthly

frequency: Daily Weekly Monthly

frequency: Daily Weekly Monthly

Interval (Every)

Week of the Month

- 1 Month(s)
- 2 Month(s)
- 3 Month(s)

frequency: Daily Weekly Monthly

Interval (Every)

Week of the Month

- 1st
- 2nd
- 3rd
- 4th
- Last

Data Fields

Data Item	Data Type	Max. Field size	Mandatory	Notes
Name	alphanumeric	40 Must not contain spaces.	Yes	A unique identifier indicating the frequency with which the service is performed.
Description	numeric	5 digits (maximum value 32767)	Yes	A meaningful description for the frequency.
Daily	alphanumeric (TRUE or FALSE)	5	Yes	Daily service
Weekly	alphanumeric (TRUE or FALSE)	5	Yes	Weekly service
Monthly	alphanumeric (TRUE or FALSE)	5	Yes	Monthly service
On demand	alphanumeric (TRUE or FALSE)	5	Yes	On-demand service
Frequency Type	alphanumeric	1	Yes	W, M, O (Weekly, monthly, every other week)

Excel/CSV File Format

	A	B	C	D	E	F	G
1	name	description	on-demand	frequency	interval	ocurrence	week of the month
2	ONWK	Once a we	FALSE	Weekly	1	1	
3	1xWk	1xWeek		Weekly	1	1	
4	2xWk	2xWeek		Weekly	1	2	
5	3xWk	3xWeek		Weekly	1	3	
6	4xWk	4xWeek		Weekly	1	4	

Cart and Container Types

◀ ▶
Edit Container Type 240LTOTE

Container Type

Name:

Description:

Save Container Type

Data Fields (3 files required)

Types

Data Item	Data Type	Max. Field size	Mandatory	Notes
Container Type	alphanumeric	20 Must not contain spaces	Yes	A unique identifier indicating the type of waste collection, for example, CDLV for Cart Delivery, FL for Commercial Front-Load.
Description	alphanumeric	128	Yes	A meaningful description for the line of business, for example, Commercial, Industrial, Residential, Cart Delivery.

Colors

Data Item	Data Type	Max. Field size	Mandatory	Notes
Color	alphanumeric	40	Yes	A unique identifier for the container color.
Description	alphanumeric	128		A meaningful description for the container color.

Manufacturers

Data Item	Data Type	Max. Field size	Mandatory	Notes
Manufacturer	alphanumeric	30	Yes	A unique identifier for the manufacturer.
Description	alphanumeric	128		Full company name or description

Excel/CSV File Format

Types

container_type.csv	
A	B
1 Container Type	
2 name	description
3 __NONE__	This type is used in locations where there is no container to be serviced
4 Recycling	
5 180LTote	180LTote
6 240LTote	240LTote
7 360LTote	360LTote
8 Bearresistantcan	Bearresistantcan
9 BlueBoxKingSize	BlueBoxKingSize

Colors

container_manufacturers.csv	
A	B
1 Container Manufacturers	
2 name	description
3 Ameri-Kart	Ameri-Kart Corp
4 Busch	Busch Systems Intl. Inc.
5 Cascade	Cascade Cart Solutions
6 CleanRiver	CleanRiver Recycling Solutions
7 Diamondback	Diamondback Products"c" Inc.

Manufacturers

container_color.csv			
	A	B	C
1	Container Color		
2	name	description	
3	Blue	Blue	
4	Green	Green	
5	Gray	Gray	
6	Brown	Brown	
7	Black	Black	

Truck Types

List of Truck Types	
Name	description
RE	Residential/Commercial
RO	Roll-off
FB	Cart delivery
SD	Sewer/Drain cleaning
RS	Road sweeper
PP	Port-o-Potty
LQ	Liquid waste
RK	Rockers

Data Fields

Data Item	Data Type	Max. Field size	Mandatory	Notes
Truck Type	alphanumeric	4 Must not contain spaces.	Yes	A unique identifier for the Truck Type
Description	alphanumeric	50	Yes	A meaningful description for the Truck Type.

Excel/CSV File Format

truck_type.csv			
	A	B	C
1	Truck Type		
2	name	description	
3	RE	Residential/Commercial	
4	RO	Roll-off	
5	FB	Cart delivery	
6	SD	Sewer/Drain cleaning	
7	RS	Road sweeper	
8	PP	Port-o-Potty	
9	LQ	Liquid waste	
10	ZS	Zombie sludge	
11	AC	Accordion removal	

Building Categories

◀ ▶

Edit Building Category *BANK*

Building Category

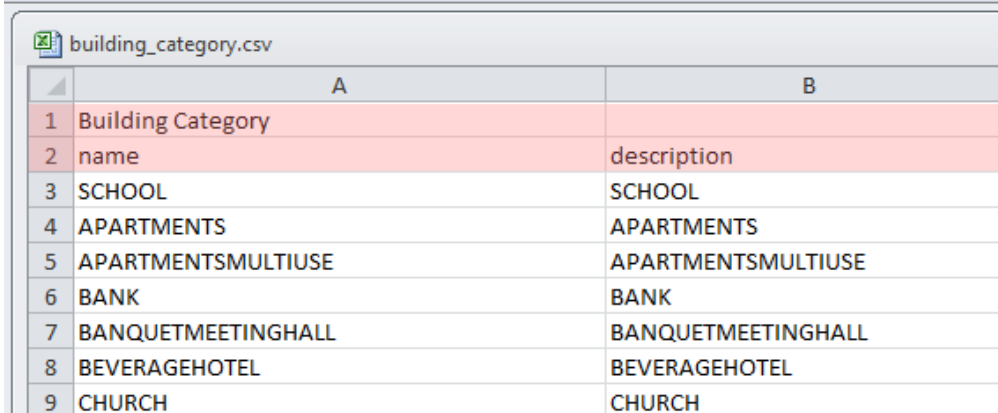
Category Name:

Description:

Data Fields

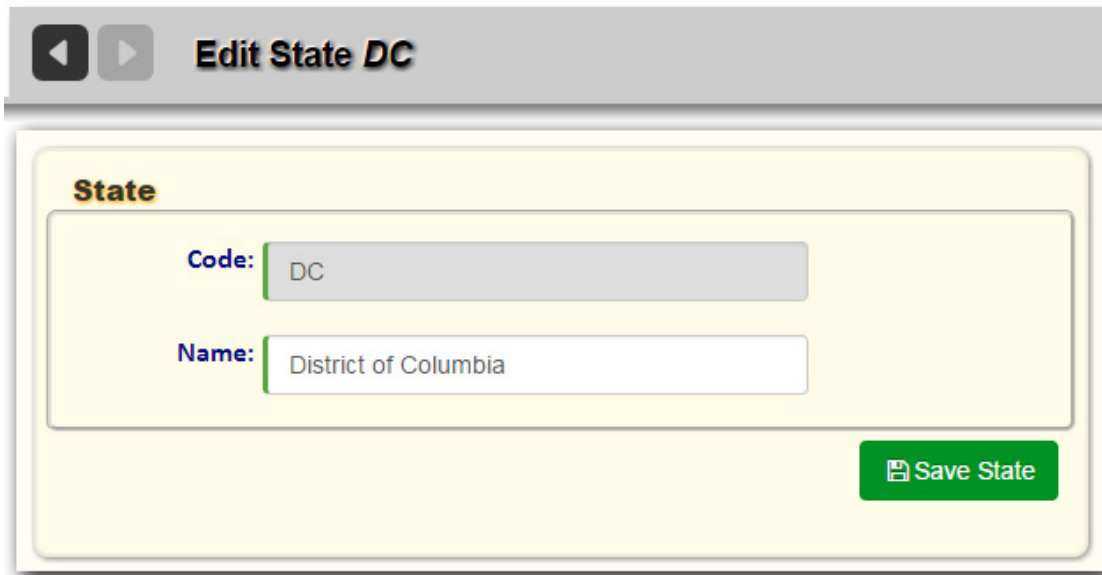
Data Item	Data Type	Max. Field size	Mandatory	Notes
Building Category	alphanumeric	20 Must not contain spaces.	Yes	A unique code identifying the type of building serviced, for example, Bank, Condo, Apartments.
Description	alphanumeric	128		A meaningful description for the Building Category identifier .

Excel/CSV File Format



	A	B
1	Building Category	
2	name	description
3	SCHOOL	SCHOOL
4	APARTMENTS	APARTMENTS
5	APARTMENTSMULTIUSE	APARTMENTSMULTIUSE
6	BANK	BANK
7	BANQUETMEETINGHALL	BANQUETMEETINGHALL
8	BEVERAGEHOTEL	BEVERAGEHOTEL
9	CHURCH	CHURCH

States and Provinces



Edit State DC

State

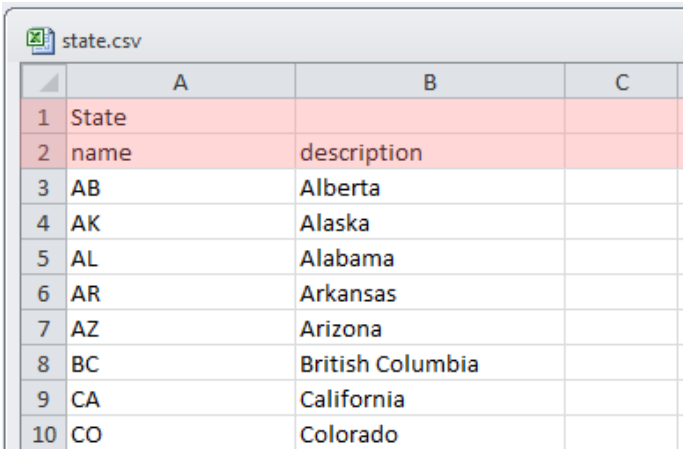
Code:

Name:

Data Fields

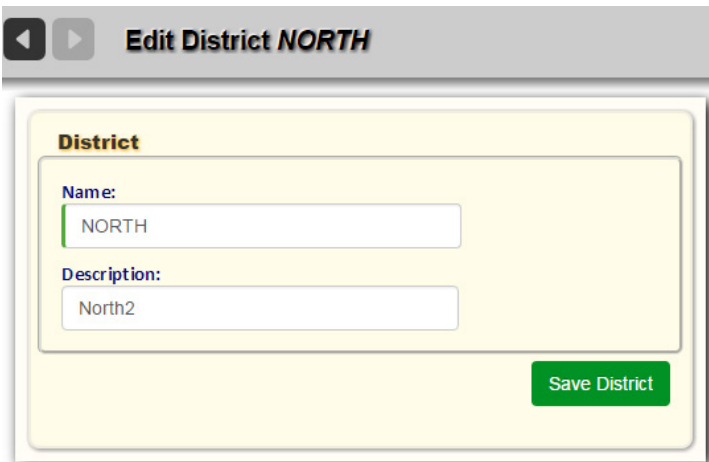
Data Item	Data Type	Max. Field size	Mandatory	Notes
Code	alphanumeric	2 Must not contain spaces.	Yes	The official abbreviation for the state or province, for example, OH, or ON. These values are already hard-coded in the application
Name	alphanumeric	0		The name of the state or province, for example, Ohio, or Ontario.

Excel/CSV File Format



	A	B	C
1	State		
2	name	description	
3	AB	Alberta	
4	AK	Alaska	
5	AL	Alabama	
6	AR	Arkansas	
7	AZ	Arizona	
8	BC	British Columbia	
9	CA	California	
10	CO	Colorado	

Districts



◀ ▶ **Edit District NORTH**

District

Name:

Description:

Data Fields

Data Item	Data Type	Max. Field size	Mandatory	Notes
District	alphanumeric	40	Yes	A unique code identifying the district serviced.
Description	alphanumeric	40		The name of the district, for example, SouthSide.

Excel/CSV File Format

	A	B
1	District	
2	name	description
3	NORTH	North2
4	south	south
5	e	East
6	WW	West
7	C	Central

Volume and Weight Units

◀ ▶ Edit Unit of Measurement *Pound*

Unit of Measurement

Name:

Equivalent Metric Value:

Metric Unit Type:

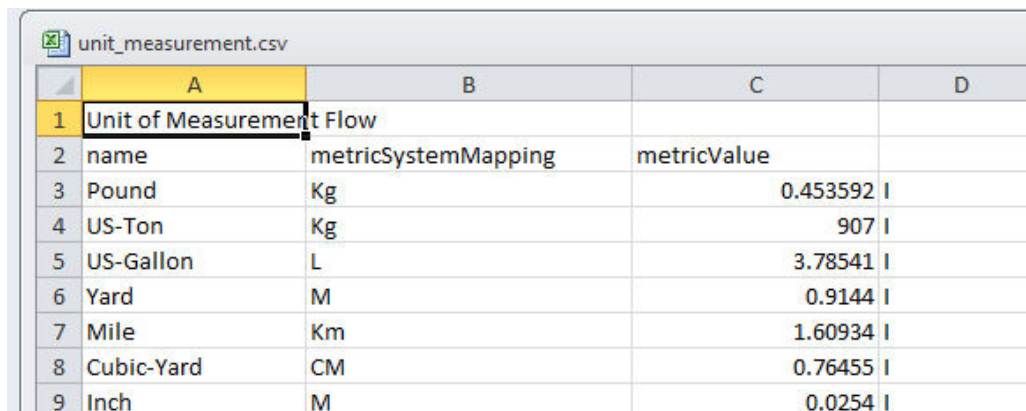
Measurement type:

- Imperial
- Metric

Data Fields

Data Item	Data Type	Max. Field size	Mandatory	Notes
Name	alphanumeric	10 Must not contain spaces.	Yes	A unique identifier for the unit of measurement, for example, US-Ton.
Equivalent Metric Value	numeric	10	Yes	A numeric value which when multiplied by Metric Unit Type, yields the equivalent weight in the metric system. The application uses the metric system as its base; non-metric units are converted to metric.
Metric Unit Type	alphanumeric	100	Yes	Metric unit used to specify the equivalent weight using the metric system. See Equivalent Metric Value .
Measurement type	alphanumeric (I or M)	1	Yes	Specifies whether units are Imperial or Metric.

Excel/CSV File Format



	A	B	C	D
1	Unit of Measurement	Flow		
2	name	metricSystemMapping	metricValue	
3	Pound	Kg	0.453592 I	
4	US-Ton	Kg	907 I	
5	US-Gallon	L	3.78541 I	
6	Yard	M	0.9144 I	
7	Mile	Km	1.60934 I	
8	Cubic-Yard	CM	0.76455 I	
9	Inch	M	0.0254 I	

Customer Prefixes

Data Fields

Data Item	Data Type	Max. Field size	Mandatory	Notes
Code	alphanumeric	20 Must not contain spaces.	Yes	A unique identifier for the Customer prefix.
Description	alphanumeric	128		A meaningful description for the Customer prefix.

Excel/CSV File Format

	A	B
1	Customer Prefix	
2	name	description
3	Mesa	Mesa
4	Fresno	Fresno
5	Needles	Needles

Case Actions

◀ ▶ **Edit Case Action *DISPATCH***

Case Action

Name:

Description:

Save Case Action

Data Fields

Data Item	Data Type	Max. Field size	Mandatory	Notes
Case Action	alphanumeric	20 Must not contain spaces.	Yes	A unique identifier for the Case Action
Description	alphanumeric	128		A meaningful description for the Case Action.

Excel/CSV File Format

case_action.csv	
	A B
1	Case Action
2	name description
3	A1DELIVER Deliver new Cart / Bin
4	A2DISPATCH Dispatch Service
5	A3REPAIR Dispatch Repair and Maintenance
6	A4VERIFY VERIFY if Service Rendered
7	A5ANALYSE INVESTIGATE Customer Complaint
8	A6BILLING INVESTIGATE Billing Issue
9	A7AUDIT Dispatch Audit
10	A8REMOVE Remove Cart / Bin

Case Types

◀ ▶ **Edit Case Type *CMPL***

Case Type

Name:

Description:

Save Case Type

Data Fields

Data Item	Data Type	Max. Field size	Mandatory	Notes
Case Type	alphanumeric	20 Must not contain spaces.	Yes	A unique identifier for the Case Type
Description	alphanumeric	128		A meaningful description for the Case Type.

Excel/CSV File Format

case_type.csv

	A	B	C
1	Case Type		
2	name	description	
3	T1CASE	Customer Case	
4	T2HICASE	URGENT Customer Case	
5	T3WO	Field Work Order	
6	T4HIWO	URGENT Field Work Order	

Rates

◀ ▶
Edit Rate CE1H

Rate Definition

Rate Code: Description:

LOB:
 District:
 Frequency:

Pricing Options

Container Selection

Container Dependency Rate can be applied only to service/workflow supporting matching containers

Type: Size:

Dates

Start Date: End Date:

Rates

Basic Rate:

Extra Pickup:

Extra Weight:

Refused Service:

Rate/Weight Unit:

Cancel Cost:

Save Rate

Data Fields

Data Item	Data Type	Max. Field size	Mandatory	Notes
Rate Type	alphanumeric	Reference data element.	Yes	A unique identifier for the Rate Type
Description	alphanumeric	Reference data element.		A meaningful description for the RateType.
Basic Rate	double	128	Yes	Regular service rate.
Extra pickup	double	n/a	Yes	Rate for servicing an extra.
Extra weight	double	n/a	Yes	Rate for extra weight picked up.
Refused service	double	n/a	Yes	Rate charged when unable to service the location.
Rate/weight unit	double	n/a		Rates per unit of weight.
Start date	date	n/a	Yes	Date rate takes effect.
End date	date	yyyy-mm-dd		Date rate expires.
Cancellation rate	double	yyyy-mm-dd		Rate for customer cancellation of service request.
Container Dependency	alphanumeric	n/a		Determines whether rate can be applied only to services/workflows

Data Item	Data Type	Max. Field size	Mandatory	Notes
Container type	alphanumeric	True, False (check box)		associated with specified container type.
Container size	numeric	20		Reference data element.
Units	alphanumeric	10		Volume in units specified.
Customer type (LOB)	alphanumeric	10		Reference data element.
District	alphanumeric	20		Reference data element.
Frequency	alphanumeric	40		Reference data element.

Excel/CSV File Format

Rate Type	name	description	rate	extraRate	extraWeightRate	noService	startDate	endDate	cancelServiceRate	customerType	district	containerType	containerSize	unitType	serviceRateFrequency	ratePerWeightUnit
RTDF	Default rate		0	3	0	0	#####		0							
CEAH	One-Time RO	121		3	35	0	#####		0 RO			ROBOX		10 Yard	ON DEMAND	21.61
CEBH	Empty Return	196.73		3	0	0	#####		0 RO			ROBOX		10 Yard	ON DEMAND	0
NERH	Empty Return	0		3	0	0	#####		0 RO			ROBOX		10 Yard	ON DEMAND	0
CEKH	Empty Return	121		3	0	0	#####		0 RO			ROBOX		10 Yard	ON DEMAND	0
CEIH	Empty Return	121		3	35	0	#####		0 RO			ROBOX		10 Yard	ON DEMAND	30.95
CSBH	Set	53		3	0	0	#####		0 RO			ROBOX		10 Yard	ON DEMAND	0

Bundled Rates

Modify Bundled Rate - 9058 ✕

To remove services from the bundle check appropriate box. To add another service use dropdown list.

Bundle Details

Bundled Rate Name: **Amount:**

Bundled Services:

F326T2	FM R3.2 6YD TRSH 2xWk	<input type="checkbox"/>
F326T2	FM R3.2 6YD TRSH 2xWk	<input type="checkbox"/>
F326T2	FM R3.2 6YD TRSH 2xWk	<input type="checkbox"/>
F326T2	FM R3.2 6YD TRSH 2xWk	<input type="checkbox"/>
F328T4	FM R3.2 8YD TRSH 4xWk	<input type="checkbox"/>
F326T3	FM R3.2 6YD TRSH 3xWk	<input type="checkbox"/>

Add Service

Service To Add:

Service Details:

Code: _____

Dispatch Type: _____

LOB: _____

Material: _____

Weight Limit: _____

Frequency: _____

Recurring: On Demand: Extra:

+ Add To Bundle

Data Fields

Data Item	Data Type	Max. Field size	Mandatory	Notes
Name	alphanumeric	20 Must not contain spaces.	Yes	A unique identifier for the Bundled Rate
Amount	double	n/a	Yes	Service Rate
Quantity (1-5)	integer	n/a	Yes	Number of services in bundle
Code (1-5)	alphanumeric	20 Must not contain spaces.	Yes	Service code. Must correspond to a Service Reference Data element

Excel/CSV File Format

	A	B	C	D	E	F	G	H	I	J	K	L
1	Bundle Rate											
2	Bundle Rate Code	Price	Qty1	Code1	Qty2	Code2	Qty3	Code3	Qty4	Code4	Qty5	Code5
3	918	0	1	F322T2	10	F326T3						
4	9058	0	4	F326T2	1	F326T3	1	F328T4				
5	9205	0	2	F324T2	1	F326T2						
6	9206	0	2	F326T1	1	F328T3						
7	9207	0	2	F323T2	1	F326T2						
8	9208	0	1	F356T2	1	F358T2						

Case Reasons

◀ ▶
Edit Case Reason A1 Missed Collection

Case Reason

Description:

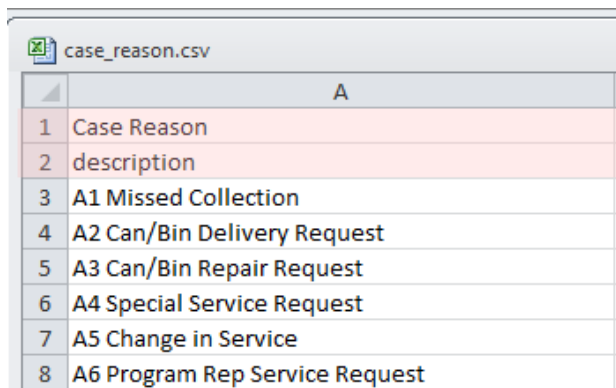
A1 Missed Collection

Save Case Reason

Data Fields

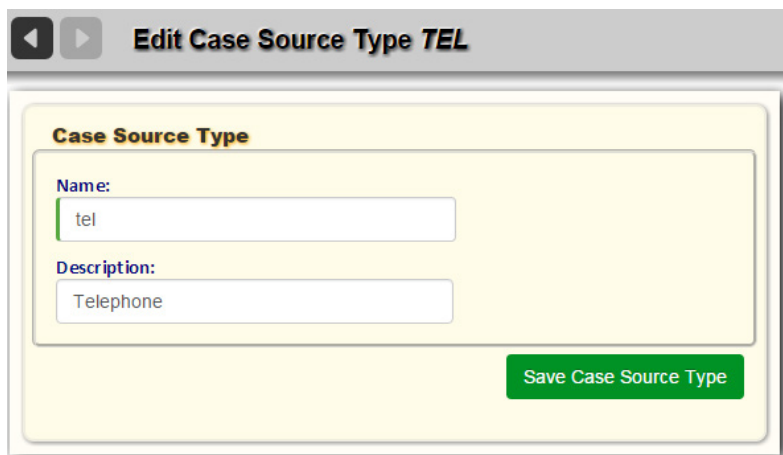
Data Item	Data Type	Max. Field size	Mandatory	Notes
Case Reason	alphanumeric	128 Must not contain spaces.	Yes	A meaningful description for the Case Reason. Must be a unique identifier.

Excel/CSV File Format



	A
1	Case Reason
2	description
3	A1 Missed Collection
4	A2 Can/Bin Delivery Request
5	A3 Can/Bin Repair Request
6	A4 Special Service Request
7	A5 Change in Service
8	A6 Program Rep Service Request

Case Source Types



Edit Case Source Type TEL

Case Source Type

Name:

Description:

Data Fields

Data Item	Data Type	Max. Field size	Mandatory	Notes
Case Source Type	alphanumeric	20 Must not contain spaces.	Yes	A unique identifier for the Case Source Type
Description	alphanumeric	128		A meaningful description for the Case Source Type.

Excel/CSV File Format

	A	B	C
1	Case Source Type		
2	name	description	
3	tel	Telephone	
4	vmail	Voicemail	
5	email	E-mail	

Case Statuses

◀ ▶ **Edit Case Status**

Case Status

Name:

Description:

Save Case Status

Data Fields

Data Item	Data Type	Max. Field size	Mandatory	Notes
Case Reason	alphanumeric	128 Must not contain spaces.	Yes	A meaningful description for the Case Reason. Must be a unique identifier.

Trucks

◀ ▶ **Add Truck**

Truck

Truck: Container Type:

Truck Type: Container Type:

Container Limit: Container Type:

Description:

Comments:

Data Fields

Data Item	Data Type	Max. Field size	Mandatory	Notes
Truck ID	alphanumeric	10	Yes	Each of the vehicles in your fleet must be assigned a unique identifier. The Truck ID can consist of numbers, letters, or a combination of the two.
Truck type	alphanumeric	4		Must correspond to a Truck Type reference data element
Container Limit	alphanumeric	N/A		The maximum number of containers a truck can accommodate when delivering containers to customers.
Description	alphanumeric	40		Enter a description for the vehicle. Doing so will make it more readily identifiable and meaningful to users.
Comments	alphanumeric	256		Additional comments regarding the vehicle

Excel/CSV File Format

1	Truck									
2	name	containerTypeid1	containerTypeid2	containerTypeid3	description	notes	truckTypeAutoid	containerLimit	containerUsage	divisionId
3	3028	Garbage	Garbage	Garbage	SL (1 Tip)		FB	20	0	
4	3031	Garbage	Garbage	Garbage	SLM		FB	50	0	
5	3037	Garbage	Garbage	Garbage	SLM		RE		0	
6	3041	Garbage	Garbage	Garbage	SLM		RE		0	
7	3042	Garbage	Garbage	Garbage	SLM		RE		0	
8	3045	Garbage	Garbage	Garbage	SLM		RE		0	
9	3046	Garbage	Garbage	Garbage	SLM		RE		0	
10	4006	Garbage	Garbage	Garbage	RL (1 Tip)		RE		0	-762496764
11	4009	Garbage	Garbage	Garbage	RL (1 Tip)		RE		0	-762496764

Drivers

Modify Driver: 6 ✕

Code 12828	License Id License Id	License Class License Class
First Name Jerry M	Last Name Gonzales	Title Equipment Operator III
Hourly Cost Hourly Cost	Notes Notes	
Active <input checked="" type="checkbox"/>	Crew Member <input checked="" type="checkbox"/>	

Cancel
Save

Data Fields

Data Item	Data Type	Max. Field size	Mandatory	Notes
Code	alphanumeric	20	Yes	The driver's employee number. In the unlikely event that your organization does not assign employee codes, you must create and assign one for each driver for purposes of the application.
First Name	alphanumeric	15	Yes	Driver's first name
Last Name	alphanumeric	15	Yes	Driver's last name
Start Date	Date YYYY-MM-DD HH:MM:SS	18	Yes	Driver's start date
End Date	Date YYYY-MM-DD HH:MM:SS	18		Driver's end date

Data Item	Data Type	Max. Field size	Mandatory	Notes
License ID	alphanumeric	30		The unique identification number for the driver's permit.
License Class	alphanumeric	30		The code indicating the type(s) of vehicles the driver is permitted to operate, for example, Class 3 With Air.
Hourly Cost	numeric	n/a		Driver's rate
Notes	alphanumeric	256		Optional notes field
Crew member	alphanumeric	True, false (check box)		Indicates whether driver is a regular crew crew member.
Title	alphanumeric	30		Driver title, e.g., Senior Driver

Excel/CSV File Format

driver.csv											
	A	B	C	D	E	F	G	H	I	J	K
1	Driver										
2	code	firstname	lastname	driversLicenceId	driversLicenceClass	notes	startDate	endDate	crewMember	title	driverTeamAutold
3	83	Adam	Chouinard		3 with air	Contracto	#####		TRUE		
4	105	Ajay	Mann		1F		#####		FALSE		
5	17	Albert	Prince		1 3 with air	Dept-08CS	#####		FALSE		
6	136	Alex	Venegas	ddd			#####		FALSE	www	
7	8	Allen	Cook		1A		#####		FALSE		
8	77	Areil	Capiendo		3 with air		#####		FALSE		
9	89	Brad	Wiebe		Class 3 with Air	Wiebe	#####		FALSE		
10	112	Brian	Kaplan		1A	Contracto	#####		FALSE		

Driver Teams

◀ ▶ **Edit Driver team A**

Driver Team

Name:

Description:

Save Driver Team

Assigned Driver

Driver Name	Driver Code	-
Rebecca Clark	11197	-
John Connolly	14493	-
Rafael Galvez	16903	-
Lorenzo Grady	16564	-
Terry Graham	16901	-
Joseph Green	17878	-
David Grimm	8578	-
Tod Haines	14824	-
Israel Hernandez	13634	-
Total Items: 27		

Assign Driver

Data Fields

Data Item	Data Type	Max. Field size	Mandatory	Notes
Driver Team	alphanumeric	12	Yes	A unique identifier for the Work Group
Description	alphanumeric	128	Yes	A meaningful description for the Work Group.

Excel/CSV File Format

📄 driver_team.csv

	A	B	C
1	Driver Team		
2	name	description	
3	TEAM1	T1	

Activity Codes

◀ ▶ **Edit Activity Code *DONE***

Activity Code

Code:

Sequence:

Completion:

Description:

Dispatch Type:

Reroutable:

Successful:

Save Activity Code

Data Fields

Data Item	Data Type	Max. Field size	Mandatory	Notes
Code	alphanumeric		Yes	A unique identifier that denotes the completion status for stops on your routes. Examples may include C for Completed, B for Blocked Access.
Sequence	numeric		Yes	Determines the order in which the list is presented to the driver.
Completion	alphanumeric uppercase Y or N		Yes	Determines whether the route stop is considered completed or not completed for the activity code used. Completed means that the route stop executed with the user code will be removed from the driver's call list.
Description	alphanumeric		Yes	Note that these descriptions are used as labels for the buttons in the WasteApp, which can accommodate maximum of 2 lines of 10 characters.

Data Item	Data Type	Max. Field size	Mandatory	Notes
Reroutable	boolean			Determines whether the stop can be reassigned to another route. Must contain Y or N.
Successful	boolean			Determines whether the service is considered successfully delivered. An assignment may have a Completion status of False and a Success status of True.

Excel/CSV File Format

activity_code.csv

	A	B	C	D	E	F	G
1	Activity Code						
2	name	Completion[cmpl]	description	sequence	isReroutable	isSuccessful	
3	C	Y	Completed	1	FALSE		
4	D	Y	UTS - Not Out	2	FALSE		
5	M	Y	Misplaced	3	FALSE		
6	Y	Y	UTS - No Acces	5	FALSE		
7	Z	Y	UTS - Damaged	6	FALSE		

Facilities

Facility

Code: AMER Sequence:

Description:

Address: 740 W Broadway Rd

Phone: robot Fax: 480-834-1923

Latitude: 33.408088 Longitude: -111.847956 GeoZone:

Integrated:

Right click on map to pin facility position. Drag the pin icon to change the position of facility.

Data Fields

Data Item	Data Type	Max. Field size	Mandatory	Notes
Code	alphanumeric	10	Yes	A unique code identifying the waste disposal facility, for example, WPGWaste.
Sequence	numeric	5 (max. value 32767)	Yes	Order in which option is presented to driver.
Description	alphanumeric	20	Yes	The name of the facility, for example, Winnipeg Waste.
Address	alphanumeric	256	Yes	The full address and postal code/zip code of the facility. This information enables the application to determine the latitude and longitude of the facility.
Phone	alphanumeric	25		Phone number of the facility
Fax	alphanumeric	25		Fax number of the facility
Latitude	numeric	10		Latitude of the facility in degrees, for example 45.483985. If this information is omitted, it will be set automatically by the application if the full address of the facility is specified.
Longitude	numeric	10		Longitude of the facility in degrees, for example -73.562072. If this information is omitted, it will be set automatically by the application if the full address of the facility is specified.
GeoZone	alphanumeric	N/A		Well-known text (WKT) file representing the facility's geozone.
Integrated	boolean	(1 or 0)		Specifies whether Facility has integrated weigh scales

Excel/CSV File Format

facility.csv									
	A	B	C	D	E	F	G	H	I
1	Facility								
2	name	latitude	longitude	address	Geozone	telephone	fax	description	sequence
3	WPFMRF	49.913689	-97.1665	1029 Henry Avenue Winnipeg MB R3E3L6	Tu13G			WIN PROC Fac	1
4	WPGBGD			Brady Road Winnipeg MB R0G1N0				WPG Bradys G	2
5	WPGBYW	0	0	Brady Road Winnipeg MB R0G1N0				WPG Brady YV	3
6	FM888	35.787688	-78.669	1751 rue richardon montreal qc canada h3k1g6	FM office	123-098-1433		Fleetmind Dis	42
7	NCPR	35.910999	-78.7435	9216 Miranda Drive Raleigh NC 27617	DDO	(919) 625-0807		NC Pallet Rec	13
8	NYWS	35.718211	-78.6754	3109 Inwood Road Raleigh NC 27603	DDO	(919)515-9421		NCSU Yard We	12

Work Groups

◀ ▶ **Edit Work Group WG1103**

Work Group

Name:

Description:

Truck Type:

➦ Work Group

List of Vehicle

Truck	Description

Total Items: 0

➦ Assign Vehicle

Assigned Routes

Route	Frequency	Service Date

Total Items: 0

Data Fields

Data Item	Data Type	Max. Field size	Mandatory	Notes
Work Group	alphanumeric	10		A unique identifier for the Work Group
Description	alphanumeric	128		A meaningful description for the Work Group.
Truck Type	alphanumeric	4		Must correspond to a Truck Types reference data element.
Truck ID	alphanumeric	10		The Truck ID. Must match a corresponding data element in Trucks Reference Data.

Excel/CSV File Format

📄 work_group.csv

	A	B	C	D	E
1	Work Group				
2	name	description	trucktype	truckname	
3	Jason L	Jason	RE		
4	Jack Song	Jack's routes	RE		
5	3TEAM	lillian Darren Routes	RE		
6	Adam C	Adam's Routes	RE		
7	Rudolphs	Maps for Rudolph's	RE		

Route Groups

◀ ▶ **Edit Route Group 12345678**

Route Group

Name:

Description:

Route Group

Assigned Routes

Route	Description	
<input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>	
MB66		-
MB67		-
MB68		-

Total Items: 3

Assign Routes

Data Fields

Data Item	Data Type	Max. Field size	Mandatory	Notes
Route Group	alphanumeric	12	Yes	A unique identifier for the Route Group
Description	alphanumeric	128		A meaningful description for the Route Group.
Route	alphanumeric	10	Yes	A unique code identifying the member Route.

Excel/CSV File Format

📄 route_group.csv

	A	B	C	D
1	Route Group			
2	name	description	route	
3	PSC	Pointe St-Charles	Fr01G	
4	PSC	Pointe St-Charles	Fr16GB	

Services

◀ ▶ **Edit Service 20YGB**

Service Definition

Service Code: <input type="text" value="20YGB"/>	Sequence: <input type="text" value="0"/>	LOB: <input type="text" value="Industrial"/>	
Service Description: <input type="text" value="20 yd Garbage"/>	Material: <input type="text" value="Garbage"/>	Minimum Weight: <input type="text" value=""/> <input type="text" value="Pound"/>	
Dispatch Type: <input type="text" value="Roll-Off"/>	Weight Limit: <input type="text" value="1000"/> <input type="text" value="Pound"/>	Frequency: <input type="text" value="twice a month"/>	

Service Cycles

On-Demand

Extra

Recurring

Default recurring workflow:

Supported Containers & Rates

Data Fields

Data Item	Data Type	Max. Field size	Mandatory	Notes
Code	alphanumeric	20	Yes	A unique identifier indicating the type of waste collection, for example, CDLV for Cart Delivery, FL for Commercial Front-Load.
Sequence	numeric	5 digits (maximum value 32767)	Yes	Useful for service codes used by the driver to service Extras, call-ins, etc. If no sequencing is required, each field still needs to be populated with a 0.
Extra	numeric (1 or 0)	1	Yes	Indicates whether the service type can be provisioned by the driver as an Extra.
On-demand	numeric (1 or 0)	1	Yes	Indicates whether the service type can be provisioned by the driver as an On-demand.
Recurring	numeric (1 or 0)	1		Indicates whether the service is recurring.
Description	alphanumeric	20	Yes	A meaningful description for the code.
Dispatch type	alphanumeric	Residential, Front-load, Roll-off		Determines the stop type (and, hence, workflow and truck type) for the assignment.
Work flow	alphanumeric	Must be populated with a Work Flow reference data element	Yes	A description of the task, for example, Cart to be replaced. See APPENDIX B - WORKFLOWS for more information about workflows.
Line of Business	alphanumeric	See description.	Yes	The line of business; must match values defined in Lines of Business.

Data Item	Data Type	Max. Field size	Mandatory	Notes
Material	alphanumeric	See description.	Yes	The waste material to be collected; must match values defined in Material Types.
Weight limit	numeric	4; must be populated with "1000"	Yes	Weight capacity of the bin or cart.
Minimum weight	numeric	N/A		Used for calculation of billing charges for roll-off service.
Weight Unit	alphanumeric	6; must be populated with "Pounds"	Yes	Unit of measurement; must match values defined in Volume and Weight Units.

Excel/CSV File Format

1	Service											
2	name	description	customerType	material	weight	weightUnit	onDemand	extra	sequence	dispatchType	defaultWorkFlo	recurring
3	AGWU240	Walk-Up ALLEY Garbage	RESI	Garbage	1000	Pounds	TRUE	TRUE	1	RESI	RESI^CSRV^Cart	TRUE
4	AGWU360	Walk-Up ALLEY Garbage	RESI	Garbage	1000	Pounds	TRUE	TRUE	2	RESI	RESI^CSRV^Cart	TRUE
5	ALGB240	ALLEY Garbage	RESI	Garbage	1000	Pounds	TRUE	FALSE	3	RESI	RESI^CSRV^Cart	TRUE
6	ALGB360	ALLEY Garbage	RESI	Garbage	1000	Pounds	TRUE	TRUE	4	RESI	RESI^CSRV^Cart	TRUE
7	AREC240	ALLEY Recycling	RESI	Recycling	1000	Pounds	TRUE	TRUE	5	RESI	RESI^CSRV^Cart	TRUE
8	AREC360	ALLEY Recycling	RESI	Recycling	1000	Pounds	TRUE	TRUE	6	RESI	RESI^CSRV^Cart	TRUE

M	N	O	P	Q	R	S	T
serviceRateFrequency	container type name	unit type name	container size	rate	work flow[dispatchType^code^description]	billing code	minWeight
1	Garbage	Liters		240 R1	RESI^CSRV^Cart to be serviced	RESI-CSRV-R1	AGWU240
	Garbage	Liters		360			
1	Recycling	Liters		240 R1	RESI^CSRV^Cart to be serviced	RESI-CSRV-R1	ALGB240
1	Garbage	Liters		240 R1	RESI^CSRV^Cart to be serviced	RESI-CSRV-R1	ALGB360
1	Recycling	Liters		240			AREC240
	Recycling	Liters		360			

Work Flows

◀ ▶ **Edit Work flow 1**

Work Flow

Work Flow

Dispatch Type

Operating department

Description:

Customer Description:

[Save Work Flow](#)

Data Fields

Data Item	Data Type	Max. Field size	Mandatory	Notes
Work flow (code)	alphanumeric	20	Yes	An identifier for the work flow.
Dispatch type	alphanumeric	20	Yes	Must correspond to a Lines of Business reference data element.
Operating Department (group)	alphanumeric	15	Yes	Must correspond to an Operating Department reference data element.
Customer Description	alphanumeric	256		Description of the work flow used by customer.

Excel/CSV File format

	A	B	C	D	E
1	Work Flow				
2	dispatchType	code	description	group	custDescription
3	RESI	CSRV	Cart to be serviced	REG-SRV	Empty
4	RESI	NC	No Cart	ssw	fwerffff
5	RESI		1 Cart to be delivered	MNT	Cart to be delivered 1
6	RESI		31 Cart to be removed	MNT	Cart to be removed
7	RESI		41 Cart to be replaced	MNT	Cart to be replaced
8	RESI		10 Cart to be repaired	MNT	Replace body
9	COMM	CSRV	Cart to be serviced	REG-SRV	Cart to be serviced
10	COMM	NC	No Cart	REG-SRV	No Cart service

Operating Departments

◀ ▶ **Edit Operating department *BARREL***

Operating Department

Name:

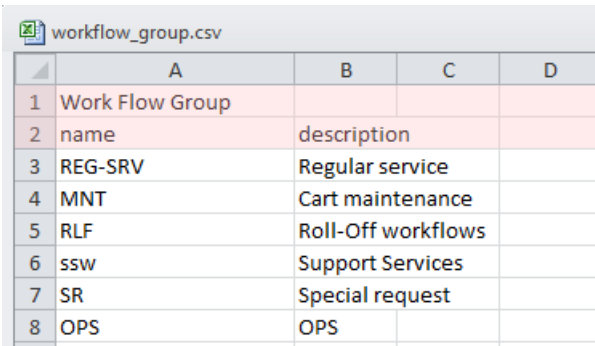
Description:

[Save Operating Department](#)

Data Fields

Data Item	Data Type	Max. Field size	Mandatory	Notes
Operating Department	alphanumeric	15		An identifier indicating the operating department. Must match a corresponding data element in Operating Department Reference Data
Description	alphanumeric	256		A meaningful description for the Operating Department.


Excel/CSV File format



	A	B	C	D
1	Work Flow Group			
2	name	description		
3	REG-SRV	Regular service		
4	MNT	Cart maintenance		
5	RLF	Roll-Off workflows		
6	ssw	Support Services		
7	SR	Special request		
8	OPS	OPS		

Importing and Exporting Reference Data

FleetLink Route Management System's import capabilities make it possible for you to import large amounts of Reference Data in a single operation, saving time and minimizing the potential errors of manual entry.

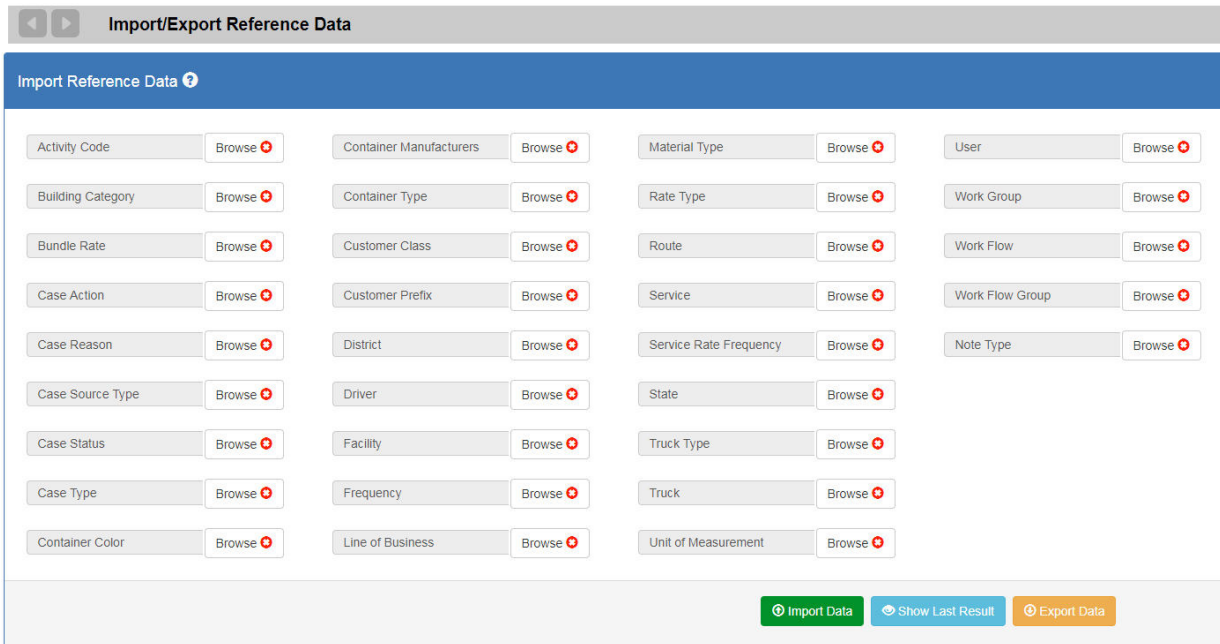
 It is assumed that you have already prepared your data according to the formats required by the FleetLink Route Management System. If you have not done so, please refer to Preparing Reference Data Off-line before proceeding.

From the Import Result screen, you can import individual reference data elements by browsing to a disk location, and then selecting Import.

When you export reference data, ALL reference data files are packed into a zip file, where you can extract and save any or all files to disk.

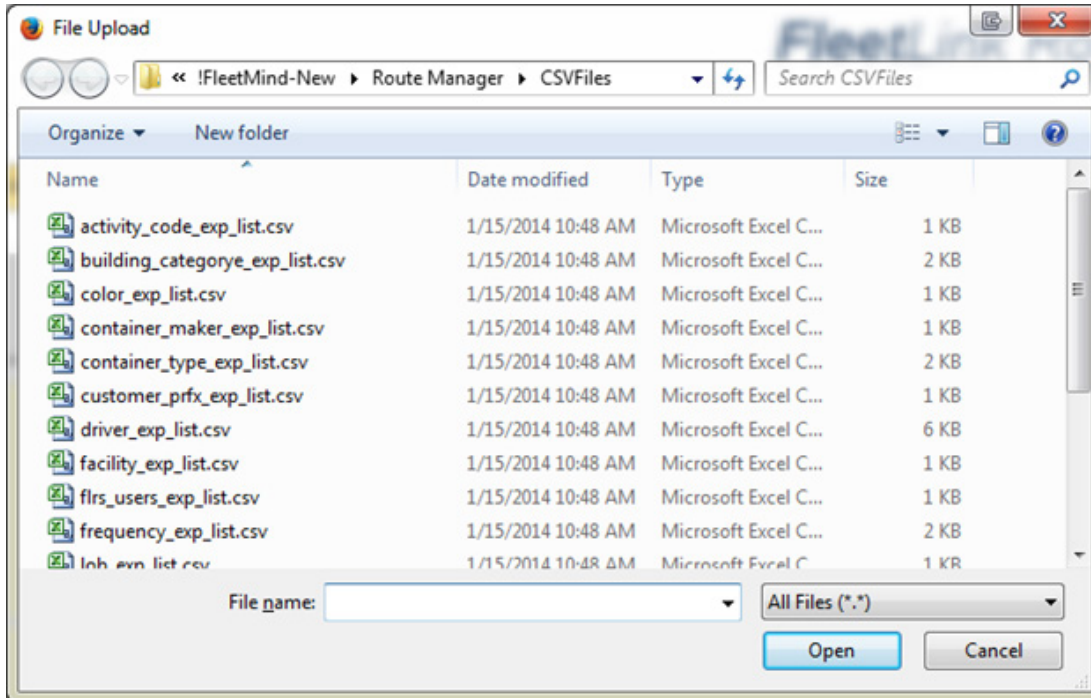
Importing Reference Data

1. From the static portion of the UI, select Reference Data > Import Reference Data. The Import Reference Data screen displays.



From this screen, you can import previously prepared CSV files for every category of Reference Data.

2. Select a reference data category, and then press its **Browse** button.



3. Navigate to the location on disk where your file is stored, select the file, and then press Open. Your file is added to the Import Reference Data list.

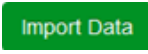
The Browse button's status indicator changes to a check mark to indicate that a file has been selected.



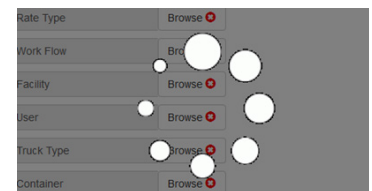
NOTE: If you realize that you have selected the wrong file, simply click the Browse button again to replace the currently selected file. To clear (delete) the selection altogether, you must press your browser's Refresh button. Doing so clears all selections.

4. To select additional categories, repeat steps 2 and 3.

5. When done, press **Import Data**.



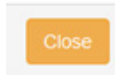
An animated progress indicator displays while file import is attempted.

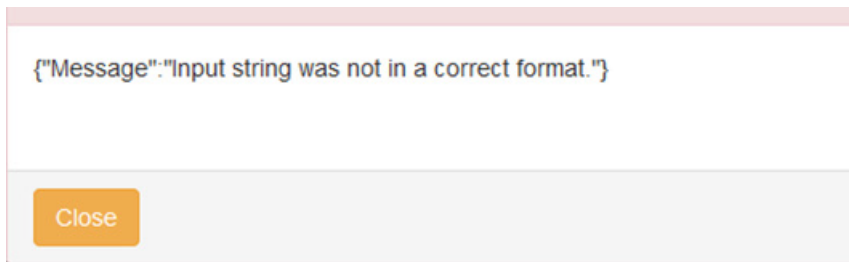


Duration will depend on the amount of data being processed.


Upon completion, a results dialog indicates success or failure of the operation.

Referential Data	Insertion	Rejection	Details	Total
Activity Code	1	0	✓	1





If errors result, review your import files to ensure that they comply with the formats specified in Preparing Reference Data Off-line.

Pressing the **Show Last Result** button  will display the Import Result screen and show the results of the most recently performed import operation.

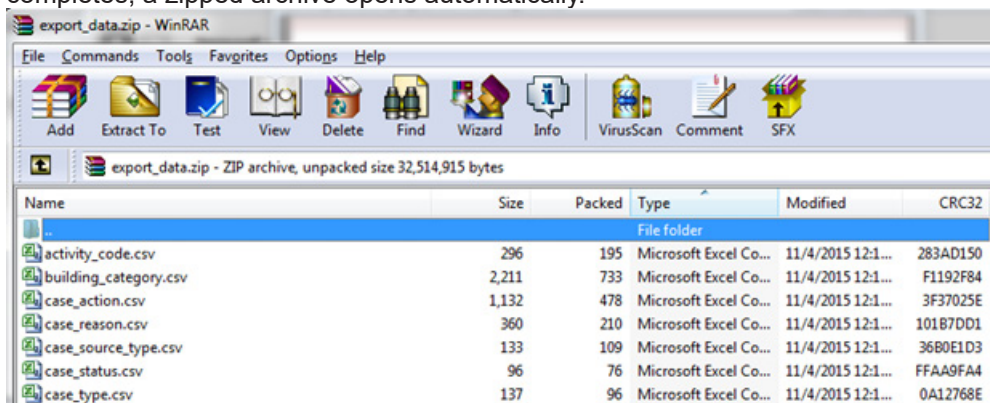
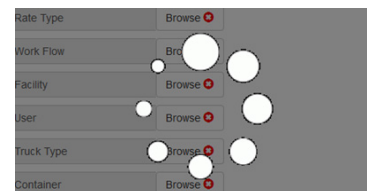
Exporting Reference Data

The export operation exports all available reference data; selection of individual categories is not supported.

1. Select **Export Data**.

An animated progress indicator displays while export is in progress.

Duration will depend on the amount of data being processed. When the process completes, a zipped archive opens automatically.



2. Extract your files to the desired disk location.

Combined Data

What is Combined Data?

The FleetLink Route Management System provides tools for importing and exporting Combined Data.

Combined Data is defined as a database record (or collection of records) each of which combines all data for one container: the container itself, the customer location to which the container is assigned, and details about that assignment.

File Formats

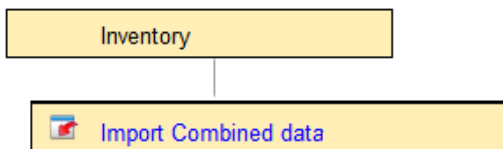
There are two different sets of Combined Data that can be imported into the FleetLink Route Management System:

- [Combined Data \(Inventory menu\)](#)
- [Route Stops \(Routes menu\)](#)

File content and format for these two sets of data are nearly identical--what differentiates them is that for Route Stops, each record has additional fields appended to the end to accommodate route data for up to 14 routes.

Inventory Combined Data

Select **Inventory > Import Combined Data**.



The following tables show the file format required when importing Combined Data.

You can download an empty CSV file and complete the fields with your own data by selecting Download Sample.

Column #	Excel Column #	Column Name	Valid Values	Database alias	Field Size
1	A	Customer Id*		Customer	60
2	B	Line of Business*		Customer	20
3	C	Business Name		Customer	60
4	D	Customer Last Name		Customer	60
5	E	Customer First Name		Customer	40
6	F	Office Phone		Customer	20
7	G	Home Phone		Customer	20
8	H	Fax		Customer	20
9	I	Email		Customer	60
10	J	Active/Inactive		Customer	8
11	K	Customer Comments		Customer	256
12	L	Customer Billing Id		Customer	60
13	M	Customer Class*		Customer	4

Column #	Excel Column #	Column Name	Valid Values	Database alias	Field Size
14	N	Billable		Customer	8
15	O	Street/Civic Number		Customer	12
16	P	Street		Customer	50
17	Q	Apt/Suite		Customer	13
18	R	District		Customer	40
19	S	City		Customer	40
20	T	State		Customer	2
21	U	Postal Code		Customer	10
22	V	Street/Civic Number		Location	12
23	W	Street		Location	50
24	X	Apt/Suite		Location	13
25	Y	District		Location	40
26	Z	City		Location	40

Column #	Excel Column #	Column Name	Valid Values	Database alias	Field Size
27	AA	State		Location	2
28	AB	Postal Code		Location	10
29	AC	Building Categories*		Location	40
30	AD	Contact Name		Location	40
31	AE	Contact Phone		Location	25
32	AF	Latitude		Location	40
33	AG	Longitude		Location	40
34	AH	Location Name		Location	60
35	AI	Billing Location Id*		Location	60
36	AJ	Geold		Location	36
37	AK	Location Active*		Location	8
38	AL	Serial Number*		Cart/Container	20
39	AM	RFID		Cart/Container	64

Column #	Excel Column #	Column Name	Valid Values	Database alias	Field Size
40	AN	Capacity		Cart/Container	50
41	AO	Capacity Units		Cart/Container	10
42	AP	Color		Cart/Container	40
43	AQ	Container Type		Cart/Container	20
44	AR	Active/Inactive		Cart/Container	8
45	AS	Container Comments		Cart/Container	256
46	AT	Manufacturer		Cart/Container	30
47	AU	Warranty Start Date		Cart/Container	30
48	AV	Warranty End Date		Cart/Container	30
49	AW	Label		Cart/Container	30
50	AX	Material		Cart/Container	40
51	AY	Dimension Unit		Cart/Container	10
52	AZ	Is Compactor		Cart/Container	8

Column #	Excel Column #	Column Name	Valid Values	Database alias	Field Size
53	BA	Width		Cart/Container	11
54	BB	Height		Cart/Container	11
55	BC	Length		Cart/Container	11
56	BD	Latitude		Cart/Container Location Association	40
57	BE	Longitude		Cart/Container Location Association	40
58	BF	Material*		Cart/Container Location Association	40
59	BG	Start Date		Cart/Container Location Association	30
60	BH	End Date		Cart/Container Location Association	30
61	BI	Active/Inactive		Cart/Container Location Association	8
62	BJ	Assign Comments		Cart/Container Location Association	256
63	BK	Service Code*		Cart/Container Location Association	10
64	BL	Facility Code		Cart/Container Location Association	40
65	BM	Rate discount		Cart/Container Location Association	7

Column #	Excel Column #	Column Name	Valid Values	Database alias	Field Size
66	BN	Service Subscription Id		Cart/Container Location Association	60
67	BO	Bundle Rate Code		Cart/Container Location Association	20
68	BP	Assignment Status Code*		Cart/Container Location Association	4
69	BQ	Shared association		Cart/Container Location Association	10
70	BR	Is Primary		Cart/Container Location Association	8
71	BS	Work Flow		On Demand Stop	280
72	BT	Target Date		On Demand Stop	10
73	BU	Driver Note		On Demand Stop	1024
74	BV	Dispatcher Note		On Demand Stop	120

Routes Combined Data

Select **Routes > Import Route Stops**.



◀ ▶ **Import Route Stops**

- To import data, each line in the file must define one container assigned to one customer at a single location.
- To assign one container to each of two locations for the same customer, the customer data must be duplicated on two lines (one container and one location per line).
- To assign two containers to the same customer location, the customer and location data must be duplicated on two lines.
- In all cases, there must be one and only one line per container.

Use customerId as unique identifier

CSV file

In addition to the Inventory Combined Data (columns 1 through 68) previously described, Route Management Combined Data contains additional route data for up to 14 routes, as shown in the following table.

Column #	Excel Column #	Column Name	Valid Values	Database alias	Field Size
67	BO	Bundle Rate Code		Cart/Container Location Association	20
68	BP	Assignment Status Code*		Cart/Container Location Association	4
69	BQ	Shared association		Cart/Container Location Association	10
70	BR	Is Primary		Cart/Container Location Association	8
71	BS	Work Flow		On Demand Stop	280
72	BT	Target Date		On Demand Stop	10
73	BU	Driver Note		On Demand Stop	1024
74	BV	Dispatcher Note		On Demand Stop	120
75	BW	Route name 1		Route	10
76	BX	Sequence for Stop in Route name 1		Stop	
...	
101	CW	Route name 14 (maximum 14 routes allowed)		Route	10
102	CX	Sequence for Stop in Route name 14		Stop	
103	CY	Work Order Id		On Demand Stop	24

Advanced Options

The Clear Routes Before Import option removes all stops in routes before importing the new data. Use this feature when reorganization of routes means that the reorganized route(s) will have fewer stops.

Advanced Options □

Clear Routes Before Import

No

Rules for Importing Combined Data

When importing combined data, you must ensure that the format of your CSV file adheres to specific criteria.

To minimize the potential for error when importing Combined Data, consult the following table to determine the maximum length and acceptable content for the individual fields of your imported file.



IMPORTANT When importing Combined Data:

Any data item in the Combined Data that corresponds to a Reference Data element must first be defined in the Route Management System's Reference Data prior to import or errors will be generated stating what is missing and needs to be added.

Missing reference data list

Line of Businesses	Building Categories	States/Provinces	Volume/Weight Units	Cart/Container Colors	Cart/Container Types	Material Types	Services
Blank field	Blank field	Blank field	Blank field	Blank field	Blank field	Blank field	Blank field

File No file selected.

Verify Mode Verify the file without updating the database


Start date format



End date format



Any missing Reference Data will result in entries being rejected and gaps in routes.







IMPORTANT RULES





- The spelling must be an exact match.
- Capitalization must be an exact match—the relationship between Combined Data and Reference Data is case-sensitive.
- The maximum field size must not be exceeded.
- No entry may include commas.

This icon denotes that the data element is Reference Data 

No.	Data Item	Data Type	Max. Field Size	Mandatory	Notes
1	Customer ID	numeric	25	Yes	0 through 9. No special characters, e.g., /, *, #, etc.
2 	Line of Businesses	alphanumeric	20	Yes	Case-sensitive; must match a corresponding Reference Data element.
3	Business Name	alphanumeric	60		Name of business, where applicable.
4	Customer Last Name	alphanumeric	40		Last name of customer
5	Customer First name	alphanumeric	40		First name of customer.
6	Office Phone	alphanumeric	20		Customer's office telephone number.
7	Home Phone	alphanumeric	20		Customer's home telephone number.
8	Fax	alphanumeric	12		Customer's fax number.
9	Email	alphanumeric	60		<ul style="list-style-type: none"> • a - z • A - Z • 0 - 9 • @ ("at" sign) • . (period)
10	Customer Active/Inactive	Flag/ alphanumeric	8		Possible values are "Active", "Inactive". If omitted, value defaults to "Active".
11	Driver comments	alphanumeric	256		Comments for customer data.
12	Customer Billing ID	alphanumeric	60		Unique identifier used for integration with billing system.
13 	Customer Class	alphanumeric	4		Must match a corresponding Reference Data element.

No.	Data Item	Data Type	Max. Field Size	Mandatory	Notes
14	Billable	alphanumeric (Y or N)	1		Determines whether customer address is billing address.
15	Civic Number	alphanumeric	12		Civic number part of address.
16	Street	alphanumeric	40		Street name part of address.
17	Apt/Suite	alphanumeric	12		Apartment/suite part of address.
18	District	alphanumeric	40		District part of address.
19	City	alphanumeric	40		City part of address.
20 	State	alphanumeric	2		Case-sensitive; must match a corresponding Reference Data element.
21	Postal Code	alphanumeric	10		Postal/ZIP code part of address.
22	Civic number (location)	alphanumeric	12		Civic number part of location address.
23	Street (location)	alphanumeric	50		Street name part of location address.
24	Apt/Suite (location)	alphanumeric	13		Apartment/suite part of location address.
25	District (location)	alphanumeric	40		District part of location address.
26	City (location)	alphanumeric	40		City part of location address.
27	State (location)	alphanumeric	2		State part of location address. Case-sensitive; must match a corresponding State Reference Data element.
28	Postal code (location)	alphanumeric	10		Postal/ZIP code part of location address.
29 	Building Categories	alphanumeric	20	Yes	Case-sensitive; must match a corresponding Reference Data element.
30	Contact name	alphanumeric	40		Customer contact name.
31	Contact phone	alphanumeric	25		Customer contact phone number.
32	Latitude	numeric	40		<ul style="list-style-type: none"> • 0 - 9 • Minus sign (-) • Period (.)
33	Longitude	numeric	40		<ul style="list-style-type: none"> • 0 - 9 • Minus sign (-) • Period (.)
34	Location Name	alphanumeric	60		Optional description for the location.
35	Billing Location ID	alphanumeric	60	Yes	For integration with company's billing system. Not modifiable on RMS UI.
36	GeoID	alphanumeric	36		Location Geoid

No.	Data Item	Data Type	Max. Field Size	Mandatory	Notes
37	Location Active	alphanumeric	8 <ul style="list-style-type: none"> Active/Inactive Y/N 1/0 true/false 	Yes	Location activation status
38	Serial number	alphanumeric	20	Yes	Container serial number.
39	RFID	alphanumeric	24		Container RFID.
40	Volume (capacity)	numeric	5		Used in conjunction with Volume/Weight units.
41 	Volume/Weight units	alphanumeric	10		Case-sensitive; must match a corresponding Reference Data element.
42 	Cart/container colors	alphanumeric	40		Case-sensitive; must match a corresponding Reference Data element.
43 	Cart/container types	alphanumeric	20		Case-sensitive; must match a corresponding container type Reference Data element.
44	Container active/inactive	Flag/ alphanumeric	8		Possible values are "Active", "Inactive". If omitted, value defaults to "Active".
45	Office Comments (container)	alphanumeric	256		Notes added by Dispatch or back-office.
46 	Manufacturer	alphanumeric	30		Case-sensitive; must match a corresponding container manufacturer Reference Data element.
47	Warranty Start Date	date	10		YYYY-MM-DD
48	Warranty End Date	date	10		YYYY-MM-DD
49	Label	alphanumeric	30		Container label
50 	Material	alphanumeric	40		Material handled by container. Must match a Material Reference Data element.
51 	Dimension unit	alphanumeric	10		Container dimension units. Must match a Units Reference Data element.
52	Is compactor	alphanumeric	8		Specifies whether the container to be serviced is a compactor

No.	Data Item	Data Type	Max. Field Size	Mandatory	Notes
53	Width	numeric	11		Container width
54	Height	numeric	11		Container height
55	Length	numeric	11		Container length
56	Latitude	numeric	40		<ul style="list-style-type: none"> 0 - 9 Minus sign (-) Period (.)
57	Longitude	numeric	40		<ul style="list-style-type: none"> 0 - 9 Minus sign (-) Period (.)
58 	Material Types	alphanumeric	5	Yes	Case-sensitive; must match a corresponding Reference Data element.
59	Start date	date	18	Yes	YYYY-MM-DD HH:MM:SS Mandatory field.
60	End date	date	18		YYYY-MM-DD HH:MM:SS Not mandatory field.
61	Active/Inactive	Flag/ alphanumeric	8		Possible values are "Active", "Inactive". If omitted, value defaults to "Active".
62	Assignment comments	alphanumeric	256		Notes for driver.
63 	Service code	alphanumeric	10	Yes	Case-sensitive; must match a corresponding Service Reference Data element.
64 	Facility code	alphanumeric	10		Waste disposal facilities; must match a corresponding Facility Reference Data element.
65	Rate Discount	Decimal (multiplier)	N/A		Discount field of the Edit Container Association screen.
66	Service Subscription ID	alphanumeric	60		For integration with company's billing system. Not modifiable on RMS UI.
67 	Bundle Rate Code	alphanumeric	20		Rate code for use with bundled services.

No.	Data Item	Data Type	Max. Field Size	Mandatory	Notes
68	Assignment Status	alphanumeric	<ul style="list-style-type: none"> • 4 • RM • TBRM • C • OHLD • PN • RD 	Yes	Assignment status code. Default value is RD.
69	Shared association	alphanumeric	10		Specifies whether the container is associated with multiple subscriptions (i.e., shared container).
70	Is primary	alphanumeric	10		<p>In a shared association, this field is mandatory. One subscription must be the primary one.</p> <p>The first subscriber to the service is the primary in the association. Should that subscription be cancelled for anyreason, the next subscriber in the succession becomes primary.</p>
71	Workflow	alphanumeric	256		Workflow for the service provided at location.
72	Target Date	alphanumeric	10 <ul style="list-style-type: none"> • mm-dd-yyyy (05-26-2000) • yyyy/mm/dd (2000/05/26) • mm/dd/yy (05/26/00) • mm-dd-yy (05-26-00) • mm/dd/yyyy (05/26/2000) 		Target date for on-demand stop
73	Driver Note	alphanumeric	1024		Note to driver.
74	Dispatcher Note	alphanumeric	120		Note to dispatcher; not seen by Driver.

For Routes and Stops Combined Data

Routes and Stops combined data will contain the following additional fields.


No.	Data Item	Data Type	Max. Field Size	Mandatory	Notes
75	Route name 1 *Route will be created if it does not exist	alphanumeric	10	Yes	<ul style="list-style-type: none"> a - z A - Z 0 - 9 To minimize the potential for conflicts in interaction between FleetLink Mobile and back-office systems, special characters such as @, *, #, \$, %, &, /, \, ? are not permitted.
76	Sequence for stop in route	numeric	5 (max. value 32767)	Yes	0 - 9.
101	Route name 14 *Route will be created if it does not exist	alphanumeric	10	Yes	<ul style="list-style-type: none"> a - z A - Z 0 - 9 To minimize the potential for conflicts in interaction between FleetLink Mobile and back-office systems, special characters such as @, *, #, \$, %, &, /, \, ? are not permitted.
102	Sequence for stop in route	numeric	5 (max. value 32767)	Yes	0 - 9.
103	Work Order ID	alphanumeric	24		<ul style="list-style-type: none"> a - z A - Z 0 - 9 To minimize the potential for conflicts in interaction between FleetLink Mobile and back-office systems, special characters such as @, *, #, \$, %, &, /, \, ? are not permitted.





Importing Container Inventory Data

The FleetLink Route Management System supports importing container inventory data. See [Import Carts/Containers](#) on the Managing Container Inventory page.

As with Combined Data, you must ensure that the format of your CSV file adheres to specific criteria.

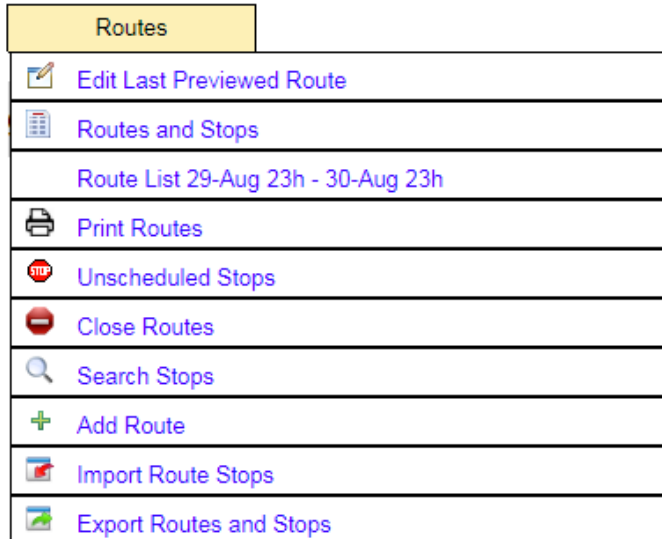
Consult the following table to determine the maximum length and acceptable content for the individual fields of your imported container inventory file.

This icon denotes that the data element is Reference Data 

Data Item	Data Type	Max. Field Size	Mandatory	Notes
Serial Number	alphanumeric	20		Container serial number.
RFID	alphanumeric	24		Container RFID.
Volume	numeric	8	Yes	Used in conjunction with Volume/Weight units.
Volume/Weight Units 	alphanumeric	10	Yes	Case-sensitive; must match a corresponding Reference Data element.
Cart/Container Color 	alphanumeric	40	Yes	Case-sensitive; must match a corresponding Reference Data element.
Cart/Container Type 	alphanumeric	20	Yes	Case-sensitive; must match a corresponding Reference Data element.
Status	Flag/ alphanumeric	8	Yes	Possible values are "Active", "Inactive", "Empty". If omitted, value defaults to "Active".
Description	alphanumeric	60		Comment; a meaningful description.
Manufacturer 	alphanumeric	30	Yes	Case-sensitive; must match a corresponding Reference Data element.
Label	alphanumeric	30		Container label
Material	alphanumeric	40		Material handled by container. Must match a Material Reference Data element.
Dimension unit	alphanumeric	10		Container dimension units. Must match a Units Reference Data element.
Is compactor	alphanumeric	8		Specifies whether the container to be serviced is a compactor
Width	numeric	11		Container width
Height	numeric	11		Container height
Length	numeric	11		Container length
Warranty Date	date YYYY-MM-DD	10		Container warranty date

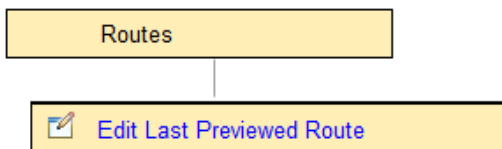
Managing Routes

The Routes menu provides the tools you need for managing your routes.



The Routes menu options are explained in the following sections.

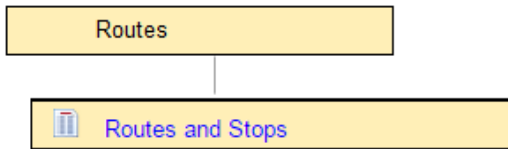
Edit Last Previewed Route



This menu option returns you to the Edit screen for the last route that you viewed or edited.

Due to the close inter-dependency of the various types of data involved in route management, you may find yourself navigating back and forth among various menus, e.g., Routes, Reference Data, etc. This menu option is provided as a quick navigation tool. Similar shortcuts are provided on the other menus of the user interface.

Routes and Stops



This menu option displays a list of all your routes in the FleetLink Route Management System.

List of Routes

Operating department: All

Name	Show Stop Count	Show Conflicts	Has GeoZone	Mod. date	Truck	Work Group	Route Group	Service date	Frequency	Material	Update GeoLocation	Update RFID	Update SerialNbr
01SS			Yes	10-Sep-2015 19:00:14 71220					AllDays	Garbage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1CD			Yes	10-Sep-2015 19:03:34 41214					DailyWeekday	Recycling	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1D				10-Sep-2015 19:00:14 71221					AllDays	RP	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1LARGE			Yes	10-Sep-2015 19:03:34 71231					DailyWeekday	Garbage	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Item	Description
	Displays the number of stops for each route.
Name, Mod Date, Frequency	Clicking any of these highlighted links brings you to the Edit Route screen.
Has GeoZone	Clicking a highlighted link brings you to the Edit GeoZone screen.
Truck	Clicking a highlighted link brings you to the Edit Truck reference data screen. A red truck icon in this column denotes that no truck is assigned to the route.
	Deletes the selected route.
Item	Description
	Lets you add a new route manually.
	Lets you create a new temporary route.
Update GeoLocation, Serial Nbr	When these options are selected, the respective values in the FleetLink Route Management System database will be updated with any new values detected during a lift. For example, if the RFID of a cart read during a lift differs from that already associated with the customer location defined in the database, the new RFID will be associated with the location.

Showing Route Conflicts

Cases may occur where routes have stops that are in conflict with other routes.

To view conflicts:

- Select the **Show Conflicts** button. The page refreshes, showing the number of conflicts (to the left of the Has GeoZone column).

List of Routes

Operating department: All

Name ↓ ↑ Show Stop Count Show Conflicts Has GeoZone Mod. date ↓ ↑ Truck

Fr18RA	16	Yes	10-Sep-2015 19:23:33	41214
Fr18RB	1	Yes	10-Sep-2015 19:23:33	41204
Fr18RC	17	Yes	10-Sep-2015 19:23:33	41205
Fr20R		Yes	10-Sep-2015 19:23:33	41214

- Click on a highlighted number to view details. A panel displays the routes with which the current one conflicts.

Conflicts for Calvin-MoR

- Mo14R
- Mo12R

- Click on a highlighted route to view the conflicting stops.

Conflicts for Calvin-MoR

Mo14R
Mo12R

Location Name	Container	Service	Address	<input checked="" type="checkbox"/> Calvin-MoR	<input checked="" type="checkbox"/> Mo14R
	E20010268302007520703F23	CURB Recycling	102 DEER RUN DR, Winnipeg, MB	<input checked="" type="checkbox"/> Calvin-MoR	<input checked="" type="checkbox"/> Mo14R
	E200103234150091183057E3	CURB Recycling	102 LINDMERE DR, Winnipeg, MB	<input checked="" type="checkbox"/> Calvin-MoR	<input checked="" type="checkbox"/> Mo14R
	E20010268306013718805284	CURB Recycling	102 TWEEDSMUIR RD, Winnipeg, MB	<input checked="" type="checkbox"/> Calvin-MoR	<input checked="" type="checkbox"/> Mo14R
	E20010268306018418805340	CURB Recycling	103 HAWKESBURY CRES, Winnipeg, MB	<input checked="" type="checkbox"/> Calvin-MoR	<input checked="" type="checkbox"/> Mo14R
	E200103234150088183057EF	CURB Recycling	103 LINDMERE DR, Winnipeg, MB	<input checked="" type="checkbox"/> Calvin-MoR	<input checked="" type="checkbox"/> Mo14R
	E200103234150086186051B6	CURB Recycling	103 PRINCEWOOD RD, Winnipeg, MB	<input checked="" type="checkbox"/> Calvin-MoR	<input checked="" type="checkbox"/> Mo14R
	E20010268302005620703F6F	CURB Recycling	106 DEER RUN DR, Winnipeg, MB	<input checked="" type="checkbox"/> Calvin-MoR	<input checked="" type="checkbox"/> Mo14R
	E200103234150087183057F3	CURB Recycling	106 LINDMERE DR, Winnipeg, MB	<input checked="" type="checkbox"/> Calvin-MoR	<input checked="" type="checkbox"/> Mo14R
	E20010268306019918405634	CURB Recycling	106 TWEEDSMUIR RD, Winnipeg, MB	<input checked="" type="checkbox"/> Calvin-MoR	<input checked="" type="checkbox"/> Mo14R
	E200103234150086183057F7	CURB Recycling	107 LINDMERE DR, Winnipeg, MB	<input checked="" type="checkbox"/> Calvin-MoR	<input checked="" type="checkbox"/> Mo14R
	E200103234150085186051B2	CURB Recycling	107 PRINCEWOOD RD, Winnipeg, MB	<input checked="" type="checkbox"/> Calvin-MoR	<input checked="" type="checkbox"/> Mo14R
	80E00AC9E494CD018B150000	CURB Recycling	10 BAYTREE CRT, Winnipeg, MB	<input checked="" type="checkbox"/> Calvin-MoR	<input checked="" type="checkbox"/> Mo14R
	F20010268302003620703FRF	CURB Recycling	10 DEER RUN DR, Winnipeg, MB	<input checked="" type="checkbox"/> Calvin-MoR	<input checked="" type="checkbox"/> Mo14R

- To remove a stop from either route, uncheck its check box.
- Confirm your action using the confirmation dialog.

Confirm requested operation

Are you sure you want to remove this stop from the route Calvin-MoR!

Yes No

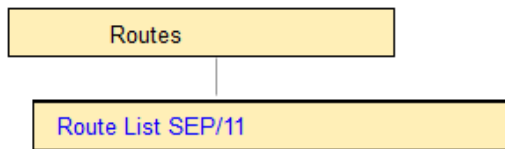
For convenience in clearing up numerous conflicts, Select/Unselect All check boxes are provided, enabling you to remove all stops in a single operation.

When you choose this option, you are prompted with the following dialog.

Confirm requested operation

Are you sure you want to remove all stops from the route Calvin-MoR!

Routes List for Current Day



This menu option displays a list of all your routes for the current day.



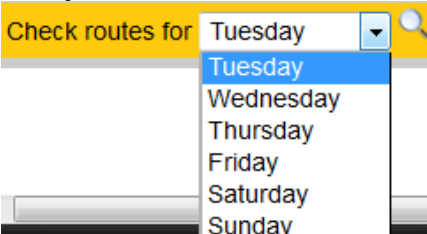
Route List For: 11-Sep-2015

Temporary Route: Truck: Work Group: Route will be similar to: Update GeoLocation: Update RFID: Update SerialNbr:

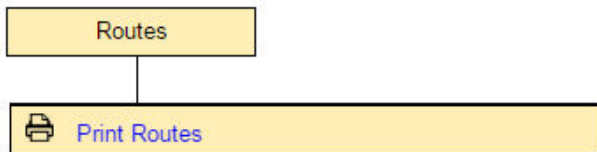
Operating department: Residential: Commercial: Roll-Off:

Temporary	Include completed	Status	Route	Truck	Work Group	Complete	Incomplete
No	<input type="checkbox"/>	Dispatched	1CD	41214-RE		0 (000.00 %) [0]	262 [0]
No	<input type="checkbox"/>	Dispatched	1LARGE	71231-RE		0 (000.00 %) [0]	4074 [0]
No	<input type="checkbox"/>	Dispatched	1TST	71231-RE		0 (000.00 %) [0]	997 [0]
No	<input type="checkbox"/>	Dispatched	1TST2	71205-RE		0 (000.00 %) [0]	1163 [0]
No	<input type="checkbox"/>	Pending	Adam-FRG		ADAM C	0 (000.00 %) [0]	330 [0]
No	<input type="checkbox"/>	Pending	Adam-FIR		ADAM C	0 (000.00 %) [0]	1981 [0]
No	<input type="checkbox"/>	Dispatched	FR01G	41211-RE		0 (000.00 %) [0]	1410 [0]
No	<input type="checkbox"/>	Dispatched	FR04G	71226-RE		0 (000.00 %) [0]	1695 [0]

Item	Description
	Sends the route to the FleetLink Mobile unit of the vehicle specified in the Truck column
Route	Clicking a highlighted link brings you to the Edit screen for the selected route.
Truck	The truck assigned to the route. Pull-down menu allows selection.
Work Group	The work group the truck is assigned to. Pull-down menu allows selection.
Send text message icon	Enables you to send a text message to the truck or work group. <div style="border: 1px solid gray; padding: 5px; margin-top: 5px;"> </div>
Complete	Clicking a highlighted link displays all the completed stops in the selected route.
Incomplete	Clicking a highlighted link displays all the incomplete stops in the selected route and brings you to the Transfer Stops screen, where you can copy individual stops to another route.

Item	Description
	Let's you transfer all incomplete calls to another route. NOTE: You must create a temporary route first if none are available in the pull-down menu. Once you have done so, your entry will be displayed there. 
Update GeoLocation, Serial Nbr	When these options are selected, the respective values in the FleetLink Route Management System database will be updated with any new values detected during a lift. For example, if the RFID of a cart read during a lift differs from that already associated with the customer location defined in the database, the new RFID will be associated with the location.
Check routes for	Let's you view the list of routes for another day. 

Print Routes



This menu option displays a list of all routes and enables you to print selected ones to a HTML file.

Print Routes

Route List for: 31-Jan-2018

Select row(s) to print route's information. Supported

Select all	Route ID	IsTemp	# Stops
<input type="checkbox"/>			
<input checked="" type="checkbox"/>	363		45
<input checked="" type="checkbox"/>	373		72
<input type="checkbox"/>	213		510

Total Items: 3 (Selected Items: 2)

To print open downloaded html file in browser and use browser's print option
Recommended settings : Layout - Portrait, Size:Letter, Margins-Default, No headers and footers

[Download](#)

1. Select a date from the calendar menu.
2. Make your route selections using the check boxes.
3. Select **Download**.
The results are printed to a HTML file that you can view in your browser.

For each route selected, route info, disposals, and notes display first.

Route Info

Route:	<input type="text" value="363"/>	Route Day:	<input type="text" value="Wednesday"/>
Route Date:	<input type="text" value="2018-01-31"/>	Driver:	<input type="text"/>
Truck:	<input type="text" value="714"/>	Total Breaks:	<input type="text"/>
Material:	<input type="text"/>		
Odometer Start:	<input type="text"/>	Start Time:	<input type="text"/>
Odometer End:	<input type="text"/>	End Time:	<input type="text"/>

Disposals

Site:	<input type="text"/>	Time:	<input type="text"/>
Ticket #:	<input type="text"/>	Liters/Weight:	<input type="text"/>

Site:	<input type="text"/>	Time:	<input type="text"/>
Ticket #:	<input type="text"/>	Liters/Weight:	<input type="text"/>

Site:	<input type="text"/>	Time:	<input type="text"/>
Ticket #:	<input type="text"/>	Liters/Weight:	<input type="text"/>

Site:	<input type="text"/>	Time:	<input type="text"/>
Ticket #:	<input type="text"/>	Liters/Weight:	<input type="text"/>

Notes

...followed by assignment details.

10	Customer: 731-40-63-7302-52201 - 721-40-65-7203-52201 Address: 1125 RIVER ST SANTA CRUZ 95060-1710 Service: Front Load Special for Acct 027 07505 000	Customer Id: 027-07505-000 Billing Loc Id: 26261 Workflow: Empty FL Bin
Qty: <input type="text" value="1"/> <input type="text"/>		
20	Customer: DENNY'S - DENNY'S Address: 1515 OCEAN ST SANTA CRUZ 95060-2826 Service: 6 Yard 3x week	Customer Id: 037-01020-013 Billing Loc Id: 9462 Workflow: Empty FL Bin
Qty: <input type="text" value="1"/> <input type="text"/>		
50	Customer: PARK VIEW COURT Address: 120 GRANT ST SANTA CRUZ 95060-2917 Service: 2 Yard 1x week Front Load	Customer Id: 039-00415-011 Billing Loc Id: 9994 Workflow: Empty FL Bin
Qty: <input type="text" value="1"/> <input type="text"/>		
60	Customer: FIRESTONE STORE Address: 510 WATER ST SANTA CRUZ 95060-4113 Service: 2 Yard 1x week Front Load	Customer Id: 048-01625-014 Billing Loc Id: 12489 Workflow: Empty FL Bin
Qty: <input type="text" value="1"/> <input type="text"/>		
70	Customer: WASHINGTON MUTUAL #B2633 Address: 730 OCEAN ST SANTA CRUZ 95060-4008 Service: 4 Yard 1x week	Customer Id: 048-01110-011 Billing Loc Id: 12417 Workflow: Empty FL Bin
Qty: <input type="text" value="1"/> <input type="text"/>		
80	Customer: JAY SIYARAM HOTELS LLC Address: 516 WATER ST SANTA CRUZ 95060-4113 Service: 4 Yard 1x week	Customer Id: 048-01635-016 Billing Loc Id: 12491 Workflow: Empty FL Bin
Qty: <input type="text" value="1"/> <input type="text"/>		
90	Customer: T J SCOTT Address: 316 MAY AVE SANTA CRUZ 95060-4109 Service: 2 Yard 1x week Front Load	Customer Id: 048-01590-014 Billing Loc Id: 12486 Workflow: Empty FL Bin
Qty: <input type="text" value="1"/> <input type="text"/>		

Completed Stops



This menu option displays a list of stops that have been completed for the current day.

Completed Stops For Wednesday 2016-11-16

16-Nov-2016 Line Of Business: All

Residential Type Front-Load Type Roll-Off Type

Route Name Truck Name Driver Name Stop Count

1LARGE	41208	Carter, Matt	3
Topley-WeG	71209	Lawrence, Jason	13

Route Name Container Service Activity Code Planned Date Execution Date Name Address Notes

Clicking on a route name in the upper panel displays details for the completed stops in the lower panel.

Unscheduled Stops



This menu option displays a list of stops that are not scheduled on any route.

Unscheduled Stops

Operating Department: All

Residential Type Front-Load Type Roll-Off Type Graffiti Type

	Start Date	Workflow	Name	Civic #	Street	City	District	Material	Service	Frequency	Size
✓	10-Apr-2015	Cart to be serviced		10147	E STARION AVE	MESA		Garbage	3 X Weekly srv GB	Weekly	2
✓	15-Apr-2015	Cart to be serviced		10147	E STARION AVE	MESA		Garbage	3 X Weekly srv GB	Weekly	2
✓	10-Apr-2015	Cart to be serviced	Fong World I...	968	Riviera Cres	Winnipeg	south	Garbage	3 X Weekly srv GB	Weekly	2
✓	10-Apr-2015	Cart to be serviced	Fong World I...	968	Riviera Cres	Winnipeg	south	Garbage	3 X Weekly srv GB	Weekly	2
✓	10-Apr-2015	Cart to be serviced	Taco Bell South	777	Elm St.	Winnipeg	south	Garbage	3 X Weekly srv GB	Weekly	2
✓	24-Apr-2015	Cart to be serviced	KFC-EAST	5555	Maple	Winnipeg		Garbage	3 X Weekly srv GB	Weekly	2
✓	24-Apr-2015	Cart to be serviced	KFC-EAST	5555	Maple	Winnipeg		Garbage	3 X Weekly srv GB	Weekly	2

Total Items: 113 Recurring On-Demand

	Route	Truck	Frequency	Material	# of stops	miles to Route	miles to Truck	Weight
✓	Adam-FrG	3028	Once	Garbage	330			0
✓	KENT164	3028	Once	Recycling	0			0
✓	OGRT	3028	Once	999RC	0			0
✓	CartRoute	3028	Once	Garbage	4			0

The list is a tabbed interface providing views of all extras, regular (permanent) stops, and Cart Delivery stops.

From this screen, you can select a stop, find the route closest to that location and assign it to the route.

Item	Description
Check box <input checked="" type="checkbox"/>	Selects the unscheduled stop.
Item	Description
Route buttons Mo19R	Selects the route to which stop is to be added.
	Indicates that route has an associated GeoZone.

Unscheduled Stops

Operating Department: All

Residential Type Front-Load Type Roll-Off Type Graffiti Type

	Start Date	Workflow	Name	Civic #	Street	City	District	Material	Service	Frequency	Size
<input checked="" type="checkbox"/>	10-Apr-2015	Cart to be serviced		10147	E STARION AVE	MESA		Garbage	3 X Weekly srv GB	Weekly	2
<input checked="" type="checkbox"/>	15-Apr-2015	Cart to be serviced		10147	E STARION AVE	MESA		Garbage	3 X Weekly srv GB	Weekly	2
<input checked="" type="checkbox"/>	10-Apr-2015	Cart to be serviced	Fong World I...	998	Riviera Cres	Winnipeg	south	Garbage	3 X Weekly srv GB	Weekly	2
<input checked="" type="checkbox"/>	10-Apr-2015	Cart to be serviced	Fong World I...	998	Riviera Cres	Winnipeg	south	Garbage	3 X Weekly srv GB	Weekly	2
<input checked="" type="checkbox"/>	10-Apr-2015	Cart to be serviced	Taco Bell South	777	Elm St.	Winnipeg	south	Garbage	3 X Weekly srv GB	Weekly	2
<input checked="" type="checkbox"/>	24-Apr-2015	Cart to be serviced	KFC-EAST	5555	Maple	Winnipeg		Garbage	3 X Weekly srv GB	Weekly	2
<input checked="" type="checkbox"/>	24-Apr-2015	Cart to be serviced	KFC-EAST	5555	Maple	Winnipeg		Garbage	3 X Weekly srv GB	Weekly	2

Total Items: 113 Recurring On-Demand

Route	Truck	Frequency	Material	# of stops	miles to Route	miles to Truck	Weight
Adam-FRG	3028	Once	Garbage	330		0	
KENT164	3028	Once	Recycling	0		0	
OGRT	3028	Once	999RC	0		0	
CartRoute	3028	Once	Garbage	4		0	

The list is a tabbed interface providing views of all extras, regular (permanent) stops, and Cart Delivery stops. From this screen, you can select a stop, find the route closest to that location and assign it to the route.

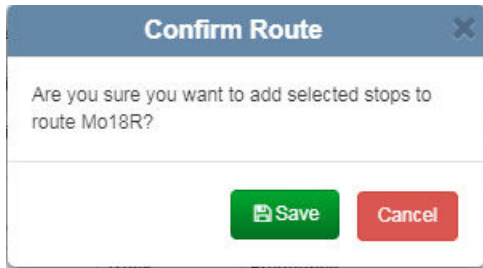
Assigning Unscheduled Stops to a Route

- In the upper panel (list of stops), locate the stop and select its check box . The lower panel refreshes, displaying a map in the left-hand area and a list of routes in the right.

Route	Truck	Frequency	Material	# of stops	miles to Route	miles to Truck	Weight
Mo18R	P866	Once	Garbage	2585			0
Mo21R	71223	Once	Garbage	2766	0.3		
Mo20R	71222	Once	Garbage	3131	0.5		
Fr09R	41203	Once	Recycling	1255	0.6	1361.7	
Tu29G	41203	Once	Garbage	1429	0.6	1361.7	
Mo27G	P736	Once	Garbage	1368	1		0
Adam-MoR	3031	Once	Recycling	1763	1.3		0
Mo19R	71211	Wednesday - W - Weekly	Garbage	2107	1.5		

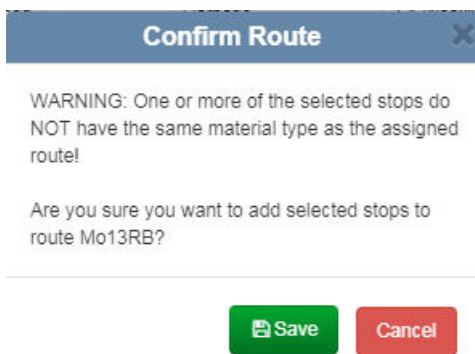
The route list sorts the routes with GeoZones closest to the stop and displays the distance in KM to the GeoZone.

- Select a route from the route list by pressing its button . A dialog prompts you to confirm your action.



3. Click Yes.
Your stop is added to the selected route.

WARNING: Where the stop to be transferred and the destination route involve different materials (e.g., recycling vs. garbage), you will be prompted to confirm your action with the following warning dialog:



WARNING: Where the stop to be transferred and the destination route have incompatible service frequencies, you will be prompted to confirm your action with the following warning dialog:

Check	Date	Stop	Address	Material	Frequency	Service
<input type="checkbox"/>	2002-01-10	Empty	7966 E MCDOWELL	Recycle	BUSINESS BLUE 90 GAL WEEKLY	1xWeek
<input checked="" type="checkbox"/>	2008-10-01	Empty	9000 E QUARTER	Recycle	BLUE 90 GAL WEEKLY	1xWeek
<input checked="" type="checkbox"/>	2017-06-13	Empty	6610 E UNIVERSIT	Gal Trash/Recycle Svc	Gal Trash/Recycle Svc	1xWeek
<input checked="" type="checkbox"/>	2017-06-13	Empty	6610 E UNIVERSIT	Gal Trash/Recycle Svc	Gal Trash/Recycle Svc	1xWeek
<input checked="" type="checkbox"/>	2017-06-13	Empty	6610 E UNIVERSIT	Gal Trash/Recycle Svc	Gal Trash/Recycle Svc	1xWeek
<input checked="" type="checkbox"/>	2017-06-13	Empty	6610 E UNIVERSIT	Gal Trash/Recycle Svc	Gal Trash/Recycle Svc	1xWeek
<input checked="" type="checkbox"/>	2017-06-13	Empty	6610 E UNIVERSIT	Gal Trash/Recycle Svc	Gal Trash/Recycle Svc	1xWeek
<input checked="" type="checkbox"/>	2017-06-13	Empty	6610 E UNIVERSIT	Gal Trash/Recycle Svc	Gal Trash/Recycle Svc	1xWeek

Route	Truck	frequency	Material	# of stops	kms to Route	kms to Truck	Weight	Next
NPMonthly1	1150	NPMonthly 1xM 1W	G	0		3512.2		2018-
test780	1105	Monthly 3rd Thu	T	0				2018-

The comparison of selected stops service frequency to the route frequency enables supervisors to ensure that the service level agreement (SLA) is met.

Close Routes

The Route Management System provides Dispatch personnel the facility to ensure that stops that have not been serviced will be re-routed.

Whether a stop is "reroutable" is determined by a configurable parameter in the Activity Codes Master List of the FleetLink Mobile WasteApp.

Activity Codes represent the actions a driver can take when servicing a call. The completion codes (completed = yes,

completed = no) associated with these activities are customer-specific and fully customizable. They must be configured using your back-office system.

Some activities represent intermediate steps (completion code = No) and are not removed from the calls list, such as Blocked Retry, where the driver indicates that he intends to return to complete the call.

FleetMind Standard Activity Codes are shown in the following table.

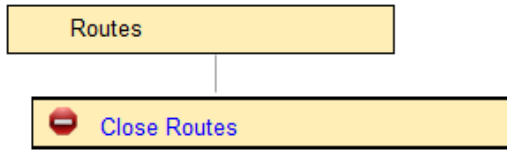
RCOM	101	Y	Completed
RNOT	102	Y	Not Out
RMIS	103	Y	Misplaced
RCTM	104	Y	Contaminated
RDMG	105	Y	Damaged
RUSS	106	Y	Unsafe Site
RNOA	107	Y	No Access
RNSV	108	Y	No Service
CCOM	201	Y	Completed
CBRT	202	N	Blocked Retry
CBRR	203	Y	Blocked Reroute
CCTM	204	Y	Contaminated
CORT	205	N	Overloaded Retry
CORR	206	Y	Overloaded Reroute
CCOV	207	Y	Carried Over
CUSS	208	Y	Unsafe Site
CNAS	209	Y	No Access to Site
CNSV	210	Y	No Service
CTIM	211	N	Waiting at Site
ICOM	301	Y	Completed
IBRR	302	Y	Blocked Reroute
IEMP	303	Y	Empty
ISND	304	N	Suspended No Disp
ISWD	305	Y	Suspended with Disp
ISWP	306	Y	Swapped
IDRC	307	Y	Dump Return Cont
INAS	308	Y	No Access to Site
INSV	309	Y	No Service
ITIM	310	N	Waiting at Site

When this flag is set to TRUE, the following behavior occurs in the Route Management System:

When a route is closed:

- ALL on-demand stops of type Residential, Front-Load, and Roll-off that are still of status Pending or of Activity Code with attribute Reroutable become available on the Unscheduled Stops screen, and can be scheduled to another route
- ALL recurring stops of type Front-Load and Roll-off (not Residential) that are still pending or of Activity Code with attribute Reroutable are converted to On-Demand stops and become available on the Unscheduled Stops screen, again to be scheduled to another route .

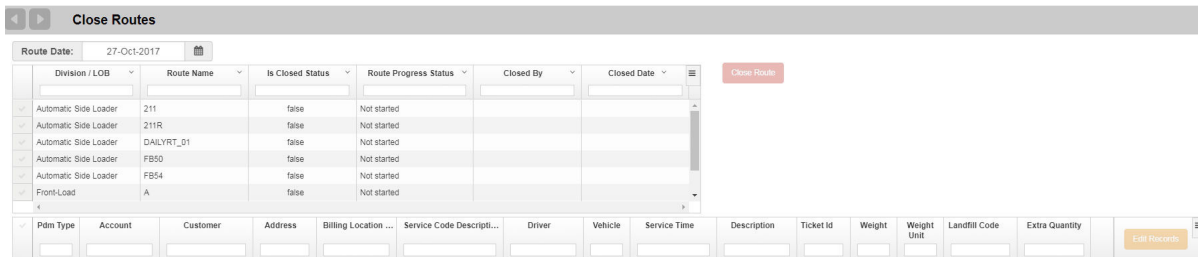
When viewing the Unscheduled Stops Screen, you can distinguish easily between stops that are there because of ReRoute, Missed, or First Time, and reschedule them accordingly.



The Close Routes option enables you to close routes that have been left open at the end of the day.

In addition, this option enables dispatchers to close individual stops manually. A scenario where this feature can be useful is when a driver using Manual Confirm mode realizes—after checkout—that he has forgotten to confirm stops that he knows have been serviced. Giving Dispatch the capability to close the stops manually ensures that the stops are not flagged as "missed" and that their completion status is reflected properly in FRM Reports and FleetWeb.

The manual close feature is provided on the Close Routes screen, and is applicable to Recurring and On-demand stops

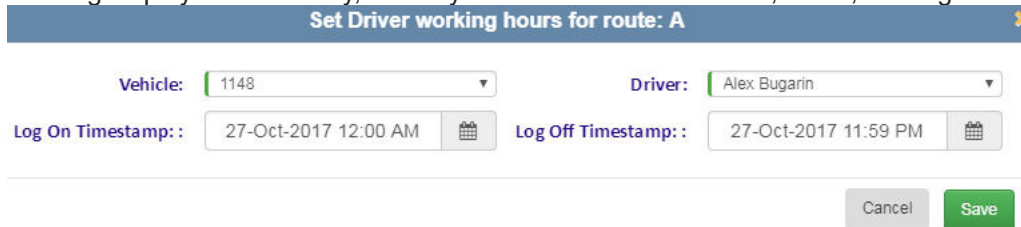


To close an entire route:

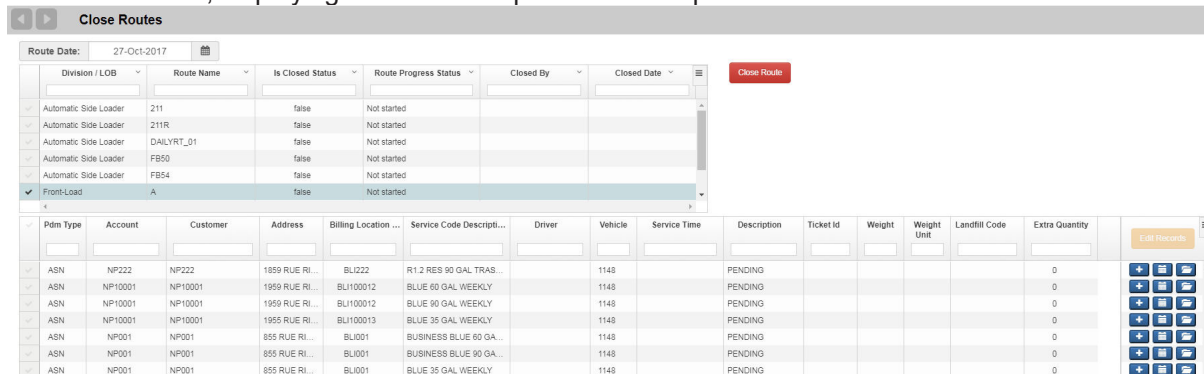
1. Locate your route in the Close Routes list, and then select its check box in the leftmost column.



A dialog displays immediately, where you can view and edit truck, driver, and logon information.



You can make changes and save here or you can dismiss the dialog. Once you have done so, the Close Routes screen refreshes, displaying the route's stops in the lower panel.



2. To close the entire route, click the Close Route button. The screen refreshes, showing the route's status as closed.

Close Routes						
Route Date: 27-Oct-2017						
Division / LOB	Route Name	Is Closed Status	Route Progress Status	Closed By	Closed Date	
Automatic Side Loader	211	false	Not started			
Automatic Side Loader	211R	false	Not started			
Automatic Side Loader	DAILYRT_01	false	Not started			
Automatic Side Loader	FB50	false	Not started			
Automatic Side Loader	FB54	false	Not started			
Front-Load	A	true	DONE	admin	2017-10-27 10:44	

Pdm Type	Account	Customer	Address	Billing Location ...	Service Code Descripti...	Driver	Vehicle	Service Time	Description

The route is closed, removed from the list, and is re-sent to the Mobile.

Search Stops



This menu option displays a form where you can enter search criteria and search for a specific customer location.

Status	Route	Civic Number	Street	District	City	SerialNumber	Volume	Type	Color	Action
RD	FB82	1340	W MONTE AVE	WEST	MESA	FRS3NNT811	2	FLBIN	Blue	
RD	HT44	1340	W MONTE AVE	WEST	MESA	FRS3NNT811	2	FLBIN	Blue	
RD	ST26	1340	W MONTE AVE	WEST	MESA	FRS3NNT811	2	FLBIN	Blue	
RD	WT11	1340	W MONTE AVE	WEST	MESA	FRS3NNT811	2	FLBIN	Blue	

In the search criteria, you can specify the starting characters for street, city, district names, or ZIP codes/postal codes. You can also search for a range of civic numbers or specify a street side (odd or even numbers, both by default).

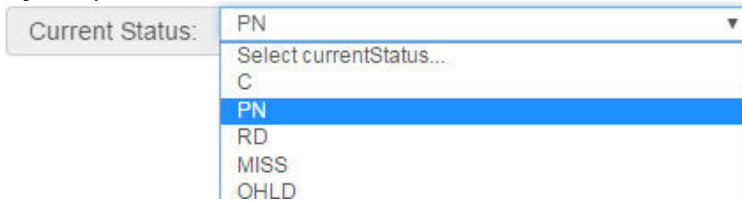
Additional search options include:

- By Customer ID
- By Service

Service:

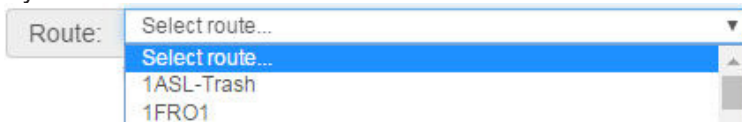
- Select Service...
- BC60
- BC90

- By completion status



A dropdown menu labeled "Current Status:" with a downward arrow. The menu is open, showing a list of options: "PN" (highlighted in blue), "Select currentStatus...", "C", "RD", "MISS", and "OHLD".

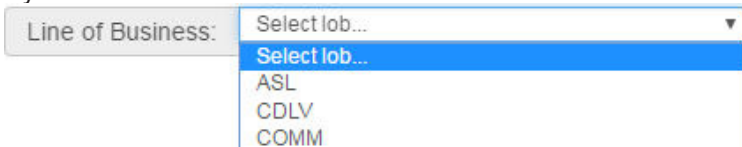
- By Route



A dropdown menu labeled "Route:" with a downward arrow. The menu is open, showing a list of options: "Select route..." (highlighted in blue), "1ASL-Trash", and "1FRO1".

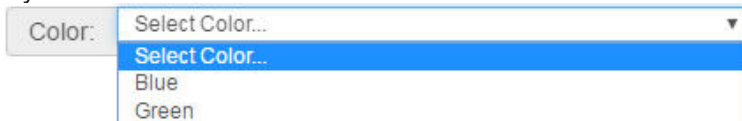
- By container volume

- By Line of Business



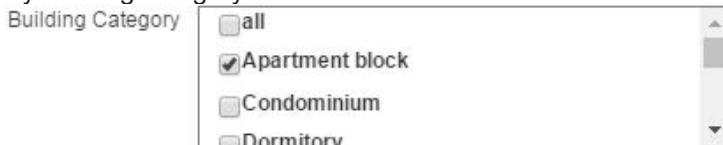
A dropdown menu labeled "Line of Business:" with a downward arrow. The menu is open, showing a list of options: "Select job..." (highlighted in blue), "ASL", "CDLV", and "COMM".

- By container color



A dropdown menu labeled "Color:" with a downward arrow. The menu is open, showing a list of options: "Select Color..." (highlighted in blue), "Blue", and "Green".

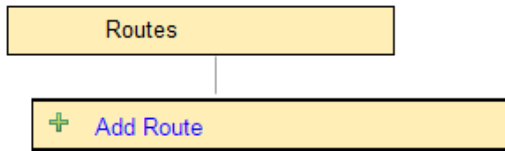
- By building category



A checkbox list labeled "Building Category". The options are: "all" (unchecked), "Apartment block" (checked), "Condominium" (unchecked), and "Dormitory" (unchecked).

In the search results, you can select specific locations to be included in the route by using the filter fields in the column headers.

Add Route



1. Select **Routes > Add Route**.
2. Enter your route information using the text field, menus, and check boxes.

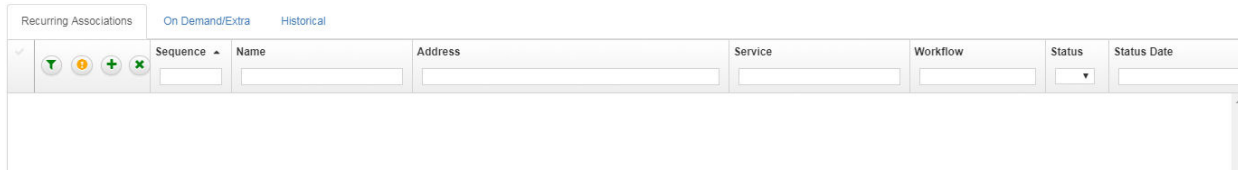
NOTES

- Name must be a unique identifier
- Single Day route: Used for regular waste collection routes. Multi Day Route for street sweeping services.
- Start Date is optional
- Route Frequency, Truck, Work Group, Material, Operating Department, and Container Type are all Reference Data elements. Make your selection from the pull-down menus.
- Temporary specifies whether the route is a regular (recurring) route or a temporary one created to handle special cases.
Temporary routes in the FleetLink Route Management System are deleted automatically on the day following their creation.
- Update GeoLocation, Update RFID, and Update #Serial are options that will update the cart's coordinates and other associated data when the lift is performed.

3. Press **Save Route** when done.

Adding Stops to the Route

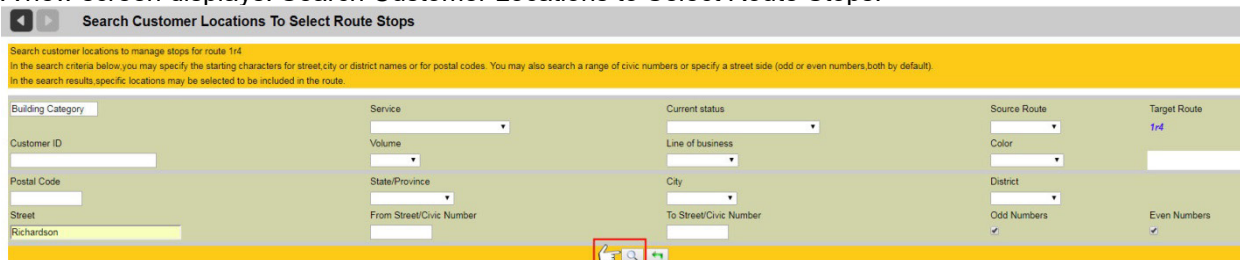
Once you have created and saved a route, the screen refreshes, displaying Edit Route in the header, and a lower panel where you can add stops and view route history.




To add stops to the route:

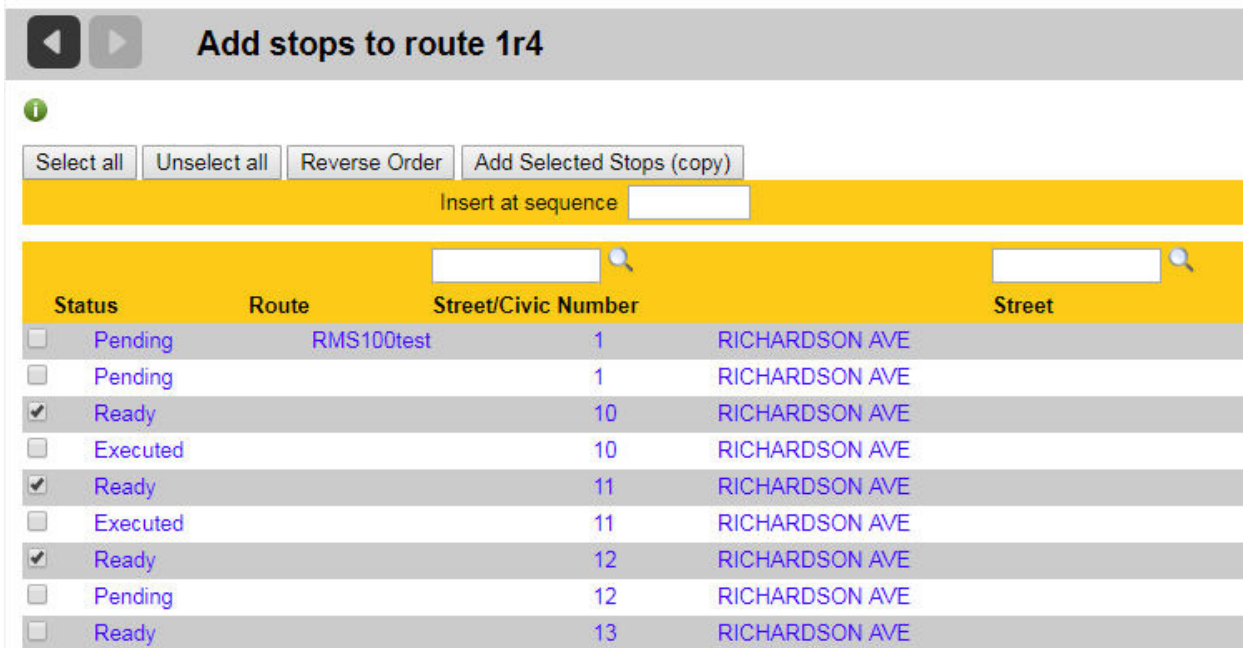
1. Choose a tab; either **Recurring Associations** or **On Demand/Extra**.

2. Select the **Add new Stop** icon ,
A new screen displays: Search Customer Locations to Select Route Stops.



Searching instructions are provided at the top of the page. In this example, searching by **Street** is used.

3. Specify search information, and then click the search button .
The **Add stops to route** screen displays results matching the search criteria, including locations that may already be in the route.



4. Using the check boxes, select the stops you wish to add.
5. Select **Add Selected Stops (copy)**.
You are returned to the Edit Route screen, where the newly added stops display in the list.

The screenshot shows the 'Edit Route' interface. At the top, there are navigation arrows and the title 'Edit Route'. Below this is a dropdown menu for 'Single Day Route'. The main area is divided into several sections:

- Route Details:** Fields for Name (114), Start Date, Route Frequency (Monday), Truck (71219), Work Group, GeoZone, Material (Recycling), Operating Department (REG-SRV), Container Type (CompactorSC15), and checkboxes for Update Geolocation, Temporary, Update Rfid, and Update #Serial.
- Message:** A text input field.
- Map:** A satellite view map of Santa Cruz, CA, with a red location pin.
- Buttons:** Temporary Truck, Route Path, Edit Positions, and Save.

 Below the main form is a section for 'Recurring Associations' with tabs for 'On Demand/Extra' and 'Historical'. A table lists the associations:

Sequence	Name	Address	Service	Workflow	Status	Status Date
1		10 RICHARDSON AVE, Winnipeg MB	CURB Garbage	Cart to be serviced		2015-Mar-06 10:03:56
2		11 RICHARDSON AVE, Winnipeg MB	CURB Garbage	Cart to be serviced		2015-Mar-06 10:03:56
3		12 RICHARDSON AVE, Winnipeg MB	CURB Garbage	Cart to be serviced		2015-Mar-06 10:03:56

Editing a Route

Once you have created a route and populated it with stops, you can edit it, as required, using the Edit Route screen, which comprises additional controls.

This screenshot shows the 'Edit Route' screen with several annotations:

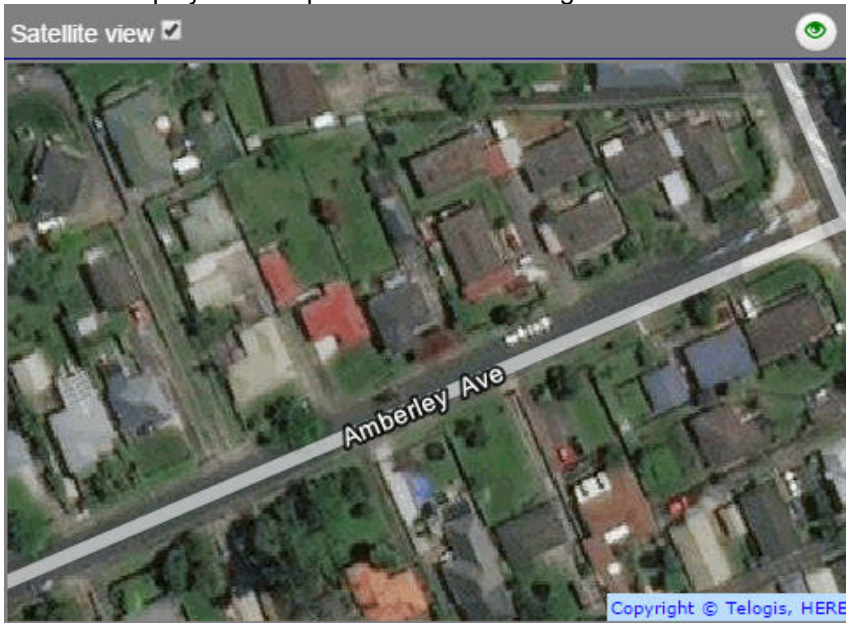
- a:** Points to the 'Satellite view' map of Montreal, QC.
- b:** Points to the 'Satellite view' toggle button.
- c:** Points to the 'Temporary Truck' button.
- d:** Points to the 'Route Path' button.
- e:** Points to the 'Edit Positions' button.
- f:** Points to the 'Recurring Associations' tab.
- g:** Points to the 'On Demand/Extra' sub-tab.
- h:** Points to the 'Historical' sub-tab.
- i:** Points to the 'Save' button.
- j:** Points to the 'Sequence' column header in the table.
- k:** Points to the 'Name' column header in the table.
- l:** Points to the 'Address' column header in the table.
- m:** Points to the 'Status' column header in the table.

 The table of recurring associations is:

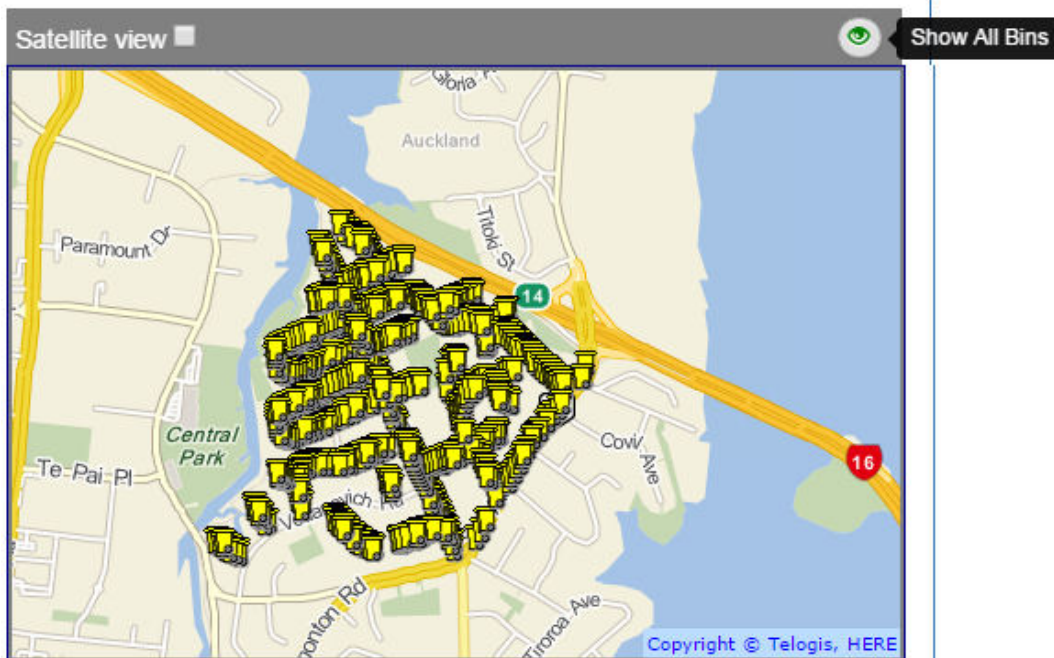
Sequence	Name	Address	Service	Workflow	Status	Status Date
0	LOCRE09	1725 Rue Saint-Denis, West Montreal QC H2x 3k4	BUSINESS BLUE 90 GAL WEE...	Empty		2018-Oct-22 06:10:51
0	BL69	1350 Rue du fort, Montreal QC	BUSINESS BLUE 90 GAL WEE...	Empty		
0	BL69	1350 Rue du fort, Montreal QC	BUSINESS BLUE 90 GAL WEE...	Empty		

a. Satellite View check box.

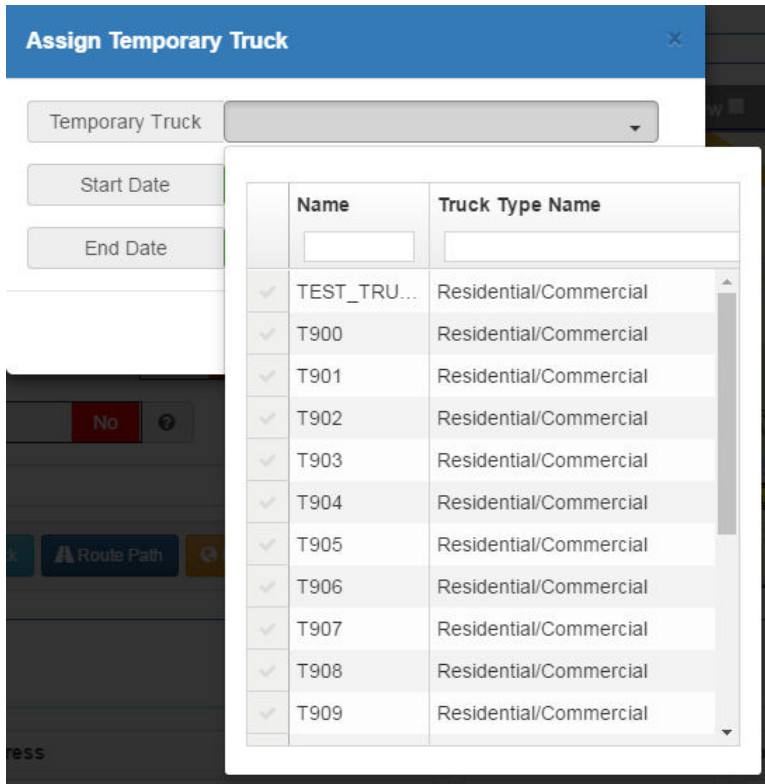
Switches display from map view to satellite image view.

**b. Show All Bins** button.

Displays bin icons for assignments on the map (or satellite image).

**c. Temporary Truck** button.

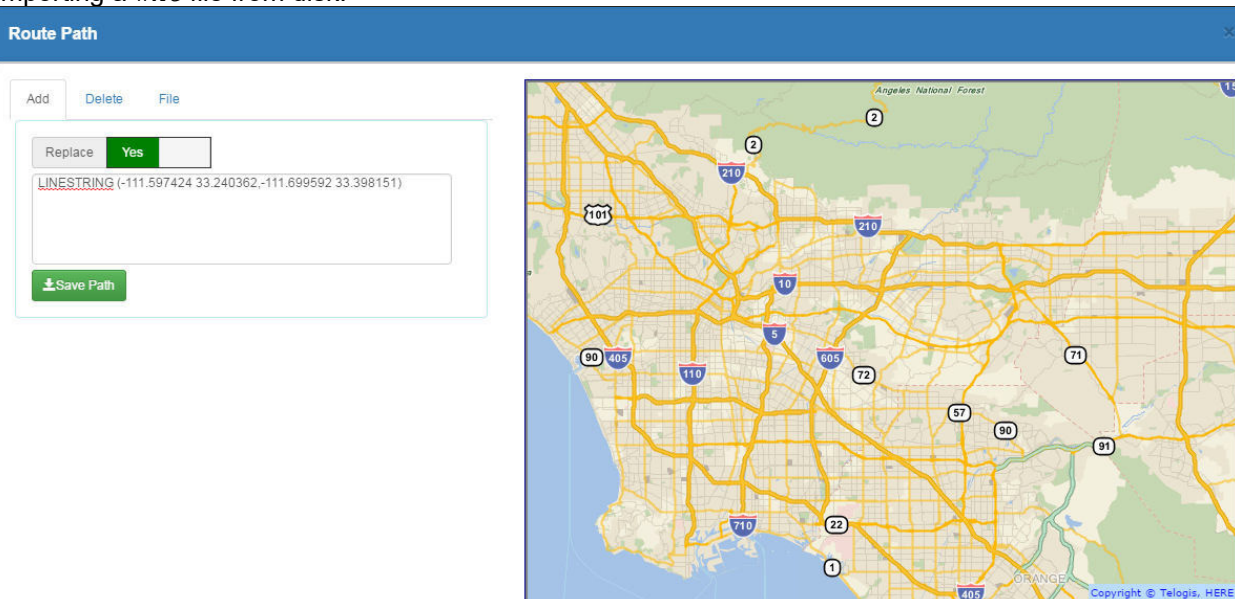
Pops up a window where you can select a temporary truck and assign it to the route.



d. **Route Path** button.

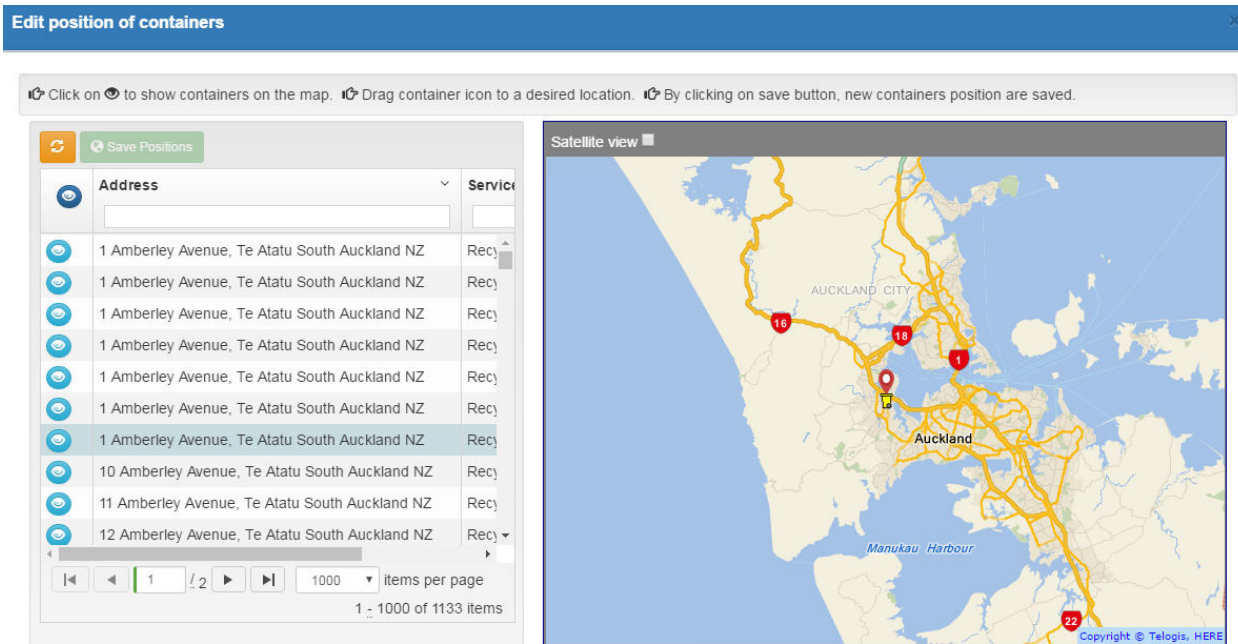
Route path is a path the driver should take while working on the route. Path is a set of WKT line strings which, if defined, will display arrows on the map.

Selecting this button pops up a window where you can define the path by typing or pasting it into a text field, or by importing a `wkt` file from disk.



e. **Edit Positions** button.

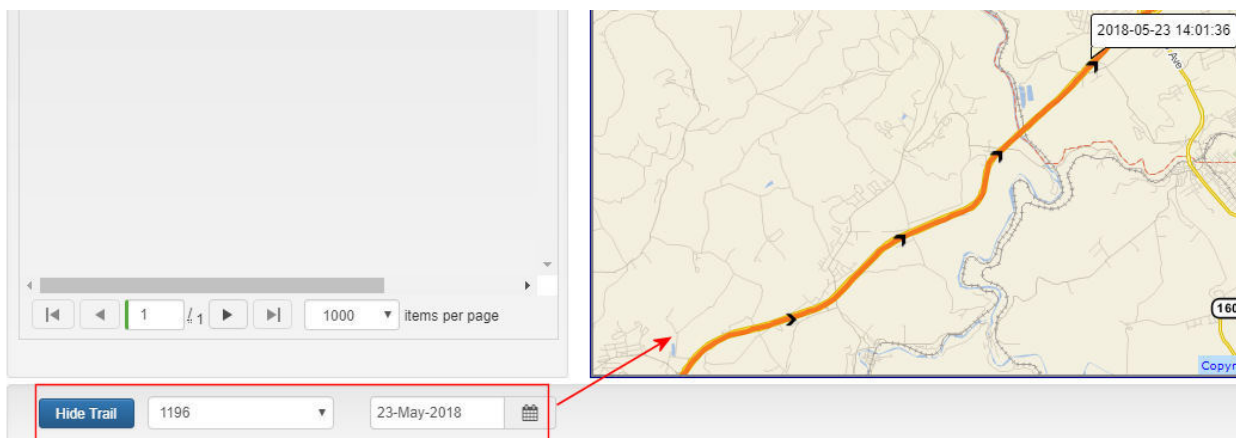
Pops up a window where you can update containers' positions by dragging them to a new location on the map (or satellite image).



As of version 3.14

To assist you with further fine tuning, you can display a breadcrumb trails of how the route is actually run. Just pick any vehicle and any date (excluding future dates) and then select **Show Trail** to display a breadcrumb trail.

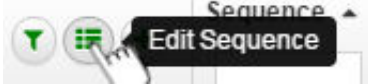
Up to 200 direction chevrons are shown with timestamp in a pop-up balloon.



- f. **Show All Filters** button.
Displays the filters currently applied to route stops.



g. Edit Sequence button.



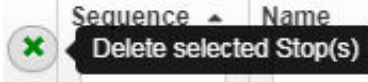
Displays the **Edit Route Sequence** screen. See [Resequencing a Route](#).

h. Add New Stop button.



Adds a new stop to the route. See [Adding Stops to the Route](#).

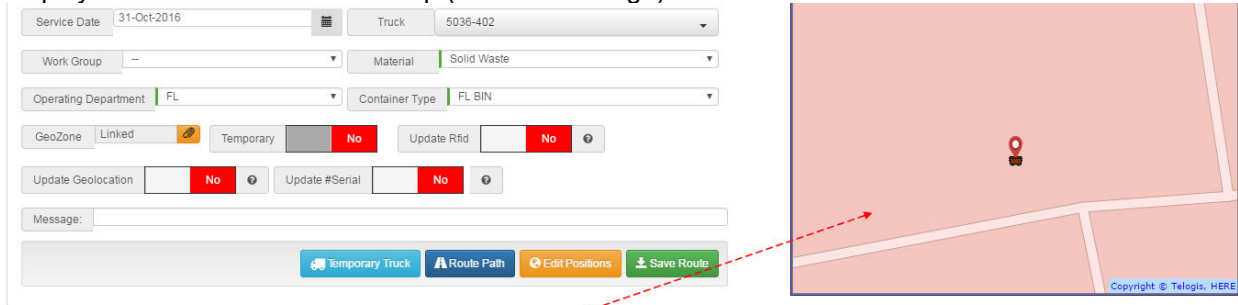
i. Delete Selected Stops button.



After selecting one or more stops from the list below, use this button to remove the stop(s) from the route.

j. Show This Bin button.

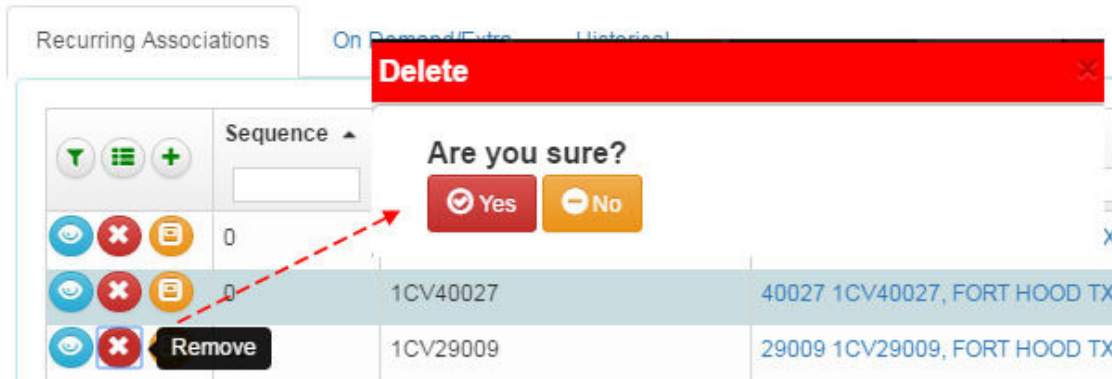
Displays the selected bin on the map (or satellite image).



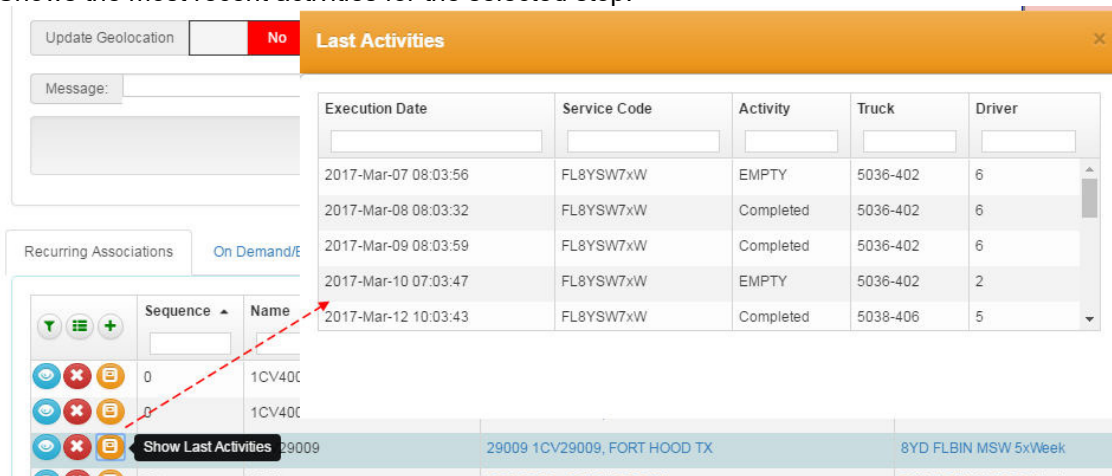
Sequence	Name	Address	Service	Workflow	Status	Status Date
0	1CV40027	40027 1CV40027, FORT HOOD TX	8YD FLBIN MSW 5xWeek	Empty FL Bin		2017-Mar-23 1
	1CV40027	40027 1CV40027, FORT HOOD TX	8YD FLBIN MSW 5xWeek	Empty FL Bin		2017-Mar-23 1
38	1CV29009	29009 1CV29009, FORT HOOD TX	8YD FLBIN MSW 5xWeek	Empty FL Bin		2017-Mar-24 1

k. Remove button.

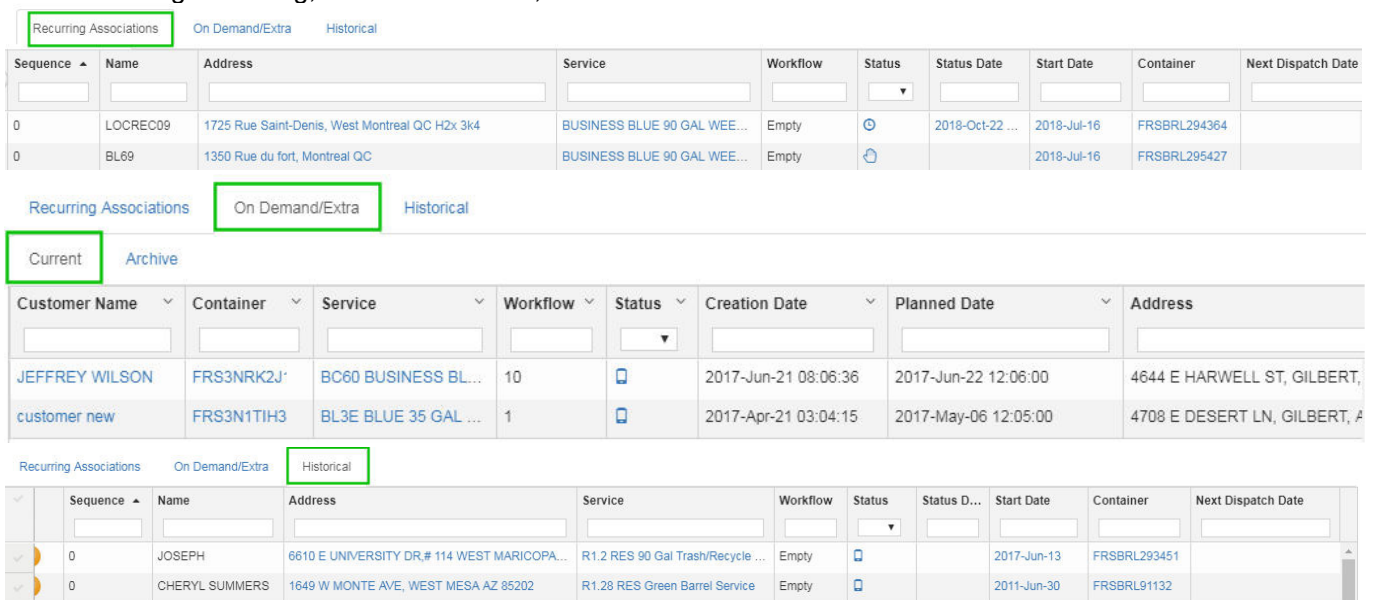
Removes the selected stop from the route.



- i. Show Last Activities button.**
Shows the most recent activities for the selected stop.



- m. View tabs.**
Choose among Recurring, On-demand/Extra, Historical.



Assigning Non-completed Stops to a Temporary Route


You can transfer incomplete calls from a route to a temporary route.

PREREQUISITE : If you do not have any temporary routes, you must create one.

Locate the unfinished route in the route list for the current day.

The number in the **Incomplete** column indicates the number of calls remaining in the route. An associated pull-down menu comprises all temporary routes to which calls can be transferred.

Transferring ALL Stops

Select a temporary route from the pull-down menu, and then click the Transfer arrow .

Temporary	Include completed	Status	Route	Truck	Work Group	Complete	Incomplete
No	<input type="checkbox"/>	Dispatched	RESEGE	71219-RE		0 (0.00%) [0]	JC-TEMP 4 [0]
No	<input type="checkbox"/>	Dispatched	CDMATCH	71216-RE		0 (0.00%) [0]	JC-TEMPNOV1 3 [0]
No	<input type="checkbox"/>	Dispatched	F04G	71226-RE		0 (0.00%) [0]	JC-TEMP 1695 [0]
No	<input type="checkbox"/>	Dispatched	F06R	71223-RE		0 (0.00%) [0]	JC-TEMP 2705 [0]
No	<input type="checkbox"/>	Dispatched	GRAF41201	41201-GF		0 (0.00%) [0]	JC-TEMP 2 [0]
No	<input type="checkbox"/>	Dispatched	RT1502	71219-RE		0 (0.00%) [0]	JC-TEMP 8 [0]

All calls are transferred to the temporary route.

Route List For: 01-Nov-2017

Temporary Route	Truck	Work Group	Route will be similar to	Update GeoLocation	Update RFID	Update SerialNbr	
Temp-088			002FL				
Temporary	Include completed	Status	Route	Truck	Work Group	Complete	Incomplete
No	<input type="checkbox"/>	Dispatched	CCMATCH	71216-RE		0 (000.00 %) [0] JC-TEMP	3 [0]
No	<input type="checkbox"/>	Dispatched	Fr04G	71226-RE		0 (000.00 %) [0] JC-TEMP	1695 [0]
No	<input type="checkbox"/>	Dispatched	Fr06R	71223-RE		0 (000.00 %) [0] JC-TEMP	2705 [0]
No	<input type="checkbox"/>	Dispatched	GRAF41201	41201-GF		0 (000.00 %) [0] JC-TEMP	2 [0]
No	<input type="checkbox"/>	Dispatched	RT1502	71219-RE		0 (000.00 %) [0] JC-TEMP	8 [0]
No	<input type="checkbox"/>	Dispatched	Th22RC	71219-RE		0 (000.00 %) [0] JC-TEMP	2 [0]
Yes	<input type="checkbox"/>	Editing	JC-TEMP	3037-RE		0 (000.00 %) [0] TEMPNOV1	14 [0]

Transferring SELECTED Stops

Click on the highlighted number in the Incomplete column.

Route List For: 19-Jun-2017

Temporary Route	Truck	Work Group	Route will be similar to	Update GeoLocation	Update RFID	Update SerialNbr	
Temp-088			002FL				
Temporary	Include completed	Status	Route	Truck	Work Group	Complete	Incomplete
No	<input type="checkbox"/>	Dispatched	1D	71221-RE		2 (018.18 %) [0] 9-21-15TEM	10 [0]
No	<input type="checkbox"/>	Dispatched	1LARGE	71231-RE		0 (000.00 %) [0] 9-21-15TEM	46 [0]
No	<input type="checkbox"/>	Pending	Adam-TuR		ADAM C	0 (000.00 %) [0] 9-21-15TEM	2923 [0]

A page displays, listing the individual stops in the route.

Make your selection(s) using the check boxes, choose a target route from the list of compatible routes, and then select the **Copy selected stops into selected route** button in the header area of the page.

Transfer stops from route NOUT2

Sequence	Address
1	435 ACADEMY RD, Winnipeg, MB
2	443 ACADEMY RD, Winnipeg, MB
3	466 ACADEMY RD, Winnipeg, MB
4	468 ACADEMY RD, Winnipeg, MB
5	472 ACADEMY RD, Winnipeg, MB
6	500 ACADEMY RD, Winnipeg, MB
7	505 ACADEMY RD, Winnipeg, MB
8	546 ACADEMY RD, Winnipeg, MB
9	549 ACADEMY RD, Winnipeg, MB
10	551 ACADEMY RD, Winnipeg, MB

Copy selected stops into selected route

Next Run Day	Vehicle	Route	Material	% Complete
Today	71211	1RE	Garbage	
Today	4006	Tmp-088	Garbage	0.0%
<input checked="" type="checkbox"/>	Today	71211	We07RL	Garbage 0.0%
<input type="checkbox"/>	1 Days	71219	FR06LW	Garbage
<input type="checkbox"/>	1 Days	71216	NOUT3	Garbage
<input type="checkbox"/>	4 Days	71219	1r3	Garbage
<input type="checkbox"/>	4 Days	71216	1r6	Garbage

20 Compatible Routes

The selected calls are transferred to the route.

Route List For: 19-Oct-2017

Temporary Route	Truck	Work Group	Route will be similar to	Update GeoLocation	Update RFID	Update SerialNbr	
Temp-088			002FL				
Operating department: All Residential Commercial Roll-Off Graffiti							
Temporary	Include completed	Status	Route	Truck	Work Group	Complete	Incomplete
No	<input type="checkbox"/>	Dispatched	NOUT1	71214-RE		0 (000.00%) [0]	Temp-088 8 [0]
No	<input type="checkbox"/>	Dispatched	NOUT2	71216-RE		0 (000.00%) [0]	Temp-088 6 [0]
No	<input type="checkbox"/>	Dispatched	We07RL	71211-RE		0 (000.00%) [0]	Temp-088 5 [4]
Yes	<input type="checkbox"/>	Editing	Temp-088	4006-RE		0 (000.00%) [0]	238 [0]

You can also select stops to be transferred by:

- Clicking on bins on the map.
- Using the selection tool to draw a rectangle around bins.

Transfer stops from route NOUT2

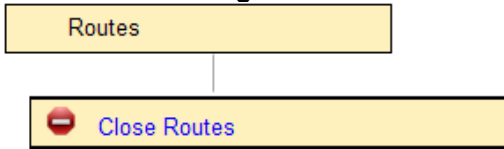
Sequence	Address
From	To
	college
<input checked="" type="checkbox"/>	150 274 COLLEGE AVE, Winnipeg, MB
<input checked="" type="checkbox"/>	151 274 COLLEGE AVE, Winnipeg, MB
<input checked="" type="checkbox"/>	188 280 COLLEGE AVE, Winnipeg, MB
<input checked="" type="checkbox"/>	212 284 COLLEGE AVE, Winnipeg, MB
<input checked="" type="checkbox"/>	240 288 COLLEGE AVE, Winnipeg, MB
<input checked="" type="checkbox"/>	251 290 COLLEGE AVE, Winnipeg, MB
<input checked="" type="checkbox"/>	252 290 COLLEGE AVE, Winnipeg, MB
<input checked="" type="checkbox"/>	253 290 COLLEGE AVE, Winnipeg, MB
<input checked="" type="checkbox"/>	254 290 COLLEGE AVE, Winnipeg, MB
<input checked="" type="checkbox"/>	269 292 COLLEGE AVE, Winnipeg, MB
<input checked="" type="checkbox"/>	287 296 COLLEGE AVE, Winnipeg, MB
<input checked="" type="checkbox"/>	305 300 COLLEGE AVE, Winnipeg, MB

For either of the above transfer operations, you can send a text message by selecting the envelope button adjacent to the Work Group menu.

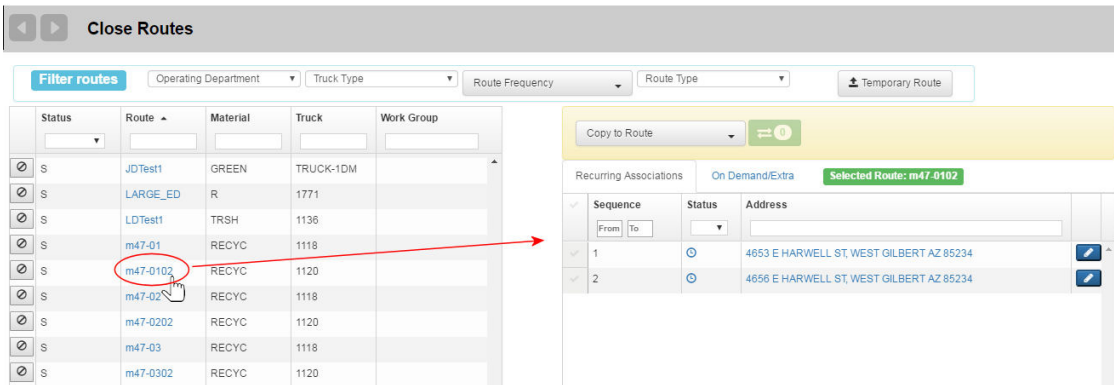
Assigning Non-completed Stops to Another Regular Route

If you prefer not to create a temporary route to execute a route's uncompleted calls, you can transfer the calls instead to an existing regular route.

1. Select **Route Management > Close Routes**.



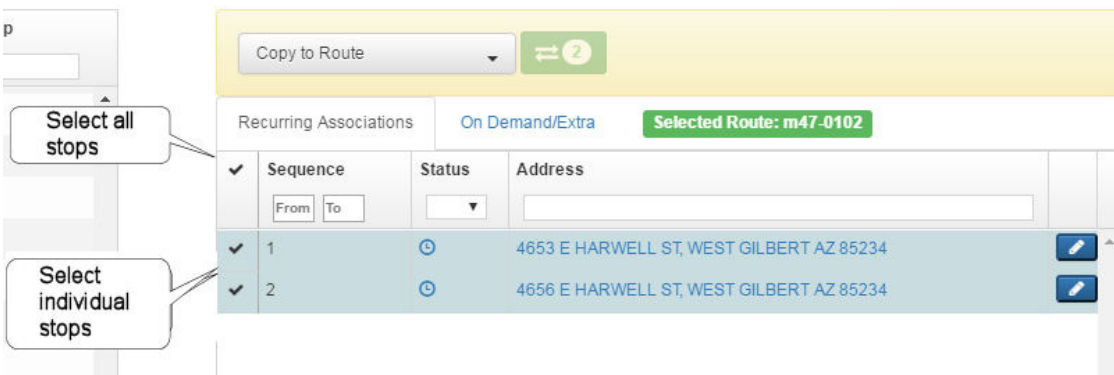
2. From the Close Routes, select the source route from the left-hand panel. The list of remaining stops for the route display in the right-hand panel.




3. Select the stops you wish to transfer by checking their corresponding check boxes.



Tip: You can select all calls in the route by clicking the check box at the top of the list.




4. From the pull-down menu at the top of the list, select a target route, i.e., the route to which the calls will be transferred.

m47-0202  Copy selected stops into selected route







	Status	Route	Material	Truck	Work Group
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	Dispatched	HB64	RECYC	1750	
<input checked="" type="checkbox"/>	Dispatched	HB65	RECYC	1759	
<input checked="" type="checkbox"/>	Dispatched	HB66	RECYC	1133	
<input checked="" type="checkbox"/>	Dispatched	m47-01	RECYC	1118	
<input checked="" type="checkbox"/>	Dispatched	m47-02	RECYC	1118	
<input checked="" type="checkbox"/>	Dispatched	m47-0202	RECYC	1120	
<input checked="" type="checkbox"/>	Dispatched	m47-03	RECYC	1118	

125 Items

- Transfer the selected calls by clicking the **Copy** button beside the pull-down menu. The list refreshes, showing the transferred calls.

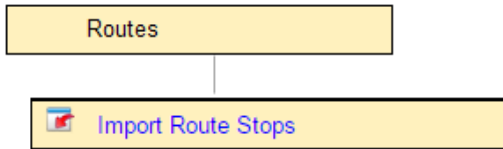
Copy to Route 

Recurring Associations On Demand/Extra **Selected Route: m47-0102**

<input checked="" type="checkbox"/>	Sequence	Status	Address
<input type="checkbox"/>	<input type="text"/> From <input type="text"/> To	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	1  m47-0202		4653 E HARWELL ST, WEST GILBERT AZ 85234 
<input checked="" type="checkbox"/>	2  m47-0202		4656 E HARWELL ST, WEST GILBERT AZ 85234 

Import Route Stops

This menu option lets you import data collected from (or exported by) your back-office (dispatch) system.



You can create new routes in the FleetLink Route Management System by importing data collected from (or exported by) your back-office (dispatch) system.

The imported data must be in a properly formatted comma-separated-value (CSV) file, which can be generated using Microsoft Excel or other spreadsheet management applications.

The formatting of the file must adhere strictly to a set of rules, which are defined on the FleetLink Route Management System user interface.

1. Prepare your data off-line, using the formatting scheme described in the figure below.



You can download an empty .csv file using the **Download Sample** button, and populate it with your own route data.

2. Select **Routes > Import Route Stops**.
The Import Route Stops screen displays.

Import Route Stops

- To import data, each line in the file must define one container assigned to one customer at a single location.
- To assign one container to each of two locations for the same customer, the customer data must be duplicated on two lines (one container and one location per line).
- To assign two containers to the same customer location, the customer and location data must be duplicated on two lines.
- In all cases, there must be one and only one line per container.
- If the work flow is not empty, import route/stops insert on demand stop for the first route.
- The format of work flows should be: Work Flow Description

Importing

Customerid as UID Yes

CSV file

Advanced Options

Clear Routes No

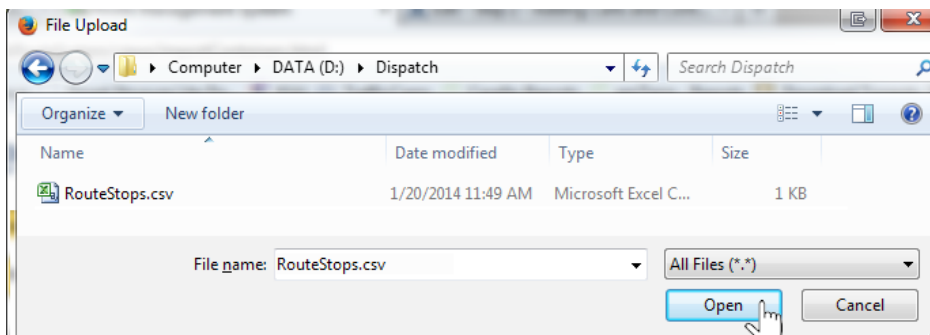
Containers / Streets Containers

[Download Sample](#)

1- Highlighted rows indicate fields used to identify customer's location 2- * Mandatory

Column #	Excel Column #	Column Name	Valid Values	Database alias	Field Size
1	A	Customer Id*		Customer	60
2	B	Line of Business*		Customer	20
3	C	Business Name		Customer	60
4	D	Customer Last Name		Customer	60
5	E	Customer First Name		Customer	40
6	F	Office Phone		Customer	20
7	G	Home Phone		Customer	20
8	H	Fax		Customer	20
9	I	Email		Customer	60
10	J	Active/Inactive		Customer	8
11	K	Customer Comments		Customer	256
12	L	Customer Billing Id		Customer	60
13	M	Customer Class*		Customer	4
14	N	Billable		Customer	8

3. Click the **Browse** button to navigate to the disk location where your file is saved.



4. Select your file, and then click **Open**.



The application provides a feature to evaluate the file to be imported.

Evaluation will validate following:

- Column mismatch between CSV file and system grid.
- Reference data missing.
- Duplicated rows in CSV file.
- Duplicated Serial Number or RFIDs.

5. Select the **Validate and Import** button. Validate and Import

A message displays the validation results for the data to be imported.

Evaluation Result - Mesa-New-stops.csv

Number of Records	9	Number of Duplicate Records	0
Number of Locations to Update	9	Number of Locations to Insert	0
Number of Customer to Update	0	Number of Customer to Insert	9
New Serial #	0	Number of Duplicate Serial#	9
New RFIDs	0	Rows with wrong Column Count	0

➔ Import Data
Cancel

Advanced Options

The **Clear Routes** option removes all stops in routes before importing the new data. Use this feature when reorganization of routes means that the reorganized route(s) will have fewer stops.

Advanced Options ⚙

Clear Routes

No

Review the results, and select **Import Data** to proceed.

The **Containers/Streets** option is used when the routes to be imported are street sweeping routes (not applicable to all installations).

For street sweeping routes, select the **Sections** option.

Advanced Options ⚙

Clear Routes

No

Containers / Streets

Sections

Export Routes and Stops



This menu option lets you export Combined Data for your routes and cart/container inventory for migration to another platform. The output is a text file (CSV) which can be opened and processed using Microsoft Excel.


Each record in the file contains all data for one container: the container itself, the customer location to which the container is assigned, and details about the assignment. The exported file is in the same format expected by the [Import Combined Data](#) feature.

From the **Export Customer, Cart/Container and Route Data** screen, you can specify filters to export only those items matching your specified criteria.

1. Specify your filter criteria using the menus and check boxes.



You can select one, several, or all routes from the route selection menu.

2. Click the **Export** button.  Your combined data file is exported.

#	Custom Line of Bu	Business F	Customer Office Ph	Home Ph	Fax	Email	Customer	Customer Civic Nbr	Street	Suite	District	City	State/Prov	Postal	Cox Building	Contact	Contact PI	Location L	Location I	Serial Nur	RFID	Capacity	Capacity L	Color
1	190A	OAKI	RESI					190	A OAKDEAN BLVD		Winnipeg MB	DETACHD	NSGLDWELLNG	49.87723	-97.2764	5.12E+09	00EDA844	49.81009	-97.182	2.12E+09	E20010268	240	Liters	Blue
2	101	ABB	RESI					101	ABBEDA CRES		Winnipeg MB	VACANTRESIDENTIAL1		49.81009	-97.182	2.12E+09	E20010268	49.81009	-97.182	5.12E+09	E20010268	240	Liters	Blue
3	101	ABB	RESI					101	ABBEDA CRES		Winnipeg MB	VACANTRESIDENTIAL1		49.81009	-97.182	2.12E+09	E20010268	49.81009	-97.182	5.12E+09	E20010268	240	Liters	Blue
4	102	ABB	RESI					102	ABBEDA CRES		Winnipeg MB	VACANTRESIDENTIAL1		49.81009	-97.182	2.12E+09	E20010268	49.81009	-97.182	5.12E+09	E20010268	240	Liters	Blue
5	102	ABB	RESI					102	ABBEDA CRES		Winnipeg MB	VACANTRESIDENTIAL1		49.81009	-97.182	2.12E+09	E20010268	49.81009	-97.182	5.12E+09	E20010268	240	Liters	Blue
6	105	ABB	RESI					105	ABBEDA CRES		Winnipeg MB	VACANTRESIDENTIAL1		49.81009	-97.182	2.12E+09	E20010268	49.81009	-97.182	5.12E+09	E20010268	240	Liters	Blue
7	105	ABB	RESI					105	ABBEDA CRES		Winnipeg MB	VACANTRESIDENTIAL1		49.81009	-97.182	2.12E+09	E20010268	49.81009	-97.182	5.12E+09	E20010268	240	Liters	Blue
8	105	ABB	RESI					105	ABBEDA CRES		Winnipeg MB	VACANTRESIDENTIAL1		49.81009	-97.182	2.12E+09	E20010268	49.81009	-97.182	5.12E+09	E20010268	240	Liters	Blue

Generating Routes from GeoZones

You can create new routes or re-generate existing ones based on the customer locations or bin locations within a GeoZone.

See [Managing GeoZones](#) for details.

Rescheduling a Route

To reschedule a route:

1. Select **Routes > Routes and Stops** to display the List of Routes screen.



2. Locate the desired route, and click on its entry in the **Name** column to display the Edit Route screen.

The screenshot shows the 'Edit Route' interface. At the top, there are navigation arrows and the title 'Edit Route'. Below this, the route name is 'FR01'. There are several fields and menus: 'Route Frequency' (set to Saturday), 'Service Date' (with a calendar dropdown), 'Truck' (set to ALL), 'Material' (set to ALL), and 'Container Type'. A dropdown menu for 'Route Frequency' is open, showing options: 'Once', 'Sunday', 'Monday', 'Tuesday', 'Wednesday', 'Thursday', 'Friday', and 'Saturday'. A red arrow points to the 'Route Frequency' dropdown, and another red arrow points to the 'Service Date' calendar. On the right, there is a map showing the route path. At the bottom, there is a table for 'Recurring Associations' with columns: Sequence, Name, Address, Service, Workflow, Status, and Status Date.

3. You must select either a Frequency **OR** a Service Date

- 3.1 Select a new frequency from the **Frequency** pull-down menu.

ATTENTION

If you cannot locate the desired frequency in the menu, then it has not been defined in the Reference Data. You must define the frequency before rescheduling the route.

- 3.2 Select the starting date from the **Service Date** calendar menu to select the specific day on which the route will be run.

⚠ By selecting a specific Service Date you override the frequency, and the route will no longer be generated automatically on other dates

4. Press **Save**  when done.

Resequencing a Route

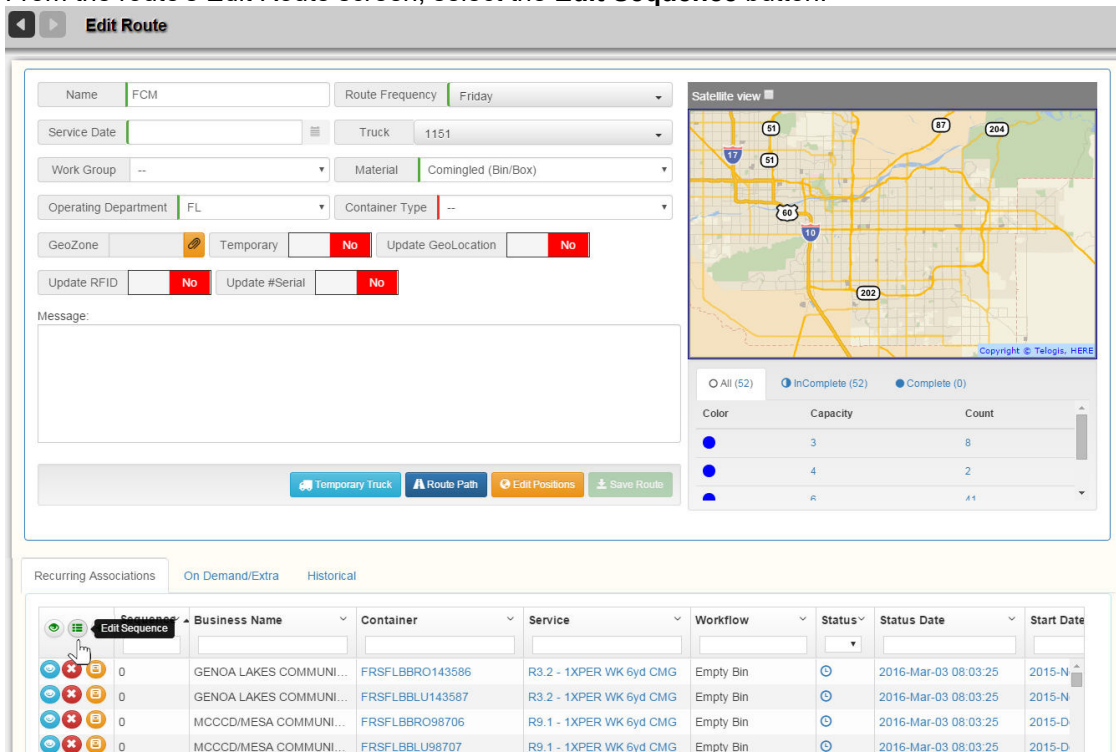
You can resequence any existing route to reflect the sequence actually followed by the driver.

Three different resequencing modes are supported:

- By breadcrumb trail
- By timestamp
- By using the sequence of another route.

To resequence a route:

1. From the route's Edit Route screen, select the **Edit Sequence** button.



The screenshot shows the 'Edit Route' interface. At the top, there are fields for Name (FCM), Route Frequency (Friday), Service Date, Truck (1151), Work Group, Material (Comingled (Bin/Box)), Operating Department (FL), and Container Type. Below these are checkboxes for GeoZone, Temporary, Update GeoLocation, Update RFID, and Update #Serial. A message box is present below the form. On the right, there is a 'Satellite view' map showing a city grid with various routes highlighted in yellow. Below the map is a legend with 'All (52)', 'Incomplete (52)', and 'Complete (0)' options, and a table with columns for Color, Capacity, and Count.

At the bottom, there is a 'Recurring Associations' section with tabs for 'On Demand/Extra' and 'Historical'. The 'On Demand/Extra' tab is active, showing a table with columns for Business Name, Container, Service, Workflow, Status, Status Date, and Start Date. The table contains four rows of data:

	Business Name	Container	Service	Workflow	Status	Status Date	Start Date
0	GENOA LAKES COMMUNI...	FRSFLBBRO143586	R3.2 - 1XPER WK 6yd CMG	Empty Bin	⊙	2016-Mar-03 08:03:25	2015-N
0	GENOA LAKES COMMUNI...	FRSFLBBLU143587	R3.2 - 1XPER WK 6yd CMG	Empty Bin	⊙	2016-Mar-03 08:03:25	2015-N
0	MCCCD/MESA COMMUNI...	FRSFLBBRO98706	R9.1 - 1XPER WK 6yd CMG	Empty Bin	⊙	2016-Mar-03 08:03:25	2015-D
0	MCCCD/MESA COMMUNI...	FRSFLBBLU98707	R9.1 - 1XPER WK 6yd CMG	Empty Bin	⊙	2016-Mar-03 08:03:25	2015-D

The next screen displays two panels depicting the route before and after resequencing.

Edit Route Sequence

Route Name: 402H, Truck: 5036-402, Total Stops : 143

Resequencing Mode: [Dropdown]

Space New Sequence values by: 10

By timestamp
Like another route
Breadcrumb trail

Save changes

Common Orig	Undo	Common Txt New	Address
0	0		40027 1CV40027 FORT HOOD TX
0	0		40027 1CV40027 FORT HOOD TX
38	10		29009 1CV29009 FORT HOOD TX
60	20		2239 2239 FORT HOOD TX
120	30		29009 1CV29009 FORT HOOD TX
127	40		34002 HC34002 FORT HOOD TX
132			RT HOOD TX
150			RT HOOD TX
150			RT HOOD TX
159	80		41007 1CV41007 FORT HOOD TX
160	90		41018 HC41018 FORT HOOD TX
161	100		29010 1CV29010 FORT HOOD TX
162	110		41001 1CV41001 FORT HOOD TX
163	120		41001 1CV41001 FORT HOOD TX
165	130		37016 MED37016 FORT HOOD TX
166	140		37016 MED37016 FORT HOOD TX
167	150		41008 1CV41008 FORT HOOD TX

Hide Map Markers

* Double click new sequence field to change value

Legend: First Stop, Last Stop, Unique address, Repeating addresses

✔ You can reduce visual clutter on the map by selecting the Hide Map Markers button, which suppresses display of assignment markers.

2. Choose a Resequencing Mode from the pull-down menu.

Breadcrumb Trail Mode

Using this mode, you can resequence the route based on a breadcrumb trail for a specific date.

1. Select **Breadcrumb Trail** from the **Resequencing Mode** menu.
2. Choose a date from the **Date** pull-down menu.

Route Name: 402H, Truck: 5036-402, Total Stops : 143

Resequencing Mode: Breadcrumb trail

Truck: 5036-402

Date: 24-Mar-2017

3. Choose a truck from the Truck menu.

Truck	5036-402
	-
	5036
	5037
	5038

4. Click **Resequence**.



The page refreshes, showing the changes in the **Route After** map panel.



- To discard your resequencing changes, select the **Revert** icon.
- To save changes, select the **Save** icon.

✔ When you choose Resequencing by Breadcrumb Trail, RMS provides Advanced Options—additional controls that enable you to troubleshoot and fine tune your resequencing.



See [Understanding Advanced Options](#).

Timestamp Mode

Using this mode, you can resequence the route based on the confirmation timestamps for the most recent execution of the route.

1. Select a **Truck** and a **Date** from their respective menus.

Route Name: MISSAUG27, Truck: 997HLD, Total Stops : 54

Resequencing Mode: By timestamp

Truck: 997HLD
71226
71227
71228
71229
71230
71231

Date: --
--
22-Mar-2017
21-Mar-2017
20-Mar-2017
19-Mar-2017
18-Mar-2017

Common Txt Orig Common T New

Re-Sequence

2. Click **Re-Sequence**.



The page refreshes, showing the changes in the Route After map panel.

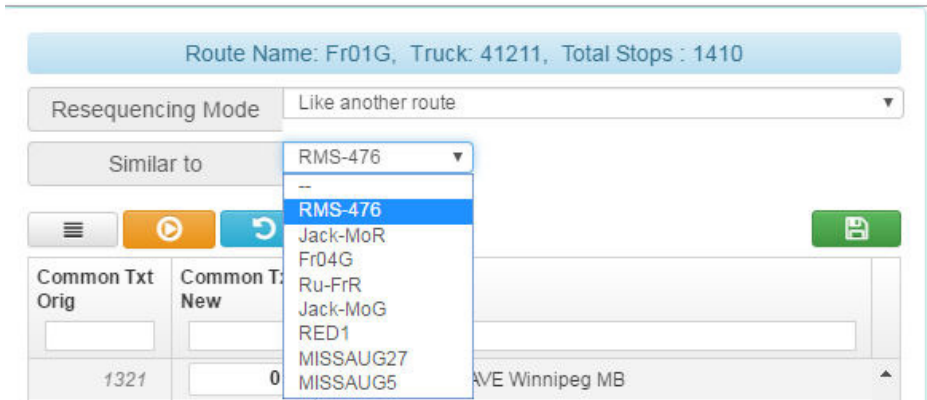


- To discard your resequencing changes, select the **Revert** icon.
- To save changes, select the **Save** icon.

Like Another Route Mode

Using this mode, you can resequence the route based on the sequence of another route.

1. Select **Like another Route** from the **Resequencing Mode** menu.
2. Choose a route from the **Similar to Route** pull-down menu.
3. Click **Resequencing**.



The page refreshes, showing the changes in the Route After map panel.



- To discard your resequencing changes, select the **Revert** icon.
- To save changes, select the **Save** icon.

Understanding Advanced Options

In [Breadcrumb Trail Mode](#), Matching is done based on the property centroid located closest to the breadcrumb. The

breadcrumb sequence is used to assign a sequence number to every stop in the route. Stops that cannot be matched are given a sequence number of 0 or 1, and thus flagged for review.

Advanced Options, available in [Resequencing by Breadcrumb Mode](#), provides a set of parameters that you can adjust should you encounter difficulty resequencing a route.

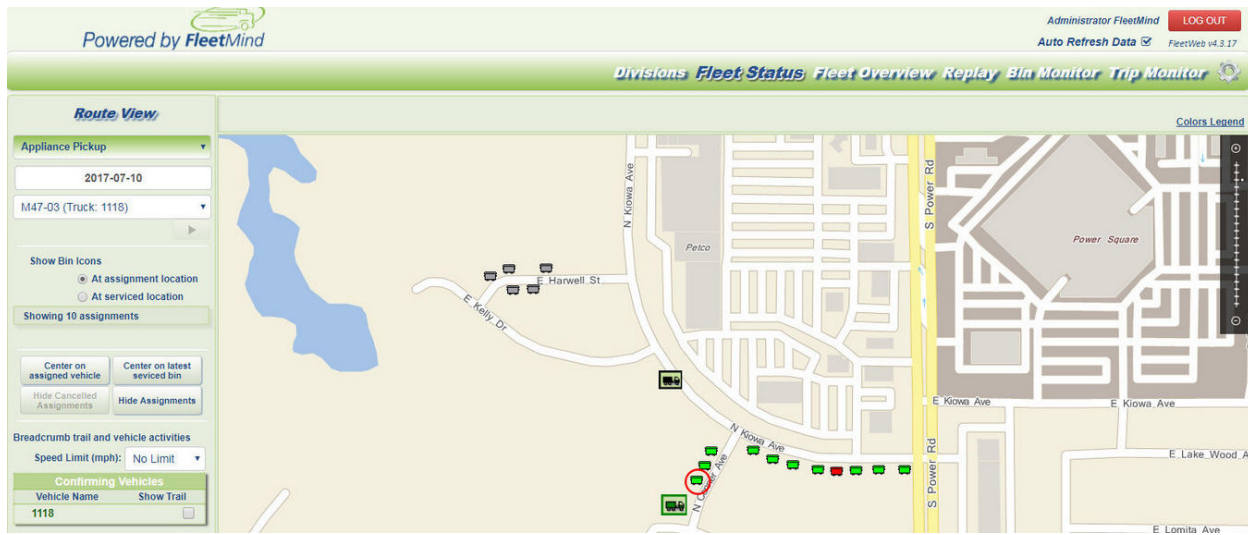
Advanced Options Explained

Parameter	Description
Anchor point (container or customer)	The point of reference for measuring distance from the GPS trail: container assumes curbside anchor, customer assumes property centroid anchor.
Corridor width* <small>See Tips for Fine Tuning</small>	Centered on the GPS trail, this value is used for gauging the distance to collection anchor points on either side of the truck. A corridor value of 50 meters suggests a lane of 25 meters on either side of the truck. Default value is 50 meters.
Adjacent point filtering distance	Used to eliminate excessive redundant GPS points on the map to create a smoother GPS trail. Default is 6 meters.
Maximum valid speed* <small>See Tips for Fine Tuning</small>	Criteria used to determine when a vehicle is simply driving down a road, as opposed to performing collection services. Default is 25 km/h.
GPS position sampling (default 15 seconds)	Used to determine 'Maximum valid speed' between 2 GPS points if speed value is not available in Vehicular Data. Default 15 seconds.


Tips for Fine Tuning

When resequencing by Breadcrumb Trail, you may find that some stops remain unsequenced, i.e., sequence=0. In this section we suggest some troubleshooting tips using RMS and FleetWeb.

Using FleetWeb—Fleet Status/Route View



Use this view to validate that the breadcrumb trail used by the driver has actually covered all the stops assigned to the route (i.e., ran a complete route) for a given date. If you see multiple trucks in the list of confirming vehicles, then it is likely that another truck helped and you do not have a complete breadcrumb trail for sequencing. In this case, you can switch to a different prior week until you find one where the route was run completely by one vehicle..

 Sometimes customers use the breadcrumb trail of a garbage route to sequence a recycling route—when choosing another date, it does not necessarily have to be the exact truck that ran the route. Customers that have tablets or handhelds sometimes will have a dedicated supervisor run the “perfect” route in their pickup trucks, naming the route with a prefix to facilitate subsequent identification.

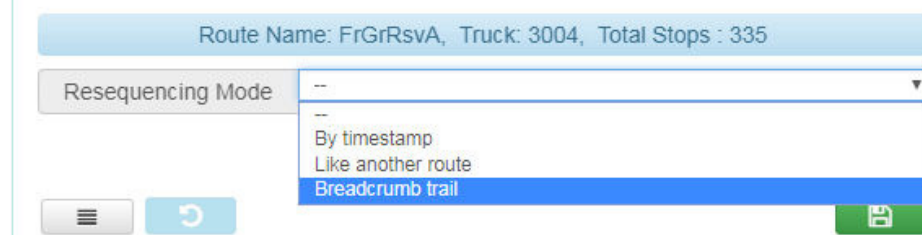
Once you have located a suitable run date, make a note of the name and date, and proceed to RMS.

Using RMS—Edit Route/Edit Sequence

1. Select and edit the route identified in FleetWeb.
2. Choose the **Edit Sequence** button.



3. Selected **Resequencing Mode > Breadcrumb Trail**.



4. Select the date identified as the truck having run the entire route on its own.

Route Name: FrGrRsvA, Truck: 3004, Total Stops : 335

Resequencing Mode: Breadcrumb trail

Truck: 3004 Date: 04-Jan-2018

Common Txt Orig: 0 Common Txt New: 0 Address: 2096 Fry St Roseville MN 55113

Calendar: January 2018. Date 04 is selected.

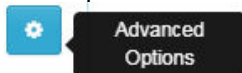
5. Conduct a first pass without modifying advanced parameters by pressing the orange **Re-Sequence** button.



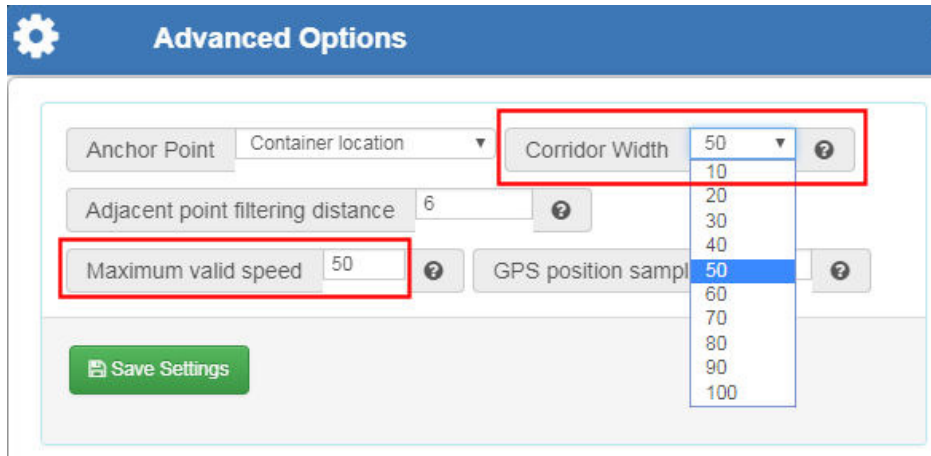
6. Review the results.

Common Txt Orig	Common Txt New	Address
0	0	1365 Lydia Ave W Roseville MN 55113
0	0	1666 Ridgewood Ln N Roseville MN 55113
0	0	1746 Skillman Ave W Roseville MN 55113
2	10	1733 Eldridge Ave W Roseville MN 55113
4	20	2206 Midlothian Rd Roseville MN 55113
6	30	1637 Ridgewood Ln N Roseville MN 55113
8	40	1617 Ridgewood Ln S Roseville MN 55113
10	50	1629 Ridgewood Ln S Roseville MN 55113

If the results are unsatisfactory, i.e., there are a significant number of stops with 0 for a sequence number, do not save—proceed to Advanced Options.



7. There are typically two reasons why stops remain unsequenced (0), both involving settings for the default parameter values:
- Corridor Width (in yards)** : Specifies the maximum distance from breadcrumb trail tolerated for inclusion in sequence.
 - Maximum Valid Speed** : Specifies the truck max speed to be considered as valid breadcrumb for sequencing.



The corridor width is relevant depending on whether sequencing in high-density urban, urban/suburb, semi-rural or rural.

The maximum speed is useful if a truck drives multiple times in front of the container and really only want to service those in the second pass or if the container in proximity of a highway.

8. Try increasing **Corridor Width** gradually from default 50 all the way to 80.
9. Try increasing **Max Valid Speed** from 25 to 50.

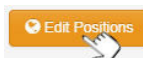
Once you have achieved an improved resequencing, you can save your work.

⚠️ Any stops that remains unsequenced are likely stops where the containers needs to be relocated, as they are too far away from the Breadcrumb Trail.

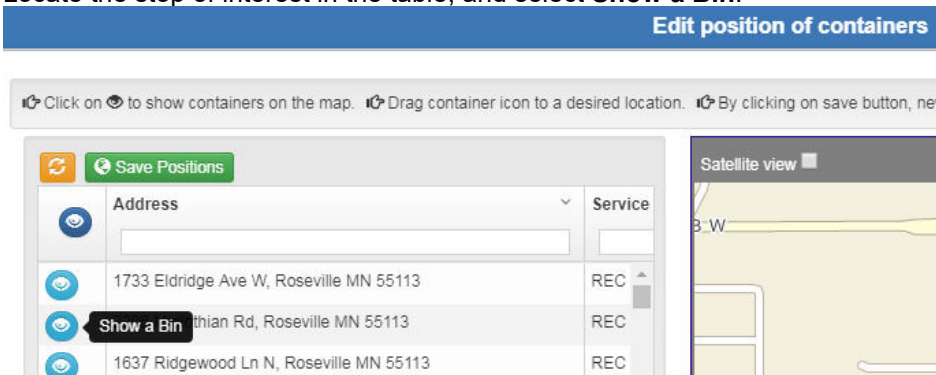
Exit resequencing mode and return to the Edit Route screen, where you can reposition selected containers as described in the following section.

RMS—Edit Route/Edit Position

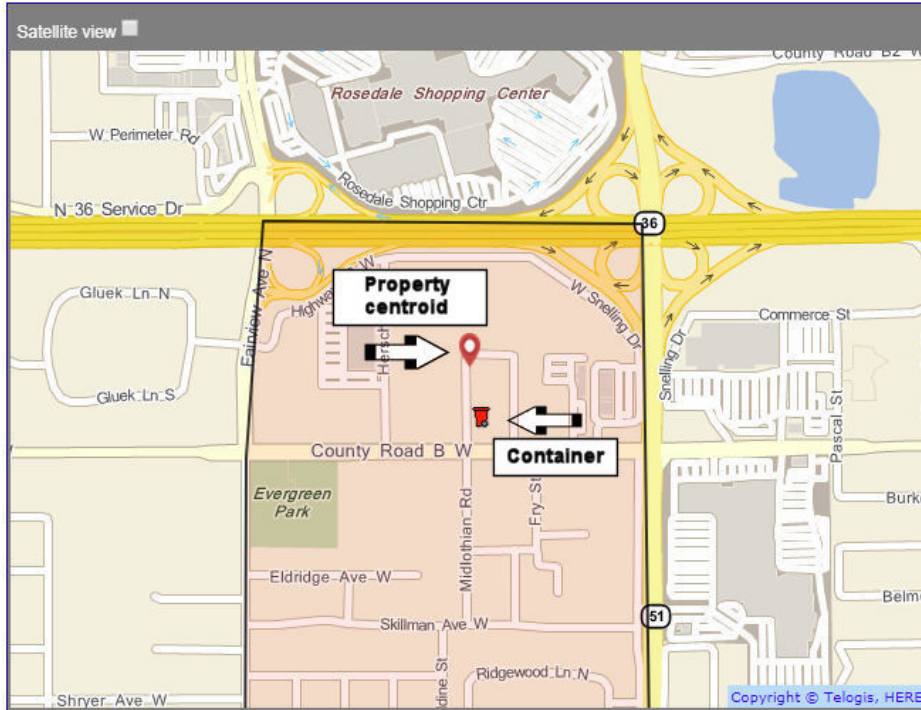
1. From the Edit Route screen, select **Edit Positions**.



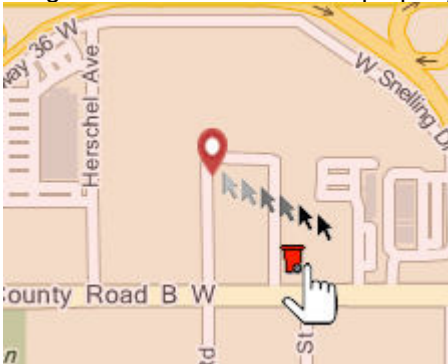
2. Locate the stop of interest in the table, and select **Show a Bin**.



The property centroid and container display on the map.



3. Drag the container toward the property centroid.



4. Select **Save Positions** when done.
5. Try resequencing the route again using Breadcrumb Trail mode.

Holiday Route Scheduling

Note to FleetLink RMS Users

The procedures described in this section are provided as a workaround solution due to constraints of the current version of RMS software.

FleetMind is currently developing a feature, for future release, to simplify and automate the task of holiday scheduling.

FleetLink RMS can accommodate rescheduling or suspension of all services for statutory holidays.

You do not have to edit each route and/or customer information individually to accomplish this. Instead, you edit Route Frequency reference data to make a global change to all routes affected for the day of the week in question.



You must make these reference data edits in two operations:

- once before the holiday to manage the rescheduling or suspension, and
- once after to revert to “business as usual” service.

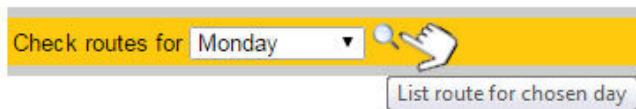
In the example provided here, we will use Monday as the holiday and reschedule all affected routes for the following day (Tuesday).

Part 1: View Regularly Scheduled Routes for the Holiday

1. Select **Routes > Routes and Stops**.



2. In the lower-left corner of the List of Routes screen, select *Monday* from the **Check routes for** menu.



The List of Routes for Monday displays.



In the interest of simplicity, we are using only a small number of routes. In a “real-world” scenario, there could be a significantly greater number.

Temporary	Include completed	Status	Route	Truck
No	<input type="checkbox"/>		FB52	1149
No	<input type="checkbox"/>		FB55	1165
No	<input type="checkbox"/>		Mon-West	1149
No	<input type="checkbox"/>		yuryRMS120	1120

Frequencies (from routes' respective Edit screens)

Route Frequency	EveryDay
Route Frequency	1st mon of month
Route Frequency	Monday
Route Frequency	Monday

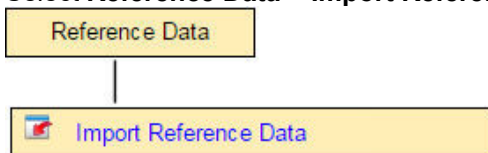
The routes have different route frequencies, however they are all scheduled to run on the coming Monday.

Part 2: Back up (Export) Route Frequencies Reference Data

Before making any modifications to your Reference Data, back it up so that you can use it as a reference in case you require it when reverting to normal operations after the holiday.

⚠ You cannot restore the data by re-importing it, but at least you will have recorded the pre-holiday state of the frequencies so that you can verify them when re-editing the data.

1. Select **Reference Data > Import Reference Data**.



2. From the Import Result screen, select the **Export Data** button.

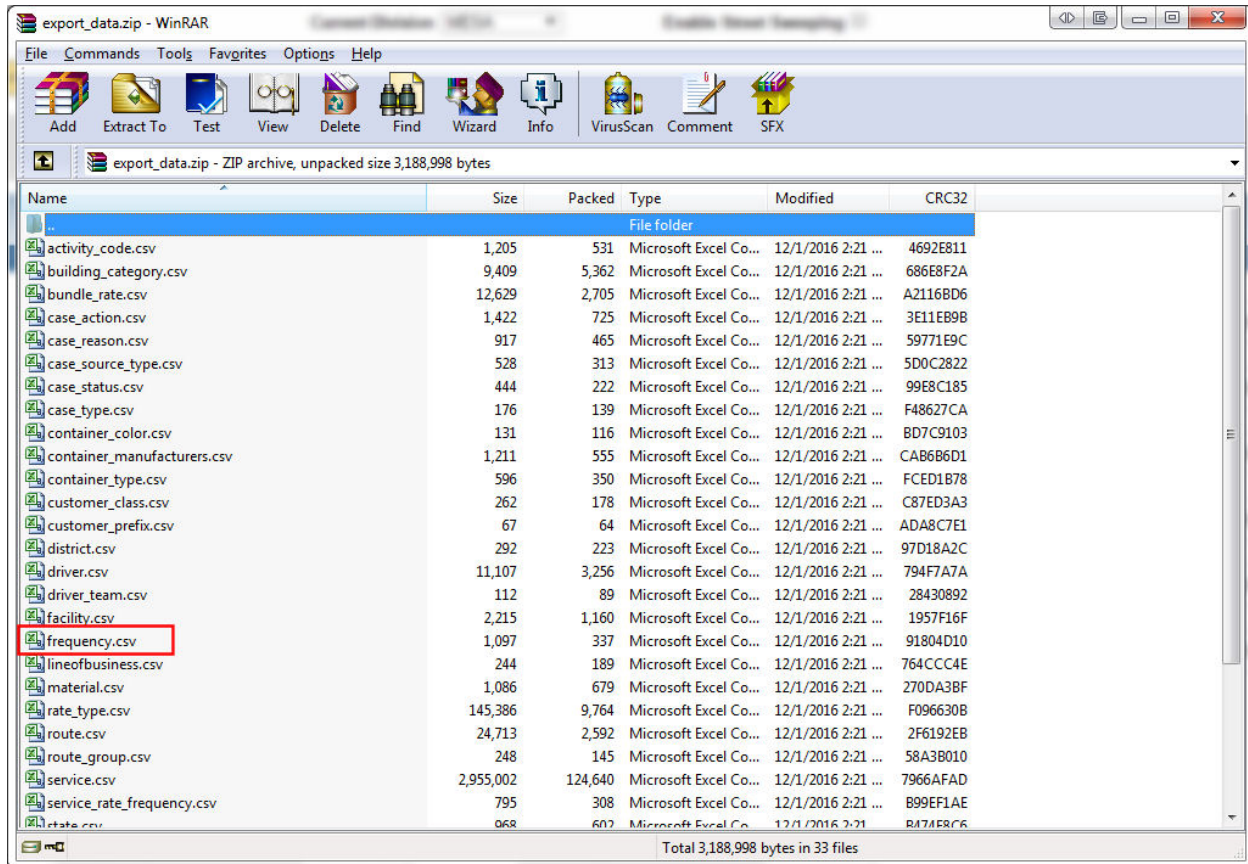
◀ ▶ **Import result**

Import Reference Data

Activity Code <input type="text" value="Browse"/>	Container Manufacturers <input type="text" value="Browse"/>	Line of Business <input type="text" value="Browse"/>	Truck <input type="text" value="Browse"/>
Building Category <input type="text" value="Browse"/>	Container Type <input type="text" value="Browse"/>	Material Type <input type="text" value="Browse"/>	Unit of Measurement <input type="text" value="Browse"/>
Bundle Rate <input type="text" value="Browse"/>	Customer Class <input type="text" value="Browse"/>	Rate Type <input type="text" value="Browse"/>	User <input type="text" value="Browse"/>
Case Action <input type="text" value="Browse"/>	Customer Prefix <input type="text" value="Browse"/>	Route Group <input type="text" value="Browse"/>	Work Group <input type="text" value="Browse"/>
Case Reason <input type="text" value="Browse"/>	District <input type="text" value="Browse"/>	Route <input type="text" value="Browse"/>	Work Flow <input type="text" value="Browse"/>
Case Source Type <input type="text" value="Browse"/>	Driver Team <input type="text" value="Browse"/>	Service <input type="text" value="Browse"/>	Work Flow Group <input type="text" value="Browse"/>
Case Status <input type="text" value="Browse"/>	Driver <input type="text" value="Browse"/>	Service Rate Frequency <input type="text" value="Browse"/>	
Case Type <input type="text" value="Browse"/>	Facility <input type="text" value="Browse"/>	State <input type="text" value="Browse"/>	
Container Color <input type="text" value="Browse"/>	Frequency <input type="text" value="Browse"/>	Truck Type <input type="text" value="Browse"/>	

✔ This will export all categories of reference data to a zipped file—you cannot export a single category at a time.

3. Extract the **frequency.csv** file from the zipped file and save it to disk.

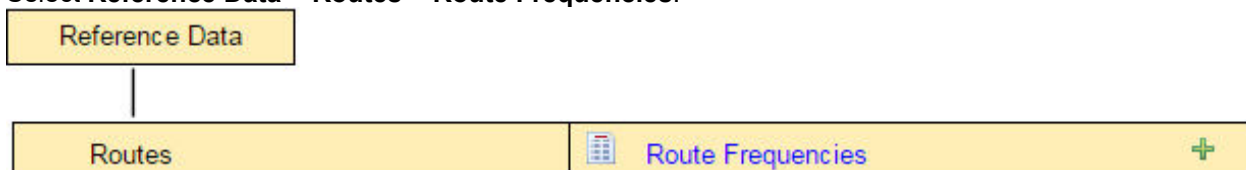


✔ Save the file with a meaningful and descriptive name, for example, **pre-holiday-backup-dec-01-2016.csv**.

You can now proceed with Reference Data modification.

Part 3: Edit Route Frequency Reference Data

1. Select **Reference Data > Routes > Route Frequencies**.



The List of Route Frequencies displays.

✔ By clicking on the **Monday** column header (to sort), you can view an at-a-glance grouping of all route frequencies that include Monday.

List of Route Frequencies											
	Frequency	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	EvenWeeksOnly	OddWeeksOnly	type
			✓								W
			✓						✓		V
			✓							✓	D
		✓	✓	✓	✓	✓	✓	✓			W
			✓		✓	✓	✓	✓			W
		✓	✓	✓	✓	✓	✓	✓			1
		✓	✓	✓	✓	✓	✓	✓			1
		✓									W
				✓							W
					✓						W
						✓					W
							✓				W

In this example, six route frequencies will require editing.

⚠ IMPORTANT: MAKE A NOTE OF ALL ROUTE FREQUENCIES THAT ARE TO BE MODIFIED IN ORDER TO MINIMIZE THE RISK OF OMITTING SOMETHING WHEN RESTORING THEM TO THEIR ORIGINAL STATE. OPTIONALLY, DO A SCREEN CAPTURE OF EACH **EDIT ROUTE FREQUENCY** SCREEN BEFORE YOU MAKE ANY MODIFICATIONS.

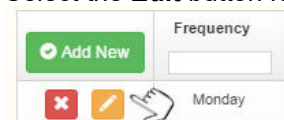
Operation	Windows	Mac
Capture entire screen		
Capture active window		

The most meaningful data used by the RMS in this table are the days of the week that are checked off. The string in the **Frequency** column is simply a name—a useful description that is comprehensible to humans.

(A route with a frequency properly configured for Monday will be scheduled for Monday, even if the name in the **Frequency** column is Bob or Lucy.)

The data we will be modifying are the days of the week, not the Frequency names.

- Select the **Edit** button for the first frequency item (*Monday* in the **Frequency** column).



The Edit Frequency screen for Monday displays.

3. In the **Day Of Week** group of buttons, Monday is currently selected.

1. Click on the **Monday** button to deselect it.

2. Click on the **Tuesday** button to select it.

4. Select **Save Route Frequency**.

A success message displays.

Route Frequency modified successfully!

5. Return to the List of Routes for Monday.

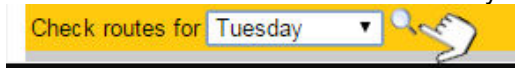
1. Select **Routes > Routes and Stops**.

2. Select *Monday* from the **Check routes for** menu.

Note that the two routes with a Monday frequency (*Mon-West* and *yuryRMS120*) are no longer on the list.

Temporary	Include completed	Status	Route
No	<input type="checkbox"/>		FB52
No	<input type="checkbox"/>		FB55

6. Now check the List of Routes for Tuesday.



The routes affected by the Monday frequency are scheduled for Tuesday.

Route List For: 06-Dec-2016						
Temporary Route	Truck	Work Group	Route will be similar to	Update GeoLocation	Update RFID	Update SerialNbr
Operating department: All	Residential	Commercial	Roll-Off			
Temporary	Include completed	Status	Route	Truck	Work Group	
No	<input type="checkbox"/>		FB52	1149		
No	<input type="checkbox"/>		Mon-West	1149		
No	<input type="checkbox"/>		drDre	1119-H		
No	<input type="checkbox"/>		yuryRMS120	1120		

- Return to the List of Route Frequencies reference data and modify (as required) the remaining frequencies that include Monday.

Constraints and Special Considerations

The Edit Route Frequency screen does not permit you to save the item if you have not selected **any** day of the week.

Edit Frequency Monday

Route Frequency

Name:

Frequency:

Day Of Week:

None selected.

Please make a valid selection

So, if service for the holiday is to be suspended altogether—not rescheduled—you must use a different approach.

Notice that different options are provided when you select:

- A **Weekly** frequency (*Weekly, Even Weeks Only, Odd Weeks Only, Every Other Week*)

Frequency:

Day Of Week:

← **OPTIONS**

Any weekly selection

and

- A **Monthly** frequency..

Frequency:

Week Number:

Day Of Week:

← **OPTIONS**

Monthly selection

More specifically, the **Monthly** selection provides the additional option of Week Number. You can take advantage of these options when no make-up day is to be scheduled for cancelled holiday services.

For example:

1. If you are certain that the holiday occurs on an Even week, you could select **Odd Weeks Only** (and vice-versa).
2. Alternatively, you could select **Monthly**, and then choose a **Week Number** and **Day of Week** combination that will get you past the holiday and buy you sufficient time to restore the Route Frequencies to their normal (backed up) state.

Reverting to the Pre-Holiday Route Frequencies

As soon as possible after the holiday, you must revert to the pre-holiday schedule.

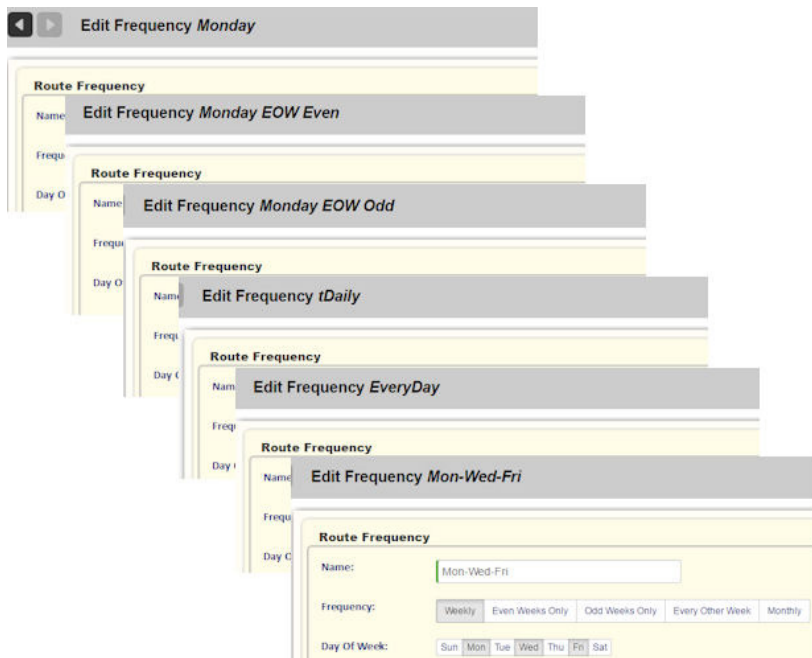
To do so, you must manually edit every Route Frequency reference data element that you modified prior to the holiday.

Consult the exported csv file and any notes and screen captures that you recorded in [Part 2](#) of this section.

Excel File

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Frequency												
2	name	sunday	monday	Tuesday	wenesday	thursday	friday	saturday	evenWee	oddWeek	type	weekNumbe	weekDay
3	Once	0	1	0	0	0	0	0	0	0	1		
4	Sunday	1	1	0	0	0	0	0	0	0	W		
5	Monday	0	1	1	0	0	0	0	0	0	W		
6	tDaily	1	1	1	1	1	1	1	0	0	1		
7	Monday EOW Even	0	0	0	0	0	0	0	1	0	V		
8	Monday EOW Odd	0	0	0	0	0	0	0	0	1	D		
9	EveryDay	1	0	1	1	1	1	1	0	0	W		
10	Mon-Wed-Fri	0	0	0	1	0	1	0	0	0	W		
11	OnceXXX	0	0	0	0	0	0	0	0	0	1		
12	EOW_Test	0	0	0	1	0	0	0	0	0	0		

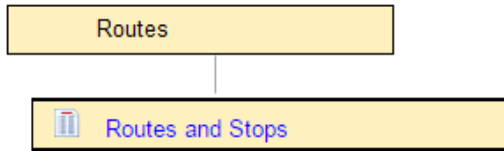
Screen Captures




Deleting a Route

To delete a route:

1. Select **Routes > Routes and Stops** to display the List of Routes screen.




2. Click on the **Delete** icon  for the desired route.

The screenshot shows the 'List of Routes' interface. At the top, there is a search bar and a 'List of Routes' title. Below is a table with columns: Name, Show Stop Count, Show Conflicts, Has GeoZone, Mod. date, Truck, Work Group, Route Group, Service date, Frequency, Material, Update GeoLocation, Update RFID, and Update SerialNbr. The first row has the value '123' in the Name column. A red 'X' icon is circled in the rightmost column of the first row.

3. Press **Yes** on the confirmation dialog.

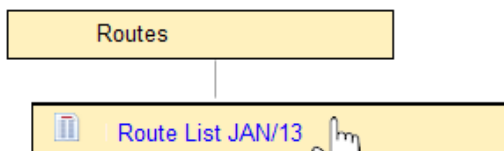
A confirmation dialog box titled 'Confirm requested operation'. The text inside asks 'Are you sure you want to delete the record 123!'. At the bottom, there are two buttons: 'Yes' and 'No'.

-  All stops from the deleted route are moved to the **Unscheduled Stops** screen.

Sending Routes to Mobiles

Once you have defined and validated all data, you can send routes to your mobiles.

1. Select **Routes > Route List Month/Day**, where MONTH and Day represent the current date.



The List of routes for the current date displays.

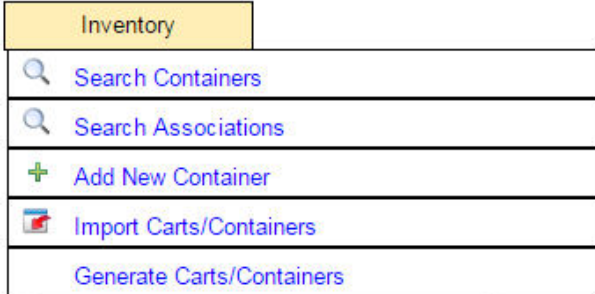
2. Locate your route in the list.
3. In the Temporary column, click the right-arrow (Dispatch to mobile) to send the route to the mobile.

Route List For: 2015-01-13

Temporary Route	Truck	Work Group	Route will be similar to	Update GeoLocation	Update RFID	Update SerialNbr	
Temp-088			123	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Residential <input checked="" type="radio"/> Commercial <input type="radio"/> Roll-Off <input type="radio"/>							
Temporary	Include completed	Status	Route	Truck	Work Group	Complete	Incomplete
No	<input type="checkbox"/>	Pending	3Team-TuG		3TEAM	0 (000.00 %) [0]	4360 [0]
No	<input type="checkbox"/>	Pending	3Team-TuR		3TEAM	0 (000.00 %) [0]	1382 [0]
No	<input type="checkbox"/>	Pending	Adam-TuR		ADAM C	0 (000.00 %) [0]	2923 [0]
No	<input type="checkbox"/>	Pending	Calvin-TuG		CALVIN DICK	0 (000.00 %) [0]	2040 [0]
No	<input type="checkbox"/>	Pending	Calvin-TuR		CALVIN DICK	0 (000.00 %) [0]	1333 [0]
No	<input type="checkbox"/>	Pending	Jack-TuG		JACK SONG	0 (000.00 %) [0]	2801 [0]
No	<input type="checkbox"/>	Pending	Jack-TuR		JACK SONG	0 (000.00 %) [0]	3615 [0]
No	<input type="checkbox"/>	Pending	Jason-TuR		JASON L	0 (000.00 %) [0]	1511 [0]

Managing Container Inventory

The Inventory menu provides the tools you need for managing your cart and container inventory.



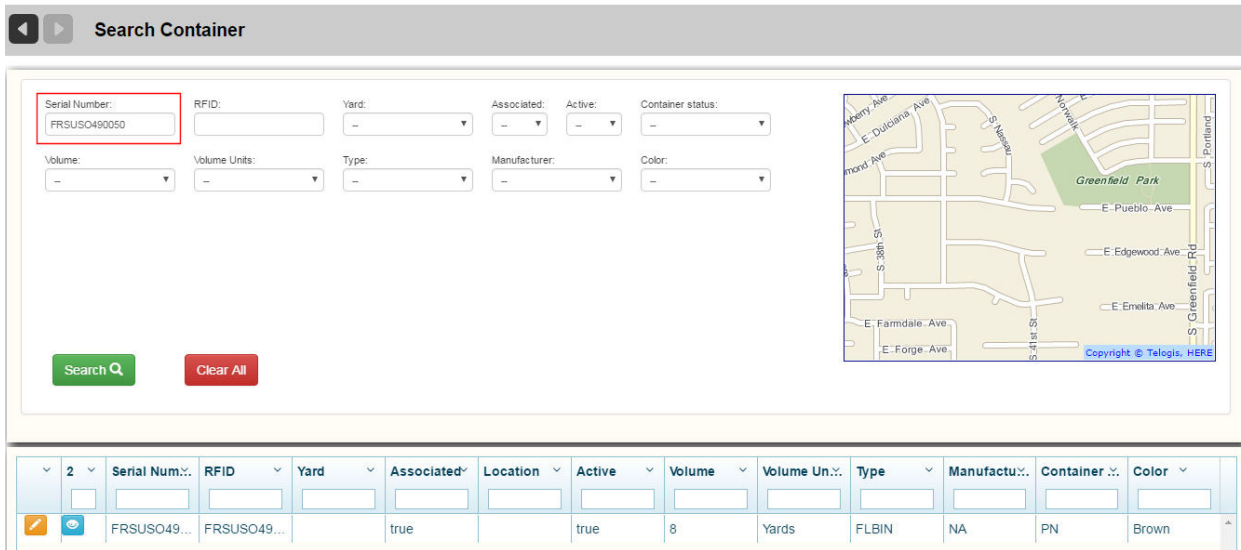
The Inventory menu options are explained in the following sections.

Search Containers

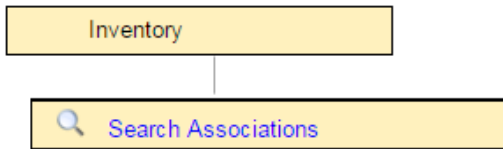


This menu option lets you locate an item in your inventory of carts and containers.

By specifying your search criteria using the text fields and menus, you can locate the cart or container and display the Edit Cart/Container screen, where you can edit its properties, and determine whether it is associated with a customer location.



Search Associations



This menu option lets you locate associations between carts in your inventory and the customer locations to which they are assigned.

The FleetLink Route Management System finds existing carts' associations using their customer locations. Specify your search criteria to list matching customer locations with their currently associated carts.

For a quick search, specify the starting characters for Street, City, District, or Postal Code. You can also search a range of civic numbers, or a specific number by omitting the **To Civic Number** field.

Your search results are returned in the List Cart/Container by Association screen.

Clicking the **Container links** will display the Edit Cart/Container Location Association screen, from which you can end and suspend the association and specify required repairs for the container. Clicking the Location links displays the Edit Location screen.

Add New Container



This menu option lets you add a new cart or container to the system manually.

Add Cart/Container

RFID Serial Number JC0001

Label Volume 90 Volume Unit Gallons

Material Trash Description

Color BLACK Container Manufacturer Snyder Container Type BRL

Yard AcmeY1 Warranty Start 15-Apr-2016 Warranty End 14-Oct-2016

Icon Yes Active Damage No Compactor No Dimension Unit Inch

Width Height Length

Office Comments (driver does not receive this information):

1. Enter all data using the text fields, menus, and check boxes.

Entering an **RFID** or **Serial Number** is mandatory. If one value is omitted, the system will automatically generate the other.

If you do not specify either value, you will get the following error message:

Error

Either RFID or serial number should be specified!

2. Choose a cart icon from the lower portion of the screen by selecting its radio button.

This is the icon you will see when you view your cart's location in a GeoZone.

3. Click **Save** when done.

Add Cart/Container

RFID	FRR2729F1876D0000001	Serial Number	JC0001
Label		Volume	90
		Volume Unit	Gallons
Material	Trash	Description	
Color	BLACK	Container Manufacturer	Snyder
		Container Type	BRL
Yard	AcmeY1	Warranty Start	15-Apr-2016
		Warranty End	14-Oct-2016
Icon		Yes	Active
		Damage	No
		Compactor	No
		Dimension Unit	Inch
Width		Height	
		Length	

Office Comments (driver does not receive this information):

Save Container

Link to customer locations >

Yards history >

Inserted! The new container inserted successfully.

The lower area of the screen now displays 2 new areas which, initially, will be empty:

1. Link to customer locations.

Once the container has been associated with a location, the link displays here.

Link to customer locations
▼

Material	Start Date	End Date
TRSH	2014-10-02T00:00:00	

2. Yards history.

This area displays a history of yards with which the container has been associated.

Yards history
▼

There is no history yard.

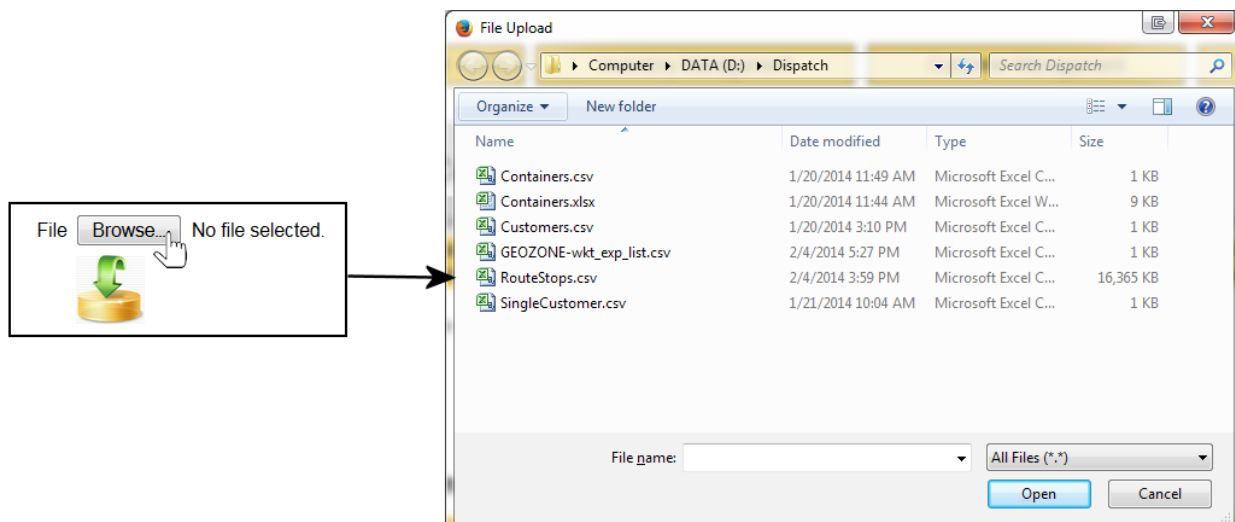
Import Carts and Containers



This menu option lets you import cart/container data from a file, as well as export your container inventory. The most efficient way to define cart/container data is to import a comma-separated-values (CSV) file that you have prepared off-line (or have generated using your back-office system or other software) and formatted according to the criteria defined.


Column number	Excel number	Column name	Size	Description
1	A	Serial number	20	Optional
2	B	RFID	24	Optional
3	C	Capacity	8	Number
4	D	Unit	10	
5	E	Color	40	
6	F	Container Type	20	
7	G	Active	8	

1. Select the **Browse** button **Browse** to navigate to the disk location where your file is located.



2. Select your file, and then click **Open**.
3. Click the **Validate and Import** **Validate and Import** button.
Your data is imported and a status message displays.

 See [Importing Container Inventory Data](#) for data rules and field descriptions.


To export your container inventory to a CSV file, select the Export Containers button .


Generate Carts and Containers



This menu option allows you to generate a series of consecutive serial numbers and RFID codes for carts and containers.

Carts/Containers are generally imported from an external data file. (See [Import Carts/Containers.](#)) However, this function can be used to generate up to 5000 carts at a time, with sequential serial numbers.


 **CAUTION!** There is no easy way to delete carts once they are generated, so this function should be used with care, by first generating a small number of containers (2 to 5) that can be updated easily in case of an error (serial numbers cannot be changed, however).

 **Example:** To generate 1000 containers numbered 96G008001 to 96G009000, with RFIDs 00A1B2C-3D4E5F6000000**8001** through 00A1B2C3D4E5F6000000**9000**:

- Number prefix may be set to:
 - 96G, or
 - 96G0, or
 - 96G00
 - ...but NOT
 - 96G008.
- Accordingly, start and end numbers must be set to:
 - 008001-009000, or

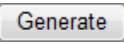
- 08001 -09000 **or**,
- 8001-9000,
....**but NOT**
- 1 - 1000.

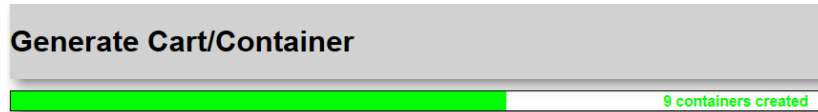
The RFID prefix must be set to match the start and end numbers (RFIDs are optional). RFIDs can be generated only if their sequence is identical to the sequence of serial numbers.

 **Beware**—an easy mistake is to select 8000-8999 instead of 8001 -9000, or to select 8000-9000 and generate 1001 containers.

Also, double-check the number of zeros to prevent ending up with missing or extra zeros in serial numbers or RFIDs.

Finally, set the remaining fields to be used for all generated containers.

1. Specify your container properties using the menus and text fields.
2. Click **Generate** .
A status message displays.



You can view the containers you have generated by selecting [Inventory > Search Containers](#) to locate your containers in the List of Containers.

Associating a Container with a Customer Location

A container becomes associated with a customer location when you subscribe a customer to a service using the Edit Location screen.

 See [Subscribing a Customer to a Service](#).

Associating Containers Without Serial Numbers or RFIDs

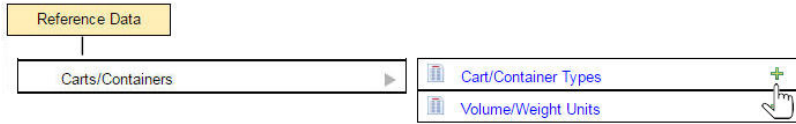
On occasion, your Dispatch system may have to deal with containers that have neither an RFID nor a serial number—for example, garbage bags—that you want to associate with a customer and location.

To associate these containers with a location, you must:

- Create a new container type in Reference Data.
- Create “dummy” container serial numbers using the Generate Cart/Containers menu option.
- Ensure that you have a Service Type associated with the containers.
- Associate the containers with Customer Locations.

For purposes of this example, you will create a container type called *Garbagebags*.

1. Select **Reference Data > Carts/Containers > Cart/Container Types**, ensuring that you click the menu option's **Add**  icon.



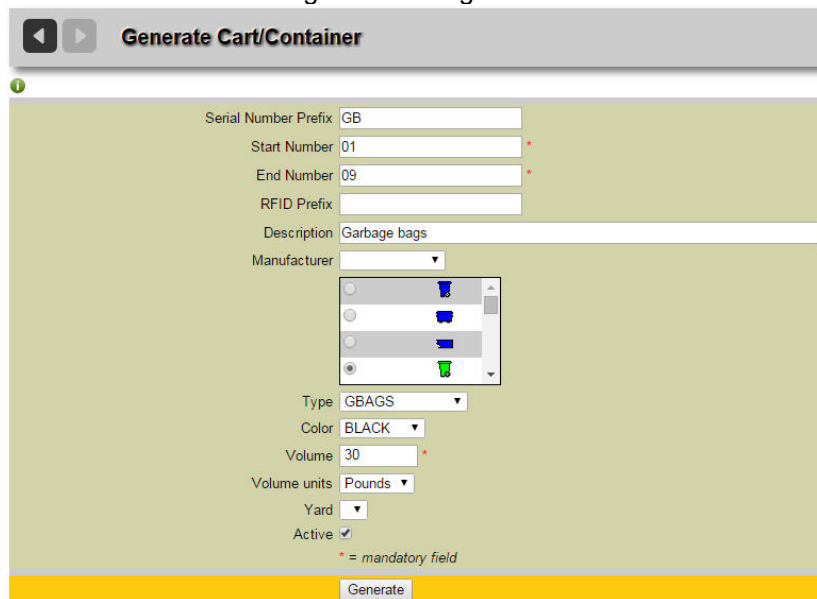
2. Create a new container type called **GBAGS**.



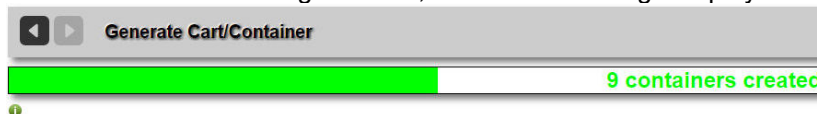
3. Press **Save Container Type** when done.
4. Select **Inventory > Generate Carts/Containers**.



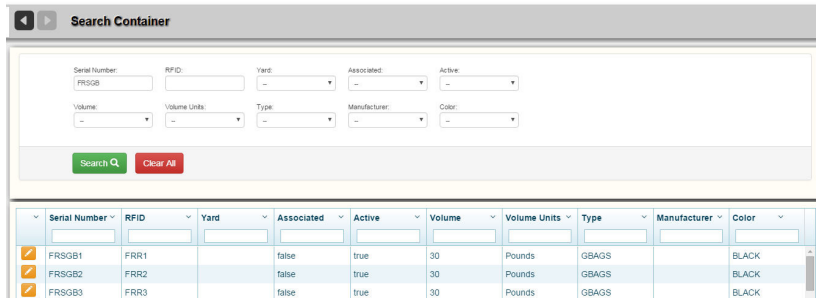
5. Generate containers using the following data.



Once the containers are generated, a success message displays.

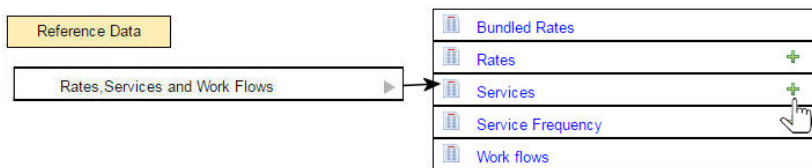


You can view the newly generated carts in the List of Containers.

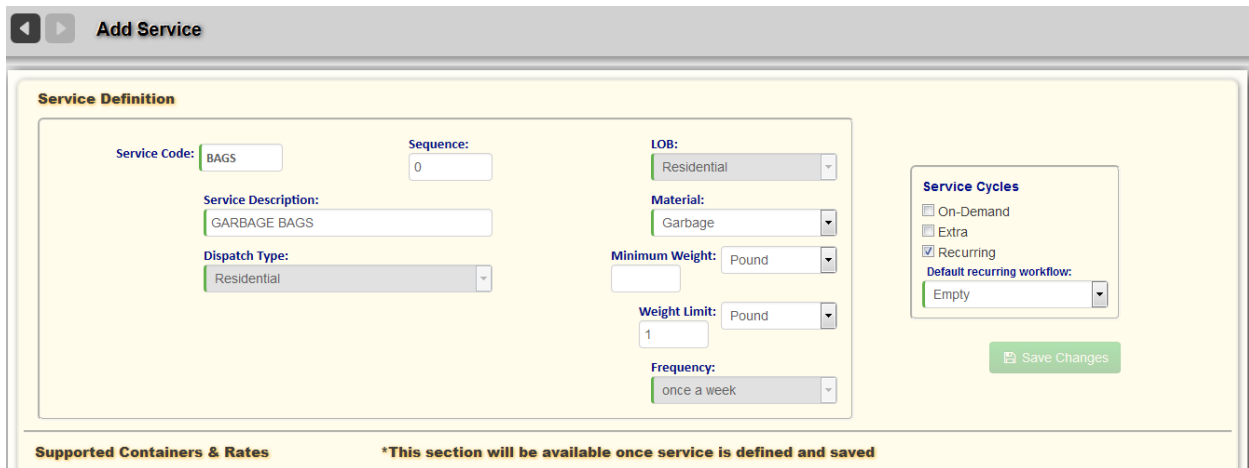


You must now ensure that you have a Service Type associated with the containers.

6. Select **Reference Data > Rates, Services and Work Flows > Services**, ensuring that you click the menu option's **Add** icon.



7. Create a new Service Type, as shown in the following figure.



8. Press **Save** Changes when done.
The lower part of the screen now displays Supported Containers and Rates.



9. Select **Add Container**.

Add Container Type ✕

*Select 1 or more container type from list below to associate it to service

Container Type	Size	Select
FLBIN	4 Yards	<input type="checkbox"/>
FLBIN	8 Yards	<input type="checkbox"/>
ROBIN	15 Yards	<input type="checkbox"/>
GBAGS	30 Pounds	<input checked="" type="checkbox"/>
UNCONTAINED	0 Yards	<input type="checkbox"/>
FLBIN	2 Yards	<input type="checkbox"/>
ROBIN	20 Yards	<input type="checkbox"/>

Cancel
Save

10. Select a container type and size, and then choose **Save**.

11. Select **Add Work Flow & Rate**.



In order for a rate and workflow to be available for selection here, they must be defined in Rate Type reference data.

Add Workflows and Rates ✕

Choose workflow(s) below then click on rate to add it to selected workflow(s). Only workflows with associated rates will be added to the service + Create New Rate

Filter Workflows:

Workflow	Rate Code
Pullback NoChg	
Remi/Emp/Restck Chg	
Remi/Emp/Restck NoChg	
Remi/Restck Chg	
Remi/Restck NoChg	
Remove	GBAGS
Remove Chg	
Remove Delinquent	
Remove NoChg	
Replace	
Replace Fine	
Replace Fine NoChg	

Filter Rates:

Rate Code	Description	Basic Service	Extra Pickup	Extra Weight	Refused Service	Cancel Cost
GBAGS	Garbage Bag Pickup	\$1.00	\$2.00	\$2.00	\$2.00	\$0.00
RTDF	Default rate	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Cancel
Save

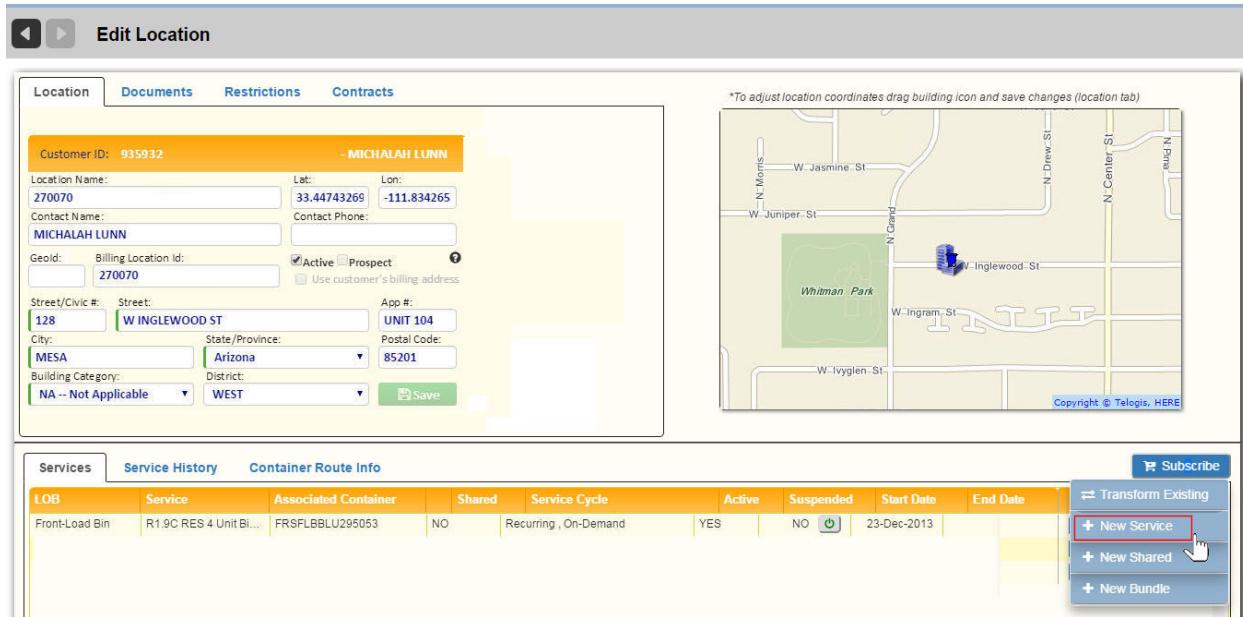
12. Select a rate code and workflow, and then choose **Save**.



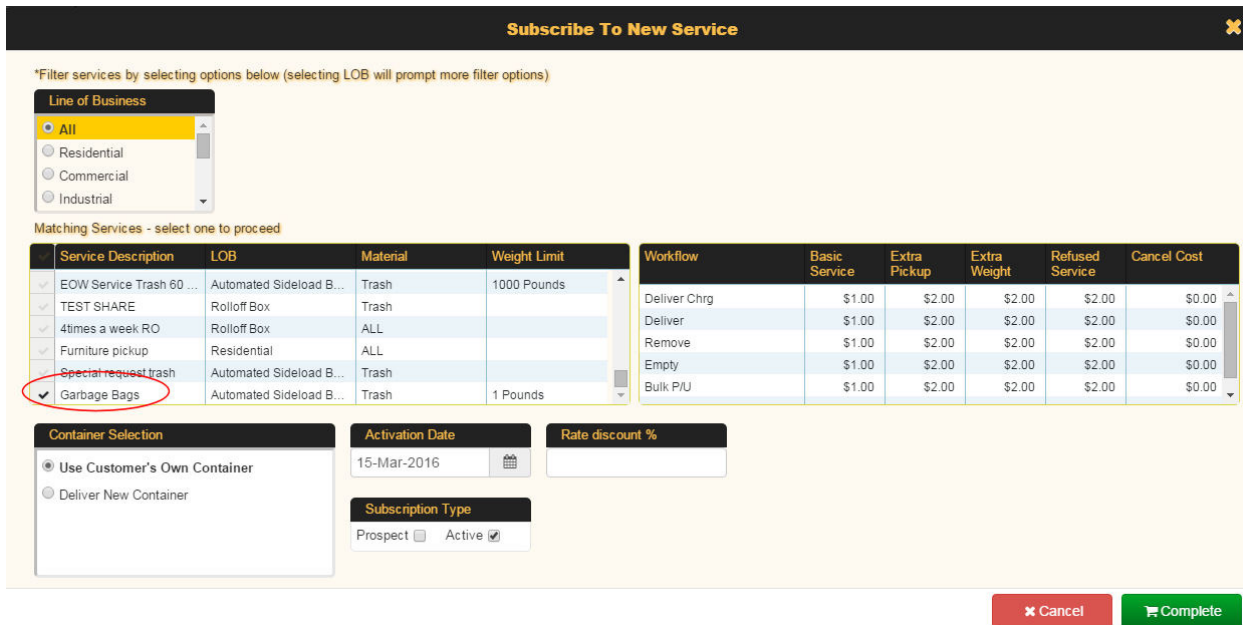
Alternatively, you can create a new rate by selecting the **Create New Rate** button. + Create New Rate

You have completed defining your service.

13. Edit the Customer Location to which the service is to be assigned.



14. Click **Subscribe to Service**.



- Filter your search results.
- Select the service from the Service Description list.
- Select Activation Date.
- Optional: enter a Rate Discount (if applicable).

15. Press **Complete** when done.
The subscription is added.

Edit Location

Location
Documents
Restrictions
Contracts

Customer ID: 935932 - MICHALAH LUNN

Location Name:
270070

Lat:
33.44743268

Lon:
-111.834265

Contact Name:
MICHALAH LUNN

Contact Phone:

Geoid:
270070

Billing Location Id:
270070

Active Prospect

Street/Civic #:
128

Street:
W INGLEWOOD ST

App #:
UNIT 104

City:
MESA

State/Province:
Arizona

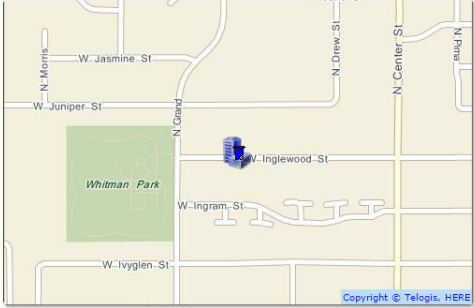
Postal Code:
85201

Building Category:
NA -- Not Applicable

District:
WEST

Save

*To adjust location coordinates drag building icon and save changes (location tab)



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Services
Service History
Container Route Info
Subscribe

LOB	Service	Associated Container	Shared	Service Cycle	Active	Suspended	Start Date	End Date	
Front-Load Bin	R1.9C RES 4 Unit Bl...	FRSFLBBLU295053	NO	Recurring , On-Demand	YES	NO ⏻	23-Dec-2013		⏪ 📅 ⏩ ✖
Automated Sidel...	Garbage Bags	FRS-OWNED-BY-CUST	NO	Recurring	YES	NO ⏻	15-Mar-2016		⏪ 📅 ⏩ ✖

Managing Customers

The Customers menu provides the tools you need for managing your customer information.



The Customers menu options are explained in the following sections.

Search Customers



The **Search Customers** menu option lets you locate a customer in your list of customers.

◀ ▶ **Search Customer**

Customer ID:	Billing Location Id:	Billing Customer ID:	Customer Last Name:	Customer First Name:	Business Name:	Home Phone:
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Office Phone:	Postal Code:	State/Province:	City:	Street:	From Street/Civic Number:	To Street/Civic Number:
<input type="text"/>	<input type="text"/>	<input type="text" value="Select State..."/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Search Tips

For a quick search, specify the starting characters for street, city or district names, or postal code. You can also specify a range of civic numbers, or a specific number by omitting the **To Civic Number** value.

A search by **Customer ID** accesses that customer profile directly, so only a complete ID may be specified.

1. Select your search criteria.
2. Click the **Search** icon.
If your search is unsuccessful, an error message displays.

Search Customers



No location found

Otherwise a results page displays, showing all matches.

◀ ▶ **Search Customer**

Customer ID:	Billing Location Id:	Billing Customer ID:	Customer Last Name:	Customer First Name:	Business Name:	Home Phone:
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Office Phone:	Postal Code:	State/Province:	City:	Street:	From Street/Civic Number:	To Street/Civic Number:
<input type="text"/>	<input type="text"/>	<input type="text" value="Select State..."/>	<input type="text"/>	<input type="text" value="aberdeen"/>	<input type="text"/>	<input type="text"/>

	Customer ID	Billing Location Id	Customer Locations	Name	Billing Customer ID
	999ABERDEENAVE		999 ABERDEEN AVE Winnipeg MB		
	1000ABERDEENAVE		1000 ABERDEEN AVE Winnipeg MB	1	null
	996ABERDEENAVE		996 ABERDEEN AVE Winnipeg MB		
	995ABERDEENAVE		995 ABERDFEN AVE Winnipeg MB		

- Selecting a customer's **View**  button displays the View Customer screen.
- Selecting a customer's **Edit**  button displays the Edit Customer screen.
- Clicking a hyperlink in the Customer Locations column displays the Edit Location screen.


Add New Customer



This menu option lets you add a new customer to the FleetLink Route Management System.

You add new customers in two steps: once you have filled out and saved the Customer Profile, the Add Location screen displays, enabling you to enter service locations (addresses) for the customer.

- Enter all customer profile data using the text fields, check boxes, and pull-down menu.
- **Customer prefix** menu: Selecting a prefix from this menu will result in the Customer ID—automatically generated by the system—contains the Customer Prefix as its first characters. See [Customer Prefixes](#).
- **Billable** check box: Check this option if this address is the billing address for the customer account.
- **WOID Required**: Selecting this option forces you to enter a work order ID when scheduling an on-demand stop via the Edit Location screen.


Once you have entered all information press **Save Customer** .

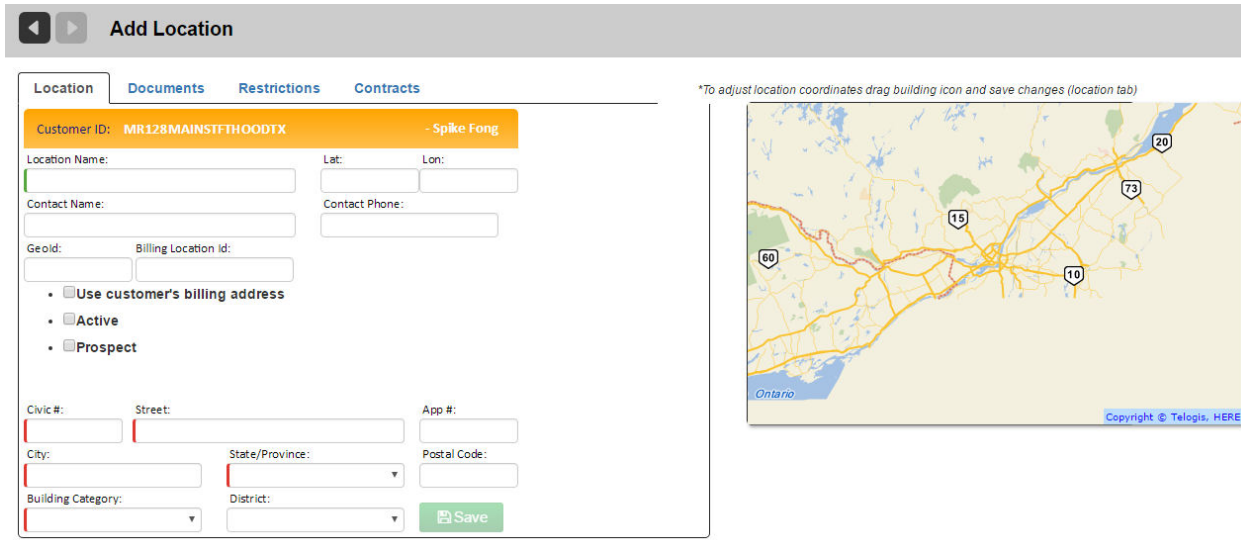
The Edit Customer screen refreshes, enabling you to add customer location information.


Customer Locations

The lower portion of the Edit Customer screen provides an area where you can view and add additional customer location information.

To add a location:

1. Select the Location button . The Add Location screen displays.

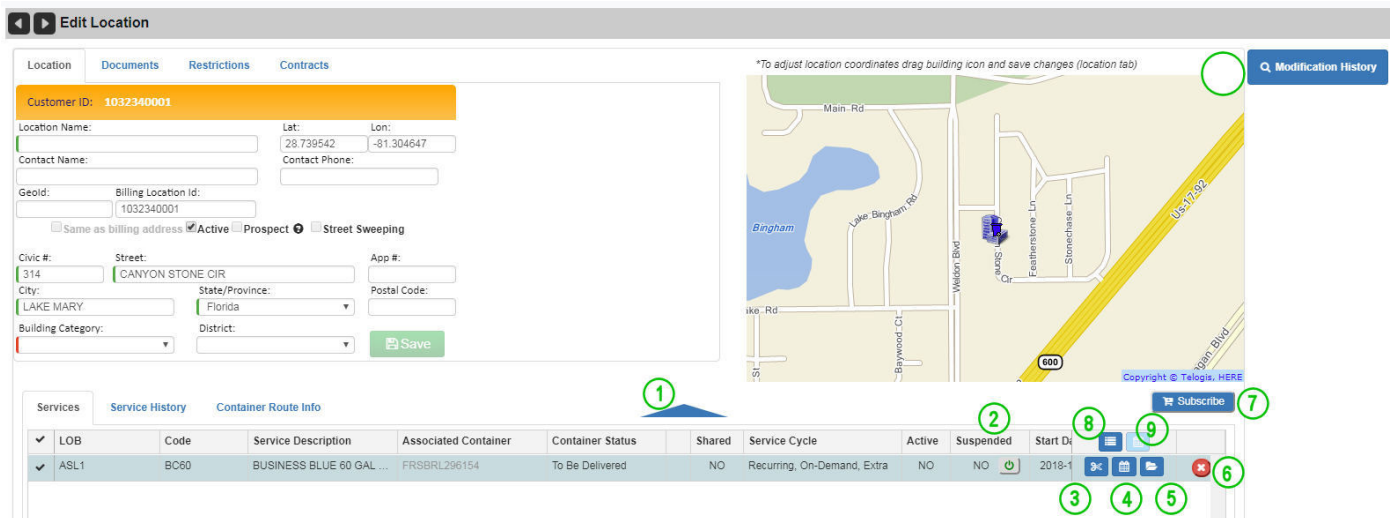


2. Enter all location information, and then press **Save** . You are returned to the Edit Customer screen, where you can add additional addresses in the same manner.

Edit Location Screen

The lower portion of the Edit Location screen is where you subscribe the location to services and manage those subscriptions, schedule on-demand stops, and open customer cases, if required. See [Subscribing a Customer to a Service](#).

A tabbed interface also provides access to the location's service history and container/route associations.



CONTROLS	
1	Enlarge/expand bottom panel for easier viewing when multiple services are listed.
2	Toggle suspension status of the service (YES/NO).
3	Terminate the service
4	Schedule on-demand stop for the service.
5	Open a customer case.
6	Delete the association between the service and the container.
7	Add subscription.
8	Schedule on-demand stop
9	Schedule multiple on-demand stops
10	Displays Audit Trail Log

Deactivating a Customer

In the event that a customer subscription must be cancelled (for example, resident has moved out of the premises), you can deactivate the Customer via the Edit Customer screen.

1. Deselect the **Active** check box.

Edit Customer

Customer Id: 516830 **Active** Prospect Billable Customer Billing Id: 516830

WOID Required Business Name:

Last Name: FOWLER First Name: JAMES

Customer Prefix: Select... Customer Class: UN Office Phone: Home Phone: Email:

Driver Comments:

Billing Address

Civic #	Street	Apt/Suite	City	District	State/Province
944	W MAIN ST	APT 2003	MESA	WEST	Arizona

2. Select **Save Customer**.
RMS deactivates all associated locations and transfers subscriptions to default location, i.e., the municipality.

Edit Location

Location Documents Restrictions Contracts

Customer ID: S16830 -- JAMES FOWLER

Location Name: FOWLER Lat: 33.4151864530 Lon: -111.850831629

Contact Name: JAMES FOWLER Contact Phone:

Billing Location Id: 134996

Same as billing address

Active

Prospect

Street Sweeping

Civic #: 944 Street: W MAIN ST App #: #2003-2

City: MESA State/Province: Arizona Postal Code: 85201

Building Category: AP - Apartment District: WEST

Save

LOB	Service	Associated Container	Shared	Service Cycle	Active	Suspended
ASL	Support Services	FRSUNCNT10746	NO	On-Demand	NO	NO

Suspending a Customer Subscription

In the event that a customer subscription must be suspended (for example, prolonged absence from the premises), you can deactivate the Customer via the Edit Customer screen.

1. Select a start date and end date from the **From** and **To** calendar menus.
2. Select **Save** when done

LAST NAME: SULLIVAN

CUSTOMER PREFIX: Select... Customer Class: UN

DRIVER COMMENTS:

BILLING ADDRESS:

Civic #: 235 Street: N ELLSWORTH RD

CUSTOMER SUSPENSION DURATION:

From: To: 2018-10-22

3. The suspension of all services for the customer is reflected in the **Suspended** column in the lower area of the screen.

You can cancel the suspension at any time by toggling the button in this column from **Yes** to **No**.

[Subscribe](#)

Active	Suspended	Start Date		
YES	YES	2016-0		
YES	YES	2018-1		

List of Not GeoCoded Customers

This feature is provided as part of the GeoCode Management functionality.

See [GeoCoding Non-GeoCoded Customer Addresses](#) for details.

List Customer Cases

This features is provided as part of the CSR Dashboard option.

See [APPENDIX A - CUSTOMER SERVICE REPRESENTATIVE \(CSR\) DASHBOARD](#) for details.

Import Customer



The Import Customer menu option lets you import customer data in a text (CSV) file.

◀ ▶ **Import Customer/Location**

- The customer file must contain the 34 columns defined below, 20 columns for customers and 14 for locations.
- To define multiple locations for the same customer, the customer data must be repeated for each additional location.
- If more than 35 columns are present, they are ignored.

Importing

1- Highlighted rows indicate fields used to identify customer's location 2- * Mandatory

Column #	Excel Column #	Column Name	Valid Values	Database alias	Field Size
1	A	Customer Id*		Customer	60
2	B	Business Name		Customer	60
3	C	Customer Last Name		Customer	60
4	D	Customer First Name		Customer	40
5	E	Office Phone		Customer	20
6	F	Home Phone		Customer	20
7	G	Fax		Customer	20
8	H	Email		Customer	60
9	I	Active/Inactive		Customer	8
10	J	Customer Comments		Customer	256
11	K	Customer Billing Id		Customer	60
12	L	Customer Class		Customer	4
13	M	Billable		Customer	8

To download a sample CSV file that you can populate with your own data, click the **Download Sample** button in the upper-right area of the page.

Import - Export Customer Documents



The Import/Export Customer Documents menu option lets you import customer documentation in a text (CSV) file for viewing within the RMS, and export that information from the RMS to a CSV file.

Import/Export Customer Documents

- The document file must contain the 10 columns defined below.
- Document Import will not create a new Customer/Location. It will add the document Name and url to existing Customers/Location in the system.
- The top 2 lines of csv header will be ignored in the importing process.
- Customer ID is mandatory and should be referred to an existing customer in RMS.
- Values within column numbers 2-8 should match the location information within the RMS.
- If more than 10 columns are present in CSV import file, the subsequent columns will be ignored.
- To define multiple contracts for the same customer location, the data must be repeated for each additional contract.

CSV file

Browse +

↓ CSV Sample
↻ Export Documents
↻ Import Documents

Column number	Excel number	Column name	Size	Description
1	A	Customer ID	25	Unique customer id
2	B	Street/Civic Number	8	Civic number
3	C	Street	40	Full street name with type and orientation
4	D	Apt/Suite	10	Suite or block number or code
5	E	District	40	District
6	F	City	40	Municipality
7	G	State/Province	2	State or Province code
8	H	Postal Code	10	Zip or postal code
9	I	Builling Location ID	60	Billing Location ID
10	J	Document name	40	Document Name
11	K	Url	1024	Document Url

To download a sample CSV file that you can populate with your own data, click the CSV icon in the upper-right area of the page. ↓ CSV Sample

Importing Documents

1. Select the **Browse** button Browse + and choose the file to be imported.
2. Select **Import Documents** ↻ Import Documents.
 - a. If there are errors in the file, an error dialog displays. Click warning icon to display details.

Result ✕

Insertion	Rejection	Details
0	1	<div style="display: flex; align-items: center; justify-content: center;"> ⚠ 👉 </div>
		<p>Reject Details</p> <p>1. Cannot find customer with 999999 Id</p>

- b. If there are no errors, a success dialog displays.

Result		
Insertion	Rejection	Details
1	0	

Exporting Documents

- Select the **Export Documents** button . Your customer contracts are exported to a CSV file.

customer_document.csv											
	A	B	C	D	E	F	G	H	I	J	K
1	Customer Document										
2	Customer Civic Nbr	Street	Suite	District	City	State/Pro	Zip/Postal Code	Billing Loca	Document Name	Document Url	
3	607314	1523 W CAROL AVE		WEST	MESA	AZ	85202	148330		333	
4											

Unsubscribed Customers



Unsubscribed Customers										
Services:	All	Subscription Ended In:	Last 1 year	Search	Export					
CustomerID	Address	Business Name	Customer Name	Office Phone	Home Phone	Service	Start Date	End Date	Day	
1000WELLINGTON...	1000 WELLINGTON CRES Winnipeg MB		Otar test			ALLEY Garbage	2012-12-15	2014-11-04	64	
1000ALDGATERDU...	1000 Aldgate Road Winnipeg MB	FaToys		1111111111	2222222222	CURB Garbage	2012-12-15	2014-11-04	64	
1000ALDGATERDU...	1000 Aldgate Road Winnipeg MB	FaToys		1111111111	2222222222	CURB Recycling	2012-12-15	2014-11-04	64	

This feature is provided as part of the CSR Dashboard option.

It enables Customer Service personnel to search, view and export data for customers who have unsubscribed from service within a selectable time frame.

Report data includes:

- * Service (from list of existing active services)
- * Reporting Period (Last 30 days, Last 60 days, Last 90 days)

Subscribing a Customer to a Service

You subscribe a customer to a service using the Edit Location screen.

1. Locate the customer in the List of Customers, and click the location link to open the **Edit Location** screen.

Edit Location

Location Documents Restrictions Contracts

Customer ID: CGF2

Location Name: 191015 Lat: 33.41401235 Lon: -111.660001

Contact Name: Contact Phone:

Geoid: Billing Location Id: 191015 Active Prospect Street Sweeping Use customer's billing address

Street/Civic #: 7923 Street: E 1ST AVE App #:

City: MARICOPA COUNTY State/Province: Arizona Postal Code: 85208

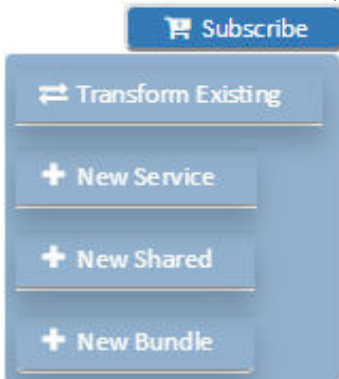
Building Category: NA -- Not Applicable District: WEST

*To adjust location coordinates drag building icon and save changes (location tab)

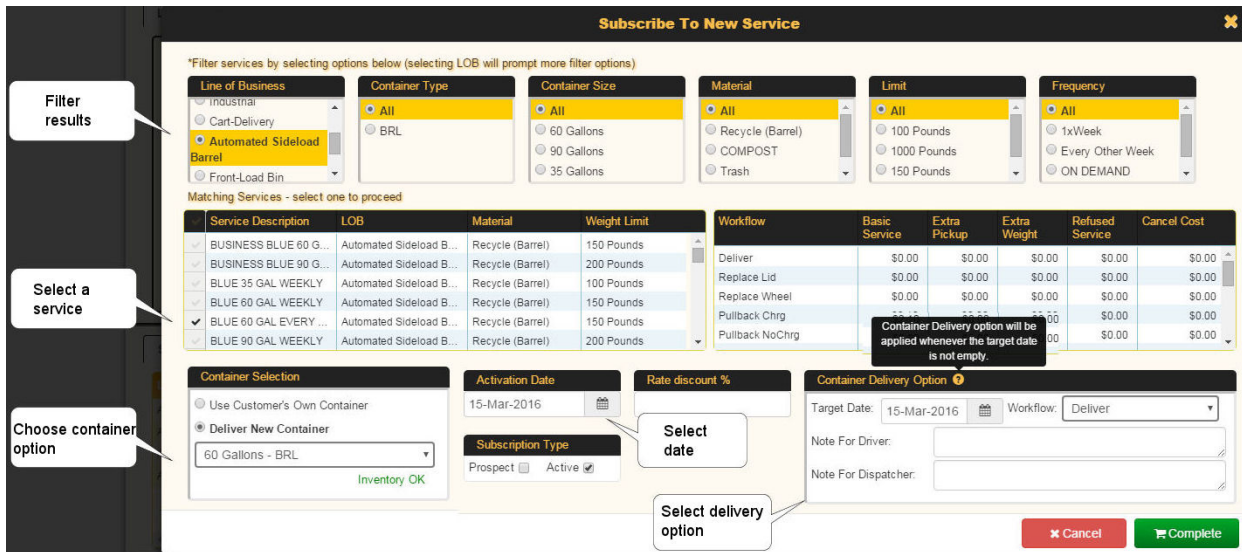
Services Service History Container Route Info

LOB	Service	Associated Container	Shared	Service Cycle	Active	Suspended	Start Date	End Date		
Automated Sidel...	BLUE 90 GAL WEEKLY	FRSBRLBLU178434	NO	Recurring, On-Demand	YES	NO <input type="button" value="On"/>	01-Mar-2016		<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
Automated Sidel...	R3.8 Business 90 Ga...	FRSBRLBLU178435	NO	Recurring, On-Demand	YES	NO <input type="button" value="On"/>	01-Mar-2016		<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
Automated Sidel...	R3.8 Business Addl ...	FRSBRLBLA178436	NO	Recurring, On-Demand	YES	NO <input type="button" value="On"/>	01-Mar-2016		<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
Automated Sidel...	R3.8 Business Addl ...	FRSBRLBLA178437	NO	Recurring, On-Demand	YES	NO <input type="button" value="On"/>	01-Mar-2016		<input type="button" value="Edit"/>	<input type="button" value="Delete"/>

2. On the Edit Location screen, select **Subscribe**, and then select **Subscribe to Service** from the menu.



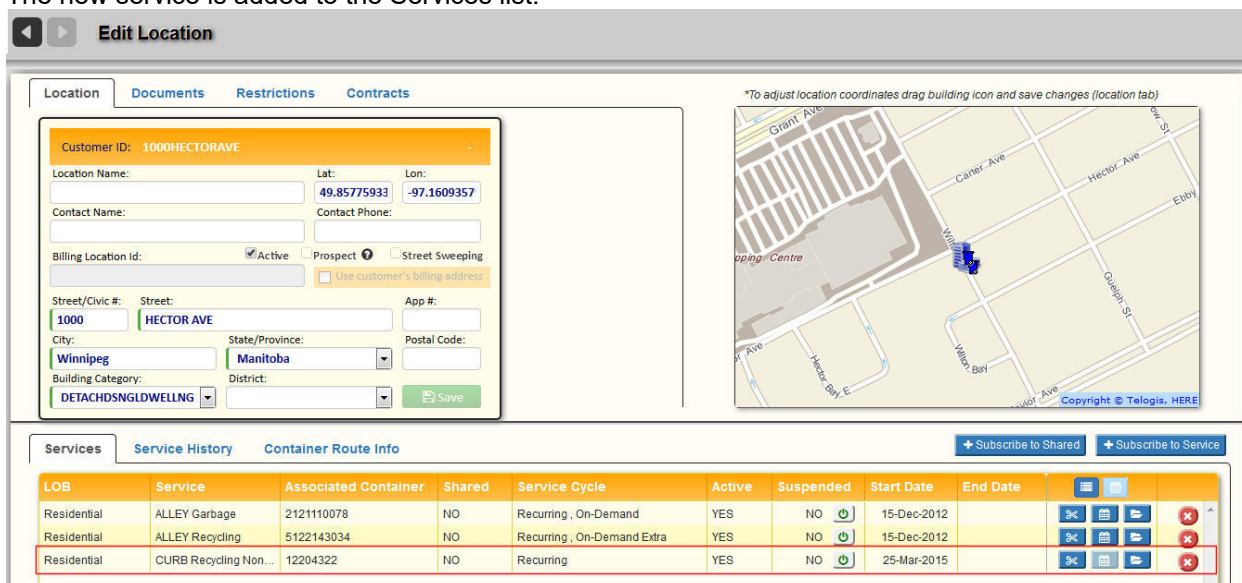
3. Select a Line of Business.
Once you have done so, further filter options become available.



4. Select a service from the Service Description area.
5. Select an Activation Date from the calendar menu.
6. Enter a Rate Discount, if applicable.
7. Make a Container Selection using one of the radio buttons. In this example, we are selecting a container from among those available in the system.

The RMS checks container inventory to ensure container availability, and displays an inventory status message, e.g., **Inventory OK**.

8. Specify a delivery date from the Container Delivery Option menu.
9. Click **Complete** when done. The new service is added to the Services list.



Subscribe to Shared Option

In a multi-family dwelling—such as an apartment building or townhouse complex—it is not uncommon for several subscribers to share a single container.

To subscribe a location to a service using a shared container:

1. On the Edit Location screen, select **Subscribe**, and then select **New Shared** from the menu.



A dialog displays, enabling you to search for a shareable container within close proximity to the current location.

Subscribe to Service for Shared Container ✕

Search Locations by Address

Street/Civic #: Street: Postal Code:

City: State/Province: 🔍 Search

Search Locations by proximity

Latitude: Longitude:

Max distance from location: 🔍 Search

Matching locations - select one to display associations

Billing Location Id	Name	Address	Active	LOB	Container	End Date

Available Services

Code	Description	LOB
BC60	BUSINESS BLUE 60 GAL WEE...	Automated Sideload Barrel
BC90	BUSINESS BLUE 90 GAL WEE...	Automated Sideload Barrel
BL35	BLUE 35 GAL WEEKLY	Automated Sideload Barrel
BL60	BLUE 60 GAL WEEKLY	Automated Sideload Barrel
BL6E	BLUE 60 GAL EVERY OTHER	Automated Sideload Barrel

Details

Service Code:

Service Description:

Start Date: 📅

Rate Discount %:

Active: Prospect:

By address By proximity

Choose a search method

✕ Cancel
🏠 Complete

2. Choose a search method (**Search Location by Address** or **Search Location by proximity**), and then click the **Search** button. 🔍 Search

In this example, an address search is used.

The Matching Locations panel displays the search results.

Search Locations by Address

Street/Civic #: Street: Postal Code:

City: State/Province:

Search Locations by proximity

Latitude: Longitude:

Max distance from location:

Matching locations - select one to display associations

Billing Location Id	Name	Address
129468	129468	817 W INGLEWOOD ST, MESA, AZ 85201
132270	132270	901 W INGLEWOOD ST, MESA, AZ 85201
102671	102671	112 #UNIT 104 W INGLEWOOD ST, MESA, ...
121375	121375	618 W INGLEWOOD ST, MESA, AZ 85201
121702	121702	622 W INGLEWOOD ST, MESA, AZ 85201

Existing Associations - select one to share

Service	Active	LOB	Container	End Date
BLUE 60 GAL WEEKLY	YES	Automated Si...	60 Gallons - BRL	
R1.28 RES Green B...	YES	Automated Si...	90 Gallons - BRL	
R1.2 RES 60 Gal Tras...	YES	Automated Si...	60 Gallons - BRL	

Available Services

Code	Description	LOB
BC60	BUSINESS BLUE 60 GAL WEE...	Automated Sideload Barrel
BC90	BUSINESS BLUE 90 GAL WEE...	Automated Sideload Barrel
BL35	BLUE 35 GAL WEEKLY	Automated Sideload Barrel
BL60	BLUE 60 GAL WEEKLY	Automated Sideload Barrel
BL6E	BLUE 60 GAL EVERY OTHER ...	Automated Sideload Barrel

New Shared Subscription Details

Service Code:

Service Description:

Start Date:

Rate Discount %:

Active: Prospect:

- Click on an address to select the closest container.
The Existing Associations panel refreshes, showing available container(s) for that location.

Search Locations by Address

Street/Civic #: Street: Postal Code:

City: State/Province:

Search Locations by proximity

Latitude: Longitude:

Max distance from location:

Found 127 locations matching selected address

Matching locations - select one to display associations

Billing Location Id	Name	Address
129468	129468	817 W INGLEWOOD ST, MESA, AZ 85201
132270	132270	901 W INGLEWOOD ST, MESA, AZ 85201
102671	102671	112 #UNIT 104 W INGLEWOOD ST, MESA, ...
121375	121375	618 W INGLEWOOD ST, MESA, AZ 85201
121702	121702	622 W INGLEWOOD ST, MESA, AZ 85201

Existing Associations - select one to share

Service	Active	LOB	Container	End Date
BLUE 60 GAL WEEKLY	YES	Automated Si...	60 Gallons - BRL	
R1.28 RES Green B...	YES	Automated Si...	90 Gallons - BRL	
R1.2 RES 60 Gal Tras...	YES	Automated Si...	60 Gallons - BRL	

Available Services

Code	Description	LOB
BC60	BUSINESS BLUE 60 GAL WEE...	Automated Sideload Barrel
BC90	BUSINESS BLUE 90 GAL WEE...	Automated Sideload Barrel
BL35	BLUE 35 GAL WEEKLY	Automated Sideload Barrel
BL60	BLUE 60 GAL WEEKLY	Automated Sideload Barrel
BL6E	BLUE 60 GAL EVERY OTHER ...	Automated Sideload Barrel

New Shared Subscription Details

Service Code:

Service Description:

Start Date:

Rate Discount %:

Active: Prospect:

- Select the container appropriate for the service you wish to add.
- Select a service from the Available Services panel.
- (Optional) specify a Start Date, Rate Discount, and Active/Prospect option from the New Subscription Details panel.
- Click **Complete**.
The service is added to your selected location using the shared container.

Customer ID: 697217 - PETER DE BEST

Location Name: 100530 Lat: 33.44724075 Lon: -111.832069

Contact Name: PETER DE BEST Contact Phone:

Billing Location Id: 100530 Active Prospect

Street/Civic #: 27 Street: W INGLEWOOD ST App #:

City: MESA State/Province: Arizona Postal Code: 85201

Building Category: NA -- Not Applicable District: WEST

LOB	Service	Associated Container	Shared	Service Cycle	Active	Suspended	Start Date	End Date
Front-Load Bin	R1.9C RES 4 Unit Bi...	FRSFLBBLU604	NO	Recurring , On-Demand	YES	NO	05-Oct-2004	
Automated Sidel...	BLUE 60 GAL WEEKLY	FRSBRBLU44074	YES	Recurring , On-Demand	YES	NO	11-Mar-2016	

Subscribing a Customer to a Bundled Rate

Feature supported in installations where Bundled Rate functionality is enabled.

To subscribe a customer to a bundled rate:

1. From the Edit Location, select **Subscribe > New Bundle**.

Customer ID: 696873 - JOSE CONTRERAS RODRIGUEZ

Location Name: 101402 Lat: 33.44770002 Lon: -111.832862

Contact Name: JOSE CONTRERAS RODRIGUEZ Contact Phone: 602-276-4311

Geoid: Billing Location Id: 101402 Active Prospect

Street/Civic #: 50 Street: W INGLEWOOD ST App #: APT 4

City: MESA State/Province: Arizona Postal Code: 85201

Building Category: NA -- Not Applicable District: WEST

LOB	Service	Associated Container	Shared	Service Cycle	Active	Suspended	Start Date
Front-Load Bin	R1.9C RES 1 Unit Bin...	FRSFLBBLU1820	NO	Recurring , On-Demand	YES	NO	31-Mar-2015

Subscribe

- Transform Existing
- + New Service
- + New Shared
- + New Bundle**

2. Select a bundled rate code from the scrolling list.

Subscribe To Bundled Rate

Select bundled rate below to proceed

Check if prospect subscription

Prospect:

-- Select bundled rate --

- 9Y22
- 9Y23
- 9Y24
- 9Y25
- 9Y26
- 9Y27
- 9Y28
- 9Y29
- 9Y30
- 9Y31
- 9Y32
- 9Y33
- 9YA1
- 9YB1
- 9YC1
- 9YD1
- 9YH1
- 9YJ1
- Tim3
- JC1**

Cancel Complete

3. Choose an Activation Date and Delivery Date from the calendar menus.
If any of the services support multiple container types, you must also select a type from its **Container Type and Size** menu.

Subscribe To Bundled Rate

Select bundled rate below to proceed

Check if prospect subscription

Prospect:

For each service select container type to be delivered and delivery workflow

Service	Container Size and Type	Workflow	
RC1U	4 Yards - FLBIN	Deliver Bin	<input checked="" type="checkbox"/>
JC01	90 Gallons - BRL	Deliver Bin	<input checked="" type="checkbox"/>

Activation Date: 2016-05-06

Delivery Date: 2016-05-06

Cancel Complete

4. Select **Complete**.
The system checks inventory for container availability, and a progress message displays.

Subscribe To Bundled Rate ✕

Select bundled rate below to proceed Check if prospect subscription

JC1 Prospect:

For each service select container type to be delivered and delivery workflow

Service	Container Size and Type	Workflow	
RC1U	4 Yards - FLBIN	Deliver Bin	✓
JC01	90 Gallons - BRL	Deliver Bin	✓

Inventory OK ✓

Subscription in progress...
■■■■

Activation Date: 2016-05-06 Delivery Date: 2016-05-06

Cancel Complete

You are then returned to the Edit Location screen, where the bundled rates display highlighted in blue to indicate pending status.

Edit Location

Location Documents Restrictions Contracts

Customer ID: 696873 - JOSE CONTRERAS RODRIGUEZ

Location Name: 101402 Lat: 33.44770002 Lon: -111.832862

Contact Name: JOSE CONTRERAS RODRIGUEZ Contact Phone: 602-276-4311

Geoid: 101402 Active Prospect Use customer's billing address

Street/Civic #: 50 Street: W INGLEWOOD ST App #: APT 4

City: MESA State/Province: Arizona Postal Code: 85201

Building Category: NA -- Not Applicable District: WEST Save

*To adjust location coordinates drag building icon and save changes (location tab)

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Services Service History Container Route Info Subscribe

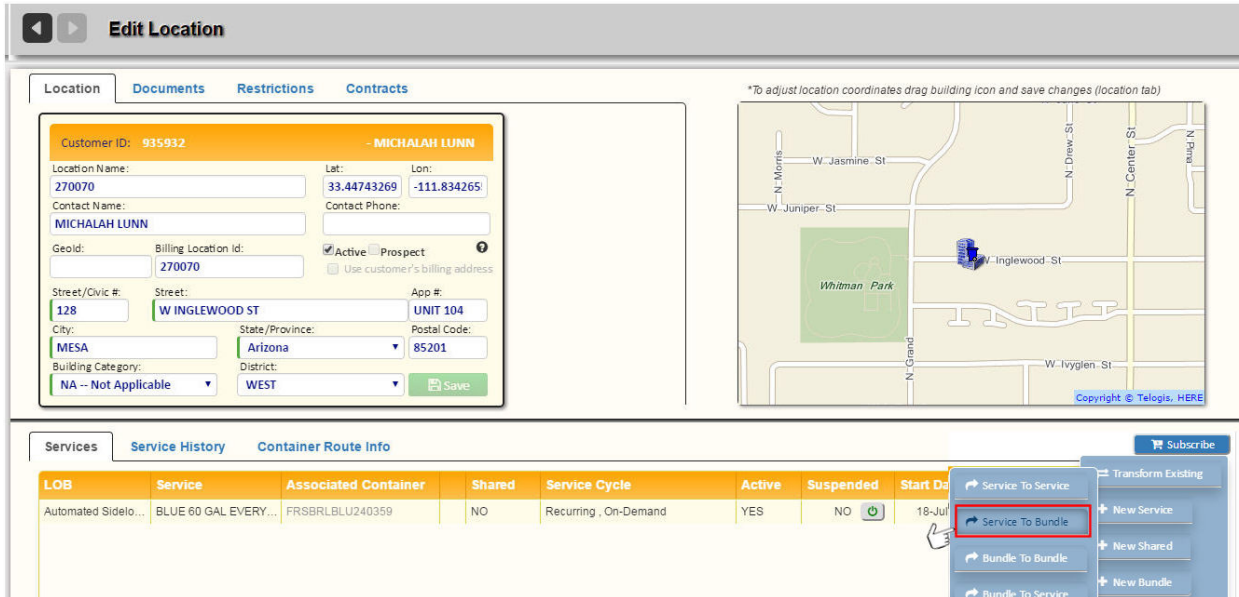
LOB	Service	Associated Container	Shared	Service Cycle	Active	Suspended	Start Date	End Date	
Front-Load Bin	R1.9C RES 1 Unit Bin...	FRSFLBLU1820	NO	Recurring , On-Demand	YES	NO ⏻	31-Mar-2015		📄 📅 🗑️ ✖
Front-Load Bin	R1.9C RES 1 Unit Bin...	FRS4yb6	NO	Recurring , On-Demand	NO	YES ⏻	06-May-2016		📄 📅 🗑️ ✖
Automated Sidelo...	JC weekly trash pickup	FRSBRLBU33674	NO	Recurring	NO	YES ⏻	06-May-2016		📄 📅 🗑️ ✖

Transforming a Customer's Services to a Bundled Rate

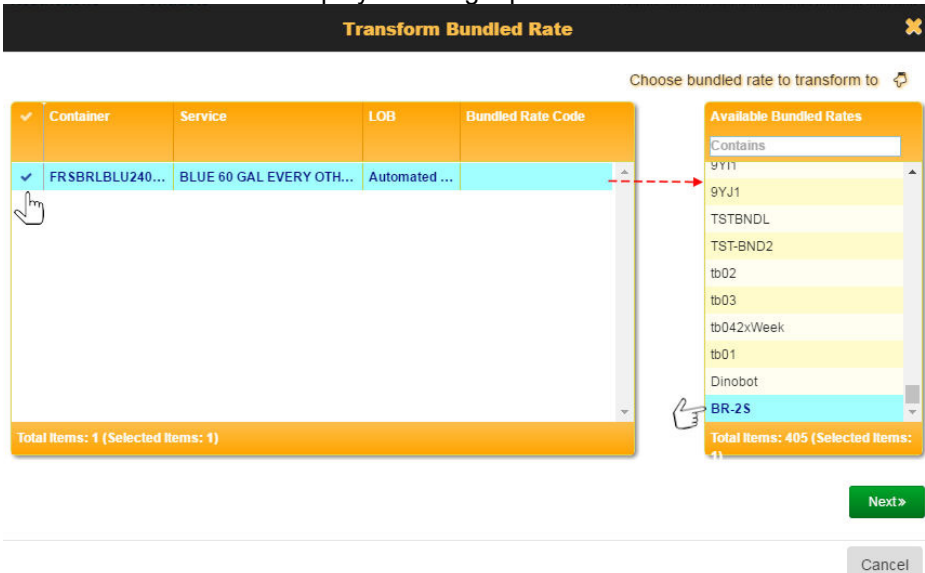
Transform Service to Bundle

To transform a customer's existing services to a bundled rate:

1. From the Edit Location screen, select **Transform Existing > Service to Bundle**.



2. In the Transform Bundled Rate dialog, select a service from the left panel. Available bundled rates display in the right panel.



3. Select a bundled rate, and then click **Next>**.
4. Review the transformation details and modify them if necessary.

Transform Bundle to Bundle

To transform a customer's existing bundled rate to a different bundled rate:

- From the Edit Location screen, select **Transform Existing > Bundle to Bundle**.

The screenshot shows the 'Edit Location' screen. The top section contains a form for location details, including fields for Customer ID, Location Name, Contact Name, Geoid, Billing Location Id, Civic #, Street, App #, City, State/Province, Postal Code, Building Category, and District. A 'Save' button is visible. To the right is a map showing the location. Below the form is a table of services with columns: LOB, Code, Service Description, Associated Container, Shared, Service Cycle, Active, Suspended, and Start Date. A context menu is open over the table, with 'Bundle to Bundle' highlighted.

LOB	Code	Service Description	Associated Container	Shared	Service Cycle	Active	Suspended	Start Date
FL	SW0802T	SWIS Rate 8YD TRSH 2xWk	FRSFLB5873	NO	Recurring, On-Demand	YES	NO	09-Jun
FL	SW0802T	SWIS Rate 8YD TRSH 2xWk	FRSFLB263309	NO	Recurring, On-Demand	YES	NO	09-Jun
FL	SW0601T	SWIS Rate 6YD TRSH 1xWk	FRSFLB184657	NO	Recurring, On-Demand	YES	NO	09-Jun
FL	SW0801T	SWIS Rate 8YD TRSH 1xWk	FRSFLB302120	NO	Recurring, On-Demand	YES	NO	09-Jun
FL	SW0802T	SWIS Rate 8YD TRSH 2xWk	FRSFLB302122	NO	Recurring, On-Demand	YES	NO	09-Jun
FL	SW0802T	SWIS Rate 8YD TRSH 2xWk	FRSFLB210837	NO	Recurring, On-Demand	YES	NO	09-Jun-2017

Scheduling an On-Demand Service

What are "On-Demand" Services?

An On-Demand service is a billable pre-configured service purchased by a customer, usually by telephone request to the Sales Agent.

Preliminaries

- Ensure that you have a **Service Frequency** defined in Reference Data for on-demand type services.

The screenshot shows the 'Service Frequency' configuration form. It includes the following fields and options:

- Name:** ON DEMAND
- Description:** ON DEMAND
- On-Demand:**
- Frequency:** Weekly, Every Other Week, Monthly

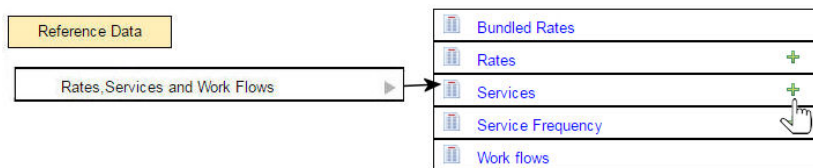
A 'Save Service Frequency' button is located at the bottom right of the form.

- Go to Rates reference data; choose a rate to apply or create a new one.

Make sure LOB, District, Container type, size, and Service Rate Frequency are defined appropriately. They must correspond to those used for the new service.

Creating the New Service

- Select **Reference Data > Rates, Services and Work Flows > Services**, ensuring that you click the green plus sign icon.



- From the List of Services, create a new service by clicking the green plus sign icon in the header.

Code	Sequence	Description	Dispatch type	Line of business	Material	Weight	Weight unit	Recurring	On demand	Extra
1FL	0 +	3 X Weekly svn GB	Commercial	Commercial	Garbage	1000.0	Pound	Yes	Yes	
10D	0 +	20 yard OD	Roll-Off	Industrial	Garbage	1000.0	Pound		Yes	
20YGB	0 +	20 yd Garbage	Roll-Off	Industrial	Garbage	1000.0	Pound	Yes	Yes	

The Add Service screen displays.

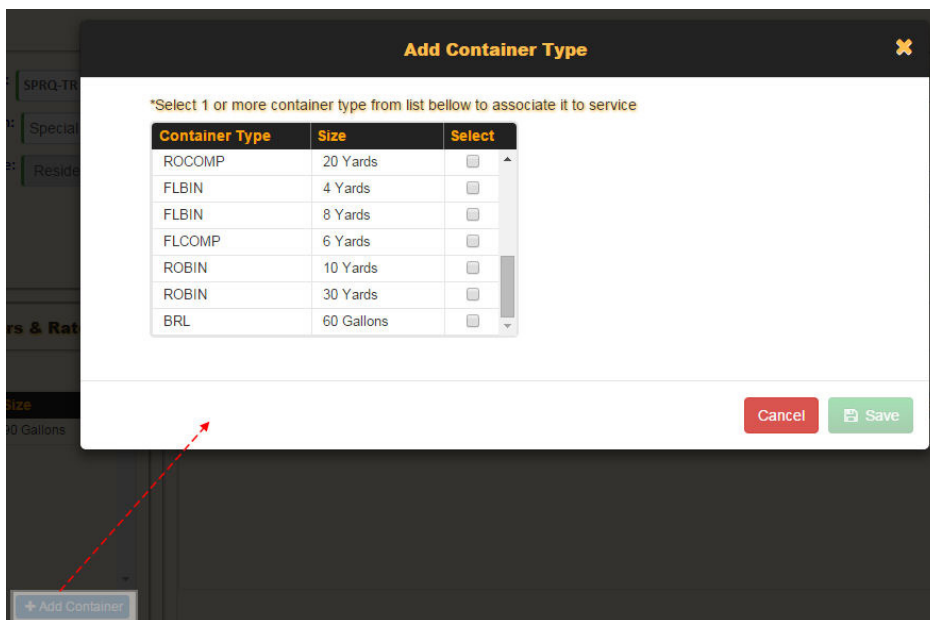
3. Define your service in the Service Definition area.
 - a. **LOB, Dispatch Type, Container Type, and Frequency** must match those specified for the Rate Type you have chosen to apply.
 - b. Choose On-Demand for **Frequency** and **Service Cycle**. Click **Save Changes**.

You must now define Containers and Rates for the service in the lower area of the screen.

Defining Containers and Rates

1. From the Supported Containers area, select **Add Container**.
2. Choose the Container Type And Size.

This must match the information specified for the Rate Type to be applied.



3. Click **Save** when done.
4. From the Workflows and Rates section, select **Add Work Flow and Rate**.

Add Workflows and Rates
✕

Choose workflow(s) below then click on rate to add it to selected workflow(s). Only workflows with associated rates will be added to the service + Create New Rate

Filter Workflows:

Workflow	Rate Code
Appl P/U	
Appl P/U NoChrg	
Bobcat Svc	
Bobcat Svc NoChrg	
Bulk P/U	
Bulk P/U NoChrg	
Deliver	
Deliver Chrg	
Deliver NoChrg	
Empty	
Fee	
Pullback	

Filter Rates:

Rate Code	Description	Basic Service	Extra Pickup	Extra Weight	Refused Service	Cancel Cost
CRES	Rem/Emp/Rstck Chrg	\$16.10	\$0.00	\$0.00	\$0.00	\$0.00
CREU	Rem/Emp/Rstck Chrg	\$16.10	\$0.00	\$0.00	\$0.00	\$0.00
CRRS	Rem/Rstck Chrg	\$6.20	\$0.00	\$0.00	\$0.00	\$0.00
CRRU	Rem/Rstck Chrg	\$6.20	\$0.00	\$0.00	\$0.00	\$0.00
CSBS	Deliver Chrg	\$8.66	\$0.00	\$0.00	\$0.00	\$0.00
CSBU	Deliver Chrg	\$8.66	\$0.00	\$0.00	\$0.00	\$0.00
CSPS	Spec P/U Chrg	\$9.90	\$0.00	\$0.00	\$0.00	\$0.00
CSPU	Spec P/U Chrg	\$9.90	\$0.00	\$0.00	\$0.00	\$0.00
NRES	Rem/Emp/Rstck NoChrg	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
NREU	Rem/Emp/Rstck NoChrg	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
NRRS	Rem/Rstck NoChrg	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
NRRU	Rem/Rstck NoChrg	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Cancel
Save

5. Select an available rate and a workflow, or create a new one by selecting **Create New Rate**.
6. Press **Save**.
You have completed defining the on-demand service.

◀ ▶ **Add Service**

Service Definition

Service Code: Sequence:

Service Description:

Dispatch Type:

LOB:

Material:

Minimum Weight: Pounds

Weight Limit: Pounds

Frequency:

Service Cycles

On-Demand

Extra

Recurring

Default recurring workflow:

Save Changes

Supported Containers & Rates

Supported Containers

Container Type	Size
BRL	90 Gallons

+ Add Container

Workflows & Rates

Workflow	Rate Description	Basic Service	Extra Pickup	Extra Weight	Refused Service	Cancel Cost
Spec P/U Chrg	Special request trash	\$0.00	\$1.00	\$1.00	\$1.00	\$0.00

+ Add Work Flow & Rate

Scheduling the New Service at a Location

1. Navigate to the Edit Location screen for the customer.
2. Select **Subscribe to Service**.

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Edit Location

Location Documents Restrictions Contracts

Customer ID: 616318 - SHEILA SULLIVAN

Location Name: SULLIVAN Lat: 33.4162981620 Lon: -111.639300805
 Contact Name: SHEILA SULLIVAN Contact Phone:
 Geoid: Billing Location Id: 193200
 Same as billing address Active Prospect Street Sweeping

Civic #: 8855 Street: E AVALON ST App #:
 City: MARICOPA COUNTY State/Province: Arizona Postal Code: 85207
 Building Category: RS - Residential District: WEST

*To adjust location coordinates drag building icon and save changes (location tab)

Services Service History Container Route Info

LOB	Service	Associated Container	Shared	Service Cycle	Active	Suspended	Start Date
ASL	Support Services	FRSUNCONT55426	NO	On-Demand	YES	NO	01-Jan-2016

Transform Existing

- Use the radio buttons to filter your selection.

Edit Location

Subscribe To New Service

*Filter services by selecting options below (selecting LOB will prompt more filter options)

Line of Business: All ASL Cart-Delivery Commercial

Container Type: All BRL SEBARREL UNCONTAINED

Container Size: All 60 Gallons 90 Gallons 35 Gallons

Material: All Recycle Green Waste Refuse

Limit: All 100 Pound 15 Ton 150 Pound

Frequency: All 1xWeek Every Other Week ON DEMAND

Matching Services - select one to proceed

Code	Service Description	LOB	Material	Weight Limit	Workflow	Basic Service	Extra Pickup	Extra Weight	Refused Service	Cancel Cost
385 02	385 02	ASL	Recycle		Empty	\$2.00	\$1.00	\$1.00	\$1.00	\$0.00
YOU_SR...	Test RMS-445	ASL	WOOD	15 Ton						
RMS445...	Test RMS445	ASL	WOOD	15 Ton						
AUD1	Auditing	ASL	WOOD							
SPRQ-TR	Special request trash	ASL	Refuse							


Container Selection: Use Customer's Own Container Deliver New Container

Activation Date: 24-Mar-2017 Rate discount %:

Subscription Type: Prospect Active


- Select a service from the Matching Services area. New input fields display at the bottom of the screen.
- Choose an **Activation date**, **Rate discount** (if applicable), and **Container Selection**. For this example, we will **Use Customer's Own Container**.
- Select **Complete**. The on-demand service now displays in the Services list at the bottom of the screen.

LOB	Code	Service Description	Associated Container	Container Status	Shared	Service Cycle	Active	Suspended	Start Date
ASL1	CBUX	Support Services	FRSUNCONT55426	Delivered	NO	Recurring, On-Demand	YES	NO	2016-0
ASL1	NSYS	Special request trash	FRS4LGBHO1	Delivered	NO	On-Demand	YES	NO	2018-1

7. Select the Schedule on-demand stop  for the service.

8. Select a **Target Date** and **Workflow**.

9. Enter a Work order ID (if required).

 **NOTE:** In some cases, you may be required to enter a work order ID. When scheduling an on-demand stop, if the customer is flagged as “Requires WO”, the user must provide WOID to be able to schedule an on-demand call. Without entering a character string here, the **Save** button is disabled. The WOID Required flag is set via a check box on the Edit Customer screen.

Route Assignment Options

At this point, you have a choice:

- If you select **Save** now, the service is scheduled but no route is assigned. You can assign a route later using the [Unscheduled Stops](#) screen. See [Assigning the Unscheduled Stop to a Route](#).
- Alternatively, you can assign a route immediately by doing the following:

1. Select the ***Advanced option** check box to display the **Route** text field.
2. Click in the text field to display the **Select Route** pop-up window.

Name	Truck Name	Material	Frequency	# of stops
WT01	1192	Refuse	Wednesday - Wed - Weekly	0
WT02	1169	Refuse	Wednesday - Wed - Weekly	0
WT03	1171	Refuse	Wednesday - Wed - Weekly	0
WT04	1754	Refuse	Wednesday - Wed - Weekly	0
WT05	1172	Refuse	Wednesday - Wed - Weekly	0
WT06	1767	Refuse	Wednesday - Wed - Weekly	0
WT07	1186	Refuse	Wednesday - Wed - Weekly	0
WT08	1761	Refuse	Wednesday - Wed - Weekly	0
WT09	1770	Refuse	Wednesday - Wed - Weekly	0
WT10	1751	Refuse	Wednesday - Wed - Weekly	1
WT11	1130	Refuse	Wednesday - Wed - Weekly	1
WT12	1188	Refuse	Wednesday - Wed - Weekly	1


Assigning the Unscheduled Stop to a Route

1. Select **Routes > Unscheduled Stops**.
2. Locate your stop in the **Unscheduled Stops** list.

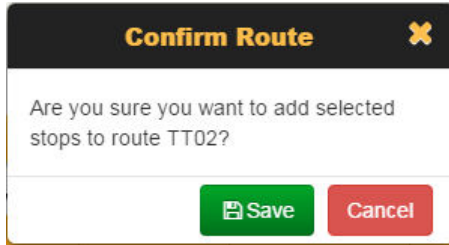
Ensure that the On-demand radio button is selected, as this is an on-demand service.

Name	Truck Name	Frequency	Material	# of stops	miles to Route	miles to Truck	Weight
FB51	1751	Everyday - Su, M, Tu, W, Th, F, Sa - Weekly	Recycle	6	10.6		
FB55	1173	Monday - M - Weekly	Recycle	15	13		
JDTest1	TRUCK-IDM	Daily/Weekdays - M, Tu, W, Th, F - Weekly	Green Waste	2	2169		0
RMS411		Wednesday - W - Weekly	ALUMINIUM	1			0
RMS365	1105	Everyday - Su, M, Tu, W, Th, F, Sa - Weekly	ASBESTOS - NON-HAZAR	3			
GFLRE	1105	Wednesday - W - Weekly	Recycle	16			

3. Select the stop from the list by checking its check box.
4. Select a route from the route list in the lower-right panel.

 The route list is sorted according to the routes' proximity to the stop.

5. Confirm the selection when the confirmation dialog displays.



6. Select **Yes** to proceed

Managing GeoZones

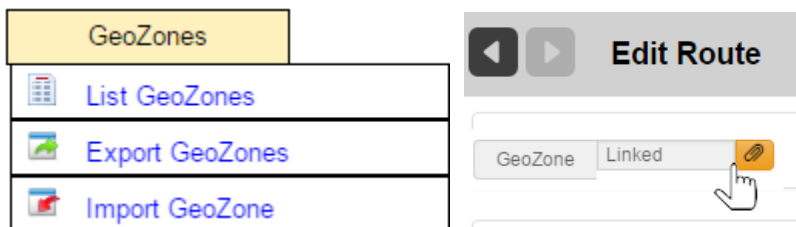
GeoZones are user-defined geographical areas that can be used for reference and classification purposes by various applications.

In RMS, GeoZones can be associated with routes, yards, and disposal facilities, and can be used to generate routes automatically. In addition, they can be used by FleetLink software for purposes of generating alarms.

You can create your own GeoZones by drawing their polygons on the map, or you can import them into the RMS in the form of .wkt (well-known text) files that contain the coordinates (latitude and longitude) of all the points defining a geographic region.

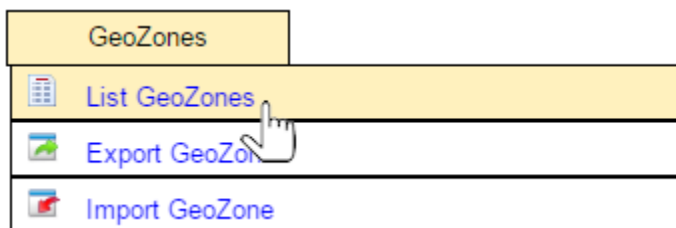
The GeoZones menu and the Edit Route screen provide the tools you need for managing your GeoZone information.

- The GeoZones menu for creating/modifying, importing, and exporting GeoZones.
- The Edit Route screen for managing Route-Geozone relationships.



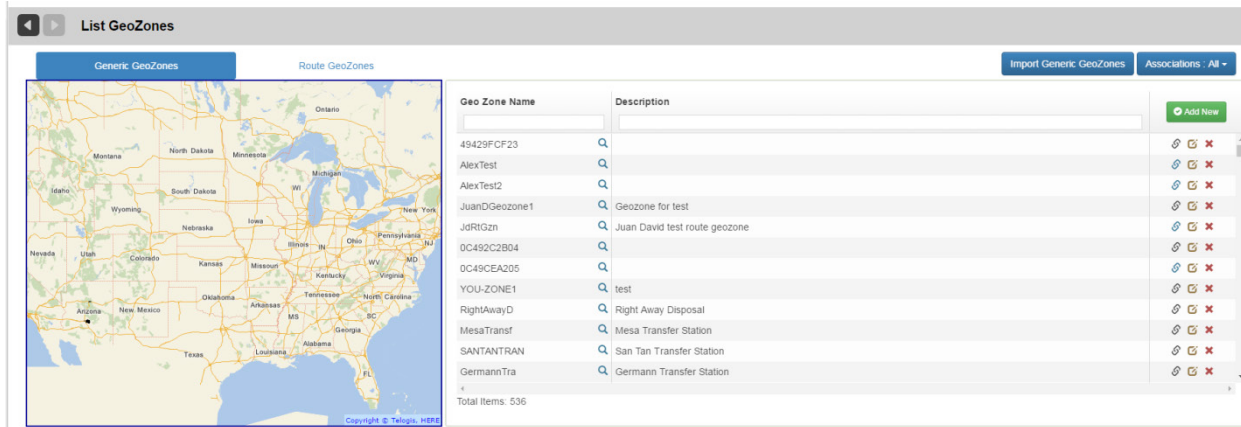
The menu options are explained in the following sections.

Viewing the List of GeoZones



To view a list of all GeoZones in the FleetLink Route Management System:

- Select **GeoZones > List GeoZones**.
The List of GeoZones displays.

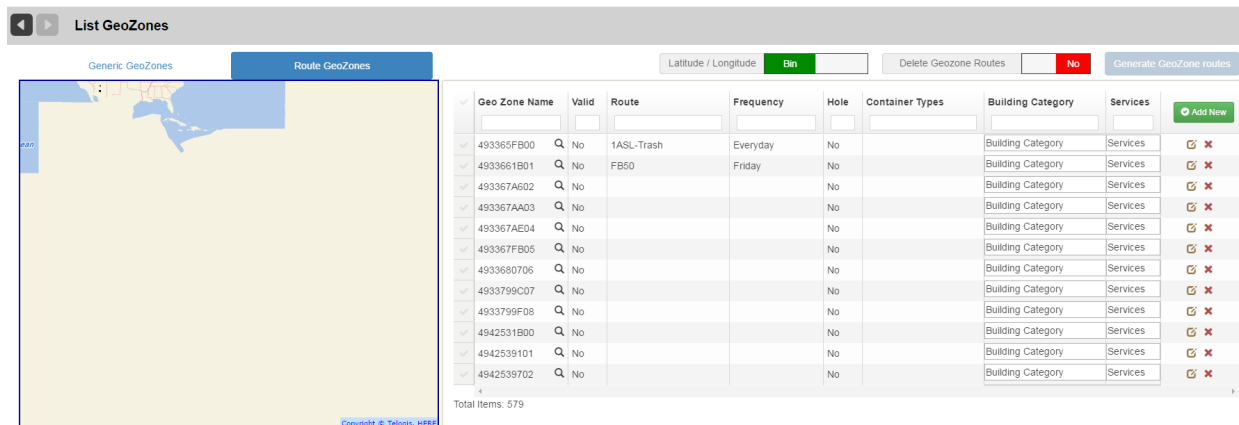


The List of GeoZones is a tabbed interface comprising:

- Generic GeoZones, those GeoZones that are not necessarily associated with routes
- Route GeoZones, GeoZones that are linked to routes.

The initial (default) view displays with the Generic tab selected, as shown above.

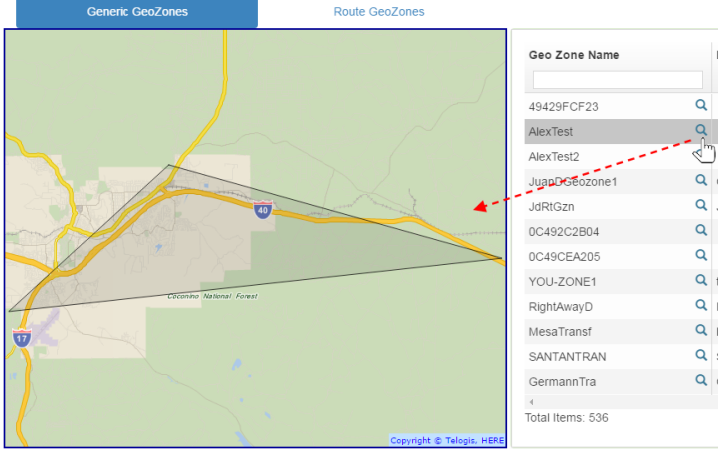
The following figure shows the list with the Route GeoZones tab selected.



Generic GeoZones Controls and Features




The Generic GeoZone tab enables editing, importing, deleting GeoZones, and viewing GeoZone associations.

Control	Function
Filter text fields in header Geo Zone Name <input type="text"/> Description <input type="text"/>	Typing text into these fields displays items containing that text in the table below

<p>GeoZones Association filter</p> <p>Associations : All ▾</p> <p>All</p> <p>Associated</p> <p>Not Associated</p>	<p>Filters the table display according association status.</p>				
<p>View Geozone (magnifying glass) in GeoZone Name column</p>	<p>Displays selected GeoZone on the map.</p> 				
<p>Import Generic GeoZones button</p> <p>Import Generic GeoZones</p>	<p>Enables you to import Geozone(s) from a data file (.csv).</p>				
<p>View Associations button</p>	<p>Pops up a dialog showing route or facility association(s).</p> <p>GeoZone Associations ✕</p> <p>lbl_grid_has_geozone: MRO1</p> <p>Facilities Routes</p> <table border="1"> <thead> <tr> <th>Geo Zone N...</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>FB51</td> <td></td> </tr> </tbody> </table> <p>Total Items: 1</p> <p>Cancel</p>	Geo Zone N...	Description	FB51	
Geo Zone N...	Description				
FB51					
<p>Edit GeoZone button</p>	<p>Opens the GeoZone for editing.</p>				
<p>Delete GeoZone button</p>	<p>Removes the GeoZone.</p>				


Route GeoZones Controls and Features

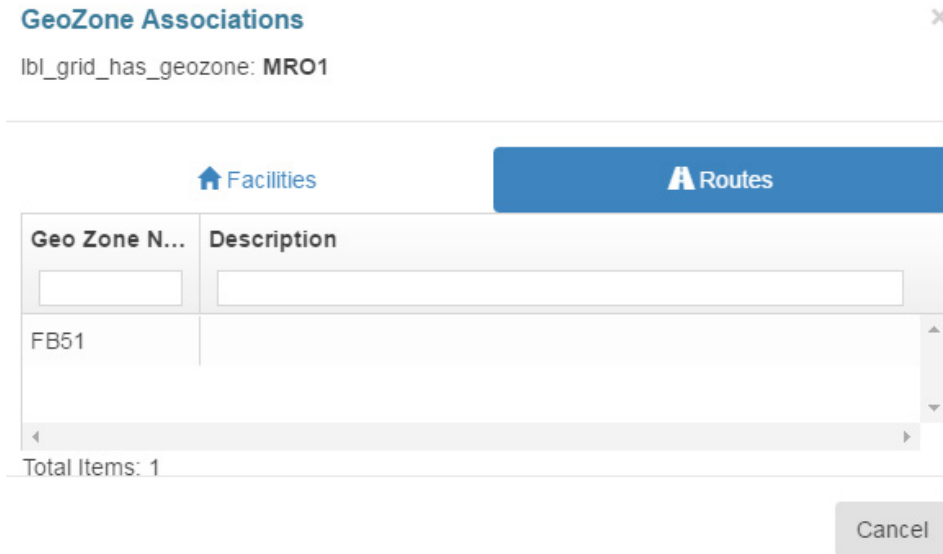
The Route GeoZones tab enables you to generate routes (individually or in bulk) from the GeoZones in the list.

Control	Function
GeoZone Select (check box) <input checked="" type="checkbox"/> 493367A602	Selects a GeoZone for further action(s), e.g., editing, deleting, route generation.
View Geozone (magnifying glass)  in GeoZone Name column	Displays selected GeoZone on the map.
Lat/Lon Bin/Location switch <input type="text" value="Latitude / Longitude"/> <input checked="" type="checkbox"/> Bin <input type="checkbox"/> <input type="text" value="Latitude / Longitude"/> <input type="checkbox"/> <input checked="" type="checkbox"/> Location	For route generation, determines whether coordinates for bin or location are used.
Delete GeoZone Routes switch <input type="text" value="Delete Geozone Routes"/> <input checked="" type="checkbox"/> Yes <input type="checkbox"/> <input type="text" value="Delete Geozone Routes"/> <input type="checkbox"/> <input checked="" type="checkbox"/> No	For route generation, determines whether existing stops are deleted before generation.
Generate GeoZone Routes button <input type="button" value="Generate GeoZone routes"/>	Generates all routes from the list of Geozones.
Edit GeoZone button 	Opens the GeoZone for editing.
Delete GeoZone button 	Removes the GeoZone.
Add New button <input type="button" value="Add New"/>	Adds a new GeoZone.
Building Category (check boxes) Building Category <input type="checkbox"/> All <input type="checkbox"/> Apartment block <input type="checkbox"/> Asylum <input checked="" type="checkbox"/> Condominium <input type="checkbox"/> Dormitory <input type="checkbox"/> Duplex	Selects Building Categories for routes to be generated,
Services check boxes Services <input type="checkbox"/> All <input checked="" type="checkbox"/> BC60 <input checked="" type="checkbox"/> BC90	Selects Services for routes to be generated,

Viewing GeoZone Associations

To view Geozone Associations:

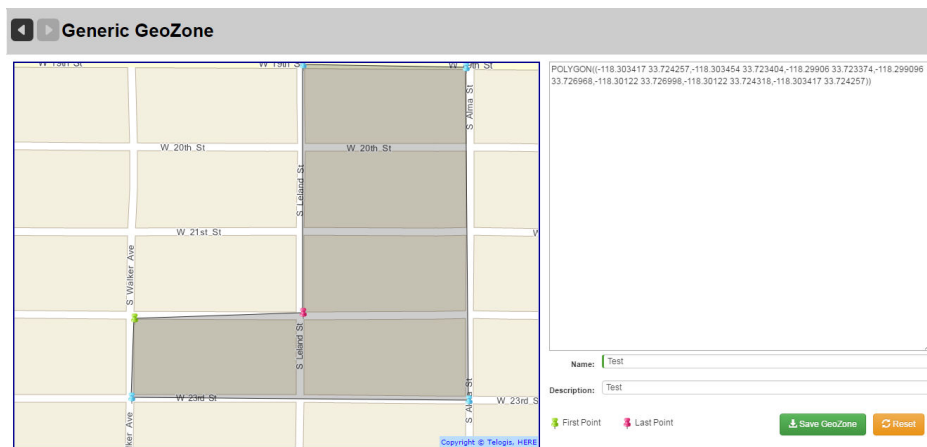
- From the Generic GeoZones tab, select the link icon  for the GeoZone of interest. A tabbed dialog (Facilities and Routes) pops up, displaying associations, if any.



Editing a GeoZone











To edit a GeoZone:

- From either the Generic GeoZones or Route GeoZones tab, select the **Edit GeoZone** button . An Edit screen for the selected GeoZone displays.



From the Edit GeoZone page, you can modify an existing GeoZone or create a new one by saving under a different name.

You can modify the GeoZone by “drawing” it on the map:

Polygon Tools	
	Green pushpin is the first point of the GeoZone.
	Red pushpin is the last point of the GeoZone.
	Blue pushpins are intermediary points of the GeoZone.
	A right click on the map adds a new point to the last point of the GeoZone.
	A right click on a pushpin deletes the point from the map.
	Polygon's shape can be modified by clicking on a point and dragging it to a new position
	The mouse wheel can be used to zoom the map in and out.
	The entire map can be repositioned by dragging it.
	Saves your work.
	Clears the polygon on the map and the WKT text field.
You can import the polygon in WKT format into the text area.	

Deleting a GeoZone

To delete a GeoZone:

1. Select its **Delete** icon.
2. Confirm the operation when the confirmation dialog displays.

Delete Geozone ✕

Are you sure you want to delete this GeoZone ?

Cancel

Delete

Adding a New GeoZone

To add a new GeoZone:

1. Select the **Add New** button. 

A generic GeoZone page displays, providing a blank slate for drawing a new GeoZone.

2. Draw the GeoZone using the polygon tools, as described in [Editing a GeoZone](#).
3. When done, enter a **Name** (mandatory) and a **Description**.
4. Select Save GeoZone.

Exporting GeoZones

To export GeoZones:

- Select **GeoZones> Export GeoZones**.



The csv file is downloaded to your local disk in the download directory defined in your browser settings.

#	A	B	C	D	E	F	G	H	I	J	K
1	#GeoZone WKT	GeoZone name	Is hole	GeoZone description	GeoZone display color	Container type	Route name	Route truck name	Route work group	Route frequency	
2	POLYGON((-111.719	TestGZ1	N	MOBILE-184	Black	FLBIN	1ASL-Trash	1773		Everyday	
3		4933661B01	N		Black						
4		493367A602	N		Black						
5		493367AA03	N		Black						
6		493367AE04	N		Black						
7		493367FB05	N		Black						
8		4933680706	N		Black						
9		4933799C07	N		Black						
10		4933799F08	N		Black						
11		4942531B00	N		Black						

Importing GeoZones

To import GeoZones:

1. Select **GeoZones> Import GeoZones**.




The Import GeoZone Data screen displays.

◀ ▶ **Import GeoZone Data**

File No file selected.

Delete GeoZones before importing



GeoZone File Format

The GeoZone file must contain columns defined below.

The header line should begin with a '#' character to be ignored by the application.

Column number	Excel number	Column name
1	A	WKT Format String "POLYGON((-114.00478 50.71159,-113.98556 50.71159,-113.98556 50.72142,-114.00478 50.72142,-114.00478 50.71159))"
2	B	GeoZone name
3	C	Is hole
4	D	Description
5	E	Color
6	F	Container Type
7	G	Route
8	H	Truck
9	I	Work Group
10	J	Frequency

2. Click the **Browse** button to navigate and select your file.
3. Click the **Import GeoZone** icon
The results of the operation display on the **Import Result** page.

Import result


Data type	Insertions	Updates	Total
Customer	0	0	0
Location	0	0	0
Cart/Container	0	0	0
Associations	0	0	0
Stop	0	0	0
GeoZone	2	0	2
Route	1	1	2
Total read	Total imported	Errors	
4	2	0	
Log 2014-02-25 11:05:55 - 2014-02-25 11:06:39			
Data imported successfully			

Generating Routes from GeoZones

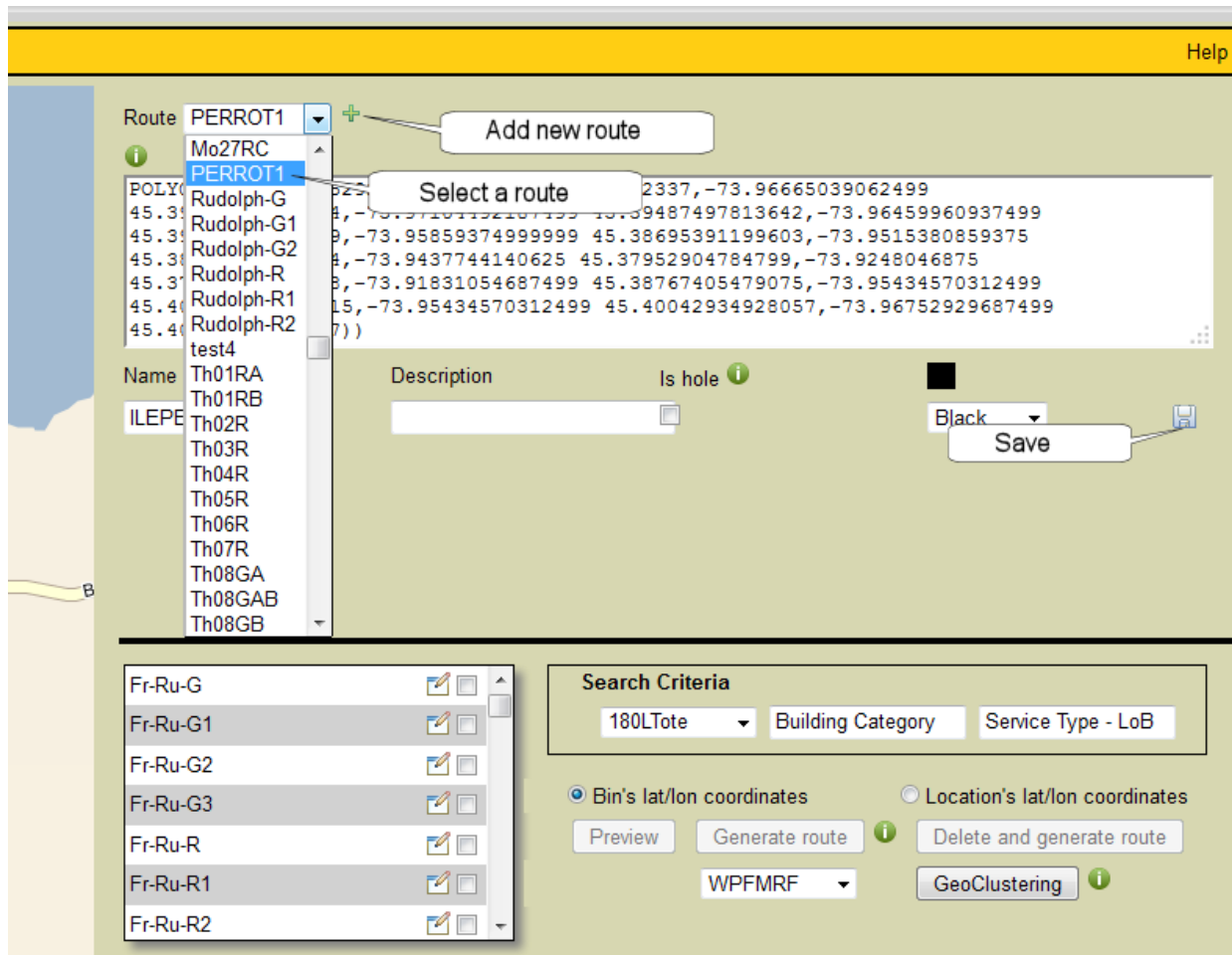
You can create new routes or re-generate existing ones based on the customer locations or bin locations within a Geo-Zone.


1. Select a route from the pull-down menu.


FOR NEW ROUTES:

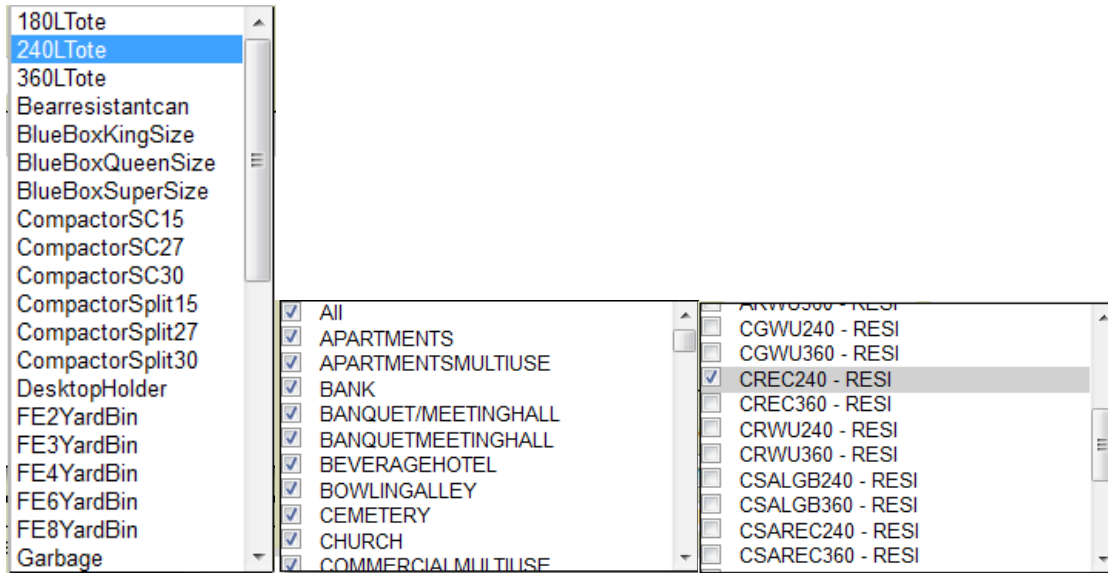
To create a new route, click the Add icon  adjacent to the pull-down menu. You will be redirected to the Add Route page, where you can specify the new route information.

Once you have saved the new route, you will automatically be returned to the Edit GeoZone page, where you can select your newly created route from the menu.

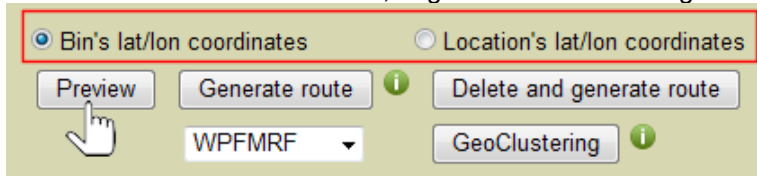


2. Click **Save** .
The controls in the lower-right area of the page are now active (i.e., no longer grayed out).
3. Select your search criteria using the **Container Type**, **Building Category**, and **Service Type - LoB** pull-down menus.

 **Container Type** is a mandatory field; select the correct type for the **Service Type** to be provided. The other two menus provide check boxes, enabling you to select multiple options.

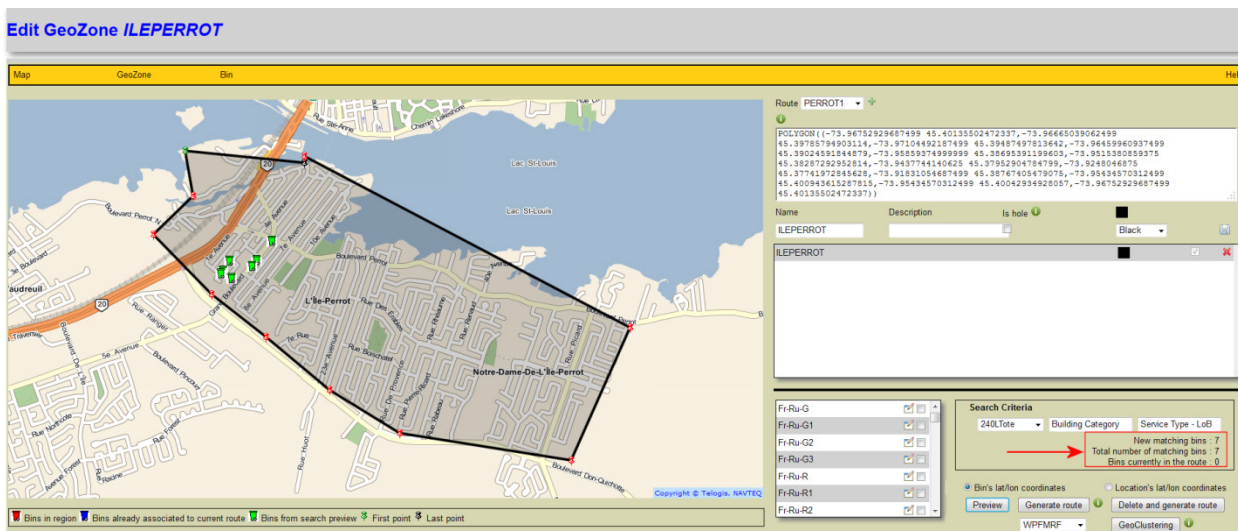


4. Select one of the following radio buttons
 - a. **Bin's lat/lon coordinates**, to generate a route using the bins' latitude and longitude.
 - b. **Location's lat/lon coordinates**, to generate a route using the locations' latitude and longitude.



5. Select **Preview** Preview

The display refreshes, showing bin locations in the map area and a results summary in the lower-right area of the page.



i In the preceding example, we chose to create a new (empty) route and query bins to populate it. Note that all bins on the map are the same color (**green**), indicating that they are "new".

Had we chosen to use an existing (populated) route and query any new bins in the GeoZone in order to add them to the route, the results summary would display something similar to that shown below.

Search Criteria

240LTote Building Category Service Type - LoB

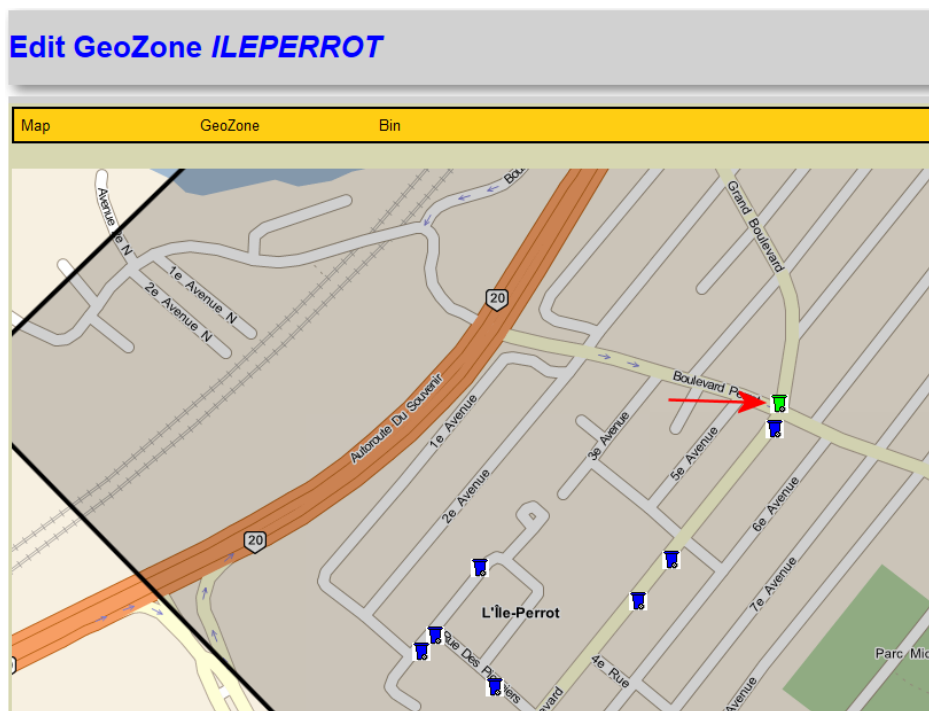
New matching bins : 1
 Total number of matching bins : 8
 Bins currently in the route : 7

Bin's lat/lon coordinates Location's lat/lon coordinates

Preview Generate route i Delete and generate route

WPFMRF GeoClustering i

Clicking on the highlighted link **Bins currently in the route** would update the map with existing bins displayed in blue and new ones in green.



You can now generate the route. To do so:

6. Select either **Generate route** Generate route or **Delete and generate route** Delete and generate route. The route is generated, and you are automatically redirected to the route's Edit GeoZone page, where you can view the results and make modifications as required.

Edit Route PERROT1

Route: PERROT1 Temporary: No Frequency: Daily/Weekda Service Date (yyyy-MM-dd): Truck: 997-003000 Work Group:

Material: Has GeoZone: Update GeoLocation: Update RFID: Update Serial Nbr:

Recycling: Yes

Clicking on the button Set As Ready saves the route automatically

Save Route Set As Ready Show All Stops

Color	Volume	Count
Blue	240	7

Complete 0 Incomplete 7

Pending top Resequence Fr-Ru-G Resequence as

Sequence	Container	Service	Current status	Activity Code	Status Date	Start Date	Address
1 +	0000000000000018001	CURB Recycling	Ready	Show last activities	2014-02-27 12:20:01	2014-02-27	307 Grand Boulevard, L'Île-Perrot, QC
2 +	jc00000000000002001	CURB Recycling	Ready	Show last activities	2014-02-27 12:38:50	2014-02-27	310 Cr. des Pionniers, L'Île-Perrot, QC
3 +	jc00000000000002002	CURB Recycling	Ready	Show last activities	2014-02-27 12:39:48	2014-02-27	80 rue des Pionniers, L'Île-Perrot, QC
4 +	jc00000000000002003	CURB Recycling	Ready	Show last activities	2014-02-27 12:40:32	2014-02-27	74 rue des Pionniers, L'Île-Perrot, QC
5 +	jc00000000000002004	CURB Recycling	Ready	Show last activities	2014-02-27 12:41:15	2014-02-27	92 rue des Pionniers, L'Île-Perrot, QC
6 +	jc00000000000002005	CURB Recycling	Ready	Show last activities	2014-02-27 12:43:12	2014-02-27	323 Grand Boulevard, L'Île-Perrot, QC
7 +	jc00000000000002006	CURB Recycling	Ready	Show last activities	2014-02-28 10:34:50	2014-02-28	135 Grand Boulevard, L'Île-Perrot, QC

Combining GeoZones

With the development and implementation of the concept of Work Groups and Route Groups, the FleetLink Route Management System supports combining GeoZones.

You can combine GeoZones easily using the **Copy To** feature on the Edit GeoZone page.

The figures below show GeoZones for two defined routes. For purposes of this example, we will copy the first, *Fr18RA*, to the second, *Fr19RA*.

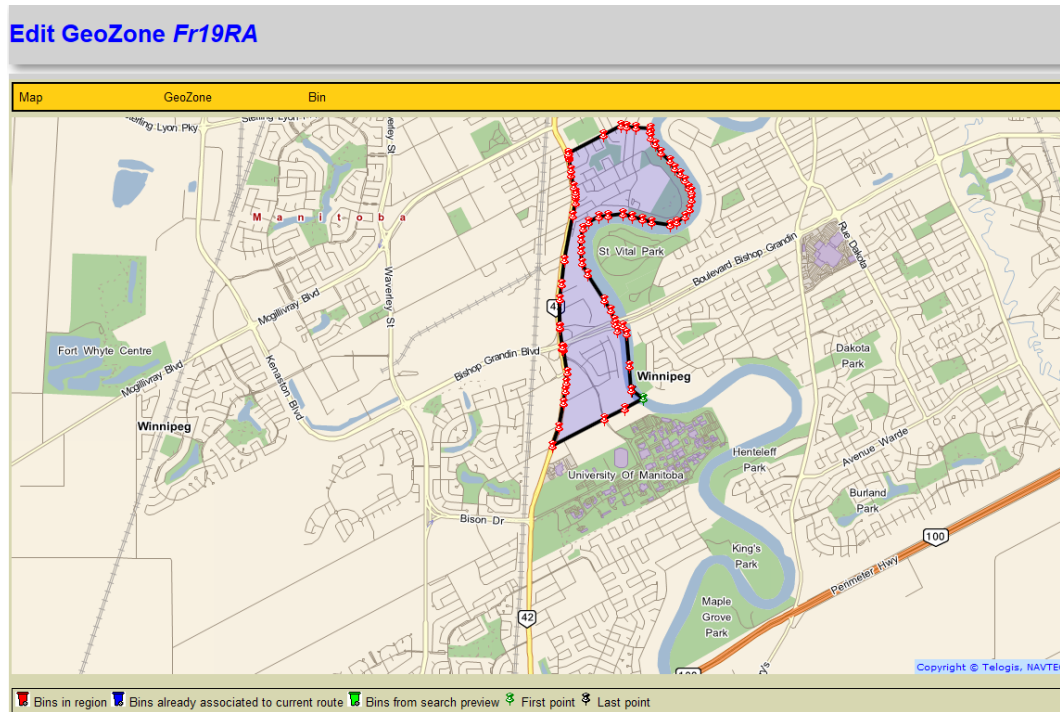
Edit GeoZone Fr18RA

Map GeoZone Bin

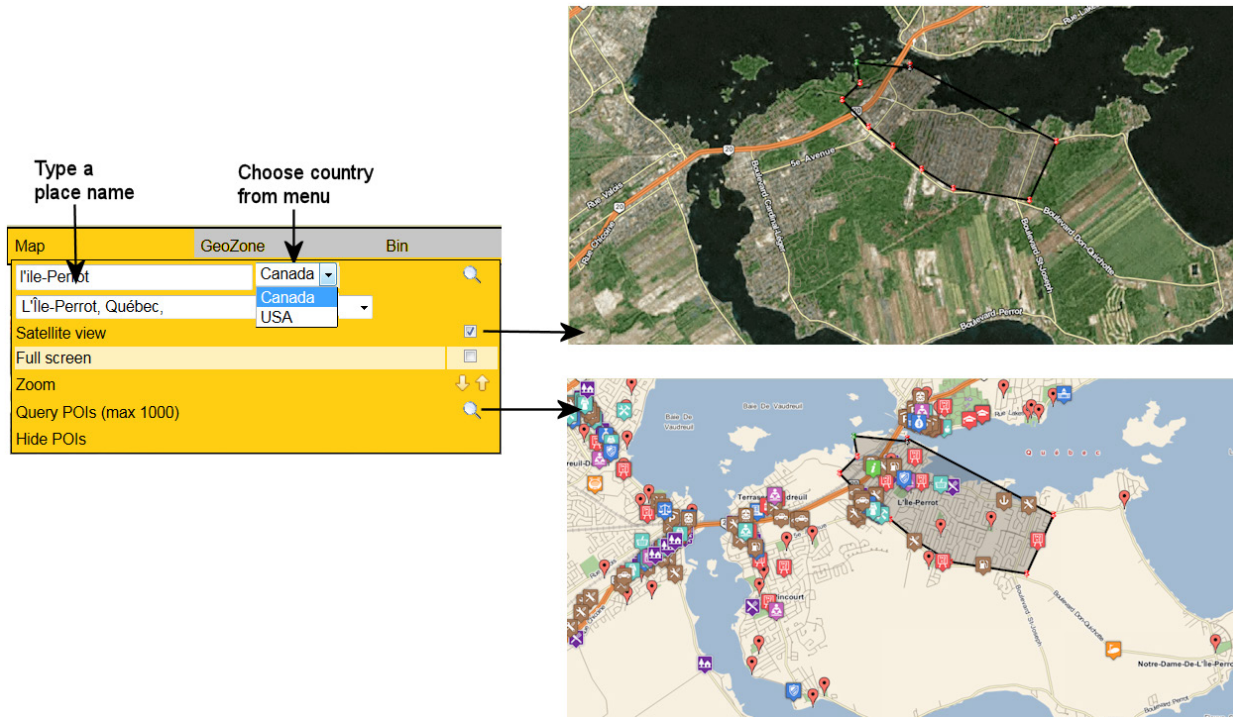
Winnipeg


Copyright © Telogis, NAVTEQ

Legend: Bins in region, Bins already associated to current route, Bins from search preview, First point, Last point



1. From the List of GeoZones, select the first GeoZone, i.e., the GeoZone you wish to copy, to open its edit page.
2. From the menu GeoZone menu in the header of the Edit screen:
 - a. From the **Copy To** pull-down menu, select the target route, e.g., *Fr19RA*.
 - b. Check the **Include stops** check box.
 - c. Click **Copy To** .



Item	Description
Location text field	Enter place name. Click to  search.
Country pull-down menu	Choose a country.
Location pull-down menu	Choose a saved or previously viewed location
Satellite view	Display satellite photo for GeoZone.
Full screen	Display GeoZone in full viewing area of your screen.
Zoom	Use the arrows to zoom in and out.
Query POIs	Display points of interest.
Hide POIs	Suppress display of POIs.

GeoZone Controls

The GeoZone menu provides controls for:

- Copying/moving/combining GeoZones.
- Map display show/hide options.
- GeoZone generation.

GeoZone
Bin

+

Move to
Fr-Ru-G ▾
Include stops

Copy to
Fr-Ru-G ▾
Include stops

Move all to
Fr-Ru-G ▾
Include stops

Copy all to
Fr-Ru-G ▾
Include stops

Hide read only GeoZones

Hide points

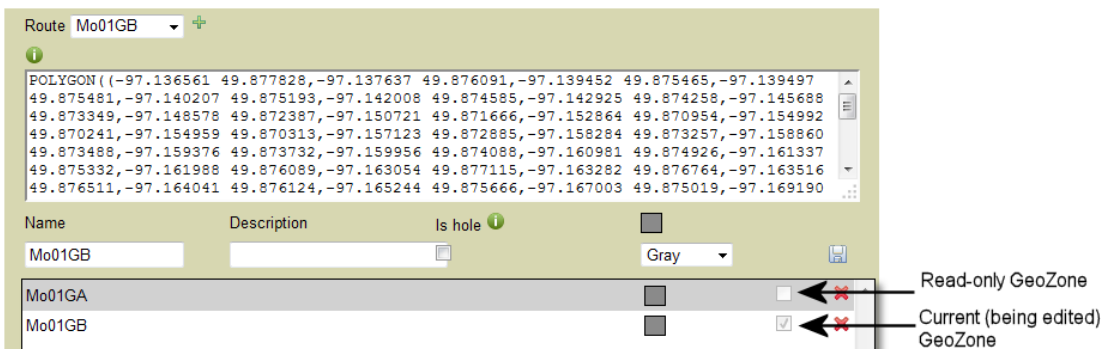
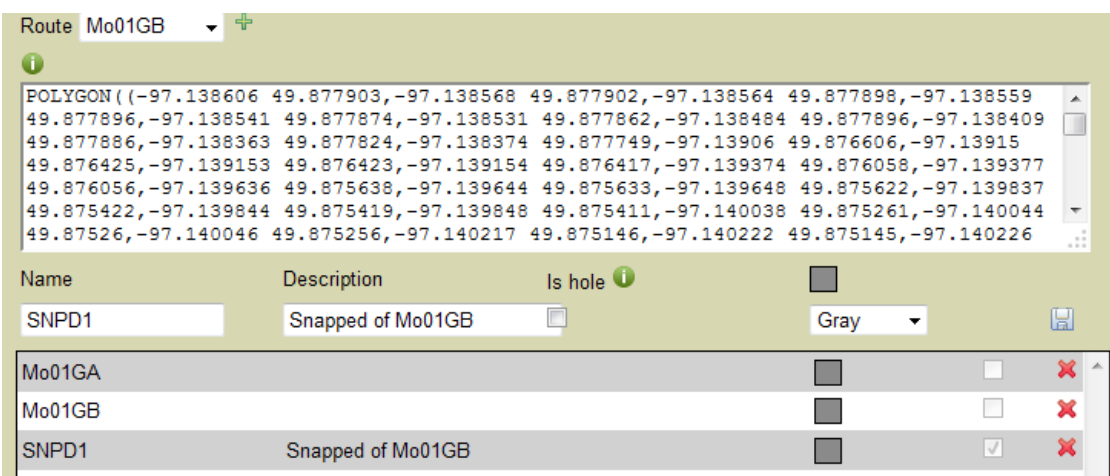


Save

Snap to streets

Delete snapped GeoZones


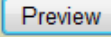
Generate automatic GeoZones
1000 ▾

Item	Description
GeoZone text field and Add icon	Enter a name in the text field and select the Add icon to create a new GeoZone.
Move to 	Moves the current GeoZone to another GeoZone.
Copy to 	Copies the current GeoZone to another GeoZone.
Move all to 	Moves all GeoZones to another GeoZone.
Copy all to 	Copies all GeoZones to another GeoZone.
Include stops check boxes	Select this check box to move/copy all assignments within a GeoZone. A GeoZone may contains stops for more than one type of service—for example, garbage and recycling—and you may not wish to include stops for both services. This option provides you the flexibility to choose the action appropriate to your move/copy operation.

<p>Hide read-only GeoZones check box</p>	<p>This tool is provided to reduce visual clutter in the map area when editing a GeoZone. The Edit GeoZone page may have multiple polygons, for example Snapped GeoZone polygons, which are listed in the right-hand area of the Edit GeoZone page.</p>  <p>Selecting this option lets you view only the polygon which you are currently editing.</p>
<p>Route pull-down menus</p>	<p>Enable selection of a target route for copy and move operations.</p>
<p>Hide Points check box</p>	<p>Shows/hides the pushpin icons that define the perimeter of the GeoZone</p>
<p>Snap to streets</p>	<p>This option creates a new polygon that is snapped to the city streets grid of the current GeoZone. The new snapped GeoZone displays in the right-hand area of the Edit GeoZone page.</p> 
<p>Delete snapped GeoZones</p>	<p>Removes all snapped GeoZone polygons from the list in the right-hand area of the Edit GeoZone page. To remove a single snapped GeoZone, locate the polygon in the list and then select its Delete  icon.</p>
<p>Generate automatic GeoZones</p>	<p>Generates GeoZones comprising the maximum number of bins specified in the pull-down menu.</p> <p> You must first perform a query of bins in the region by selecting Query route bins (maximum 10000) from the Bin Controls menu.</p>

Bin Controls

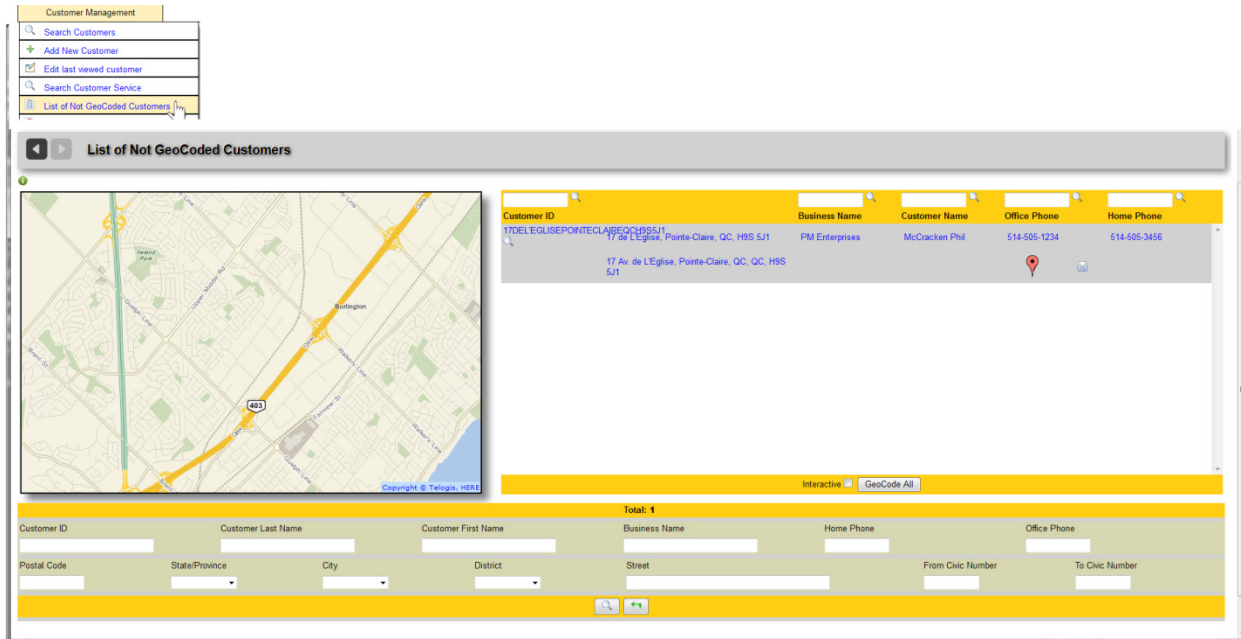
The Bin Controls menu provides query controls and hide/show functionality for bins in the GeoZone.

Item	Description
Query route bins (max 10000)	Displays bins already in routes.  To check for new bins (i.e., bins not yet scheduled on any routes), use the Preview  function, located in the lower-right area of the page. see Generating Routes from GeoZones
Hide route bins	When selected, suppresses display of bins already in routes—useful for de-cluttering the map display when previewing new bins
Query bins in displayed region (max 10000)	Displays all bins located within the entire map display region.
Hide region bins	Suppresses display of bins located in displayed region..

GeoCoding Non-GeoCoded Customer Addresses

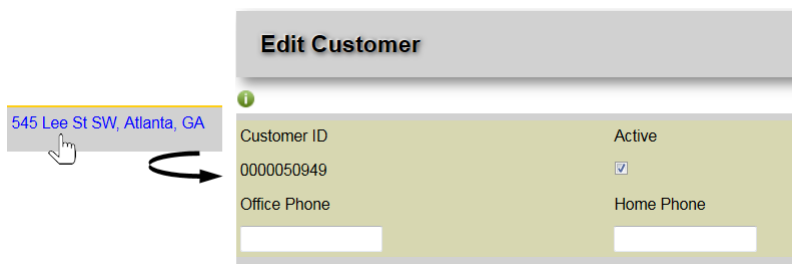
The FleetLink Route Management System provides a facility for listing all non-geocoded customer locations and geocoding them individually or all at once.

1. Select **Customers > List of Not GeoCoded Customers**.
The List of Not GeoCoded Customers displays.

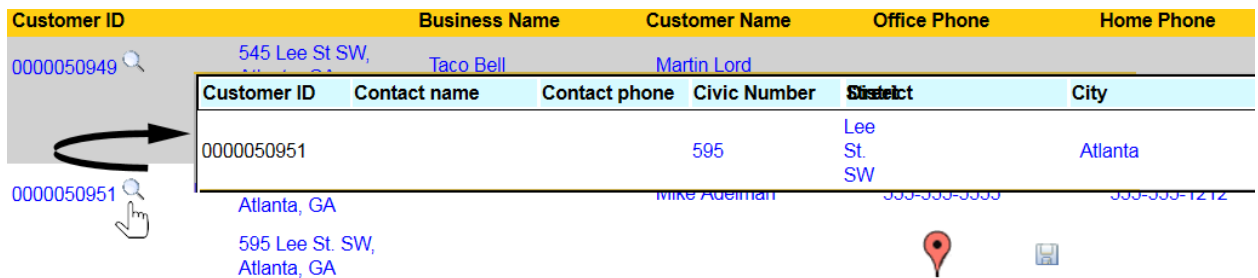


The right-hand side of the interface displays a list of all customer addresses that are not geocoded.

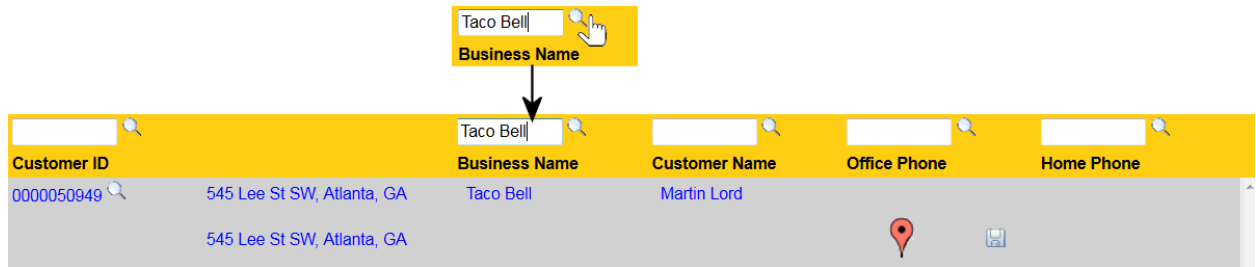
- a. Clicking on a highlighted link in any column brings you to the Edit Customer page.




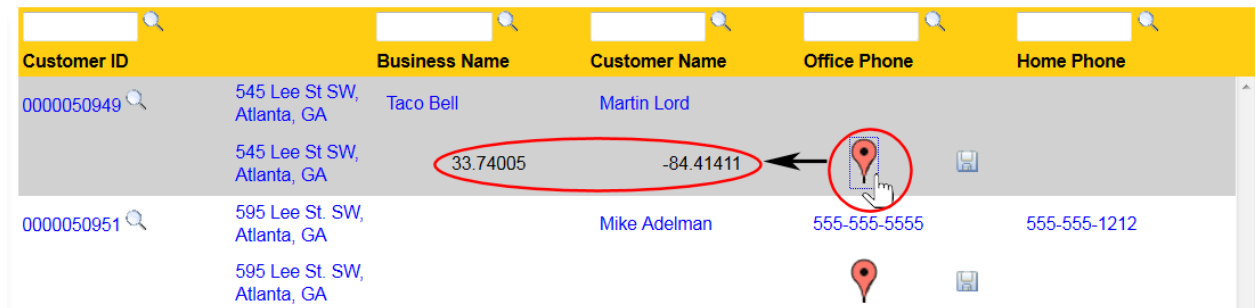
- b. Clicking on the magnifying glass icon beside the **Customer ID** displays a pop-up window with customer location information.



- c. Typing a text string into the text field of any column and then clicking its magnifying glass icon returns all records with that string in the corresponding field.





- d. To geocode a single location, click the balloon icon . The application will attempt to geocode the location, returning its corresponding latitude and longitude when successful.





- e. To geocode all entries in the list, select **GeoCode All**.
- f. Select the **Interactive** check box when geocoding to plot the geocoded location on the map.



The lower area of the interface provides additional search features.

- g. The magnifying glass icon  initiates a search.
- h. The reset icon  clears all fields in the lower area of the interface.

 After geocoding any or all addresses, you must click **Save**  or your changes will not be applied.

Managing Reference Data

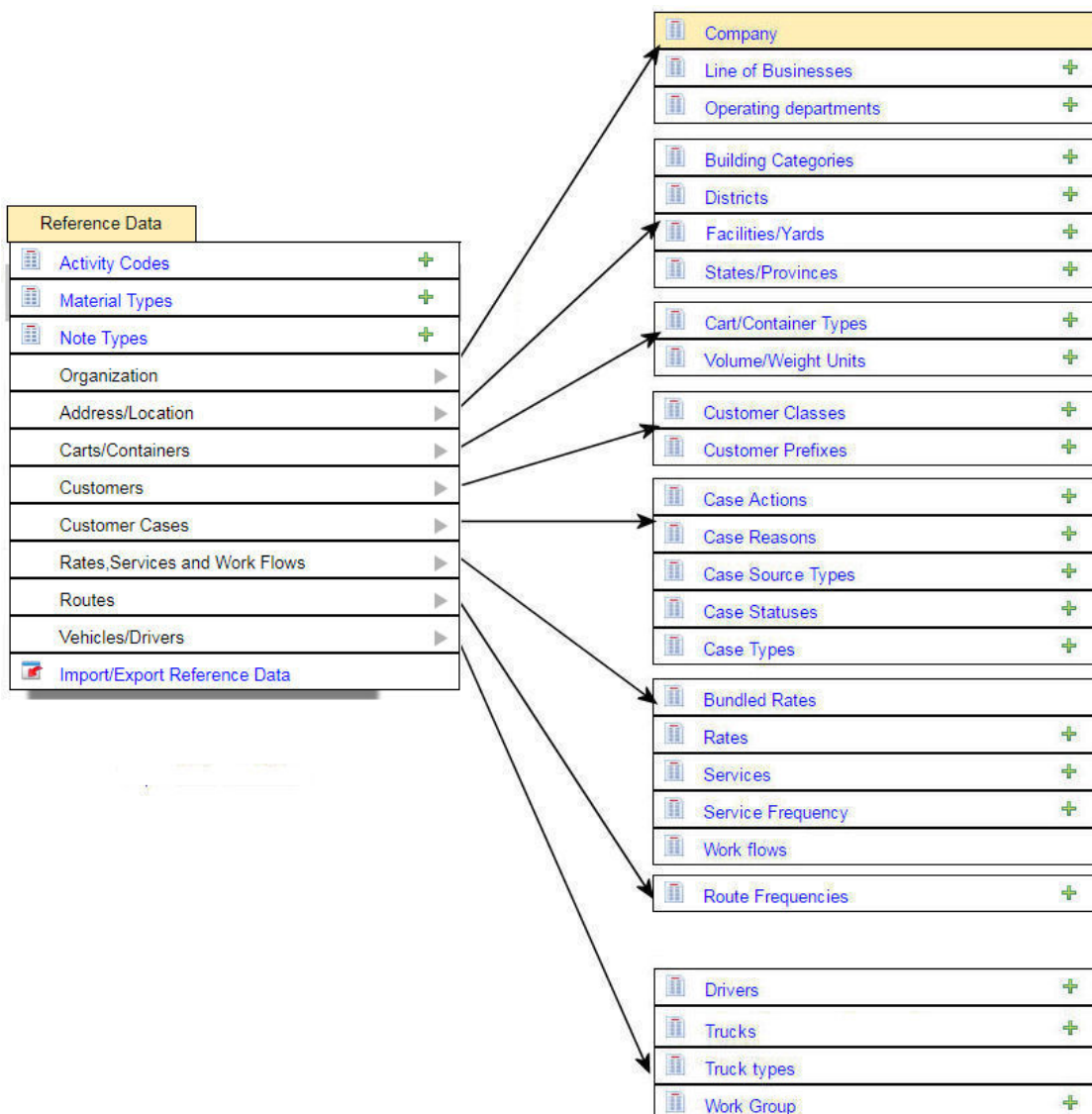
What is Reference Data?


Reference data is specific to your enterprise. It defines the properties for your business and represents information that is available for use by all routes in your system.

Defining reference data is the starting point for your project. The most efficient way to define reference data is to import a comma-separated-values (CSV) file that you have prepared off-line (or have generated using your back-office system or other software) and formatted according to the criteria defined for each type of data.

Defining (or Importing) Reference Data

You define reference data using the menu options provided by the Reference Data pull-down menu.



 **TIP:** It is recommended that you define your **Services** reference data as one of the last items, as it has dependencies on many other Reference Data elements in the list.

Material Types

Material Types Reference Data specifies the types of disposal material for your business . Examples include Recyclable Materials, Compostable Yard Waste, Organics, Garbage, and so on.

This data defines the menu options available on the FleetLink Mobile WasteApp user interface, their captions, and the order in which they are presented to the user.

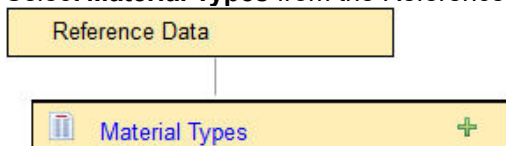
Material types are used in defining the Service types as well as filling out the material Master List for disposals or call-ins.

It follows the FleetMind standard API message compliance.




















MSGTYPE=MAT	3	alpha-num
VEHNAME=33-106	10	alpha-num
LSTVER=050418160000	12	alpha-num
LSTSIZE=00020	5	num
00001CODE=L9	10	alpha-num
00001DESC=# 9 NEWS, COATED BOO	20	alpha-num
00002CODE=L6		

Viewing the List of Material Types

- Select **Material Types** from the Reference Data pull-down menu.

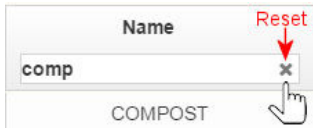


The **List of Material Types** screen displays.


List of Material Types					
	Name	Sequence	Description	Disposal Rate	Unit of Measurement
 	C	10	CARDBOARD ONLY		
 	A	20	ASBESTOS - NON-HAZAR		
 	D	30	ASBESTOS - HAZARDOUS		
 	W	40	WOOD		
 	T	50	TIRES		
 	CN	60	CONCRETE		
 	G	70	GLASS		
 	M	80	METAL / COPPER		
 	AL	90	ALUMINUM	150	Yard

Sorting and Searching

- Type a search string into the text box of a column header. The table will show results as you type. Use the **Reset Search** icon to clear the contents of the search text field.



Editing Material Information

- Click on an **Edit** icon.  The **Edit Material** screen displays.

 A screenshot of the "Edit Material SMMX" screen. The title bar shows "Edit Material SMMX" with navigation arrows. The main content area is titled "Material Type" and contains several input fields:

- Type: SMMX
- Sequence: 17
- Description: Scrap Metal Mixed
- Disposal Rate: 14.25
- Unit of Measurement: US-Ton (dropdown menu)

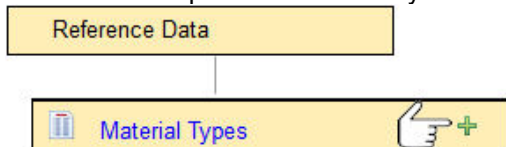
 A green "Save Material Type" button is located at the bottom right of the form.


- To edit Material information, use the text fields. Press **Save Material Type** when done.

Adding a Material Manually

You can add a Material manually in one of two ways:

- From the static portion off the UI by selecting **Reference Data > Material Types** and clicking the green plus sign icon.



- From the **List of Material Types** screen by selecting the Add New button.  The **Add Material** screen displays.

1. To add Material information, use the text fields.
2. Press **Save Material Type** when done.

Deleting a Material

To delete a Material:

- From the **List of Material Types** screen, select the delete icon  for the item you wish to remove from the list.

Resequencing Material Types

An material type's value in the **Sequence** column defines the order in which that menu option appears on the FleetLink Mobile WasteApp user interface.

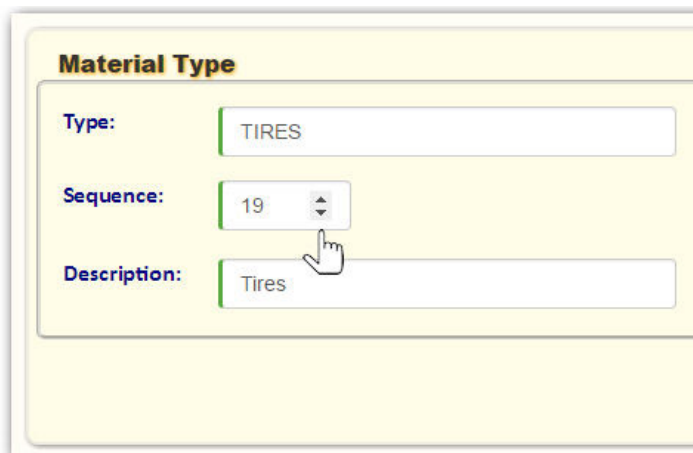
You can customize this order to suit your requirements or preferences by editing the value in the **Sequence** column.

You can resequence a Material Type in one of two ways:

- From the **List of Material Types**, double-click in the **Sequence** text field and type in a new value.

	Name	Sequence
	<input type="text"/>	<input type="text"/>
	CAMP	
	TIRES	19
	RECY	2
	TIRER	20
	XTREE	21
	GREEN	4
	CDBD	4
	CARD	47

- From the **Edit Material** screen, enter the desired value into the Sequence text field, and then press **Save**.

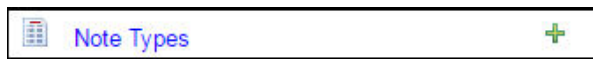


The screenshot shows a form titled "Material Type" with a yellow background. It contains three input fields: "Type" with the value "TIRES", "Sequence" with a dropdown menu showing "19", and "Description" with the value "Tires". A mouse cursor is pointing at the "Sequence" dropdown.

Exporting Material Types

You can export Material Types for migration to another platform using the Import Reference Data screen. See [Importing and Exporting Reference Data](#).

Note Types



Note Types refer to the codes defined in the Note Type Codes (NTC) master list that is sent to the mobile units. These codes are used to define lists of recipients for messages sent between the mobiles and the server

Note Types Reference Data defines the codes defined in the Note Type Codes (NTC) master list that is sent to the mobile units. These codes are used to define lists of recipients for messages sent between the mobiles and the server

Viewing the List of Note Types

- Select **Note Types** from the Reference Data pull-down menu.



The **List of Note Types** screen displays.

List of Note Types				
	Name	Sequence	Description	Dispatch Type
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	NT1	1	Note one for testing MIAN-177	Residential
	NT2	20	Note two for testing MIAN-177	Commercial
	test	5	test123	Commercial
	test2	52	test123	Commercial
	1	1	1	Graffiti (stop type 7)

Sorting and Searching

- Click on a column name to sort ascending or descending.
- Type a search string into the filter text box of a column header.

Editing Note Type Information

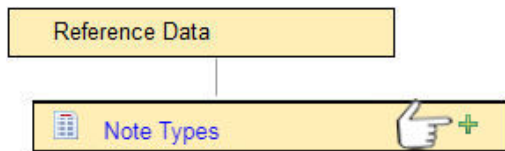
- Click on the **Edit** button in the left column. The **Edit Note Type** screen displays.


- To edit activity code information, use the text fields and pull-down menu. Press **Save Activity Code** when done.

Adding a Note Type

You can add an Activity Code manually in one of two ways:

- From the static portion off the UI by selecting **Reference Data > Activity Codes** and clicking the green plus sign icon




- From the **List of Note Types** screen by selecting the **Add New** button. 

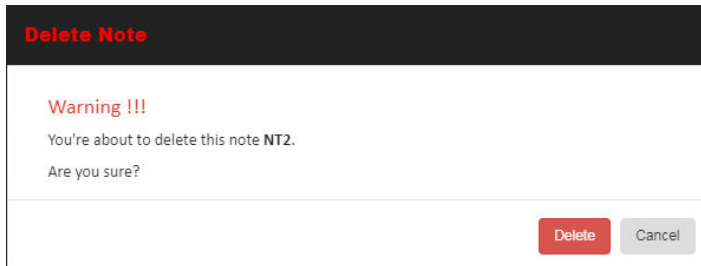
The **Add Note Type** screen displays.

- To add Note Type information, use the text field and pull-down menus.
- Press **Save Note Type** when done.

Deleting a Note Type

To delete a Note Type:

- From the List of Note Types screen, select the **Delete** button for the item you wish to remove from the list.  You will be prompted to confirm deletion of the record.



Exporting Note Types

You can export Note Types for migration to another platform using the Import Reference Data screen.


See [Importing and Exporting Reference Data](#) .

Lines of Business

Line of Business Reference Data specifies the types of waste management services for your business, and hence, the functionalities offered on the FleetLink Mobile WasteApp user interface.

The standard FleetMind LOBs are Commercial, Industrial, Residential, and Cart Delivery.

The LOBs are associated to the ASN Stop type. You can technically add different LOBs to the system and have them associated all to the same stop type.

 Any new LOBs that you define must be added to the FleetLink Connector database using the PuTty tool.

```
Fleetmind Solutions Inc.
Manual master list generating tool
2013/09/27 08:50:46

What do you want to work on?

(T)Truck, (D)Driver, (A)Activity code, (L)Landfill, (M)Material, (N)Note type, (
P)Proc code, (S)Service code, (G)Generate, (E)Export, (C)Container type, (B)LOB,
(Q)Quit \> B

Note Ctrl-C cancels the modification
lobStopType: (A)Add, (U)Update, (E)Erase all, (S)Show, (C)Search, (R)Return to m
ain menu \> a

Enter master list lobStopType lobCode \> LOB1

Enter master list lobStopType stopType \> 1
lobStopType added: lob1

Note Ctrl-C cancels the modification
lobStopType: (A)Add, (U)Update, (E)Erase all, (S)Show, (C)Search, (R)Return to main menu \> █
```

Viewing the List of Lines of Business

- Select **Reference Data > Organization > Line of Businesses..**



The **List of Line of Businesses** screen displays.

List of Line of Businesses		
	Name	description
	ASL	Automated Sideload Barrel
	CDLV	Cart-Delivery
	COMM	Commercial
	FL	Front-Load Bin
	XXXX	I love it
	IND	Industrial
	MBIZ	Monkey Business
	RESI	Residential
	RO	RO
	ROLLOFF	Rolloff Box
	SS	Support Services

Sorting and Searching

- Click on a column name in the header to choose a column's sort order.
- Type a search string into the filter text box of a column header.

Editing Line of Business Information

- Click on the **Edit** icon for the **Line of Business**.
- The **Edit Line of Business** screen displays.

Edit Line of business CDLV

Line of Business

Name:

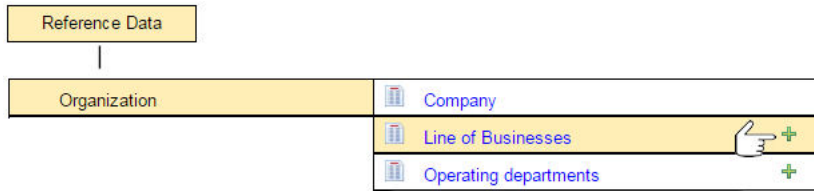
Description:


- To edit Line of Business information, use the text fields. Press **Save Line of Business** when done.

Adding a Line of Business Manually

You can add a Line of Business manually in one of two ways:

- From the static portion off the UI by selecting **Reference Data > Organization > Line of Businesses** and clicking the green plus sign icon.



- From the **List of Line of Businesses** screen by selecting the **Add New** button in the header area of the dynamic portion of the screen. 

The **Add Line of Business** screen displays.

- To add Line of Business information, use the text fields.
- Press **Save Line of Business** when done.

Deleting a Line of Business

To delete a Line of Business:

- From the **List of Line of Businesses** screen, select the **Delete** button for the item you wish to remove from the list.



You will be prompted to confirm deletion of the record.

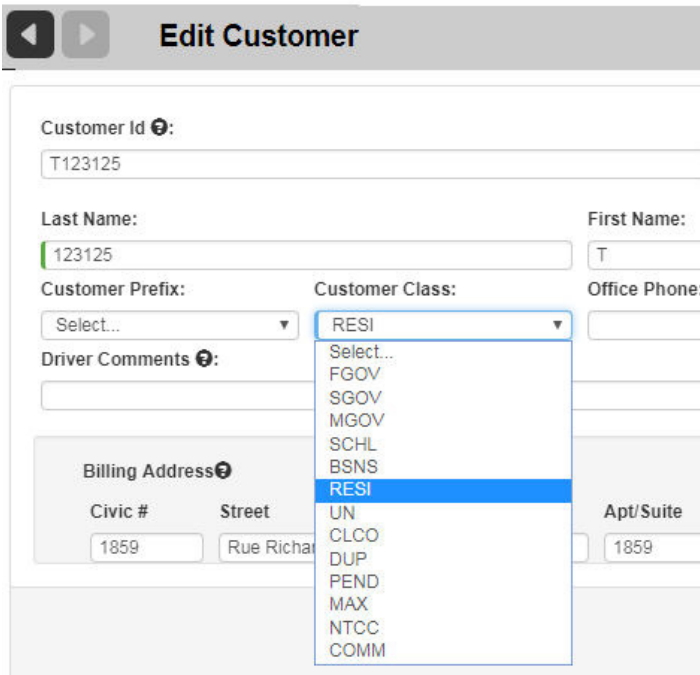
Exporting Lines of Business

You can export Lines of Business for migration to another platform using the Import Reference Data screen. See [Importing and Exporting Reference Data](#).

Customer Classes

Customer Classes Reference Data is provided as an optional data element for integration with a company’s billing system

You associate a Customer Class with a customer via the Edit Customer screen.



Viewing the List of Customer Classes

- Select **Reference Data > Customers > Customer Classes**.

Reference Data							
Customers	<table border="1"> <tr> <td></td> <td>Customer Classes</td> <td>+</td> </tr> <tr> <td></td> <td>Customer Prefixes</td> <td>+</td> </tr> </table>		Customer Classes	+		Customer Prefixes	+
	Customer Classes	+					
	Customer Prefixes	+					


The **List of Customer Classes** screen displays.



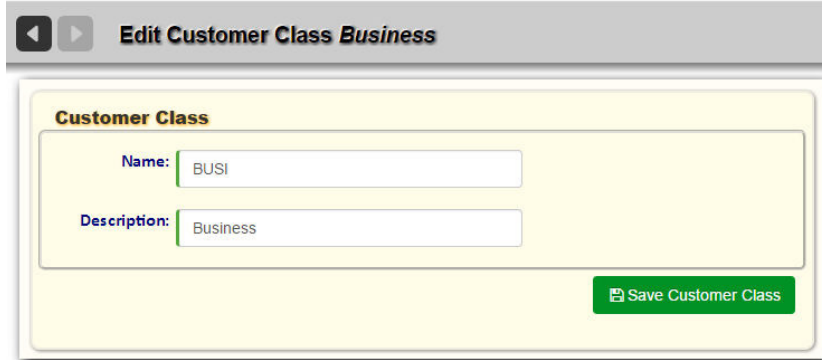
Add New		Name	description
		FGOV	Federal Government
		SGOV	State/Provincial Government
		MGOV	Municipal Government
		SCHL	School
		BSNS	Business
		RESI	Residential
		BUSI	Business
		OTHE	Others
		IN	Industry
		CM	Commercial

Total Item: 12

Editing Customer Class Information

Click on the **Edit** button for the **Customer Class**. 

The **Edit Customer Class** screen displays.

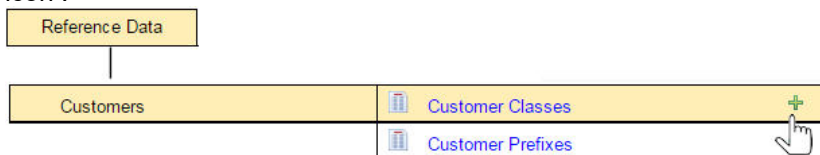



To edit the information, use the text fields.
Select **Save Customer Class** when done.


Adding a Customer Class Manually

You can add a Customer Class manually in one of two ways:

- From the static portion off the UI by selecting **Reference Data > Customer Classes** and clicking the green plus sign icon.



- From the **List of Customer Classes** screen by selecting the **Add New** button. 



- To add information, use the text field and check boxes.
- Press **Save Customer Class** when done.

Deleting a Customer Class

To delete a Customer Class:

- From the List of Customer Classes screen, select the **Delete** button for the item you wish to remove from the list. 
You will be prompted to confirm deletion of the record.

Delete Customer Classes**Warning !!!**

You're about to delete this customer classes FGOV.

Are you sure?

Delete

Cancel

Exporting Customer Classes

You can export Customer Classes for migration to another platform using the Import Reference Data screen. See [Importing and Exporting Reference Data](#).

Customer Prefixes

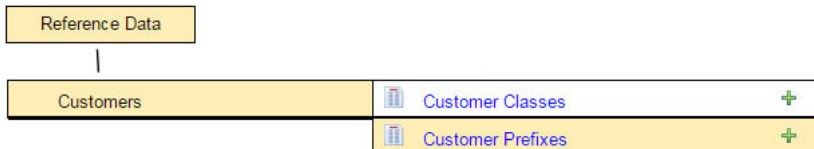
When adding new customers to the FleetLink Route Management System, the application generates a unique ID for the new customer. A Customer Prefix is any alphanumeric string that is meaningful to your business for purposes of sorting or categorization of customers.

For example, if you wish to add a new customer to a Division of your business named “Beacon Hill”, you may wish to add a customer prefix called “BH”. This will enable you to generate a unique system ID resembling “BHnnnnnnnn”, where nnnnnnnnn is the numeric part of the unique Customer ID.

Customer Prefixes are used to make customers linkable/groupable, and may be used in the future for billing purposes.

Viewing the List of Customer Prefixes

- Select **Reference Data > Customers > Customer Prefixes**.



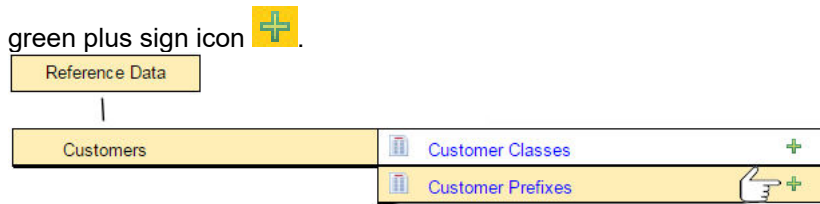
The List of Customer Prefixes page displays.

List of Customer Prefixes		
	Customer Prefix	Customer
Add New	<input type="text"/>	<input type="text"/>
	Mr	Mister
	Ms	Ms
	Mrs	Mrs

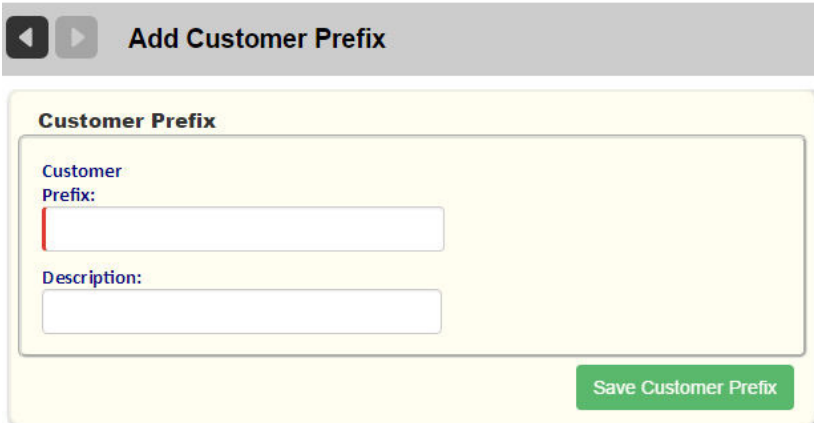
Adding a Customer Prefix

You can add a Customer Prefix in one of two ways:

- From the static portion of the UI by selecting **Reference Data > Customers > Customer Prefixes** and clicking the



- From the **List of Customer Prefixes** screen by selecting the green plus sign icon in the header area of the dynamic portion of the screen. The **Add Customer Prefix** screen displays.



- To add Customer Prefix information, use the text fields.
 - Customer Prefix** is a mandatory field, and must be a unique identifier.
- Press **Save** when done.

Exporting Customer Prefixes

You can export Customer Prefixes for migration to another platform using the Import Reference Data screen. See [Importing and Exporting Reference Data](#).

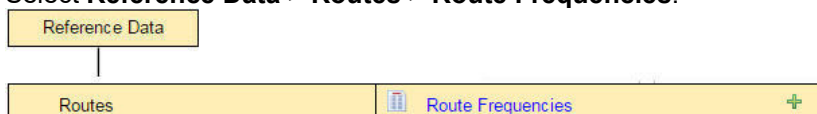
Route Frequencies

Route Frequencies Reference Data defines the frequency with which your routes are run.

You associate a frequency with a route via the Edit Route screen.

Viewing the List of Route Frequencies

- Select **Reference Data > Routes > Route Frequencies**.



The **List of Route Frequencies** screen displays.

Frequency	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	EvenWeeksOnly	OddWeeksOnly	type
Once										1
Sunday	✓									W
Monday		✓								W
Tuesday			✓							W
Wednesday				✓						W
Thursday					✓					W
Friday						✓				W
Saturday							✓			W
Monday EOW ...		✓						✓		V
Monday EOW ...		✓							✓	D
Tuesday EOW ...			✓					✓		V

Editing Route Frequency Information

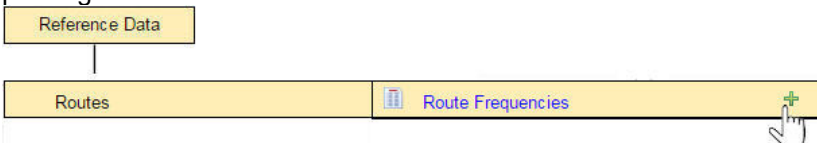
- Select the **Edit** button. The **Edit Frequency** screen displays.

To edit route frequency information, use the text field and check boxes. Select **Save Route Frequency** when done.

Adding a Route Frequency Manually

You can add a route frequency manually in one of two ways:

- From the static portion off the UI by selecting **Reference Data > Routes > Route Frequencies** and clicking the green plus sign icon .



- From the **List of Route Frequencies** screen by selecting the **Add New** button.

The **Add Frequency** screen displays.

1. To add route frequency information, use the text field and check boxes.
2. Press **Save Route Frequency** when done.

Deleting a Route Frequency

To delete a route frequency:

- From the List of Route Frequencies screen, select the **Delete** button for the item you wish to remove from the list.  You will be prompted to confirm deletion of the record.

Delete this route

Warning !!!

You're about to delete this route **Sunday**.

Are you sure?

Delete

Cancel

Exporting Route Frequencies

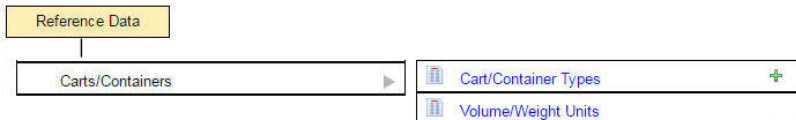
You can export Route Frequencies for migration to another platform using the Import Reference Data screen. See [Importing and Exporting Reference Data](#) .

Cart and Container Types

Cart and Container Reference Data specifies the types of waste receptacles used by your business, and hence, the cart/container types displayed on the calls list and menus of the FleetLink Mobile WasteApp user interface. Common examples include Blue Boxes, Totes, Yard Bins, and Compactors.

Viewing the List of Cart/Container Types

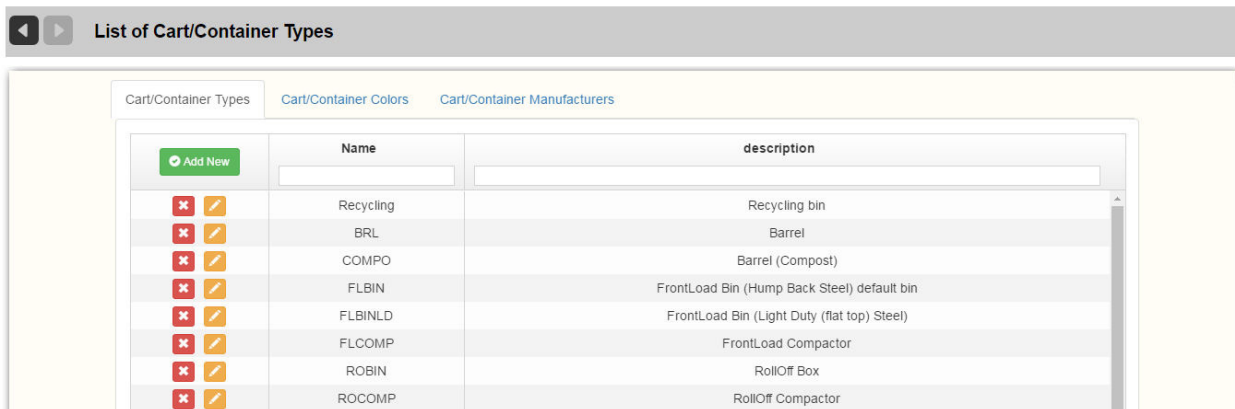
- Select **Reference Data > Carts/Containers > Cart/Container Types**.



The **List of Cart/Container Types** screen displays.

The list is a tabbed interface, providing lists of:

- Cart/Container Types** (default view)
Container types are descriptive categories that can be associated with containers. The programmed container types can be associated with [Service Types](#) .
Container types are simply a code and description that are available via a drop down list when adding a container.



The association of container type with container enables the system to group containers together, mostly for service type reasons and, ultimately, billing reasons.

- Cart/Container Colors**
Cart Container colors enable you to associate the color word to the container to be more descriptive. The actual visual color next to the word has no meaning.

Cart/Container Types	Cart/Container Colors	Cart/Container Manufacturers
Add New	<input type="text"/>	<input type="text"/>
	Blue	
	Green	
	Gray	
	Brown	
	WHITE	White
	BLACK	Black
	YELLOW	Yellow
	PINK	This color is PINK

The color is pushed through the assignment message to provide a more descriptive indication to the driver about the container he is servicing.

MSGTYPE=ASN	3	alpha-num		mandatory
VEHNAME=33-106	10	alpha-num		mandatory
DATE=040406	6	YYMMDD		mandatory
ROUTEID=35SH	10	alpha-num	Note 00	mandatory
STOPTYPE=2	1	alpha-num	Note0	mandatory
XREF=430833 001440500100135SH	36	alpha-num	Note1	mandatory
FMUID=860sd860458re49849yi9	37	alpha-num	(FM internal usage)	optional
SEQ=167	6	num		optional
CALLREF=33 -0014405	20	alpha-num		optional
CUST_NAME= RANCHO GONZALEZ	21	alpha-num	Note11	optional
CUST_ADDR1=27 MTN RD	21	alpha-num	Note11	optional
CUST_ADDR2=	21	alpha-num	Note11	optional
CUST_CITY=SANTA PAULA	21	alpha-num	Note11	optional
CUST_STATE=CA	21	alpha-num	Note11	optional
CUST_COUNTRY=USA	21	alpha-num	Note11	optional
CUST_ZIP=1234567890	21	alpha-num	Note11	optional
CUST_TEL=123-456-7890	21	alpha-num	Note11	optional
CUST_ACCOUNT=RES-0989976	21	alpha-num	Note11	optional
GPSLAT=+45.50000	10	alpha-num	Note12 (+/-deg.decimal)	optional
GPSLON=-73.50000	10	alpha-num	Note12 (+/-deg.decimal)	optional
PRIMINFO=RANCHO GONZALEZ 27 MTN RD	42	alpha-num	Note11	OBSOLETE
SECINFO= SANTA PAULA CA	42	alpha-num	Note11	OBSOLETE
THIRDINFO=	42	alpha-num	Note11	OBSOLETE
WOID=0000101	10	alpha-num		optional
SCHEDULE=-----SS	7	alpha-num	7-positions flag	optional
NBPLANNED=1234	4	num	Note8	optional
LANDFILLCODE=ABCD1234	8	alpha-num	Note6	optional
PROCESSCODE=A5	8	alpha-num	Note7	optional
RBIND=N	1	Y or N (def=N)	Note10	optional
WARNING_MSG=	21	alpha-num	Note13	optional
DETAILEDNOTE=	400	alpha-num		optional
INSTR=PICKUP A FRIDGE	60	alpha-num	Note3	OBSOLETE
LISTOFNOTE=Use door F9/At rear of building	183	alpha-num	Note2	optional
TARGETTIME=1025	5	alpha-num	HHhMM	optional
FLAGS=1100	10	alpha-num	Note5	optional
INFORMDRIVER=Y	1	alpha (Y or N)	assumed N	optional
LSTSIZE=1	3	num		mandatory
001LIFTID=001	3	num		mandatory
001SERIALNO=1234	13	alpha-num		optional
001COLOR=RED	16	alpha-num		optional (cart-deliv)
001RFID=00000000000000000000234563	26	alpha-num		optional
001GPSLAT=+45.50000	10	alpha-num	+/-deg.decimal	optional
001GPSLON=-73.50000	10	alpha-num	+/-deg.decimal	optional
001LISTOFNOTE=P/U EXTRA BIN	183	alpha-num	Note2 / Note4	optional
001SERVICETYPE=2	21	alpha-num	Note14	optional
001SIZE=2	10	alpha-num		optional
001SERVCODE=Z3	10	alpha-num	Note9	optional
001SDESC=REGULAR SERVICE	20	alpha-num	Note9	optional

• Cart/Container Manufacturers

The manufacturer label is simply an identification field. It's not pushed to other applications. There is no functionality tied to the manufacturer; it is simply a field that contains a code and description that is tied to defining a container.

Cart/Container Types Cart/Container Colors **Cart/Container Manufacturers**

Add New		Name	description
		Ameri-Kart	Ameri-Kart Corp
		Busch	Busch Systems Intl. Inc.
		Cascade	Cascade Cart Solutions
		CleanRiver	CleanRiver Recycling Solutions
		Diamondback	Diamondback Products, Inc.
		ORBIS	ORBIS Corporation

Sorting and Searching

- Click on a column name in the header to choose a column's sort order.
- Type a search string into the filter text box of a column header

Editing Cart/Container Type Information

- Click on an item in the **Container Type** column.
The **Edit Container Type** screen displays.

Edit Container Type *FLBIN*

Container Type

Name:

Description:

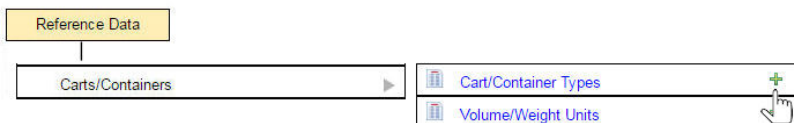
Save Container Type

- To edit Container information, use the text fields.
Press **Save Container Type** when done.

Adding a Cart/Container Type Manually

You can add a Cart or Container type manually in one of two ways:

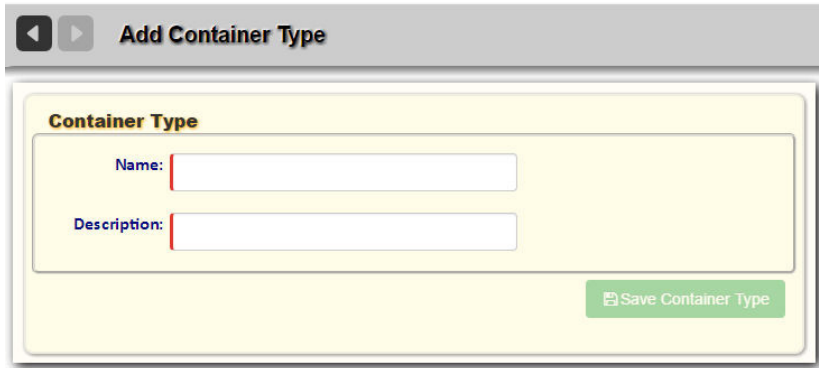
- From the static portion of the UI by selecting **Reference Data > Cart/Container Type** and clicking the green plus sign icon .



- From the **List of Cart/Container Types** screen by selecting the **Add New** button.



The **Add Container Type** screen displays.



1. To add Material information, use the text fields.
2. Press **Save Container Type** when done.

Deleting a Container Type

To delete a Container Type:

- From the **List of Cart/Container Types** screen, select the **Delete** button for the item you wish to remove from the list. You will be prompted to confirm deletion of the record.

Delete container type

Warning !!!

You're about to delete this container type FLBIN.

Are you sure?

Delete

Cancel

Exporting Cart/Container Types

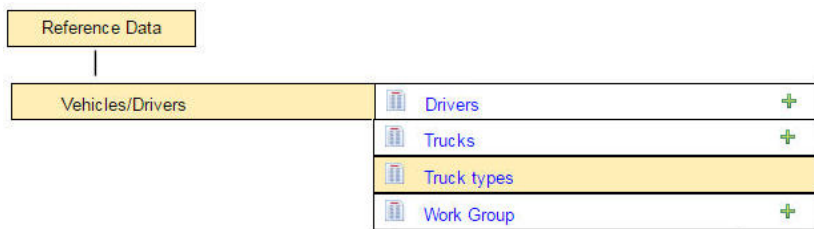
You can export Cart/Container Types for migration to another platform using the Import Reference Data screen. See [Importing and Exporting Reference Data](#).

Truck Types

Trucks Reference Data defines the purposes of the vehicles used on your routes .

Viewing the List of Truck Types

- Select **Reference Data > Vehicles/Drivers > Truck Types**.



The List of Truck Types Displays

List of Truck Types	
Name	description
RE	Residential/Commercial
RO	Roll-off
FB	Cart delivery
SD	Sewer/Drain cleaning
RS	Road sweeper
PP	Port-o-Potty
LQ	Liquid waste

Truck types are hard-coded in the RMS. They can be added, deleted, and edited only by authorized RMS users.

Exporting Truck Types

You can export Truck Types for migration to another platform using the Import Reference Data screen. See [Importing and Exporting Reference Data](#).

Building Categories

Building Categories Reference Data specifies the types of buildings serviced by your business . Examples include Apartments, Office, Single-Family Dwelling, and Banquet Hall

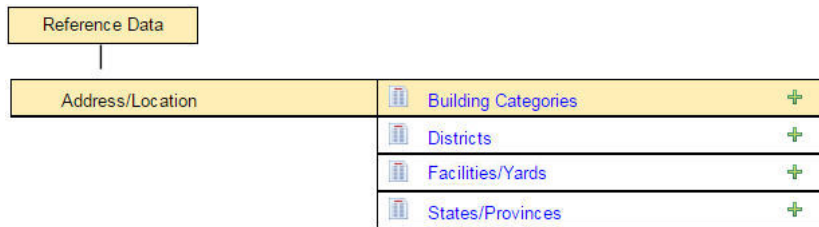
This data has no impact on the FleetLink Mobile WasteApp user interface, but may be of use for route planning or statistical analysis by your Operations department.

A building category is a grouping available to the customer location that describes the building location. The Customer location will have a building category. Each customer can have multiple locations and each location can have multiple containers. The building category is associated with the Customer location level.

In the FleetLink Route Management System, the building category field gives the ability to the person in charge of creating the routes to omit a certain building type from the route generation process. Building Categories are not transferred to any other level of FleetMind applications.

Viewing the List of Building Categories

- Select **Reference Data > Address/Location > Building Categories**.



The **List of Building Categories** screen displays.

Add New		Name	description
		Apartment block	Residential building
		Asylum	Residential building
		Condominium	Residential building
		Dormitory	Residential building
		Duplex	Residential building
		House	Residential building

Sorting and Searching

- Click on a column name in the header to choose a column's sort order.
- Type a search string into the filter text box of a column header to search for an item.

Editing Building Category Information










- Click on an the **Edit** button for a Building Category.
- The **Edit Building Category** screen displays.


- To edit Building Category information, use the text fields.
Press **Save** when done.

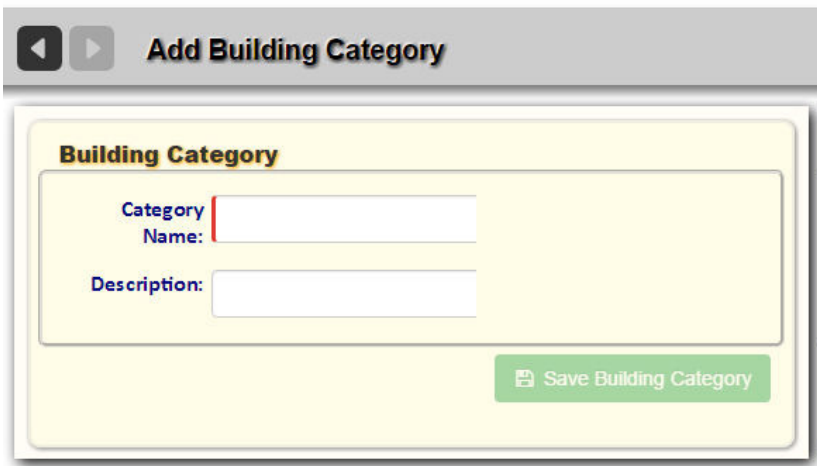
Adding a Building Category Manually

You can add a Building Category manually in one of two ways:

- From the static portion off the UI by selecting **Reference Data > Building Categories** and clicking the green plus sign icon .

Reference Data	
Address/Location	 Building Categories  
	 Districts 
	 Facilities/Yards 
	 States/Provinces 

- From the **List of Building Categories** screen by selecting the **Add New** button.  The **Add Building Category** screen displays.

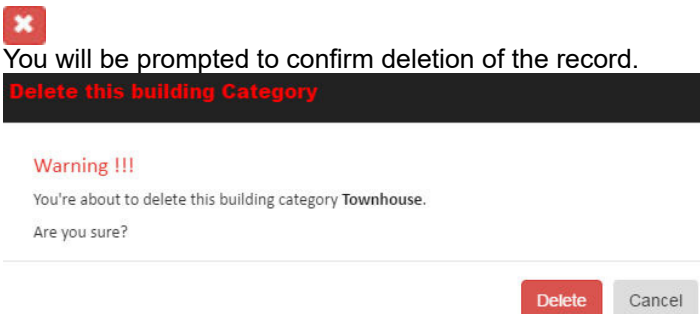


- To add Building Category information, use the text fields.
- Press **Save Building Category** when done.

Deleting a Building Category

To delete a Building Category:

- From the **List of Building Categories** screen, select the Delete button for the item you wish to remove from the list.



Exporting Building Categories

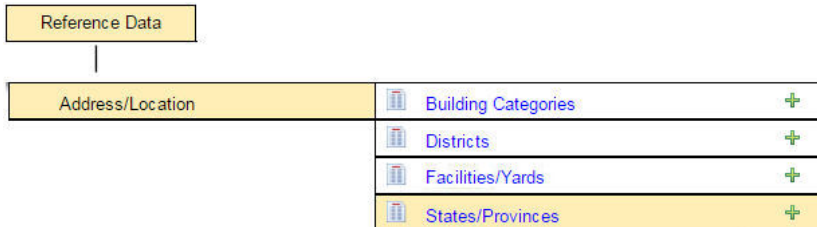
You can export Building Categories for migration to another platform using the Import Reference Data screen. See [Importing and Exporting Reference Data](#).

States and Provinces

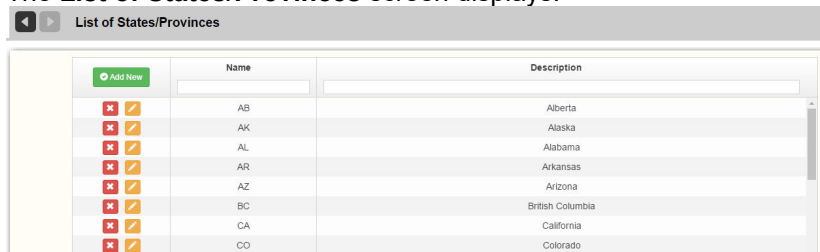
States and Provinces Reference Data specifies the U.S. states and/or Canadian provinces serviced by your business.

Viewing the List of States

- Select **Reference Data > Address/Location > States/Provinces**.



The **List of States/Provinces** screen displays.

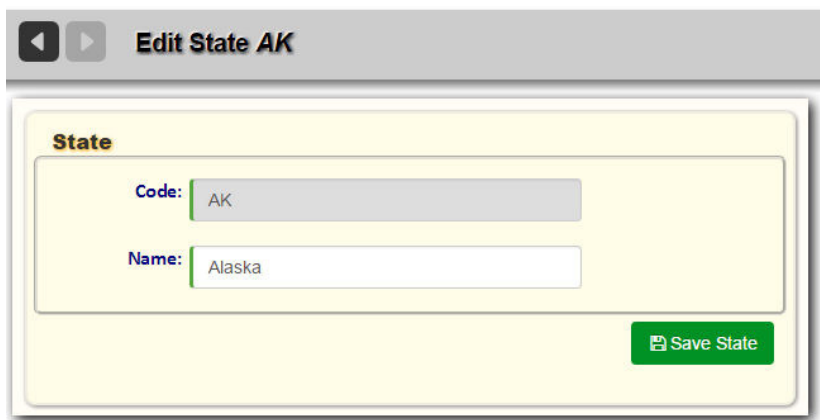



Sorting and Searching

- Click on a column name in the header to choose a column's sort order.
- Type a search string into the filter text box of a column header.

Editing States/Provinces Information

- Click on an item in the Code column.
The **Edit State** screen displays.

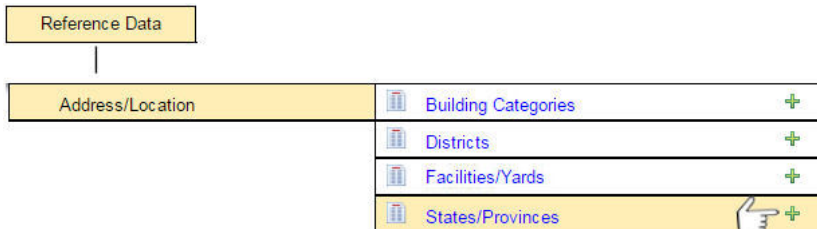


- To edit Facility information, use the text field.
 - Name** is a mandatory field and must be a unique identifier.
- Press **Save**  when done.

Adding a State or Province

You can add a State or Province in one of two ways:

- From the static portion of the UI by selecting **Reference Data > States/Provinces** and clicking the green plus sign icon .



- From the **List of States and Provinces** screen by selecting the green plus sign icon in the header area of the dynamic portion of the screen. The **Add State** screen displays.

The screenshot shows the 'Edit State AK' screen. The form is titled 'State' and has two text input fields: 'Code' with the value 'AK' and 'Name' with the value 'Alaska'. A green 'Save State' button is located at the bottom right of the form.

- To add State/Province information, use the text fields.
 - Name** is a mandatory field, and must be a unique identifier.
 - Code** is the abbreviation for the province or state.
- Press **Save State** when done.

Deleting a State or Province

To delete a State/Province:

- From the **List of States/Provinces** screen, select the **Delete** button for the item you wish to remove from the list.  You will be prompted to confirm deletion of the record.

Delete this state**Warning !!!**

You're about to delete this state DC.

Are you sure?

Delete

Cancel

Exporting States/Provinces

You can export States/Provinces for migration to another platform via the Import Reference Data screen.

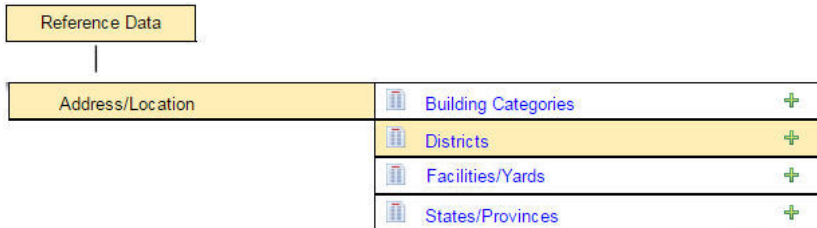
See [Importing and Exporting Reference Data](#).

Districts

Districts Reference Data specifies the geographic areas serviced by your business.

Viewing the List of Districts

1. Select **Reference Data > Address/Location > Districts**.




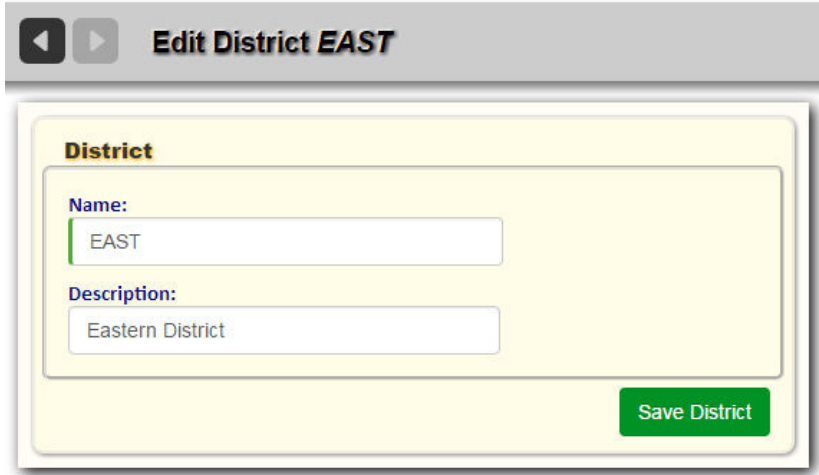
The List of Districts page displays.

List of Districts		
	District	description
	<input type="text"/>	<input type="text"/>
	XXXX	test import district
	West	West Side
	test	test
	South	South Side
	sdfsdfs	
	East	East Side
	sdfs	
	North	North Side

- Clicking on an **Edit** button directs you to the Edit District page.
- Selecting the **Delete** button deletes the selected District.
- Selecting **Add New** enables you to add a new District.

Editing Districts Information


1. Click on the **Edit** button on the List of Districts page. 
The Edit District page displays.

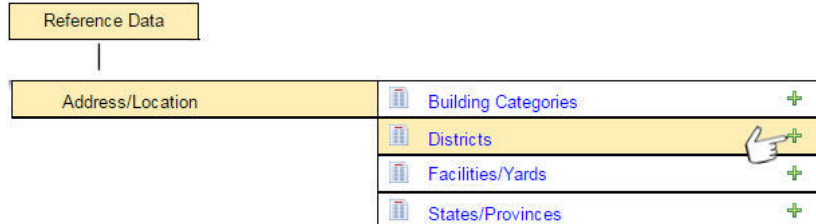


District and **is a** is a mandatory field and must be a unique identifier.

2. Press **Save District** when done editing.

Adding a District


1. You can add a District in one of two ways:
 - a. From the static portion off the UI by selecting **Reference Data > Address/Location > Districts** and clicking the green plus sign icon .



- b. From the **List of Districts** screen by selecting the **Add New** button.
The **Add District** screen displays.
The data elements on this screen are identical to those of the Edit District page.
2. Enter all required information and press **Save District** when done

Deleting a District

To delete a District:

- From the **List of Districts** screen, select the **Delete** button for the item you wish to remove from the list. 
You will be prompted to confirm deletion of the record.

Delete this district

Warning !!!

You're about to delete this unit South.
Are you sure?

Delete Cancel

Exporting Districts

You can export Districts for migration to another platform via the Import Reference Data screen. See [Importing and Exporting Reference Data](#).

Volume and Weight Units

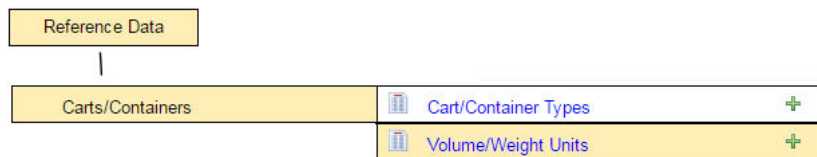
The FleetLink Route Management System has pre-programmed metric unit types:

- Cubic Meters
- Kilogram
- Kilometer
- Liter
- Meter
- Metric Ton

This page enables you to add a different unit of measurement corresponding to its equivalent metric unit type.




Viewing the List of Volume and Weight Units

1. Select **Reference Data > Carts/Containers > Volume/Weight Units**.



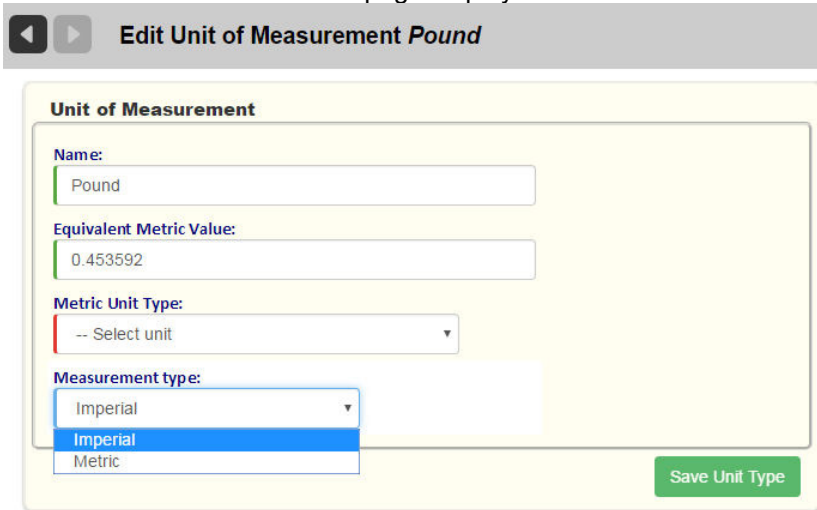
The List of Measurement Units page displays.

List of Measurement Units					
	Name	Equivalent Metric Value	Metric Unit Type	msrType	Description
	1	2	L	I	Liter
	Cm	0.01	M	M	Meter
	Cubic-Yard	0.76455	CM	I	Cubic Meters
	Gallons	3.78541	L	M	Liter
	Ib4Ib	144.5	Kg	I	Kilogram
	Inch	0.0254	M	I	Meter

- Clicking on the **Edit** button directs you to the Edit Unit of Measurement page. 
- Selecting the **Delete** button deletes the selected unit of measurement. 
- Selecting **Add New** enables you to add a new unit of measurement. 

Editing Volume and Weight Units Information

1. Click on an any highlighted link on the List of Measurement Units page. The Edit Unit of Measurement page displays.



The screenshot shows the 'Edit Unit of Measurement' page for 'Pound'. The page has a title bar with navigation arrows and the text 'Edit Unit of Measurement Pound'. Below the title bar is a form titled 'Unit of Measurement' with the following fields:


- Name:** A text input field containing 'Pound'.
- Equivalent Metric Value:** A text input field containing '0.453592'.
- Metric Unit Type:** A dropdown menu with the text '-- Select unit'.
- Measurement type:** A dropdown menu with 'Imperial' selected, and a list of options: 'Imperial' and 'Metric'.

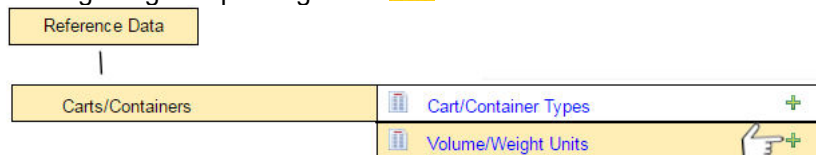
A green 'Save Unit Type' button is located at the bottom right of the form.

Name and **Equivalent Metric Value** are mandatory fields; **Name** must be a unique identifier.

2. Press **Save Unit Type** when done editing.

Adding a Unit of Measurement

1. You can add a Unit of Measurement in one of two ways:
 - a. From the static portion off the UI by selecting **Reference Data > Carts/Containers > Volume/Weight Units** and clicking the green plus sign icon .



- b. From the **List of Measurement Units** screen by selecting the **Add New** button. 


The **Add Unit of Measurement** screen displays.

The data elements on this screen are identical to those of the [Edit Unit of Measurement](#) page.

2. Enter all required information and press **Save Unit Type** when done

Deleting a Unit of Measurement

To delete a Unit of Measurement:

- From the **List of Measurement Units** screen, select the delete **Delete** button for the item you wish to remove from the list. 

You will be prompted to confirm deletion of the record.

Delete Material

Warning !!!

You're about to delete this material **Ib4Ib**.

Are you sure?






Delete


Cancel

Exporting Units of Measurement

You can export Units of Measurement for migration to another platform via the Import Reference Data screen. See [Importing and Exporting Reference Data](#).

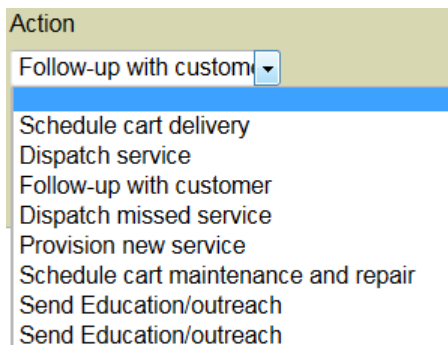
Case Actions

Reference Data	
Customer Cases	<ul style="list-style-type: none">  Case Actions +  Case Reasons +  Case Source Types +  Case Statuses +  Case Types +

 This reference data element is a component of the Customer Service Representative (CSR) Dashboard and may not be applicable to your installation.

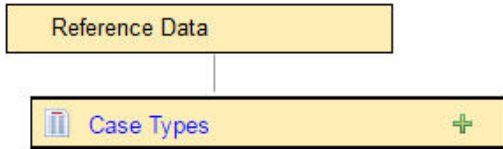
Case Actions are the actions that can be taken to process or resolve a Customer Case.

These actions represent the available menu options you will see on the Action pull-down menu when editing or adding a customer case.



See [Defining CSR Reference Data](#).

Case Types



i This reference data element is a component of the Customer Service Representative (CSR) Dashboard and may not be applicable to your installation.

Case Types indicate the nature of the customer case, as different types will determine the course(s) of action and may be accorded different priorities.

List of Case Types		
Case Type	Description	
CMPL	Complaint	✘
IR	Information request	✘
WO	Work order	✘

See [Defining CSR Reference Data](#).

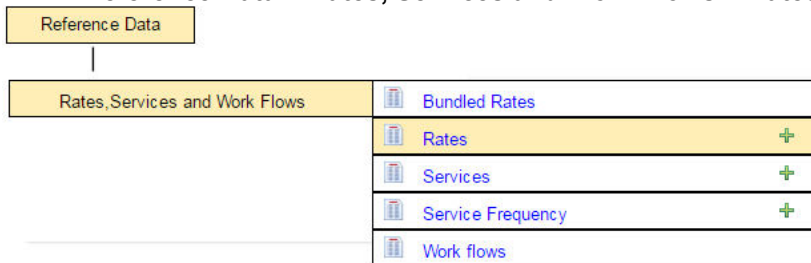
Rates

i See also: [Bundled Rates](#).

Viewing List of Rates

To view the List of Rates:

- Select **Reference Data > Rates, Services and Work Flows > Rates**.



The List of Rates displays.

List of Rates		Code	Description	Rate	Extra Rate	Extra Weight Rate	No Service Rate	Cancel Servi...	Start Date	End Date
<input type="button" value="Add New"/>										
<input type="checkbox"/>	<input type="checkbox"/>	RTDF	Default rate	0	0	0	0	0	08-November-...	
<input type="checkbox"/>	<input type="checkbox"/>	BC60	BUSINESS BL...	0	0	0	0	0	01-January-2016	
<input type="checkbox"/>	<input type="checkbox"/>	NSBR	Deliver	0	0	0	0	0	01-January-2016	
<input type="checkbox"/>	<input type="checkbox"/>	NRLR	Replace Lid	0	0	0	0	0	01-January-2016	
<input type="checkbox"/>	<input type="checkbox"/>	NRWR	Replace Wheel	0	0	0	0	0	01-January-2016	
<input type="checkbox"/>	<input type="checkbox"/>	CPBR	Pullback Chrg	2.1	0	0	0	0	01-January-2016	
<input type="checkbox"/>	<input type="checkbox"/>	NPBR	PullBack NoChrg	0	0	0	0	0	01-January-2016	
<input type="checkbox"/>	<input type="checkbox"/>	NRBR	Remove	0	0	0	0	0	01-January-2016	

- Selecting the Active tab displays all Rates currently in effect.
- Selecting the Expired tab shows expired Rates.

Rates define the billing rates associated with different types of services, for example, regular service, extras, extra weight, and No Service.

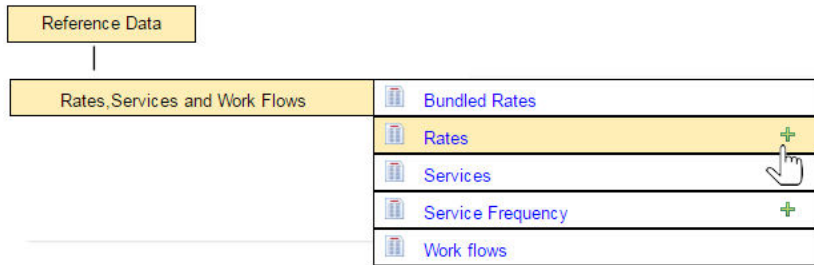
Edit Rate <i>CEAH</i>	
Rate Definition	
Rate Code: <input type="text" value="CEAH"/>	Description: <input type="text" value="One-Time RO 10YD GREEN"/>
LOB: <input type="text" value="RO"/>	District: <input type="text" value="-- Select if applicable"/>
Frequency: <input type="text" value="ON DEMAND"/>	
Pricing Options	
Container Selection	
Container Dependency <input checked="" type="checkbox"/> Rate can be applied only to service/workflow supporting matching containers	
Type: <input type="text" value="ROBOX"/>	Size: <input type="text" value="10"/> <input type="text" value="Yard"/>
Dates	
Start Date: <input type="text" value="2016-Jan-01"/>	End Date: <input type="text"/>
Rates	
Basic Rate:	<input type="text" value="121"/>
Extra Pickup:	<input type="text" value="3"/>
Extra Weight:	<input type="text" value="35"/>
Refused Service:	<input type="text" value="0"/>
Rate/Weight Unit:	<input type="text" value="21.61"/>
Cancel Cost:	<input type="text" value="0"/>
<input type="button" value="Save Rate"/>	


After you have defined Rate Types, you can apply them when defining services.

Adding a New Rate

You can add a Rate manually in one of two ways:

- From the static portion of the UI by selecting **Reference Data > Rates, Services and Work Flows > Rates** and clicking the green plus sign icon .



- From the **List of Rates** screen by selecting the **Add New** button. 

The **Add Rate** screen displays.

Enter the new rate information using the text fields and pull-down menus.

When done, select **Save Rate**.

Exporting Rates

You can export Rates for migration to another platform using the Import Reference Data screen. See [Importing and Exporting Reference Data](#).

Bundled Rates

Bundled Rates are special discounted rates available to customers who subscribe to a package comprising multiple service subscriptions.

Viewing List of Bundled Rates

To view the List of Bundled Rates:

Select **Reference Data > Rates, Services and Work Flows > Bundled Rates**.

Reference Data	
Rates, Services and Work Flows	Bundled Rates
	Rates +
	Services +
	Service Frequency +
	Work flows

The List of Bundled Rates displays.

List of Bundled Rates

To modify bundle click edit button. Grayed out names indicate bundles already in use - only amount value can be modified. Bundled rates never used can be deleted. New bundles can be created from grid menu. ☰

Bundled Rate (nbr of services)	Amount	Service Code	Service Description	LOB
918 (11)	\$0.00			
9058 (6)	\$0.00			
9205 (3)	\$0.00			
9206 (3)	\$0.00			
9207 (3)	\$0.00			
9208 (2)	\$0.00			
9209 (12)	\$1.00			
9210 (5)	\$0.00			
9212 (13)	\$0.00			
9213 (6)	\$0.00			

The first column in the table lists the rate code and (in parentheses) the number of services in the bundle.

Clicking an expand button  displays the list of services in the bundle.

918 (11)	\$0.00			
		F322T2	FM R3.2 2YD TRSH 2xWk	Front-Load Bin
		F326T3	FM R3.2 6YD TRSH 3xWk	Front-Load Bin
		F326T3	FM R3.2 6YD TRSH 3xWk	Front-Load Bin
		F326T3	FM R3.2 6YD TRSH 3xWk	Front-Load Bin
		F326T3	FM R3.2 6YD TRSH 3xWk	Front-Load Bin

Typing search criteria into the text fields in the table header filters the contents, displaying only those bundled rates containing the specified criteria.

Clicking the **X** in the text fields clears the filter.


List of Bundled Rates

To modify bundle click edit button. Grayed out names indicate bundles already in use - only amount value can be modified. Bundled rates never used can be deleted. New bundles can be created from grid menu.

Bundled Rate (nbr of services)	Amount	Service Code	Service Description	LOB
<input type="text"/>	<input type="text" value="FILTER"/>	<input type="text" value="f322t2"/>	<input type="text" value="CLEAR"/>	<input type="text"/>
918 (1)	\$0.00	F322T2	FM R3.2 2YD TRSH 2xWk	Front-Load Bin
9160 (13)	\$0.00	F322T2	FM R3.2 2YD TRSH 2xWk	Front-Load Bin
		F322T2	FM R3.2 2YD TRSH 2xWk	Front-Load Bin
		F322T2	FM R3.2 2YD TRSH 2xWk	Front-Load Bin

Editing Bundled Rates

To edit a Bundled Rate:

- Click its **Edit** button.  The **Modify Bundled Rate** screen displays.



Edit functionality will differ according to the bundle's "in-use" status:

- In-use bundles are displayed in grayed-out text. They cannot be deleted, and the only parameter that can be edited is **Amount**.
- Never-used bundles can be deleted, and their edit screen allows all fields to be edited.

In-Use Bundles

Modify Bundled Rate - 9205

This bundled rate is already in use. Only amount can be modified.

Bundle Details		Add Service	
Bundled Rate Name: 9205	Amount: <input type="text" value="0"/>	Service To Add: <input type="text" value="Select Service"/>	
Bundled Services:		Service Details:	
F324T2	FM R3.2 4YD TRSH 2xWk	Code:	
F324T2	FM R3.2 4YD TRSH 2xWk	Dispatch Type:	
F326T2	FM R3.2 6YD TRSH 2xWk	LOB:	
		Material:	
		Weight Limit:	
		Frequency:	
		Recurring:	On Demand: Extra:
			<input type="button" value="+ Add To Bundle"/>

To edit an in-use bundled rate:

- Enter a new value in the **Amount** text field.
- Click **Save** when done.

Never-Used Bundles

To remove services from the bundle check appropriate box. To add another service use dropdown list.

Bundle Details

Bundled Rate Name: 918 Amount: 0

Bundled Services:

F322T2	FM R3.2 2YD TRSH 2xWk	<input type="checkbox"/>
F326T3	FM R3.2 6YD TRSH 3xWk	<input type="checkbox"/>
F326T3	FM R3.2 6YD TRSH 3xWk	<input type="checkbox"/>
F322T2	FM R3.2 2YD TRSH 2xWk	<input type="checkbox"/>
F322T2	FM R3.2 2YD TRSH 2xWk	<input type="checkbox"/>

Add Service

Service To Add: -- Select Service --

Service Details:

Code:
Dispatch Type:
LOB:
Material:
Weight Limit:
Frequency:
Recurring: On Demand: Extra:


+ Add To Bundle

Cancel Save

For unused bundled rates, you can:

- Delete the Bundled Rate.
- Modify the Bundled Rate Name.
- Modify the Amount.
- Remove services from the bundle.
- Add services to the bundle.

To delete a Bundled Rate:

- Select its delete icon. 

To modify Name or Amount:

1. Type a new value into the respective text field.
2. Select **Save**.

To remove a service from the bundle:

1. In the Bundled Services list (left panel), select the check box for the service. The service displays as red strike-through text.

F322T2	FM R3.2 2YD TRSH 2xWk	<input type="checkbox"/>
F322T2	FM R3.2 2YD TRSH 2xWk	<input checked="" type="checkbox"/>

Frequency: Recurring: On Demand: Extra:

+ Add To Bundle

Cancel Save

2. Select **Save**.

To add a service to the bundle:

1. In the Add Service area (right panel), select a service from the **Service to Add** pull-down menu.

Modify Bundled Rate - 918 ✖

To remove services from the bundle check appropriate box. To add another service use dropdown list.

Bundle Details

Bundled Rate Name: Amount:

Bundled Services:

F322T2	FM R3.2 2YD TRSH 2xWk	<input type="checkbox"/>
F326T3	FM R3.2 6YD TRSH 3xWk	<input type="checkbox"/>
F326T3	FM R3.2 6YD TRSH 3xWk	<input type="checkbox"/>
F322T2	FM R3.2 2YD TRSH 2xWk	<input type="checkbox"/>
F322T2	FM R3.2 2YD TRSH 2xWk	<input type="checkbox"/>

Add Service

Service To Add:

-- Select Service --

BLUE 60 GAL EVERY OTHER WEEK

BLUE 60 GAL WEEKLY

BLUE 90 GAL EVERY OTHER WEEK

BLUE 90 GAL WEEKLY

BUSINESS BLUE 60 GAL WEEKLY

BUSINESS BLUE 90 GAL WEEKLY

Commingled Rcycl Bin 2yd SPU(Addl)

Commingled Rcycl Bin 3yd SPU(Addl)

Commingled Rcycl Bin 4yd SPU(Addl)

Commingled Rcycl Bin 6yd SPU(Addl)

Commingled Rcycl Bin 8yd SPU(Addl)

Compactor Empty and Return

Compactor Green Waste Empty

Compactor Inert Waste Empty

Compost Service

Emergency pickup

EQM Service Trash 60 or 90

2. Select **Add to Bundle**. + Add To Bundle
The service is added to the Bundled Services list.

Bundle Details

Bundled Rate Name: Amount:

Bundled Services:
















F322T2	FM R3.2 2YD TRSH 2xWk	<input type="checkbox"/>
F326T3	FM R3.2 6YD TRSH 3xWk	<input type="checkbox"/>
F326T3	FM R3.2 6YD TRSH 3xWk	<input type="checkbox"/>
F322T2	FM R3.2 2YD TRSH 2xWk	<input type="checkbox"/>
F322T2	FM R3.2 2YD TRSH 2xWk	<input type="checkbox"/>
BL90	BLUE 90 GAL WEEKLY	<input type="checkbox"/>


3. Select **Save**.

Exporting Bundled Rates

You can export Bundled Rates for migration to another platform using the Import Reference Data screen. See [Importing and Exporting Reference Data](#).

Case Reasons

Reference Data											
Customer Cases	<table border="1"> <tr> <td> Case Actions</td> <td>+</td> </tr> <tr> <td> Case Reasons</td> <td>+</td> </tr> <tr> <td> Case Source Types</td> <td>+</td> </tr> <tr> <td> Case Statuses</td> <td>+</td> </tr> <tr> <td> Case Types</td> <td>+</td> </tr> </table>	 Case Actions	+	 Case Reasons	+	 Case Source Types	+	 Case Statuses	+	 Case Types	+
 Case Actions	+										
 Case Reasons	+										
 Case Source Types	+										
 Case Statuses	+										
 Case Types	+										
















 This reference data element is a component of the Customer Service Representative (CSR) Dashboard and may not be applicable to your installation.


Case Reasons represent predefined descriptions of the case that the Customer Service Representative will be able to select from a pull-down menu when entering or editing a case.

List of Case Reasons	
Description	+
Collection container is too heavy/big when full	×
Collection staff damaged my recycling container	×
Collection staff spilled recyclables on the ground and did not remove them	×
Collection staff were not wearing pants	×
Collection staff were rude or discourteous	×
Collection vehicle damaged private property	×
Collection vehicle was speeding or operating dangerously	×
This program is too confusing/restrictive/complicated etc.	×
Tim TEST REASON	×
Tim TEST REASON3	×
10	Export

See [Defining CSR Reference Data](#).

Case Source Types

Reference Data											
Customer Cases	<table border="1"> <tr> <td> Case Actions</td> <td>+</td> </tr> <tr> <td> Case Reasons</td> <td>+</td> </tr> <tr> <td> Case Source Types</td> <td>+</td> </tr> <tr> <td> Case Statuses</td> <td>+</td> </tr> <tr> <td> Case Types</td> <td>+</td> </tr> </table>	 Case Actions	+	 Case Reasons	+	 Case Source Types	+	 Case Statuses	+	 Case Types	+
 Case Actions	+										
 Case Reasons	+										
 Case Source Types	+										
 Case Statuses	+										
 Case Types	+										
















 This reference data element is a component of the Customer Service Representative (CSR) Dashboard and may not be applicable to your installation.


Customer Cases will usually be initiated by a communication from the customer—via various means, such as email, telephone, web interface, and so on—to register a complaint or request a service

Customer Cases may also, on occasion, originate with a driver. For example, a driver may notice that a customer's bin is missing a wheel or is damaged to the point that it cannot be lifted with a side-loader. The driver may then relay this information to the back office so that a Customer Case may be created.

See [Defining CSR Reference Data](#).

Case Statuses

Reference Data											
Customer Cases	<table border="1"> <tr> <td> Case Actions</td> <td>+</td> </tr> <tr> <td> Case Reasons</td> <td>+</td> </tr> <tr> <td> Case Source Types</td> <td>+</td> </tr> <tr> <td> Case Statuses</td> <td>+</td> </tr> <tr> <td> Case Types</td> <td>+</td> </tr> </table>	 Case Actions	+	 Case Reasons	+	 Case Source Types	+	 Case Statuses	+	 Case Types	+
 Case Actions	+										
 Case Reasons	+										
 Case Source Types	+										
 Case Statuses	+										
 Case Types	+										

 This reference data element is a component of the Customer Service Representative (CSR) Dashboard and may not be applicable to your installation.










Case status indicates the current state of a customer case within the CSR's work flow.

Three statuses are predefined in the CSR Dashboard:

- Open - Unassigned
- Open - Assigned
- Closed

See [Defining CSR Reference Data](#).

Company

Reference Data							
Organization	<table border="1"> <tr> <td> Company</td> <td></td> </tr> <tr> <td> Line of Businesses</td> <td>+</td> </tr> <tr> <td> Operating departments</td> <td>+</td> </tr> </table>	 Company		 Line of Businesses	+	 Operating departments	+
 Company							
 Line of Businesses	+						
 Operating departments	+						

Company reference data defines the properties of your company.

Used primarily for [Customer Service Report generation](#), Company reference data has the following hierarchy:

- Company
- Region
- Division

- Site
- Service Area

The image shows a hierarchical data entry process. It starts with an 'Edit Company' form, followed by 'Edit Region', 'Edit Division', and 'Edit Site'. Each form has fields for Name, Description, and contact information. The 'Edit Site' form includes a dropdown for 'Division' and 'Region'. Below the 'Edit Site' form, there are two tables: 'Service areas' and 'Yards'. The 'Service areas' table has columns for Name and Description, with 'Nort East Service Area' listed. The 'Yards' table has columns for Name and Description, with 'Y1' and 'Y2' listed. Finally, the 'Edit Service area' form shows a dropdown for 'Site' and a text field for 'Name' and 'Description'.

When generating either the Curbside CSR or the Multi-Family CSR reports, one of the mandatory criteria is *Service Area*. When creating a case, the user will select the service area as part of the report criteria.

The service area is the bottom of the hierarchical company chart.

The screenshot shows a report generation interface. On the left, there are input fields for: Collector Name (Fleetmind Test), Collector ID Number (FM), Service Area (All Service Areas), Reporting Period (All Service Areas), Contact Person (FM Canada), Phone Number (8886391666), and Email Address (CSR@fleetmind.com). The 'Service Area' dropdown is highlighted with a red box. In the center, there is a 'Select date range' section with 'Date from' (2014-07-09) and 'Date to' (2014-07-09) fields. On the right, there is a 'Generate Report' button.

Adding a Region to the Company

To add a Region:

1. Select **Reference Data > Organization > Company** to display the Edit Company page.

Edit Company


Name: abc
Id: abc
Description: [text field]
Street: [text field] Suite: [text field] District: [text field] City: [text field]
State code: AZ Postal code: [text field] Contact name: [text field] Contact Phone: [text field] Contact email: [text field]
* = mandatory field

Regions

Name	Description
gaz	GAZ


Service areas



Region	Division	Site	Service area	Yards
gac	WSX	EDC	North East Service Area	Y1
gac	WSX	EDC		Y2

2. Select the green plus sign icon  in the header area of the dynamic portion of the screen. The Add Region page displays.

Add Region

Company: abc abc
Name: ABC-EastSide
Description: East Side Region
* = mandatory field
abc abc

3. Enter a region name in the **Name** field. This is a mandatory field and must be a unique identifier.
4. Enter a meaningful description for the region in the **Description** field.
5. Click **Save**  when done. Your new Region is added to the Edit Company page.

  **Edit Company**

Name *


Id *

Description

Civic Number Street Suite

State code Postal code Contact name

* = mandatory field



Regions

Name	Description
qaz	QAZ
ABC-EastSide	East Side Region

Adding a Division to a Region

To add a Division to a Region:

1. From the Edit Company page, click the highlighted link for the desired Division to display the Edit Region page.

Edit Company

Name *

Id *

Description

Civic Number Street Suite

State code Postal code Contact name

* = mandatory field

Regions

Name	Description
qaz	QAZ
ABC-EastSide	East Side Region

2

Service areas

Region	Division	Site
qaz	WSX	EDC

- Select the green plus sign icon in the header area of the dynamic portion of the screen.

Edit Region

Company abc abc

Name *

Description

* = mandatory field

abc abc

Divisions

Name	Description

The Add Division page displays.

3. Enter all required information using the text fields and pull-down menu.

Name is a mandatory field and must be a unique identifier.

4. Click **Save** when done.
Your new Division is added to the Edit Region page.

Divisions

Name	Description	
EASTSIDE-DIV-1	East Side Division 1	


Adding a Site to a Division


To add a Site to a Division:

1. From the Edit Division page, select the green plus sign icon in the header area of the dynamic portion of the screen.

The Add Site page displays.

2. Enter all required information using the text fields and pull-down menu.

 Name is a mandatory field and must be a unique identifier.

3. Click **Save**  when done.
Your new Site is added to the Edit Division page.

Sites

Name	Description	
Site-1	EastSide Site 1	 

Adding a Service Area to a Site

To add a Service Area to a Site:

1. From the Edit Site page, select the green plus sign  icon in the header area of the dynamic portion of the screen.

Edit Site

Division: EASTSIDE-DIV-1
 Name: Site-1
 Description: EastSide Site 1

Civic Number: 222
 Street: Main
 Suite: 100
 District:
 City: Winnipeg

State code: MB
 Postal code:
 Contact name: Bubba Lopez
 Contact Phone: 204-555-1212
 Contact email: bubba@abc.com

* = mandatory field

Service areas

Name	Description
0	

Yards

Name	Description
0	

Region	Division	Site	Service area
qaz	WSX	EDC	Nort East Service Area

Region	Division	Site	Yard
qaz	WSX	EDC	y1
qaz	WSX	EDC	y2

The Add Service Area page displays.

Add Service area

Site: Site-1
 Name: Service-Area-1
 Description: Service Area 1

* = mandatory field

Site-1

- Enter all required information using the text fields and pull-down menu.



Name is a mandatory field and must be a unique identifier.

- Click **Save** when done.

Your new Service Area is added to the Edit Site page.

Edit Site

Division: EASTSIDE-DIV-1
 Name: Site-1
 Description: EastSide Site 1

Civic Number: 222
 Street: Main
 Suite: 100
 District:
 City: Winnipeg

State code: MB
 Postal code:
 Contact name: Bubba Lopez
 Contact Phone: 204-555-1212
 Contact email: bubba@abc.com

* = mandatory field

Service areas

Name	Description
Service-Area-1	Service Area 1


Yards


Name	Description
0	

The Service Area will now be an available menu option (and a mandatory field) when generating [Customer Service Reports](#).

Trucks

Trucks Reference Data defines the vehicles used on your routes.

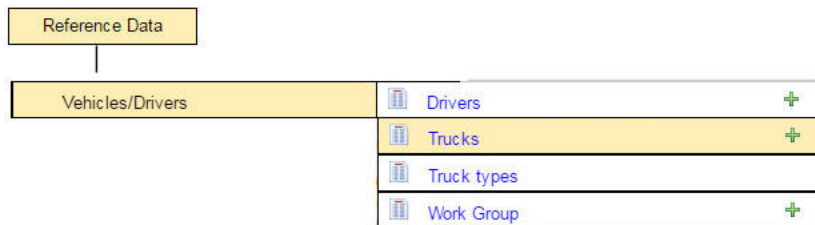
 Because truck creation in the FleetLink Route Management System and the Command Center are independent, they need to be created in both places.

 Residential routes are server-resource intensive. If the system has been setup to send 20 residential routes every morning to trucks that don't exist, valuable route generation time will be wasted.

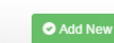












The only data that is functionally important to the system is the name of the truck. All other fields are just descriptive.

Viewing the List of Trucks





- Select **Reference Data > Vehicles/Drivers > Trucks**.



The List of Trucks screen displays.

List of Trucks				
	Name	Truck Type	Container Limit	Work Group
 	1105	Residential/Commercial	0	-
 	1118	Residential/Commercial	0	-
 	1120	Residential/Commercial	0	-
 	1130	Residential/Commercial	0	-
 	1131	Residential/Commercial	0	-
 	1132	Residential/Commercial	0	-

Sorting and Searching

- Use the **Sort Ascending/Sort Descending** arrows   to choose a column's sort order.
- Type a search string into the text box of a column header and press the **Search** icon  to search for a truck or a description.
Use the **Reset Search** icon  to clear the contents of the search text field.

Editing Truck Information

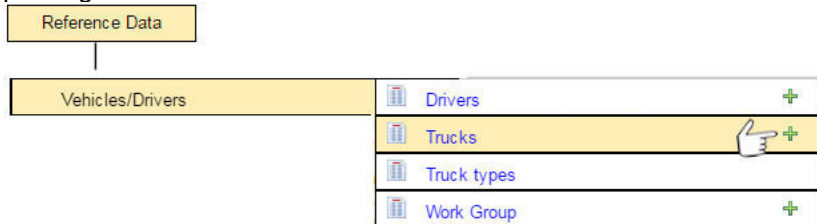
- Click on an item in the Truck or Description column.
The Edit Truck screen displays.

- To edit truck information, use the text fields and pull-down menus. Select **Save Truck** when done.

Adding a Truck Manually

You can add a truck manually in one of two ways:

- From the static portion off the UI by selecting **Reference Data > Vehicles/Drivers > Trucks** and clicking the green plus sign icon.



- From the List of Trucks screen by selecting the green plus sign icon in the header area of the dynamic portion of the screen.

Truck	Truck Type	Description	Work Group	
3028	Roll-off	SL (1 Tip)		
3031	Residential/Commercial	SLM	SOUTH-G	✖
3033	Residential/Commercial	SLM		✖
3036	Residential/Commercial	OTT		✖
3037	Residential/Commercial	SLM		✖
3041	Residential/Commercial	SLM		✖
3042	Residential/Commercial	SLM		✖
3045	Residential/Commercial	SLM		✖
3046	Residential/Commercial	SLM		✖
4006	Residential/Commercial	RL (1 Tip)		✖
4009	Residential/Commercial	RL (1 Tip)		✖
4010	Residential/Commercial	RL (1 Tip)		✖
4018	Residential/Commercial	RL		✖
4028	Residential/Commercial	RL		✖
4032	Residential/Commercial	RL (1 Tip)		✖
4036	Residential/Commercial	SLM (1 Tip)		✖
85		Total: 85		Export

The Add Truck screen displays.


Add Truck	
Truck	
Truck: JSL-1	Container Type: BRL
Truck Type: Residential/Commercial	Container Type: Select a Container
Container Limit: 	Container Type: Select a Container
Description: John's Sideloader	
Comments: <div style="border: 1px solid gray; height: 50px;"></div>	
Save Truck	

3. To add truck information, use the text fields and pull-down menus.

4. Press **Save Truck** when done.

Deleting a Truck

To delete a truck:

- From the List of Trucks screen, select the delete (red X)  icon for the truck you wish to remove from the list.

List of Trucks			
Truck	Truck Type	Description	Work Group
3028	Roll-off	SL (1 Tip)	
3031	Residential/Commercial	SLM	SOUTH-G
3033	Residential/Commercial	SLM	
3036	Residential/Commercial	OTT	
3037	Residential/Commercial	SLM	
3041	Residential/Commercial	SLM	
3042	Residential/Commercial	SLM	
3045	Residential/Commercial	SLM	
3046	Residential/Commercial	SLM	
4006	Residential/Commercial	RL (1 Tip)	
4009	Residential/Commercial	RL (1 Tip)	
4010	Residential/Commercial	RL (1 Tip)	
4018	Residential/Commercial	RL	
4028	Residential/Commercial	RL	
4032	Residential/Commercial	RL (1 Tip)	
4036	Residential/Commercial	SLM (1 Tip)	
85	Total: 85		Export

- You will be prompted to confirm deletion of the record.

Confirm deletion

Are you sure you want to delete the record 3028!

Drivers

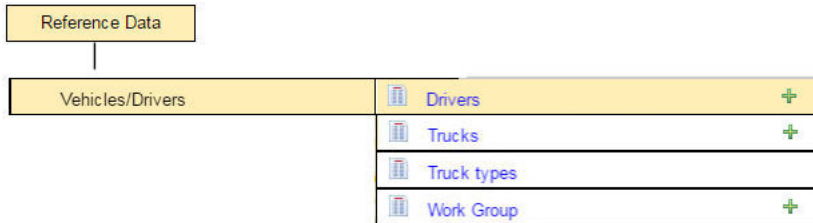
Drivers Reference Data defines the personnel authorized to drive the vehicles in your fleet.

Changes to drivers in this page are reflected in the drivers master list, and must conform to the waste messaging API.

MSGTYPE=DRV	3	alpha-num	mandatory
VEHNAME=33-106	10	alpha-num	mandatory
LSTVER=050418160000	12	alpha-num	mandatory
LSTSIZE=00007	5	num	mandatory
00001CODE=AA	20	alpha-num	mandatory
00001DESC=ABDUL	20	alpha-num	mandatory
00002CODE=AM			

Viewing the List of Drivers

- Select **Reference Data > Vehicles/Drivers > Drivers**.



The **List of Drivers** screen displays.


Name	Code	Start date	Crew Member
Adam Chouinard	83	2014-05-21 00-33-45	No
Ajay Mann	105	2014-05-21 00-33-45	No
Albert Prince	46	2014-05-21 00-33-45	No
Alex Venegas BK	136	2014-05-21 00-33-45	No
Allen Cook	16	2014-05-21 00-33-45	No
Areil Capiendo	77	2014-05-21 00-33-45	No
Brad Wiebe	89	2014-05-21 00-33-45	No
Brian Kaplan	112	2014-05-21 00-33-45	No
Brian Clyne	13	2014-05-21 00-33-45	No
Calvin Dick	56	2014-05-21 00-33-45	No
Charanpreet Sharma	3	2014-05-21 00-33-45	No
Charles Rudolph	4	2014-05-21 00-33-45	No
Charles Lenton	54	2014-05-21 00-33-45	No
Charles Rudolph	67	2014-05-21 00-33-45	No
Charles Boyd	7	2014-05-21 00-33-45	No
Chris Desjarlais	109	2014-05-21 00-33-45	No


90 Total: 90 Export

This screen is a tabbed interface that comprises lists of active and inactive drivers.

Sorting and Searching

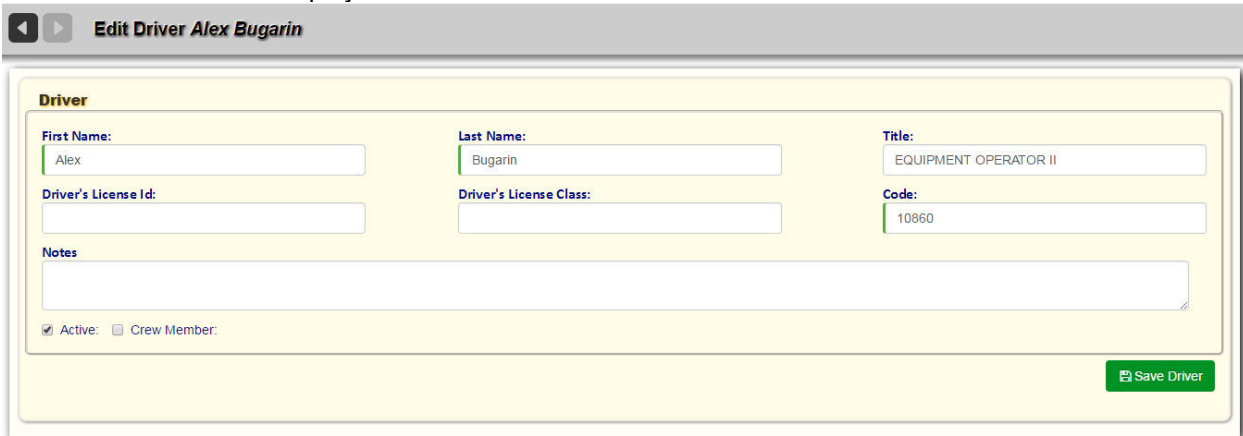
- Use the **Sort Ascending/Sort Descending** arrows to choose a column's sort order.

- Type a search string into the text box of a column header and press the **Search** icon  to search for a **Driver**, **Code**, or **Start Date**.

Use the **Reset Search** icon  to clear the contents of the search text field.

Editing Driver Information

- Click on an item in the **Driver**, **Code**, or **Start Date** column. The Edit Driver screen displays.



Driver

First Name: Alex

Last Name: Bugarin

Title: EQUIPMENT OPERATOR II

Driver's License Id:

Driver's License Class:

Code: 10860

Notes

Active Crew Member

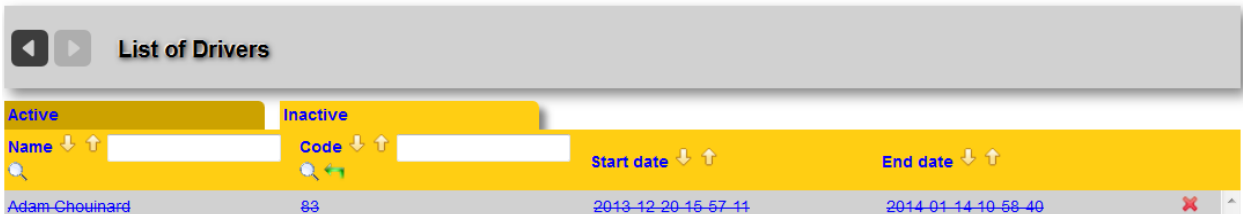
Save Driver

To edit driver information, use the text fields and check boxes. Press **Save Driver** when done.

CHANGING DRIVER STATUS

To change a driver's status from Active to Inactive:

- Uncheck the **Active** check box , and then press **Save Driver**. The driver's name is moved from the Active to Inactive list.



List of Drivers

Active		Inactive	
Name	Code	Start date	End date
Adam Chouinard	83	2013-12-20-15-57-11	2014-01-14-10-58-40

To return a driver to Active status.

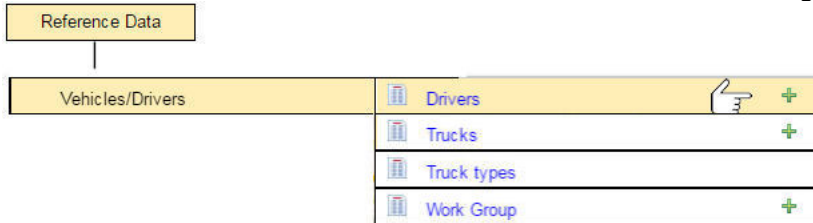
- From the Inactive list, click on a driver's name to re-display the **Edit Driver** screen.
- Check the **Active** check box, and then press **Save Driver**.

The driver is now returned to the Active list.

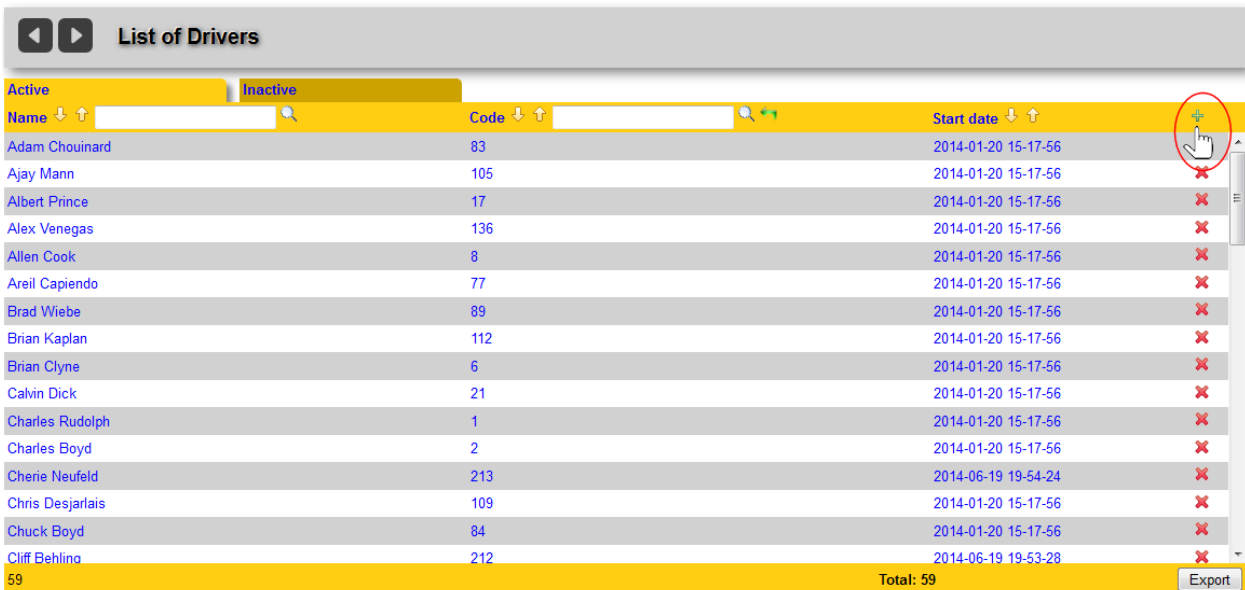
Adding a Driver Manually

You can add a driver manually in one of two ways:

- Select **Reference Data > Vehicles/Drivers > Drivers** and click the green plus sign icon.



- From the **List of Drivers** screen by selecting the green plus sign icon in the header area of the dynamic portion of the screen.




The **Add Driver** screen displays.

- To add driver information, use the text fields and pull-down menus.
- Press **Save Driver** when done.
The newly added driver is placed automatically in the Active list.

Deleting a Driver

To delete a driver:

- From the List of Drivers screen, select the delete (red X)  icon for the driver you wish to remove from the list. You will be prompted to confirm deletion of the record.

Confirm deletion

Are you sure you want to delete the record Dweezil Fong!

Activity Codes

Activity Codes Reference Data defines the codes that indicate the completion status for stops on your routes; they are completion codes that are included in the activity master list that's sent to the mobile.

Examples include Completed (normal completion), UTS (unable to service)—bin not out, access blocked, cart misplaced, and so on.

Activity Codes Reference Data defines the buttons or menu options available on the FleetLink Mobile WasteApp user interface, their captions, and the order in which they are presented to the user.


They are restricted to the Waste API fields.

MSGTYPE=ACT	3	alpha-num	mandatory
VEHNAME=33-106	10	alpha-num	mandatory
LSTVER=050419160000	12	alpha-num	mandatory
LSTSIZE=00004	5	num	mandatory
00001CODE=C	4	alpha-num	mandatory
00001DESC=COMPLETE	20	alpha-num	mandatory
00001EXCEP=N	1	'Y' or 'N' (def=Y)	optional
00001COMP=Y	1	'Y' or 'N' (def= N)	optional

Viewing the List of Activity Codes

- Select **Activity Codes** from the Reference Data pull-down menu.

Reference Data

 Activity Codes +

The **List of Activity Codes** screen displays.

List of Activity Codes						
Add New	Code	Sequence	Completion	Description	Reroutable	Dispatch Type
 	DONE	1	Yes	Completed	Yes	
 	WRNG	2	No	Wrong Selection	Yes	
 	XTRA	3	Yes	Extra Service	Yes	
 	ROUT	4	Yes	Re-Route	Yes	
 	NOUT	5	Yes	Not Out	Yes	
 	NOFE	6	Yes	Not Out (Trip Fee)	Yes	
 	FREO	7	Yes	Freon (Fee)	Yes	
 	EMPT	8	Yes	Empty	Yes	
 	CONT	9	Yes	Contaminated	Yes	
 	BLKD	10	Yes	Blocked	Yes	

Sorting and Searching

- Click on a column name to sort ascending or descending.
- Type a search string into the filter text box of a column header.

Editing Activity Code Information

- Click on an item in the Activity Code column. The **Edit Activity Code** screen displays.

◀ ▶ **Edit Activity Code *DONE***

Activity Code

Code:

Sequence:

Completion:

Description:

Dispatch Type:

Reroutable:

Successful:

[Save Activity Code](#)

- To edit activity code information, use the text fields and pull-down menu.

Press **Save Activity Code** when done.

About Reroutable Activity Codes

All Activity Codes have an associated **Reroutable** flag.

Used primarily for exceptions, when this check box is selected, the driver will have the option of making the unserviceable stop Reroutable, which means that it will be removed from his assignment list and made available for rescheduling by Dispatch on another route.

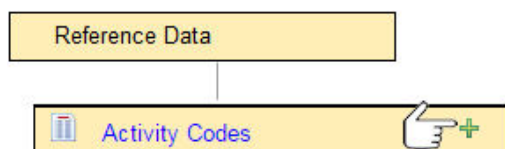
A typical example would be the **BLOCKED REROUTE** button when logging an exception status.




Adding an Activity Code Manually

You can add an Activity Code manually in one of two ways:

- From the static portion off the UI by selecting **Reference Data > Activity Codes** and clicking the green plus sign icon.




- From the **List of Activity Codes** screen by selecting the **Add New** button. 

The **Add Activity Code** screen displays.

1. To add activity code information, use the text field and pull-down menus.
2. Press **Save Activity Code** when done.

Deleting an Activity Code

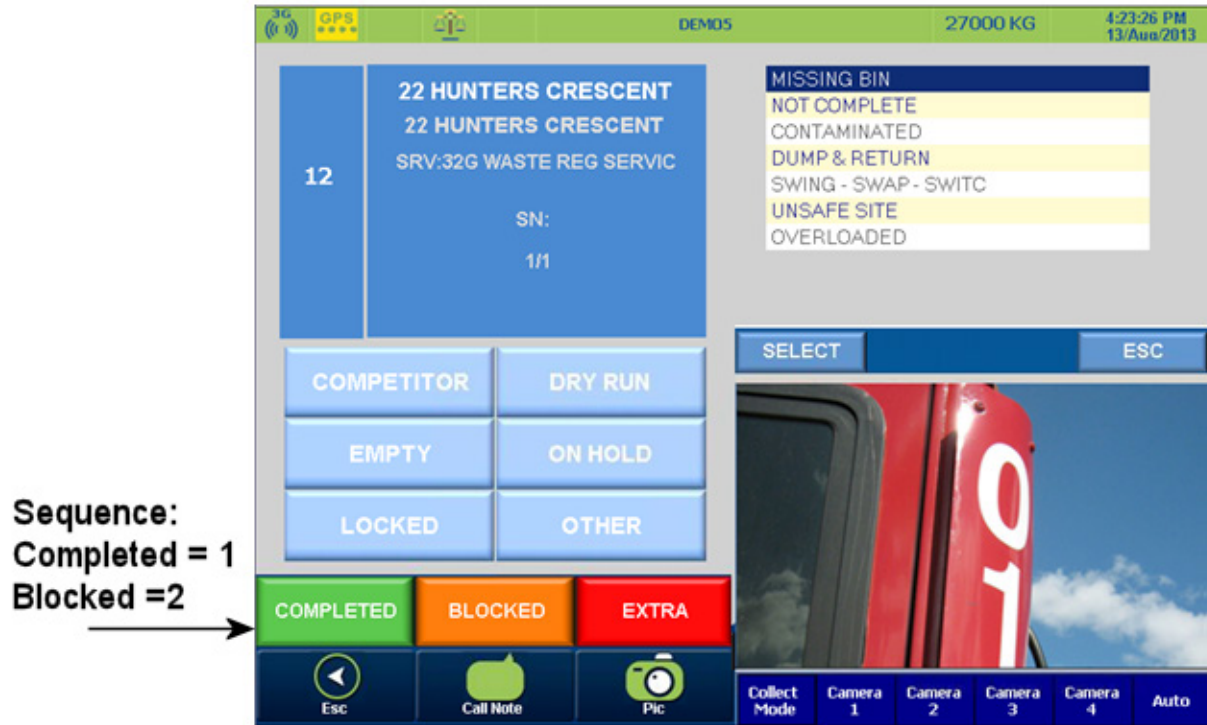
To delete an activity code:

- From the List of Activity Codes screen, select the **Delete** button for the item you wish to remove from the list.  You will be prompted to confirm deletion of the record.

Resequencing Activity Codes

An activity code's value in the Sequence column defines the order in which that function (button or menu option) appears on the FleetLink Mobile WasteApp user interface.

For example:



You can customize this order to suit your requirements or preferences by editing the value in the **Sequence** column.

To resequence an Activity Code:

- From the **Edit Activity Code** screen, type the desired value into the **Sequence** text field, or use the increment/decrement controls to change the value..



Exporting Activity Codes


You can export Activity Codes for migration to another platform using the Import Reference Data screen.

See [Importing and Exporting Reference Data](#)

Facilities

Disposal Facilities Reference Data specifies the Disposal Facilities utilized by your business . Information includes contact information and Facility location, which the application can translate into geographic coordinates for use by the FleetLink Mobile WasteApp .

The Route Management System does not have the ability to add/remove facilities based on LOB or division. This means that all trucks will receive all entries in the in this list (unless modified through the FleetLink Connector)

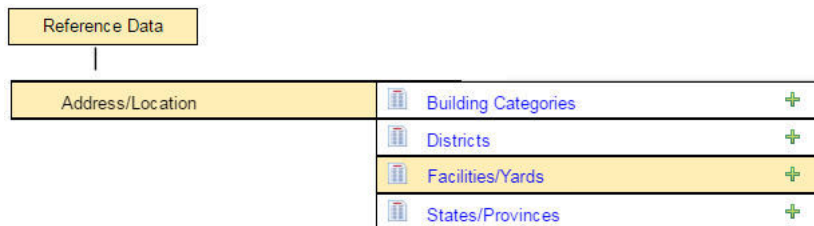
 Disposal messages coming from the mobile are not inserted to the route system database.

Only the code and description are passed to the FleetLink Connector; the column length is respected from the waste API.

MSGTYPE=FAC	3	alpha-num			mandatory
VEHNAME=33-106	10	alpha-num			mandatory
LSTVER=050630160000	12	alpha-num			mandatory
LSTSIZE=00005	5	num			mandatory
00001CODE=TT	10	alpha-num			mandatory
00001DESC=TIDEMORE TRANSFER	20	alpha-num			mandatory
00001GPSLAT1=	10	alpha-num	+/-deg.decimal	Note1	Optional
00001GPSLON1=	10	alpha-num	+/-deg.decimal	Note1	Optional
00001GPSLAT2=	10	alpha-num	+/-deg.decimal	Note1	Optional
00001GPSLON2=	10	alpha-num	+/-deg.decimal	Note1	Optional
00002CODE=ATTAR					
00002DESC=ATTAR METALS					
00003CODE=BFI VAUG					
00003DESC=BFI – VAUGHAN					
00004CODE=CANSORT					
00004DESC=CAN-SORT RECYCLING					
00005CODE=CAPITAL					
00005DESC=CAPITAL – BRAMPTON					

Viewing the List of Facilities

- Select **Reference Data > Address/Location > Facilities.**




The **List of Facilities** screen displays.

List of Facilities/Yards						
Facility		Yard				
	Name	Sequence	Description	Address	Phone	Fax
	AJ	5	Apache Junction Landfill			
	AMERI	15	American Metals			
	ARIZONA	12	Arizona Pacific			
	BIO	14	BioPappel			

Sorting and Searching

- Click on a column name to sort ascending or descending.
- Type a search string into the filter text box of a column header.

Editing Facility Information

- Click on the **Edit** button for a Facility. 
The **Edit Facility** screen displays.



◀ ▶ Edit Facility *BIO*

Code  Sequence

Description

Address


Phone Fax

Latitude Longitude GeoZone 

Integrated

Right click on map to pin facility position. Drag the pin icon to change the position of facility.

Show Catalog Save Facility

- To edit Facility information, use the text fields.
 - **Code** and **Description** are mandatory fields; **Code** must be a unique identifier.
 - **Sequence** is the order in which the Facility is displayed among the controls or menu options on the FleetLink Mobile WasteApp user interface. You may leave this value at **0** for the time being and edit later.
 - **Address**, although not a mandatory field, is one whose contents can be used by the system to calculate the geographic coordinates for the facility. Specify full address including ZIP code or Postal Code when ever possible.
 - **Phone** and **Fax** fields are for human reference only, and have no impact on the functionality of FleetLink Mobile WasteApp.
 - **Latitude** and **Longitude** are the geographic coordinates of the facility. You may enter these manually or omit them altogether. If you have specified a full and valid address in the **Address** field, the application may calculate the coordinates and copy them to these fields automatically.
 - **GeoZone**: A unique identifier for the GeoZone. Make selection using the pop-up window.
 - **Integrated**: Specifies whether the Facility is equipped with integrated weigh scales.
 - **Map controls**:
 - Right-clicking on a location on the map pins the Facility at those coordinates and updates the Latitude and Longitudes fields accordingly.
 - Dragging the pin icon repositions the Facility and updates the Latitude and Longitudes fields with the new coordinates.
 - Clicking the “eye”  button zooms the map into the Facility.

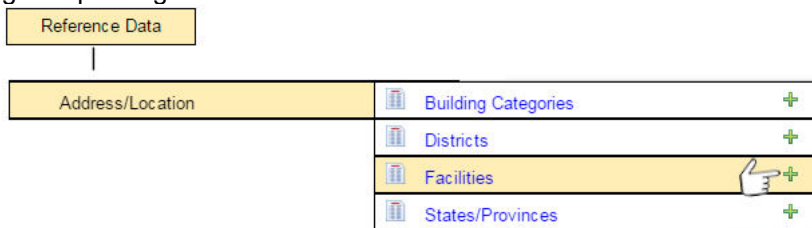
- **Show Catalog:** If the Facility has provided a catalog with prices for disposal materials, clicking this button displays the catalog. You can update the catalog with new materials by clicking the catalog's **Add** button.


2. Press **Save Facility** when done.

Adding a Facility

You can add a Facility in one of two ways:

- From the static portion off the UI by selecting **Reference Data > Address/Location > Facilities** and clicking the green plus sign icon .



- From the **List of Facilities** screen by selecting the **Add New** button.  The **Add Facility** screen displays.
- To add Facility information, use the text fields. See [Editing Facility Information](#) for field descriptions.
- Press **Save Facility** when done

Resequencing a Facility

Sequence refers to the order in which facilities are displayed on the driver's user interface.

You can resequence a facility in one of two ways:

- From the List of Facilities, by typing a value in the **Sequence** field, and then clicking **Save**.

- From the Edit Facility screen, by typing a new value in the text field, or using the increment/decrement controls.

Sequence

Deleting a Facility

To delete a Facility:

- From the **List of Facilities** screen, select the **Delete** button for the item you wish to remove from the list. You will be prompted to confirm deletion of the record.



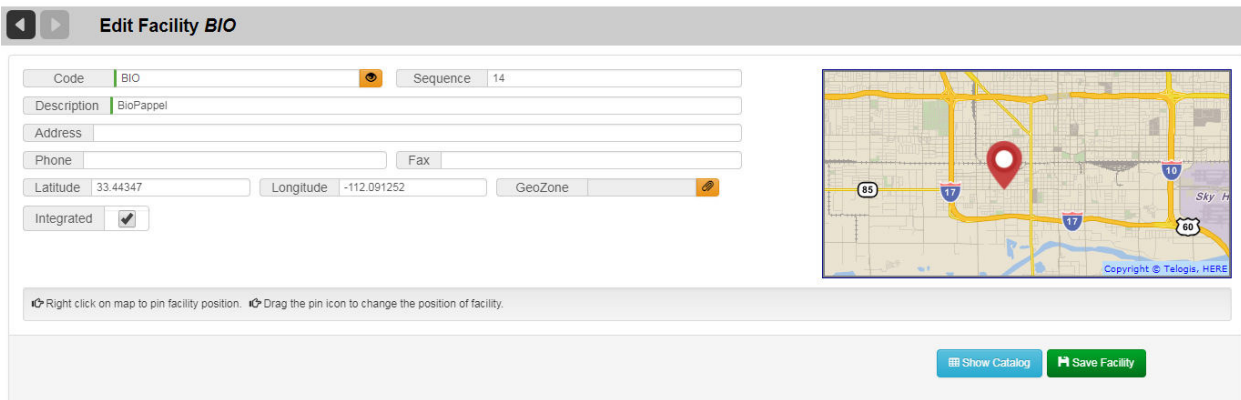
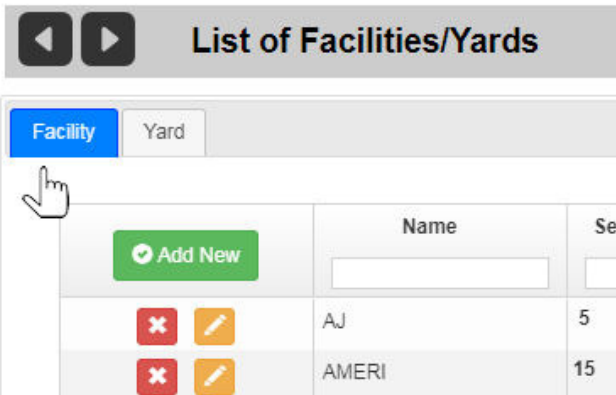
Warning !!!

You are about to delete AZPAC.

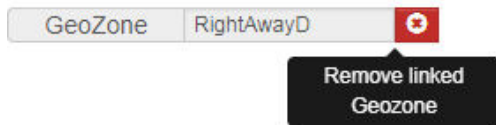
Are you sure?

Assigning a GeoZone to a Facility

- Open the List of Facilities (**Reference Data > Facilities/Yards**), choose the **Facilities** tab, and select a Facility from the list to open its edit screen.



If the Facility is already linked to a GeoZone, its name is displayed in the GeoZone text field.



Otherwise, this field will be blank.

i You can break the current link by selecting the delete button.

To link an unlinked Facility:

2. Select the paper clip icon (**Link Facility to a GeoZone**) to show GeoZones.



Controls are provided to show all GeoZones in the RMS and to filter the list according to the Facility's coordinates. Hovering your mouse on a GeoZone name displays its polygon on the map.

Linked to GeoZone
✕

To set a geozone to the current facility click on the + button in the following list ➡ Display All GeoZones

	GeoZone Name	Description
+	49429FCF23	
+	AlexTest	
+	AlexTest2	
+	JuanDGeozone1	Geozone for test
+	JdRtGzn	Juan David test route geozo
+	0C492C2B04	
+	0C49CEA205	
+	YOU-ZONE1	test
+	RightAwayD	Right Away Disposal
+	MesaTransf	Mesa Transfer Station
+	SANTANTRAN	San Tan Transfer Station
+	GermannTra	Germann Transfer Station
+		ReCommunity Transfer Stat

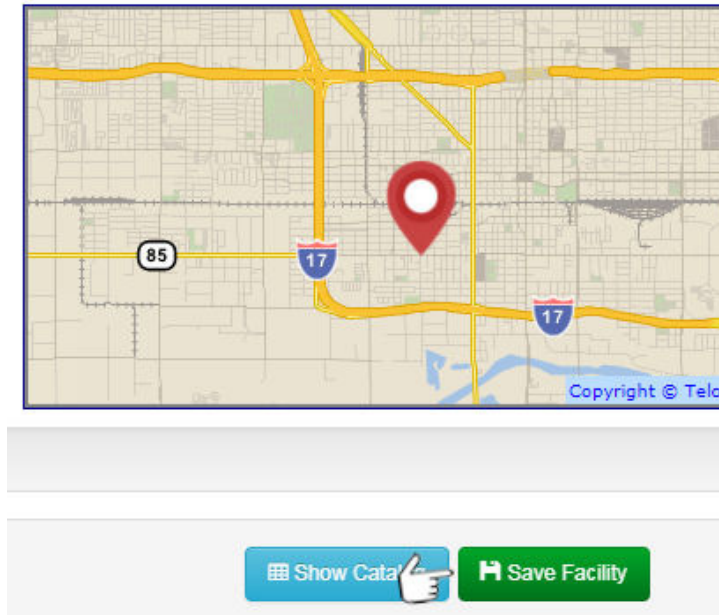
Filter geozone based on position of facility


3. Set a GeoZone by clicking on the Add icon adjacent to the GeoZone name.

The GeoZone is assigned to the Facility and you are returned to the Edit Facility screen, where you must select **Save Facility**.

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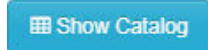


 If none of the GeoZones displayed when you select Show GeoZones is suitable for the Facility, you can create your own Generic GeoZone, return to this edit page, and assign the new GeoZone to the Facility. See






Managing Costs for a Facility



RMS provides the capability to manage a catalog of costs per material at disposal facilities.




1. Select **Show Catalog**.



The Facility Price Catalog displays showing the Name, Description, and a date range for which the catalog is valid.

Facility Price Catalog				
	Name	Description	Start Date	End Date
    	CATALOG1	Catalog 1	2017-Jul-20	2017-Sep-20 ^


CONTROLS	
	Add a material to the catalog.
	Show material cost.


	Delete material.
	Edit material.
	Clone price catalog.

Adding a Catalog Item

1. Click the **Add** button  in the table header.




Facility Price Catalog
×






2. Enter a name, description, and start date. End Date is optional.
3. Select **Save**.
The material is added to the catalog.

Facility Price Catalog
×

	Name	Description	Start Date	End Date
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	CATALOG1	Catalog 1	2017-Jul-20	2017-Sep-2
	CATALOG2	Catalog 2	2017-Oct-16	

Editing a Catalog Item

To edit a material item:

1. Click the **Edit Material** button  and make modifications as required on the Facility Price Catalog.

Facility Price Catalog ×

Name	<input type="text" value="CATALOG2"/>
Description	<input type="text" value="Catalog 2"/>
Start Date	<input type="text" value="16-Oct-2017"/> ☰
End Date	<input type="text"/> ☰

Save

2. Select **Save** when done.

Deleting a Catalog Item

To delete a catalog item:

1. Select the **Delete Material** button . The item is removed from the catalog

Managing Material Costs

1. Select **Show Material Cost**.
If no costs have been assigned, a message displays in the Cost area.

Facility Price Catalog

	Name	Description	Start Date	End Date
+	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
\$	<input type="text" value="ALOG1"/>	<input type="text" value="Catalog 1"/>	<input type="text" value="2017-Jul-20"/>	<input type="text" value="2017-Sep-2"/>
\$	<input type="text" value="CATALOG2"/>	<input type="text" value="Catalog 2"/>	<input type="text" value="2017-Oct-16"/>	

There is no material cost...

Add Material Cost

2. To assign a cost, click **Add Material Cost**.

3. Select **Material** and **Units** from their respective menus, and enter a cost in the **Cost** text field.
4. Click **Save** when done.
The item is added to the list.

Facility Price Catalog				
	Name	Description	Start Date	End Date
	CATALOG1	Catalog 1	2017-Jul-20	2017-Sep-2
	CATALOG2	Catalog 2	2017-Oct-16	

	Material	Measurement	Cost
	TIRES	Ton	211.88










Cloning a Catalog

1. Select the **Clone Catalog** button.



The catalog and all its associated costs are added to the list, where you can rename, edit it, and change date range as required.

Facility Price Catalog

	Name	Description	Start Date	End Date
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
   	CATALOG1	Catalog 1	2017-Jul-20	2017-Sep-20
   	CATALOG1	Catalog 1	2017-Jul-20	2017-Sep-20

Exporting Facilities

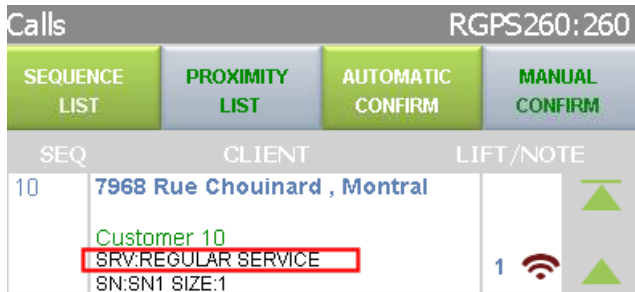
You can export Facilities for migration to another platform using the Import Reference Data screen. See [Importing and Exporting Reference Data](#).

Work Groups

See Managing Work Groups.

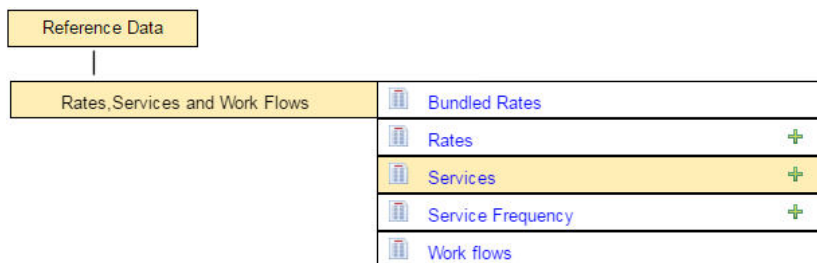
Services

Services Reference Data specifies the types of waste management services provided by your company and, hence, the service types displayed on the calls list and menus of the FleetLink Mobile WasteApp user interface.

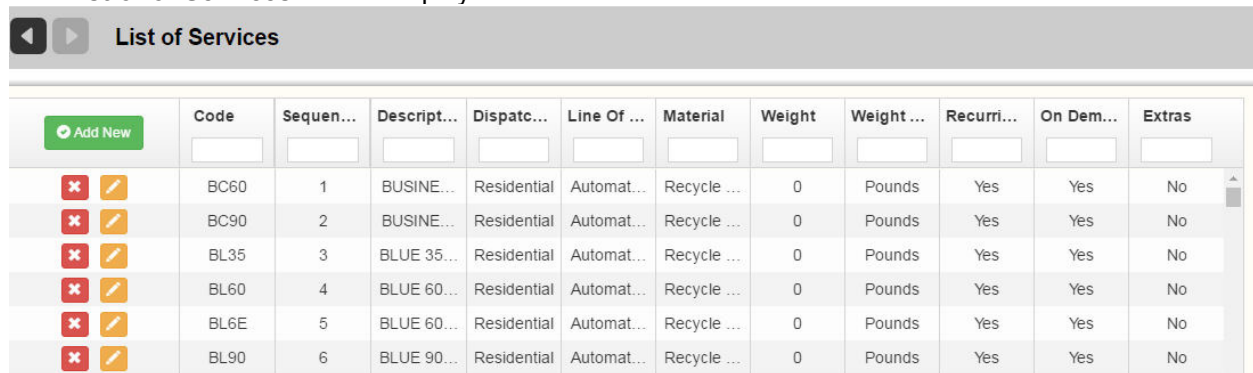


Viewing the List of Services

- Select **Reference Data > Rates, Services and Work Flows > Services**.



The **List of Services** screen displays.



Sorting and Searching

- Click on a column name to sort ascending or descending.
- Type a search string into the filter text box of a column header.

Editing Services Information

- Click on the **Edit** button for a Service. The **Edit Service** screen displays.

Edit Service 01J2

Service Definition

Service Code: Sequence: LOB:

Service Description: Material:

Dispatch Type: Minimum Weight: Pounds

Weight Limit: Pounds

Frequency:

Service Cycles

On-Demand
 Extra
 Recurring

Default recurring workflow:

Supported Containers

Container Type	Size
FLBIN	4 Yards

Workflows & Rates

Workflow	Rate Description	Basic Service	Extra Pickup	Extra Weight	Refused Service	Cancel Cost
Add Casters	Add Casters	\$20.15	\$0.00	\$0.00	\$0.00	\$0.00
Add Casters NoChrg	Add Casters NoChrg	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Add NoChrg Casters	Add NoChrg Casters	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Remove Casters	Remove Casters	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Remove NoChrg Casters	Remove NoChrg Casters	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Empty Bin	R3.2 1xWK CDBD	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

2. To edit Service information, use the text fields, check boxes, and pull-down menus.
 - **Service Code** is a mandatory field and must be a unique identifier.
 - **Service Description** is a mandatory field. Enter a meaningful description of the service.
 - **Sequence** defines the order in which the Service appears in the FleetLink Mobile WasteApp user interface. This can be left at 0 for the time being; you can edit the value later.
 - **(LOB) Line of business** specifies the market being served, e.g., *Commercial*, *Residential*; must match values defined in [Lines of Business](#). If you have not already defined Line of Business reference data, this will menu will be empty.
 - **Dispatch type**: selects a type of dispatch, and hence, type of vehicle for the service.
 - **Material** specifies the waste material to be collected; must match values defined in [Material Types](#). If you have not already defined Material Types reference data, this will menu will be empty.
 - **Minimum weight**: Used to formulate correction factor for recording lift weights. (Can be left at 0.)
 - **Weight** limit specifies the Weight capacity of the bin or cart.
 - **Weight unit** is the unit of measurement; must match values defined in [Volume and Weight Units](#). If you have not already defined Units reference data, this will menu will be empty.
 - **Frequency** specifies the regularity with which the service is provided, e.g., weekly.
 - **Recurring** denotes a regularly scheduled service, for example, weekly or bi-weekly.
 - **Extra** specifies whether the service is considered an *Extra* service.
 - **On demand** specifies whether the service is an *On Demand* service.


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- **Default Recurring Work flow** specifies the description of the task, for example, *Cart to be replaced*; must match values defined in *Work Flows* . If you have not already defined Work Flow reference data, this will menu will be empty.
- **Supported Containers:** Use this area to manage (add, delete) containers supported by the service.
- **Workflows and Rates:** Use this area to manage (add, delete) to manage the work flows and associated billing rates supported by the service.

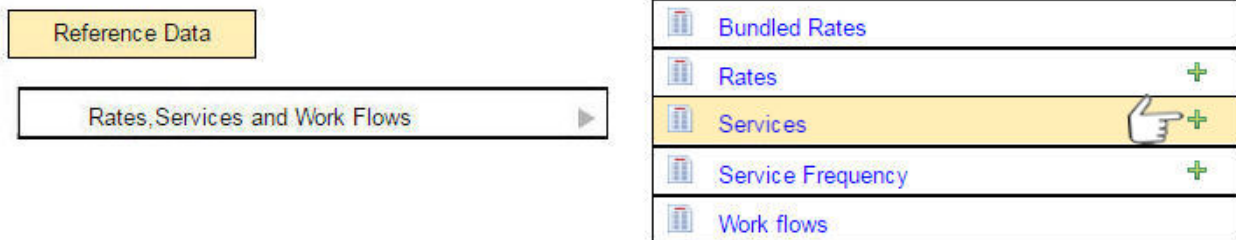
3. Press **Save Changes** when done.

Adding a Service

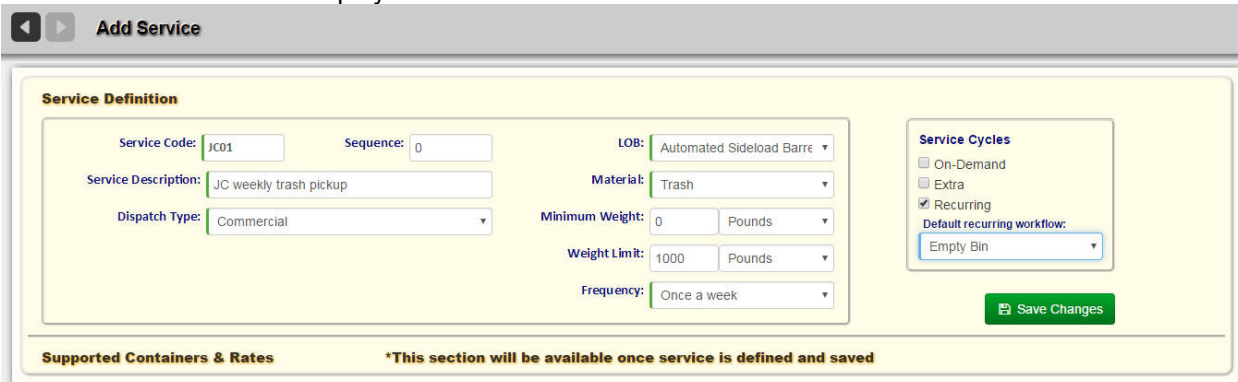
 Adding Services is a step that is best left until you have defined all other Reference Data, as Services have dependencies on several other Reference Data categories.

You can add a Service in one of two ways:

- From the static portion of the UI by selecting **Reference Data > Rates, Services and Work Flows > Services** and clicking the green plus sign icon .



- From the **List of Services** screen by selecting the **Add New** button . The **Add Service** screen displays.



1. To add Service Definition information, use the text fields, pull-down menus, and check boxes. See [Editing Services Information](#) for field descriptions.
2. Once you have specified the Service Definition data and saved your changes, the page refreshes and you can add [Container and Rates](#) information.

Supported Containers, Workflows and Rates

To specify supported container(s):

1. Select **Add Container**.
2. From the Add Container window, select container type(s), and then click **Save**.

*Select 1 or more container type from list below to associate it to service

Container Type	Size	Select
ROBIN	40 Yards	<input type="checkbox"/>
FLCOMP	6 Yards	<input type="checkbox"/>
ROBIN	10 Yards	<input type="checkbox"/>
ROBIN	30 Yards	<input type="checkbox"/>
BRL	60 Gallons	<input checked="" type="checkbox"/>
BRL	90 Gallons	<input checked="" type="checkbox"/>
FLCOMP	2 Yards	<input type="checkbox"/>

Cancel Save

The containers are added to the list of those supported.

3. Select **Add Work Flow and Rate.** [+ Add Work Flow & Rate](#)
4. Select a Workflow from the list.
5. Choose a Rate Code or, optionally, create a new one by selecting **Create New Rate.** [+ Create New Rate](#)
The selected rate code is applied to the workflow.

Add Workflows and Rates

Choose workflow(s) below then click on rate to add it to selected workflow(s). Only workflows with associated rates will be added to the service. [+ Create New Rate](#)

Filter Workflows:

Filter Rates:

Workflow	Rate Code
Add Casters	
Add Casters NoChrg	
Add NoChrg Casters	
Deliver Bin	
Deliver Chrg	
Deliver Chrg Addl	
Deliver FullChrg	
Deliver HalfChrg	
Deliver NoChrg	
Empty Bin	RTDF
Fee	
Install Lock Chrg	

Rate Code	Description	Basic Service	Extra Pickup	Extra Weight	Refused Service	Cancel Cost
RTDF	Default rate	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

[Cancel](#) [Save](#)

6. Select **Save.**

Deleting a Service

To delete a Service:

- From the **List Services** screen, select the **Delete** button for the item you wish to remove from the list.
- You will be prompted to confirm deletion of the record.

Delete service

Warning !!!
You are about to delete this service: BL90.
Are you sure?

[Delete](#) [Cancel](#)

Exporting Services

You can export Services for migration to another platform using the Import Reference Data screen. See [Importing and Exporting Reference Data](#).

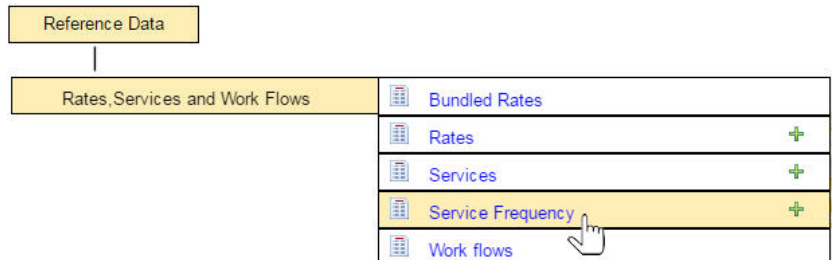
Service Frequencies

Service Frequency Reference Data specifies the frequency with which services are rendered at a Customer Location, for example, Daily, Twice a Week, On-Demand.

Viewing the List of Service Frequencies

- Select **Reference Data > Rates, Services and Work Flows > Service Frequency**

The List of Service Frequencies screen displays.



Service Frequencies

Modification History

	Name	Description	Frequency	Interval (Every)	Occurrences
	ONWK	Once a week	Weekly	1	1
	1xWk	1xWeek	Weekly	1	1
	2xWk	2xWeek	Weekly	1	2
	3xWk	3xWeek	Weekly	1	3
	4xWk	4xWeek	Weekly	1	4
	5xWk	5xWeek	Weekly	1	5
	6xWk	6xWeek	Weekly	1	6
	7xWk	7xWeek	Weekly	1	7
	EOW	Every Other Week	Monthly	2	1
	ON DEMAND	ON DEMAND	Monthly	1	1

Adding a New Service Frequency

To add a new service frequency:

- Select the **Add New** button.
- The Add Service Frequency screen displays.



Service Frequency

Name

Description

On-Demand On-Demand Capable

frequency: Daily Weekly Monthly

frequency: Daily Weekly Monthly

frequency: Daily Weekly Monthly

Interval (Every)

Week of the Month
 1 Month(s)
 2 Month(s)
 3 Month(s)

frequency: Daily Weekly Monthly

Interval (Every)

Week of the Month
 1st 2nd 3rd 4th Last

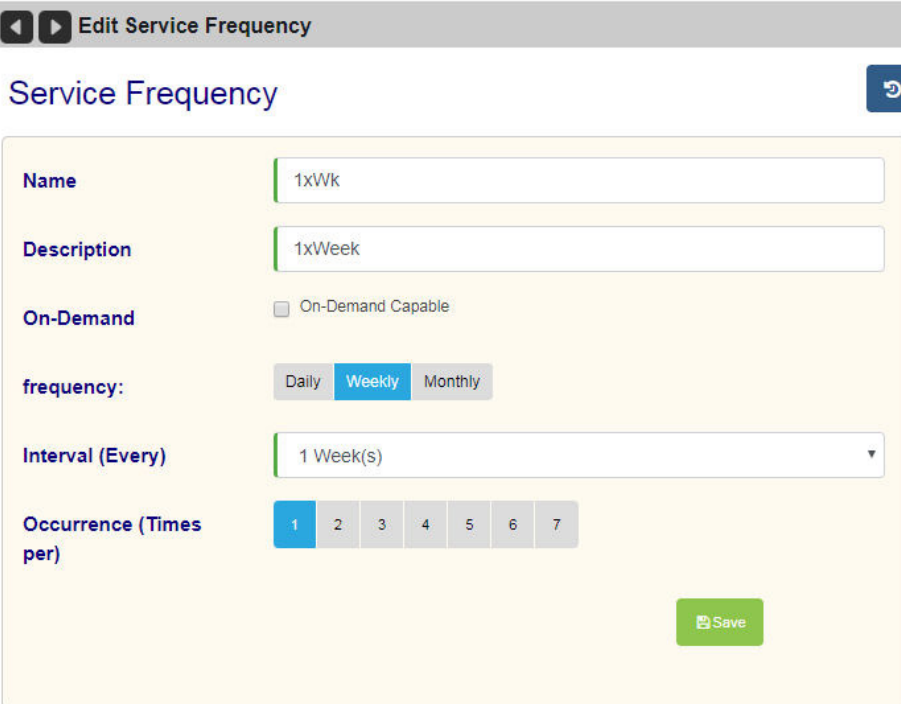
2. Enter a unique **Name** and a **Description** in their respective text fields.
3. Choose the **On-Demand** check box, as appropriate.
4. Select a Frequency: **Daily**, **Weekly**, or **Monthly**.
5. For Weekly and monthly frequencies, select an **interval**.
6. Click **Save** to commit your changes.

Editing a Service Frequency

To edit a service frequency:

1. Select its **Edit** button. 


The Edit Service Frequency screen displays.



2. Make the required modifications as described for *Adding a New Service Frequency*.

Deleting a Service Frequency

To delete a service frequency:

1. Select its **Delete** button. 
2. Confirm the operation in the confirmation dialog.

Delete Service Frequency

Warning !!!

You're about to delete this route 4xWk.

Are you sure?

Delete

Cancel

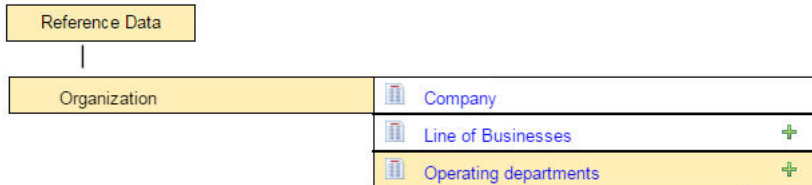
Operating Departments

Operating Departments Reference Data specifies the cost centers responsible for the various types of waste management services provided by your business.

Each Operating Department may be associated with different Work Flows, Lines of Business, and Dispatch Types.

Viewing the List of Operating Departments

- Select **Reference Data > Organization > Operating Departments**.



The List of Operating Departments displays.

Add New		Operating department	Description
		REG-SRV	Regular service
		MNT	Cart maintenance
		RLF	Roll-Off workflows
		ADT	Auditing
		ASL	Side-Load
		FL	Front-Load
		ROLLOFF	Roll-Off

Editing Operating Departments

- Click the **Edit** button for the Operating Department.
- Enter/modify the information in the text fields, and then select **Save Operating Department**.

Edit Operating department BARREL


Operating Department

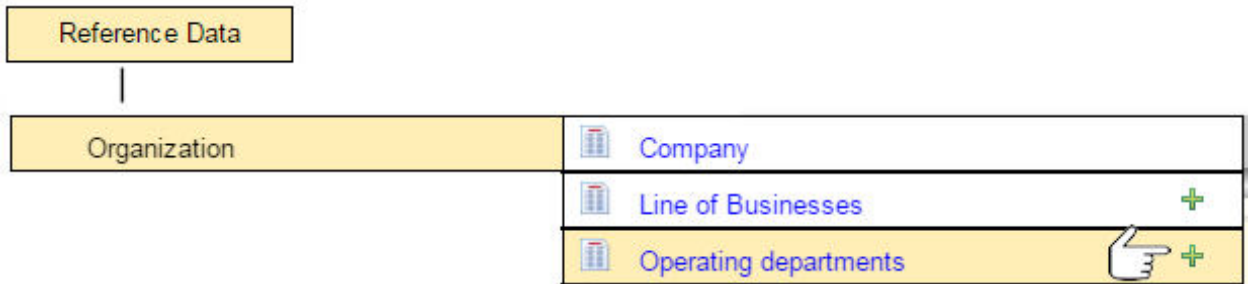
Name:


Description:

Adding Operating Departments

- You can add an Operating Department manually in one of two ways:
 - From the static portion off the UI by selecting **Reference Data > Organization > Operating Depart-**


ments and clicking the green plus sign icon . 



- From the **List of Operating Departments** screen by selecting the **Add New** button. 
- 2. Enter a unique identifier in the **Name** field, and a description in the **Description** field.
- 3. Select **Save Operating Department**.

Deleting an Operating Department

To delete an Operating Department:

- From the List of Operating Departments screen, select the **Delete** button for the item you wish to remove from the list. 
You will be prompted to confirm deletion of the record.

Delete Operating Department

Warning !!!

you are about to delete BARREL.

Are you sure?

Delete

Cancel

Exporting Operating Departments

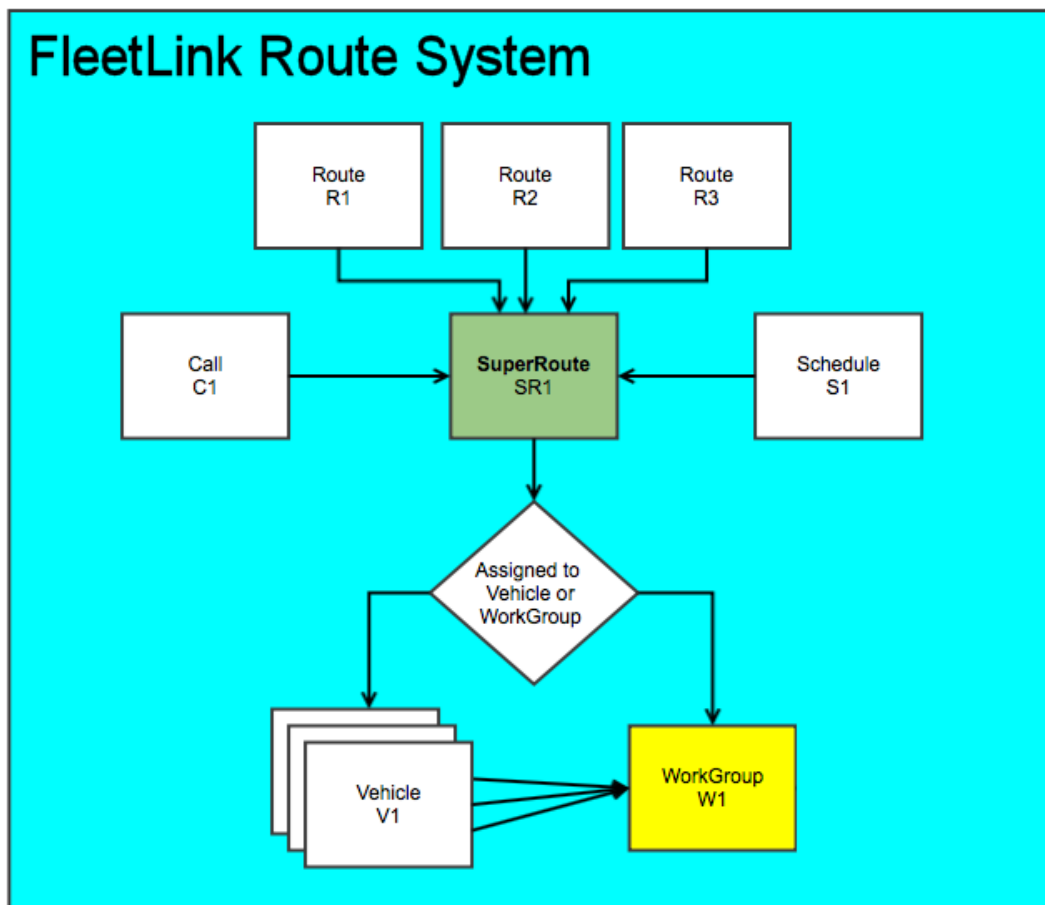
You can export Operating Departments for migration to another platform using the Import Reference Data screen. See [Importing and Exporting Reference Data](#).

Managing Work Groups

What are Work Groups?

A work group is a collection of vehicles working as a team to complete work assigned to them. From the perspective of the FleetLink Route Management System, a work group can be thought of as an identifier that can be set as a destination of a route.

Work Group Concepts



- Operations or Dispatch personnel create a Work Group as a Reference Data entity (see [Defining Work Groups](#)). They can then populate that Work Group by selecting trucks already defined in the Route Management System and assigning them to the Work Group.
- A Work Group mimics the behavior of a Truck with respect to confirmations, alarms and disposals. It is a “Virtual Truck”.
- As stops get confirmed (or driven-by, or stopped-by), the messages are communicated and the status of the routes are updated, specifying which truck communicated the information. The status of the Super Route is a “view” of the status of each route comprising it.

- The dispatcher may need to reconfigure the WorkGroup if a truck fails to start in the morning or breaks down during the day. At that point, the dispatcher must add one or more trucks to the Work Group. This addition will prompt the FleetLink Route Management System to immediately dispatch the Super Route associated with the Work Group to the newly added truck(s).
- At the end of the day, the dispatcher may need to reassign work that has not been completed. In this case, the dispatcher may create a temporary route.
- A temporary route can be dispatched to a Work Group. In this case, confirmations from all trucks in the Work Group will update the same route. If more than one confirmation, driven-by or stopped-by is received, the first one will count, and all others will be ignored.
- A regular route can also be dispatched to a Work Group. The behavior will be the same as that described for a temporary route.
- When Work Groups are viewed in the FleetLink Report Manager, each truck will appear within the Work Group route.
- In FleetWeb, both the individual trucks and the Work Groups can be viewed and tracked. Clicking on the stops will display the usual information, including the truck that performed the work.

















Rules

- The work Group name must be unique.
- A vehicle can be a member of no more than one Work Group at a time..
- If a vehicle has been added to a Work Group, this vehicle cannot be the single destination of a route. All existing routes associated with this vehicle will be removed once it is added to a Work Group.
- Cancels or RTCs will not be sent to vehicles for routes that have a Work Group as a destination
- If a vehicle has been added to a Work Group after the route has been dispatched, when you manually re-dispatch the route, it will be sent only to the newly added vehicle, in order to minimize unnecessary traffic on the system.

Defining Work Groups


To define a new Work Group:

1. Select **Reference Data > Vehicles/Drivers > Work Group**, ensuring that you click on the green **Add**  icon.

Reference Data									
 Activity Codes	+								
 Material Types	+								
 Note Types	+								
Organization	▶								
Address/Location	▶								
Carts/Containers	▶								
Customers	▶								
Customer Cases	▶								
Rates, Services and Work Flows	▶								
Routes	▶								
Vehicles/Drivers	<table border="1"> <tbody> <tr> <td> Drivers</td> <td style="text-align: right;">+</td> </tr> <tr> <td> Trucks</td> <td style="text-align: right;">+</td> </tr> <tr> <td> Truck types</td> <td></td> </tr> <tr> <td> Work Group</td> <td style="text-align: right;">+</td> </tr> </tbody> </table>	 Drivers	+	 Trucks	+	 Truck types		 Work Group	+
 Drivers	+								
 Trucks	+								
 Truck types									
 Work Group	+								
 Import/Export Reference Data									

The Add Work Group page displays.

2. Enter a **Work Group** identifier and **Description** in their respective text fields.

 **Work Group** is a mandatory field, and must be a unique identifier.


◀ ▶ **Add Work Group**

Work Group

Name:

Description:

Truck Type:

3. Select **Work Group**  when done.
The page refreshes, displaying a vehicle list and assigned routes list panels.

- To add trucks to the work group, select the **Assign Vehicle** button. A pop-up menu displays where you can select the trucks to be added to the group.

Truck	Description	
1103-H	3/4 Ton pick-up Foreman	+
1107-H	1/2 Ton pick-up -Foreman	+
1108-H	1/2 Ton pick-up -QA	+
1109-H	1/2 Ton pick-up -QA	+
1117-H	1/2 Ton pick-up -Foreman	+
1118	1 Ton pick-up -Appliance Co...	+
1119-H	1 Ton pick-up -Foreman	+
1120	3 Ton -Bin Truck	+
1120-H	3 Ton -Bin Truck	+
1126-H	1/2 Ton pick-up -QA	+
1127-H	1/2 Ton pick-up -Safety	+
1128-H	1/2 Ton pick-up -Foreman	+
1130	Side Loader	+

- Select vehicles by clicking on their **Add** icons , and close the pop-up window when done. The vehicles are added to the List of Vehicles.

List of Vehicle

Truck	Description	
<input type="text"/>	<input type="text"/>	
1130	Side Loader	
1136	Side Loader	
1147	Side Loader	
1186	Side Loader	

Total Items: 4

Assign Vehicle

6. Select **Work Group** again when done.
The new work group is added to the List of Work Groups.

List of Work Groups

Add New	Work Group	Truck Count	Description	Truck Type
	WG1	0	Work Group 1	Residential/Commercial
	WG-Southwest	3	Southwest recycling	Residential/Commercial
	SOUTH-G	3	SOUTH SIDE GARBAGE	Residential/Commercial

The next step is to associate a Work Group with the route.

Associating a Work Group with a Route

You can either add a new route for your Work Group, or associate the Work Group with an existing route. In the following example, a new route is added.

1. Select **Routes > Add Route**.

Routes

Add Route

2. Create a new route on the **Add Route** page, as shown in the following figure.

! Notice that the **Truck** and **Work Group** pull-down menus are mutually exclusive, i.e., you can do only one of the following two operations, not both:

- Associate a Work Group with a Route.
- Associate a Truck with a Route.

In the above example, we are assigning this new route to a work group.

3. **Select Save Route** when done.

You can add stops to the route now or do it later. See [Creating a Single Route](#).

i When you view your route in the List of Routes, you will notice a Work Group icon in the **Truck** column instead of a truck number, and the Work Group identifier in the **Work Group** column.

Name	Show Stop Count	Show Conflicts	Has GeoZone	Mod. date	Truck	Work Group	Route Group	Service date
2ndFriM			Yes	2016-03-16 20:00:17.64	1151			
2TIM			Yes	2016-03-16 20:00:47.78	1152			
7706				2016-02-15 10:10:51.417	1101-H			02-May-2016
ChesterTUE				2016-03-16 16:44:32.553		SOUTH-G		24-Mar-2016
FB51				2016-02-12 21:32:32.267				

Managing Yards - Automatic Gate-Crossing

Yards are part of a company hierarchy, defined in [RMS Reference Data](#) , whose topmost level is **Company**.


The screenshot displays the RMS user interface for managing yards. It shows a hierarchy of entities: Company, Region, Division, Site, and Service area. The 'Edit Site' screen is highlighted, showing a table of 'Yards' with columns for Name and Description. The 'Yards' table is circled in red.

Name	Description	Name	Description
Not East Service Area	Not East Service Area	Y1	Y1
		Y2	Y2

Yards are a subset of **Site** reference data; they can be added, deleted, modified, and also associated with GeoZones, just as Routes and Facilities can.

Adding a Yard to a Site

1. Locate the Site to which the new yard is to be edited, and open its Edit Site screen.

 In order to do so, you will have to drill down through the Company hierarchy described in [Company Reference Data](#) as follows:
Reference Data > Company > Region > Division > Site.

2. In the **Yards** area of the screen, select the **Add** icon to add a new yard.

Yards

Name	Description	
Y1	Y1	+
y2	y2	×
Y3	Ye	×
SB YD1	test	×

4

3. Fill in all details in the **Yard Information** area of the Add Yard screen, and press **Save** when done.

Add Yard

Yard Information

Site: EDC

Yard Name: John's Landfill Description: Junk 'R' Us

Street/Civic #: 77 Street: Main Suite:

City: Winnipeg Province/State: Manitoba Postal Code: R3C 1A3

District:

Contact Name: Phone: Email:

GeoZone Details

Associated GeoZone Info

Your new Yard is now saved and added to the list in the Yards area of the Edit Site screen.


Yards

Name	Description	
Y1	Y1	+
y2	y2	×
Y3	Ye	×
SB YD1	test	×
John's Landfill	Junk 'R' Us	×

You can now associate the new yard with an existing GeoZone, or create a new generic one to associate with it.

Associating a Yard with a GeoZone

Once you have saved your new Yard, RMS will try to locate a GeoZone containing the Yard's coordinates.

 If no GeoZone can be located, you can create a new one. See [Creating a New GeoZone](#).

All located GeoZones are listed in the GeoZone Details area, and their polygons are shown on the map.

Edit Yard John's Landfill

Yard Information

Site: EDC

Yard Name: John's Landfill Description: Junk 'R' Us

Street/Civic #: 77 Street: Main Suite:

City: Winnipeg Province/State: Manitoba Postal Code: R3C 1A3

District:

Contact Name: Phone: Email:

GeoZone Details

To associate yard to geozone select(click) one from the list below

Name	Description
Th16GC	
Th16RC	
1RO	
1FL	

Mouse over name to highlight polygon

Associated Geozone Info

Yard is not associated to geozone.

Hovering your mouse over a GeoZone name in the table highlights that polygon on the map.

To make a GeoZone association:

1. Click on a name in the table.
2. Choose **Associate Selected GeoZone**.

GeoZone Details

To associate yard to geozone select(click) one from the list below

Name	Description
Th16GC	
Th16RC	
1RO	
1FL	

The selected GeoZone is now associated with the Yard.

Associated Geozone Info

Name: 1RO

Description:

Should you wish to associate the Yard with a different GeoZone, simply select **Disassociate GeoZone**, and make a new association by selecting a different GeoZone or creating a new one.

Creating a New GeoZone

If RMS cannot locate a GeoZone containing the yard's coordinates, you can create a new one which you can later associate with the Yard.

GeoZone Details

Could not find geozone(s) containing yard's location

Create Geozone


Associated Geozone Info

Yard is not associated to geozone.

To do so:

1. Select the **Create GeoZone** button.
You will be redirected to the Add Generic GeoZone screen.

Add Generic GeoZone

Name * Description 

* = mandatory field

Map showing streets: Grassie Blvd, Gunn Rd, Transcona Community Bicreserve, Concordia Ave, Gateway.

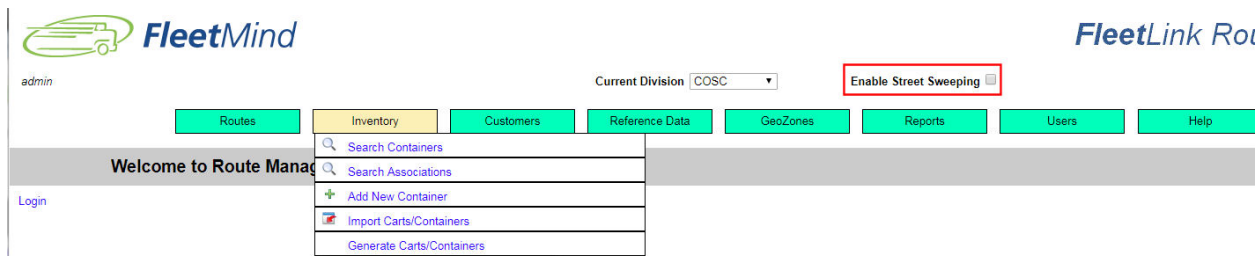
2. Create your new GeoZone, as described in Managing GeoZones.
3. Once you have done so, return to the Edit Yard screen, where your new GeoZone will be available for selection in the GeoZone Details list.

Managing Street Sections for Sweeper Routes

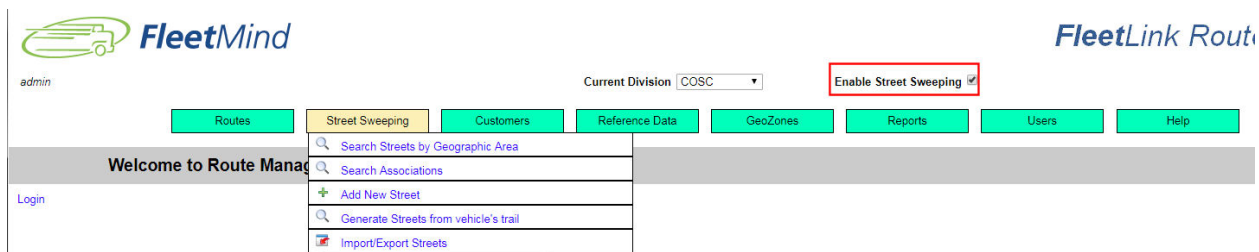
In addition to providing routing capabilities for regular sanitation and waste-hauling services, as of version 3.5 FleetLink RMS accommodates debris removal (e.g., street sweeping and snow clearing) routes.

Since these types of services do not involve container inventory (nor customer locations and associations in the conventional sense), a new menu, *Street Sections*, is provided, replacing the *Inventory* menu when the **Street Sweeping** option is selected. The header area of the RMS user interface includes an **Enable Street Sweeping** check box to toggle this option.

Regular Menu Bar (Street Sweeping not enabled)



Alternate Menu Bar (Street Sweeping enabled)



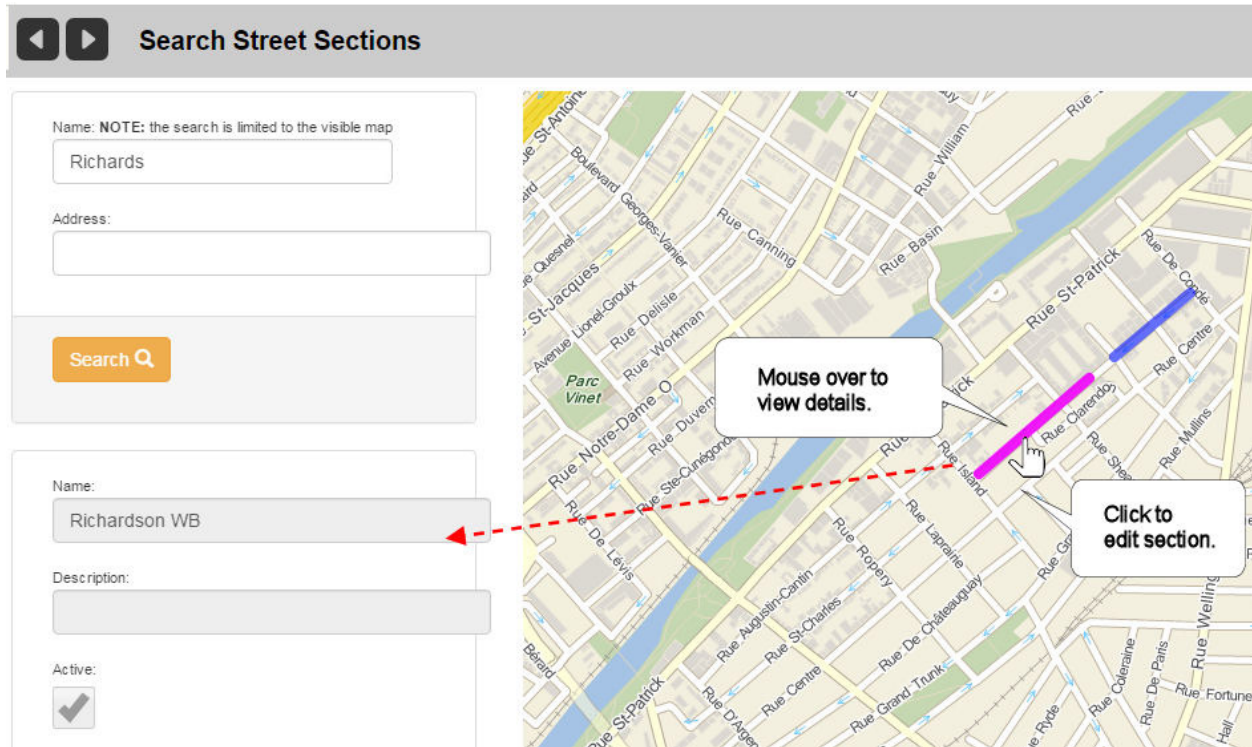
Unlike regular waste removal and recycling routes, which are generally completed in one day, street-sweeping routes may span several days, with the driver resuming a route where he/she left off on a previous day.

With regular waste collection service, the unfinished part of a route is represented by uncompleted assignments (e.g., lifts). With street-sweeping routes, the RMS employs the concept of Street Segments rather than lift assignments to measure the route's completion status.

Street Sections Menu



The Street Sections menu provides the necessary tools for managing street-sweeping routes:



1. Hovering your mouse on a section displays details in the left hand pane.
2. Clicking on a section directs you to the Edit Street Section screen.

Editing Street Sections

The Edit Street Section screen enables you to make modifications to previously defined street sections.

◀ ▶ **Edit Street Section**

Street Name: Richardson WB	Description: Richardson Westbound	Active: <input checked="" type="checkbox"/>
From: 45.48399056,-73.5620183	To: 45.4821419,-73.56503954	

Clean
Save

A green checkered flag indicates the starting point of a section, a black checkered flag marks the end point.

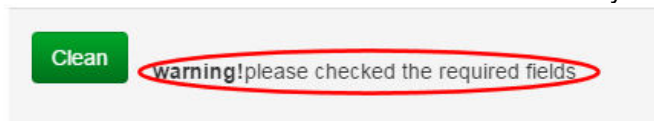
- To define a new end point, right-click on a point on the map or drag (left mouse button) the black checkered flag to that location.
- To change the starting point, drag the green checkered flag to a new location.

Once you select **Save**, the latitude/longitude values in the **From** and **To** fields update accordingly.

Alternatively, if you know the exact coordinates for points to be modified, you could type these values directly into the text fields.

Selecting the **Clean** Clean button clears all data for the current section, including all text fields in the upper area of the screen.

You cannot save a street section in this state. If you attempt to do so, a warning message displays.



After making any edits on this screen, select **Save** to commit your changes.

Add New Street

This option enables you to create new street sections easily by drawing them on the map.

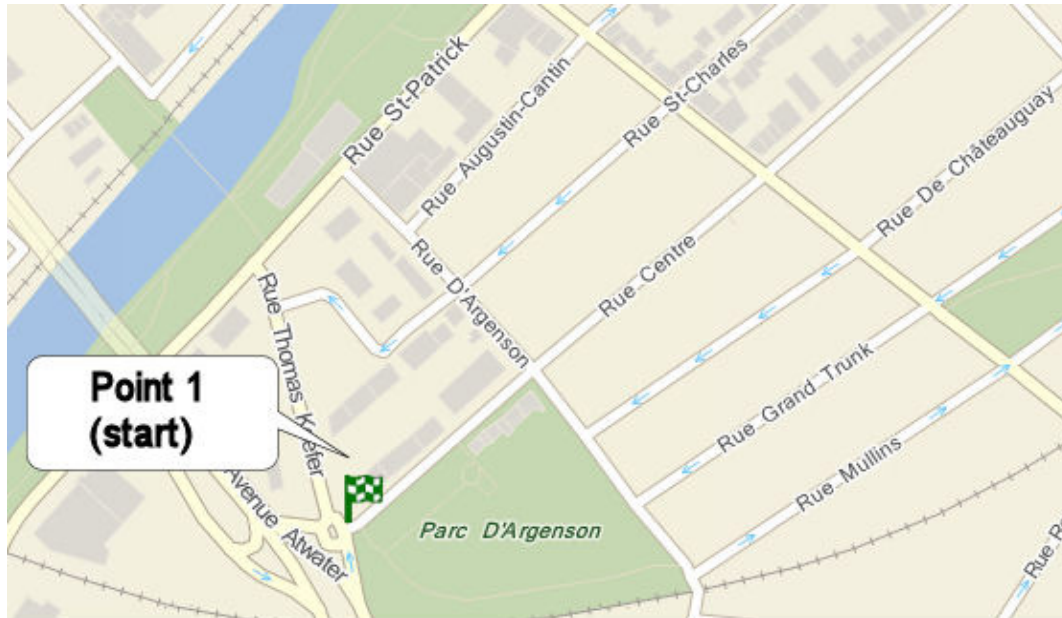


1. Select **Street Sections > Add New Street**. The Add Street screen displays.

 The screenshot shows the 'Add Street' interface. At the top is a grey header with 'Add Street' and navigation arrows. Below is a form with fields for 'Street Name:', 'Description:', 'Active:' (checkbox), 'From:', and 'To:'. A map of a city street grid is displayed below the form. At the bottom are 'Clean' and 'Save' buttons.

2. Locate the street of interest on the map (pan and zoom, if necessary), and right-click where you want to define the section's starting point. A green checkered flag displays at the first point, and its coordinates display in the **From** and **To** text fields.

 A close-up of the 'From:' and 'To:' text fields. Both fields contain the same coordinates: 45.476120513941126,-73.57324267382813.



To define a street section, a minimum of two points are required (defining a line). You may, optionally, add additional points to extend the line or even draw a polygon.

3. Right-click on a second point.
A black checkered flag displays to mark the end point.



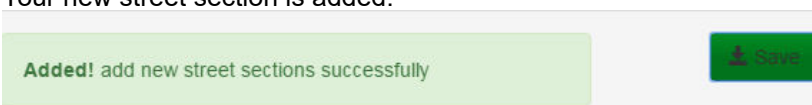
The most recently added point always becomes the end point of the segment. For example, if you were to add a third point, Point 2 would no longer be marked as the end point. Instead, the point is marked with a dot rather than a flag, and point 3 becomes the end.



- Give your new street section an identity by entering a information in the **Name** and **Description** fields in the upper area of the screen.

Street Name:	Description:	Active: <input checked="" type="checkbox"/>
Centre St.	Atwater east to Charlevoix	

- Check the **Active** check box.
Doing so enables the section to be added to a route and dispatched to the mobile.
- Select **Save** when done.
Your new street section is added.



Search Associations

This feature currently under development.

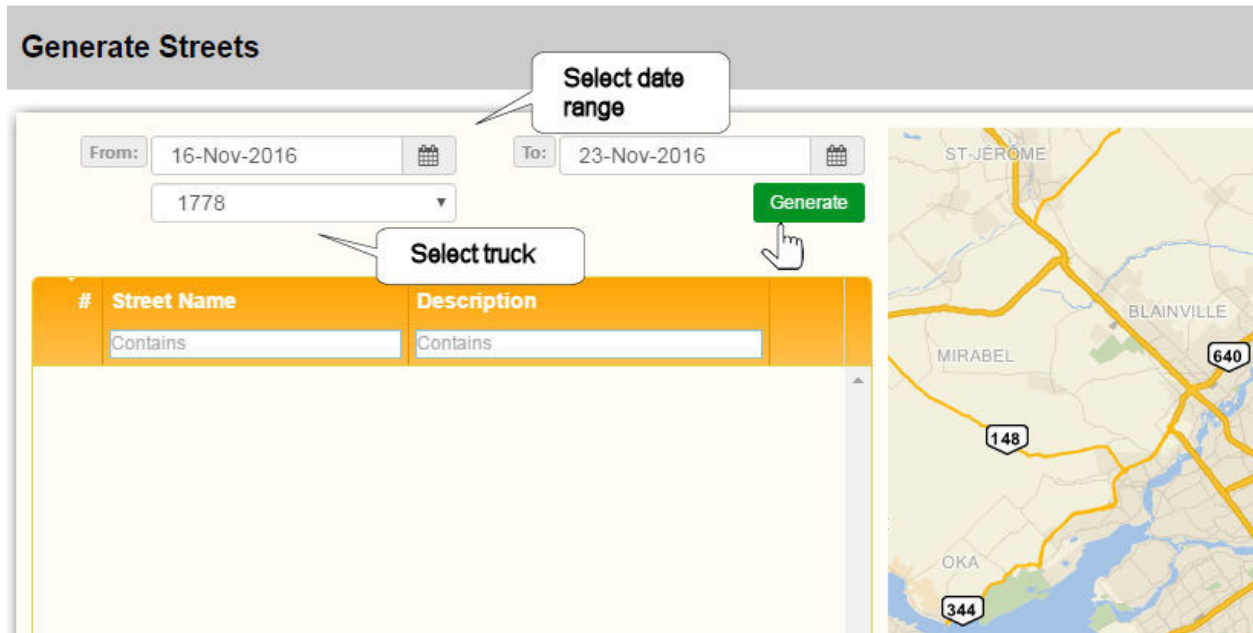
Generate Streets from Vehicle's Trail

This option enables you to generate street sections from the path traveled by your vehicles, save them, and assign them to a route.

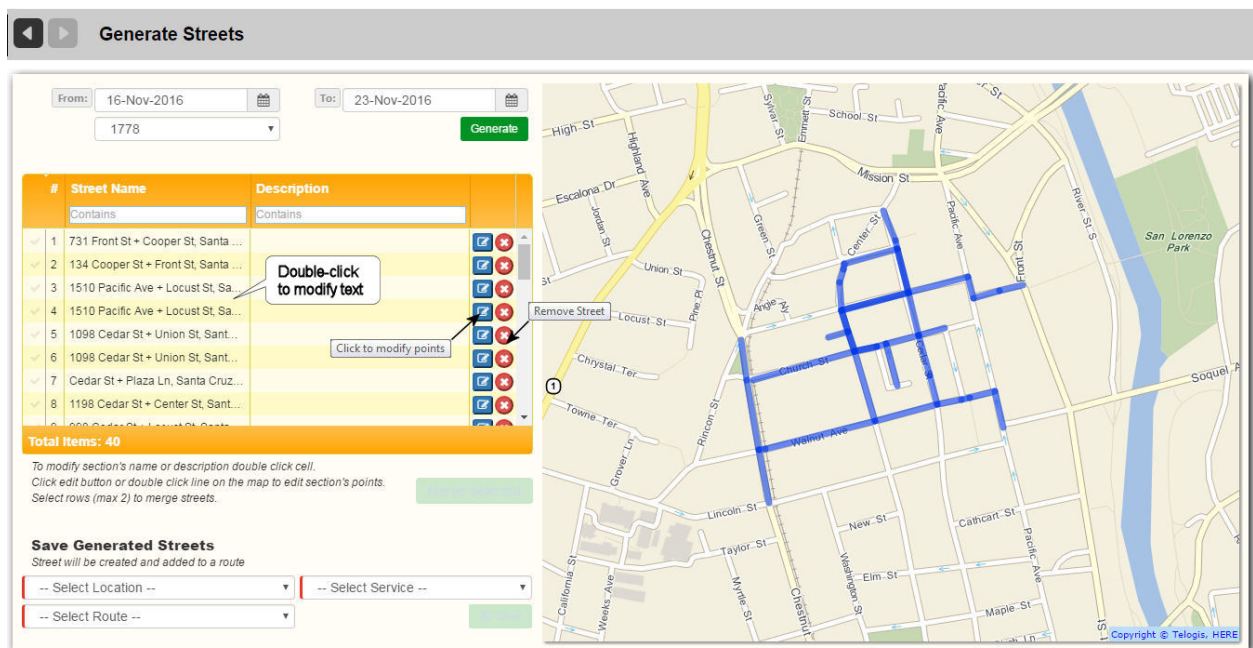


- Select **Street Sections > Generate Streets from vehicle's trail**.

The Generate Streets screen displays.

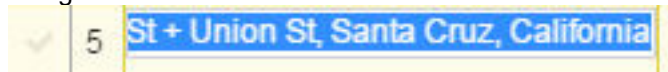


2. Select a date range from the **From** and **To** calendar menus.
3. Choose a truck from the **Vehicle** menu.
4. Click **Generate**.
Generated street sections are listed in the table and displayed on the map.

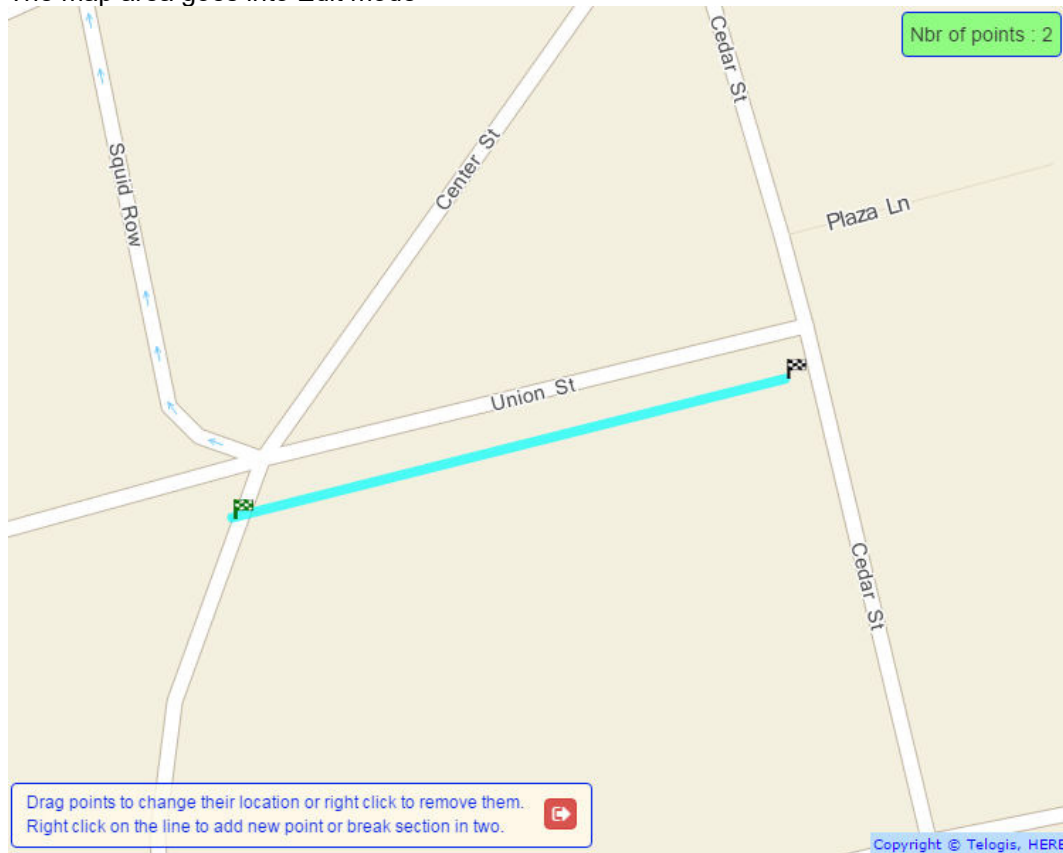


5. Before assigning the street sections to a route, you can do the following:
 - a. To edit an entry in the Street Name or Description column, double-click in the text field and enter a new

string.

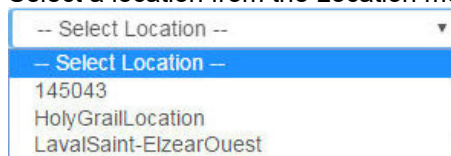


- b. To remove a street section, select its **Delete** button.
 - c. To modify the points of a street section, select its **Edit** button.
- The map area goes into Edit mode

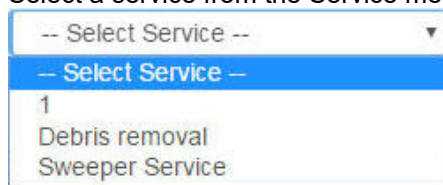


6. To assign the street sections to a route:

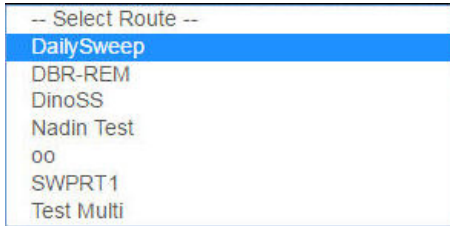
- a. Select a location from the Location menu.



- b. Select a service from the Service menu.



- c. Select a route from the Route menu.



- Click **Save** to commit your changes.

Import/Export Street Sections

This option enables you to import street sections from a CSV file prepared off line, and to export your street sections from the RMS to a CSV file that you can save to disk.



- Select **Street Sections > Import/Export Street Sections**. The Import/Export Streets screen displays.

Importing

- To import data, each line in the file must define one Street.
- Street names must be unique.
- If a Street Name already exists in the database, it will be updated.
- Duplicate Street Names in the csv file will be ignored.

CSV file

Advanced Options Clear existing Streets before import.

* Mandatory

Column #	Excel Column #	Column Name	Field Size	Valid Values
1	A	*Street Name	60	
2	B	*Description	256	
3	C	*Active	8	<input type="button" value="i"/>
4	D	*Wkt		<input type="button" value="i"/>

Importing

As is the case for importing all other data into RMS, your street sections CSV file must adhere strictly to formatting rules, which are shown in the lower area of the screen.

Clicking an Info icon (where provided) displays an example of valid field values in the right-hand pane.

* Mandatory

Column #	Excel Column #	Column Name	Field Size	Valid Values
1	A	*Street Name	60	
2	B	*Description	256	
3	C	*Active	8	
4	D	*Wkt		

Valid values for *Wkt column

```
POLYGON((27.7734375 27.761329874505233,21.708984375
20.3034175184893,30.76171875 16.46769474828897,38.49609375
24.206889622398023,27.7734375 27.761329874505233))
```

You can also download and save a blank sample file, which you can populate with your own data, by clicking the **Download Sample** button.



Sample CSV File

	A	B	C	D	E	F
1	Street Name	Description	Active	WKT		
2						
3						
4						
5						

To import a CSV file containing street sections:

- Click the **Browse** button to open an Explorer window, browse and select a file.
- The button's caption changes to indicate that a file has been selected.
- Select **Validate and Import**.
- RMS validates the data and, on success, imports the file.

Advanced Options

Advanced Options

Clear existing Streets before import. Yes

Select this option if the intention is for the RMS database is to comprise **fewer** street sections after the data is imported.

Exporting

- Select the **Export Data** button.
- Browse to a disk location and save your file.

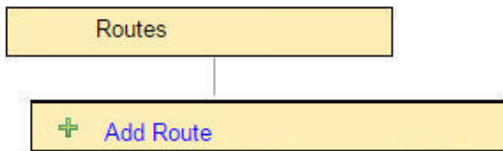
	A	B	C	D	E	F	G	H	I	J	K	L	M
697	198 Almar Ave + Sunset Ave	Santa Cruz	California		TRUE	LINESTRING(-122.04205 36.952389,-122.04205 36.952389,-122.04218 36.95299)							
698	298 Almar Ave + Oxford Way	Santa Cruz	California		TRUE	LINESTRING(-122.04218 36.95299,-122.04218 36.95299,-122.04236 36.95382)							
699	398 Almar Ave + Alta Ave	Santa Cruz	California (1)		TRUE	LINESTRING(-122.04236 36.95382,-122.04236 36.95382,-122.04255 36.954651)							
700	301 Alta Ave + Bethany Curv	Santa Cruz	California		TRUE	LINESTRING(-122.04255 36.954651,-122.04255 36.954651,-122.03975 36.95506)							
701	1701 Delaware Ave + Almar	Santa Cruz	California (2)		TRUE	LINESTRING(-122.04271 36.95499,-122.04271 36.95499,-122.04287 36.95635)							
702	101 Handley St + Almar Ave	Santa Cruz	California (1)		TRUE	LINESTRING(-122.04287 36.95635,-122.04287 36.95635,-122.04297 36.95712)							
703	632 Almar Ave + Handley St	Santa Cruz	California (1)		TRUE	LINESTRING(-122.04297 36.95712,-122.04297 36.95712,-122.04301 36.95735)							
704	#NAME?	Santa Cruz	California (1)		TRUE	LINESTRING(-122.04301 36.95735,-122.04301 36.95735,-122.04307 36.95771)							
705	644 Almar Ave + Hebard St	Santa Cruz	California		TRUE	LINESTRING(-122.04307 36.95771,-122.0431 36.957891)							
706	828 Almar Ave + Ingalls St	Santa Cruz	California		TRUE	LINESTRING(-122.04331 36.95946,-122.04331 36.95946,-122.04346 36.96029)							
707	850 Almar Ave + Rankin St	Santa Cruz	California		TRUE	LINESTRING(-122.04346 36.96029,-122.04346 36.96029,-122.04365 36.961441)							
708	2107 Mission St [Ca-1] + Almi	Santa Cruz	Califor		TRUE	LINESTRING(-122.04365 36.961441,-122.04365 36.961441,-122.04383 36.96261)							

Adding Street Sections to a Route via Add Stops to Route Screen

This feature currently under development.

Adding a New Street Sweeper Route

You add a Street Sweeper route as you would any other type of route: via the **Routes** menu. (See [Creating a Single Route.](#))



 For Street Sweeper Routes, you must select **Multi Day Route** from the pull-down menu at the top of the screen.

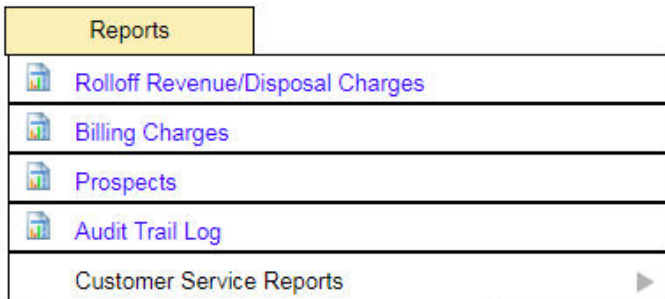
The screenshot shows the 'Add Route' screen with the following fields and options:

- Route Type: Single Day Route (selected), Single Day Route, Multi Day Route
- Name: SWEEP-101
- Route Frequency: Thursday EOW Odd
- Service Date: [Calendar icon]
- Truck: 1778 - Road sweeper
- Work Group: --
- Material: Debris
- Operating Department: DBR
- Container Type: No Container
- GeoZone: Not Linked, Temporary, No, Update Rfid, No
- Update Geolocation: No, Update #Serial: No
- Message: [Text area]
- Save Route: [Save icon]

On the right, there is a map in 'Satellite view' showing a city street grid with several routes highlighted in yellow. The map includes highway shields for 101, 605, 72, 57, 90, 31, and 210. The copyright notice at the bottom of the map reads 'Copyright © Telogis HERE'.

Generating Reports

Although the FleetLink Report Manager (FRM Reports) is the most comprehensive application in the FleetMind Solution for report generation, the RMS Reports menu enables you to generate route-relevant revenue and billing-reports and Customer Service reports.



The following options are provided:

- [Rolloff Revenue/Disposal Charges](#)
- [Billing Charges](#)
- [Prospects](#)
- [Audit Trail Log](#)
- [Customer Service Reports](#)

Rolloff Revenue/Disposal Charges

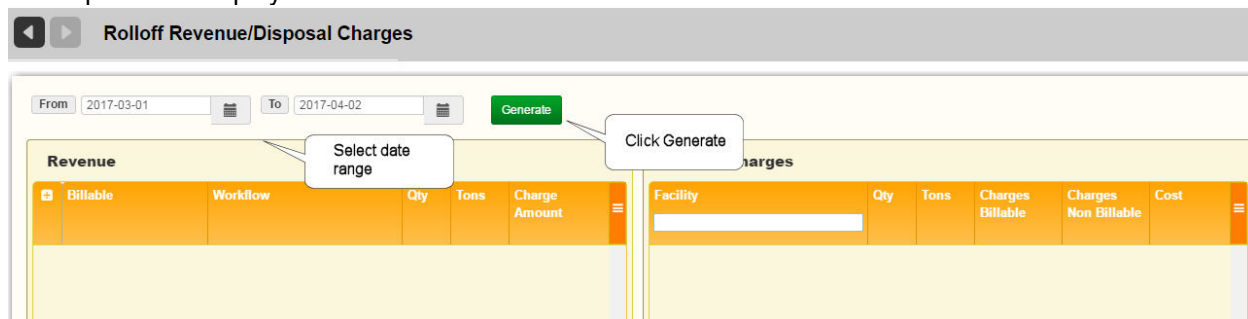
The Rolloff Revenue/Disposal Charges report tracks the history of roll-off revenue and disposal costs per material for each disposal facility, .

To generate a Rolloff Revenue/Disposal Charges report:

1. Select **Reports > Rolloff Revenue/Disposal Charges**.



The report form displays.



2. Enter a date range using the **From** and **To** calendar menus.
3. Select **Generate**.
The screen refreshes, displaying revenue in the left panel and charges in the right

Rolloff Revenue/Disposal Charges

From: 2017-03-01 To: 2017-04-02 **Generate**

Revenue				
Billable	Workflow	Qty	Tons	Charge Amount
Charge		8	11	\$1,720.29
	Empty Return Trash	2	1	\$570.39
	Relocate	2	0	\$242.00
	Remove Trash	2	10	\$801.90
	Set	2	0	\$106.00
No Charge		2	0	\$0.00
	Set	2	0	\$0.00
Total :		10	11	\$1,720.29

Landfill Charges					
Facility	Qty	Tons	Charges Billable	Charges Non Billable	Cost
Phoenix Transfer Station	1	10	\$680.90	\$0.00	\$0.00
Sky Harbor Transfer Station	1	1	\$449.39	\$0.00	\$0.00
Total :		2	11	\$1,130.29	\$0.00

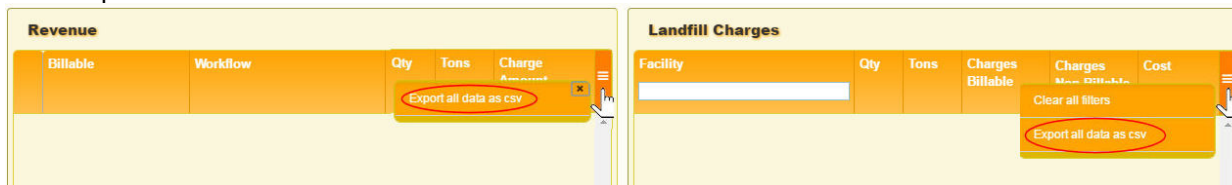
4. To filter results in the Landfill Charges panel by Facility, enter the name of the facility—in whole or in part—in the **Facility** text field.



5. To reset the filter, select **Clear all filters** from the drop-down menu.



6. To export either Revenue or Landfill charges for review and analysis off-line, choose **Export all data as CSV** from their respective menus.

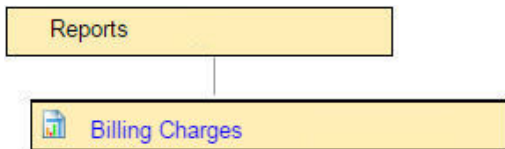


Billing Charges

The Billing Charges report tracks the history of billing charges for services provided.

To generate a Billing Charges report:

1. Select **Reports > Billing Charges**.



2. Select a date range, Dispatch Type(s), and Operating Department(s) using the calendar menus and pull-down menus, and then click **Generate**.

The report displays results matching your search criteria.

Billing Charges

From: 2016-02-02 To: 2016-04-06 All Dispatch Types All Operating Departments **Generate**

Filter Customers: All Billable Non-billable **Export to CSV**

Customer	Customer Billing Id	Location Name	Location Address	Location Billing Id	Timestamp	Description	Amount
LINDA JANZON	644313	204053	7431 E MCLELLAN RD # ,WEST...	204053	2016-02-15 15-24-36	Deliver	\$0.00
MICHAEL CARRENO	696324	251122	6610 E UNIVERSITY DR ## 4, W...	251122	2016-02-09 13-52-41	Deliver	\$0.00
LINDA JANZON	644313	204053	7431 E MCLELLAN RD # ,WEST...	204053	2016-02-15 15-24-36	Deliver	\$0.00
LINDA JANZON	644313	204053	7431 E MCLELLAN RD # ,WEST...	204053	2016-02-15 15-24-33	Deliver	\$0.00
STEVEN LUCERO	644005	102415	107 W INGLEWOOD ST # ,WEST...	102415	2016-03-07 13-36-55	Deliver NoChrg	\$0.00
STEVEN LUCERO	644005	102415	107 W INGLEWOOD ST # ,WEST...	102415	2016-02-12 13-30-38	Deliver NoChrg	\$0.00

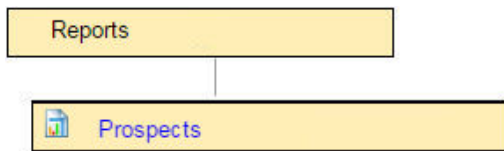
3. You can filter the results further by using the text fields in the column headers and the **All/Billable/Non-billable** radio buttons.
4. To export your report results for off-line review and analysis, select **Export to CSV**.

Prospects

The Prospects report displays a list of all prospective (non-active) customers and services in the Route Management System

To generate a Prospects report:

1. Select **Reports > Prospects**.



The Prospects report displays.

The screenshot shows the 'Prospects' report interface. The 'Prospect Customers' tab is active. The table has columns for Customer Last Name, Customer First Name, Business Name, Office Phone, Fax, E-mail, and City. Each column has a 'Contains' filter dropdown. The data rows are:

Customer Last Name	Customer First Name	Business Name	Office Phone	Fax	E-mail	City
Chewbacca	Kardashian		555-555-5555			Mesa
Gonzalo	McDonald		555-555-5559			Mesa
Kermit	Schwarzenegger					Mesa

The Prospect Customers tab, shown above, displays a list of customer profiles.

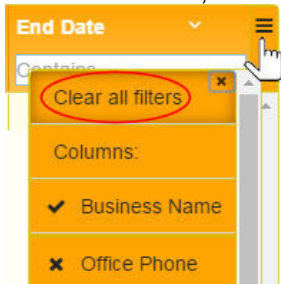
The Prospect Services tab, shown following, displays a list of services for the prospect customers.

The screenshot shows the 'Prospects' report interface with the 'Prospect Services' tab active. The table has columns for Customer Last Name, Customer First Name, Business Name, LOB, Service, Start Date, and End Date. Each column has a 'Contains' filter dropdown. The data rows are:

Customer Last Name	Customer First Name	Business Name	LOB	Service	Start Date	End Date
Null (3)						

A red watermark 'PLACEHOLDER IMAGE' is overlaid on the table.


2. To filter results in any column, enter a string—in whole or in part—in the text fields in the table header. To reset the filter, clear the text field, or select **Clear all filters** from the drop-down menu.



3. To show/hide columns in the report, make your selections from the same drop-down menu.

Clear all filters ✕

Columns:

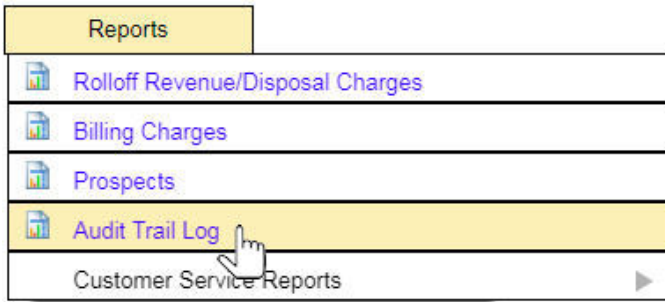
- ✓ Business Name
- ✓ Office Phone
- ✕ Home Phone 
- ✓ Fax
- ✓ E-mail
- ✕ Civic Number
- ✓ Street
- ✓ Suite
- ✕ District
- ✕ City
- ✓ State/Province
- ✕ Postal Code

Audit Trail Log

The Audit Trail Log enables you to query and view operations performed on the RMS database(s) over a range of dates, and by whom (RMS user name) the operations were done.

To generate an Audit Trail Log report:

Select **Reports > Audit Trail Log**.



A screenshot of the 'Audit Trail Log' interface. It features a search form with the following fields: Customer (dropdown), Billing Location Id, Modified By, and Code. A date range selector shows '2018-02-01 - 2018-03-23'. A 'Submit query' button is on the right. Below the form is a table with columns: Audit Id, Audit Date, Customer Id, Modified By, Action, Property, New Value, and Old Value. A red box highlights a section of the table. Numbered callouts (1-4) point to the 'Choose audit type' dropdown, the date range selector, the 'Submit query' button, and the 'View users and operations done' callout box respectively.

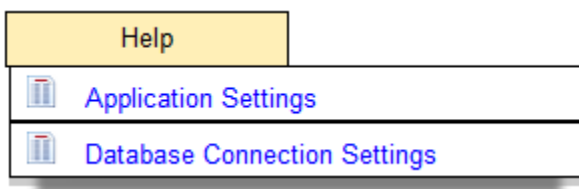
Audit Id	Audit Date	Customer Id	Modified By	Action	Property	New Value	Old Value
224268 (24)							
224285 (24)							
224289 (1)							
224301 (1)							
224309 (1)	2018-02-13 09:06:03	201802131	admin	Update	Suspension Start		2018-02-13 00:00:00.000
224319 (24)	2018-02-13 09:19:12	201802131	admin	Update	Suspension Start	2018-02-13 00:00:00.000	
	2018-02-13 09:21:13	201802133	admin	Insert	Auto Id	147157	
	2018-02-13 09:21:13	201802133	admin	Insert	Customer Id	201802133	
	2018-02-13 09:21:13	201802133	admin	Insert	Business Name	2133	
	2018-02-13 09:21:13	201802133	admin	Insert	Last Name	02133	
	2018-02-13 09:21:13	201802133	admin	Insert	Office Phone #	2018021333	
	2018-02-13 09:21:13	201802133	admin	Insert	Home Phone #	2018021333	
	2018-02-13 09:21:13	201802133	admin	Insert	Fax	2018021333	
	2018-02-13 09:21:13	201802133	admin	Insert	Email	201802133@gmail.com	
	2018-02-13 09:21:13	201802133	admin	Insert	Active	1	

You can query changes made to:

- Customers
- Locations
- Subscriptions
- Reference Data

Modifying Settings

RMS settings are accessible via the Help menu.



Application Settings

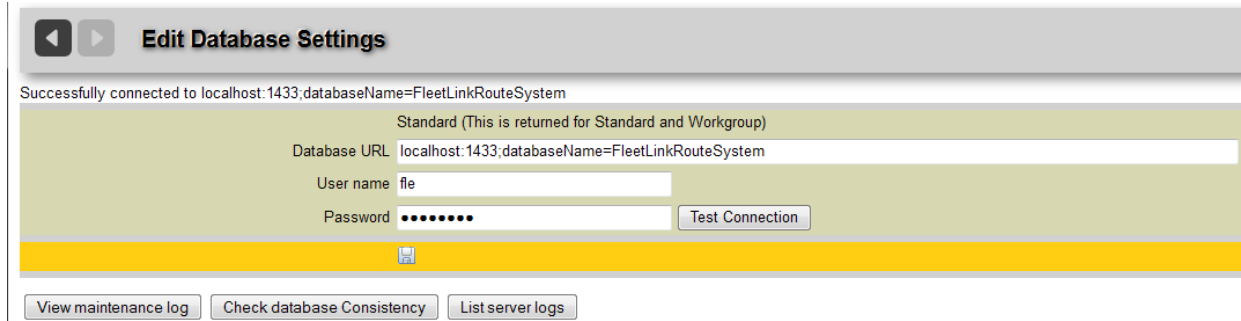
The Edit Application Settings screen enables you to specify URLs used by the application, default map coordinates, and colors for the various elements of the application's user interface.

Edit Application Settings	
Name	Value
pictureUriBase	http://192.168.201.172/images <small>http link to the location where pictures taken by driver are stored</small>
telogisGeobaseUrl	http://192.168.201.155/geostream
feDatabaseUrl	192.168.201.172;databaseName=fleetlinkenterprise;username=fe;password=password
mailServer	imail.fleetmind.com
defaultMapLatLon	43.36415,-79.80308
defaultCustomerId	11075SOUTHSTATE#24
showContractInfo	<input checked="" type="checkbox"/> Displays contract information on edit location screen
useFlirsPasswordEncryption	<input type="checkbox"/> Should be checked if using Azure database
unitOfMeasure	<input checked="" type="checkbox"/> Display unit of measure in miles
PWS	<p>pwsUriBase: http://localhost:8090/platform/WebServices/RouteSequencerService/BreadcrumbSequencer <small>http link to call Route Sequencer Service</small></p> <p>pwsUriBaseGeoZone: http://localhost:8090/platform/WebServices/referentialData <small>http link to call GeoZone service</small></p> <p>pwsUriBaseFleetData: http://localhost:8090/platform/WebServices/Fleetdata <small>http link to call FleetData service</small></p> <p>pwsAuthorization: Basic Zmx0ZDZlR1aW5kU2VydmljZTo4MzZl0Axlmts <small>Connection header value for Route Sequencer Service</small></p> <p>pwsDivision: 1 <small>Division Pws</small></p>
Name	Color
pageHeaderBgColor	CCCCCC
rowSeparatorBgColor	CCCCCC
listHeaderRowBgColor	FFC90E
popupHeaderColor	D1F9FF

- pictureUriBase:** specifies the URL for images used in the application. Must be the same as the images.url setting in the VDI.
 The images folder where the image files are archived should be accessible via URL.
- telogisGeobaseUrl:** specifies the URL for the geostream server. This IP address should be used as opposed to 127.0.0.1 or local host in the url. Telogis 3.9.1 is the minimum required version to run Service Centric routesystem (2013-09-23). This minimum requirement may change as Telogis releases fixes.
- defaultMapLatLon:** specifies the coordinates for the default location the map will open whenever a map that has no geo-located content is opened.
- Color palette:** specifies user interface colors. Enter your settings as six-digit hexadecimal values.
- Reset** button: resets all colors changed during the current editing session to their previous values.
- Reset to Default** button: resets all colors to their default values.
- Save** button: saves changes made during the current editing session.

Database Connection Settings

The Edit Database Connection Settings screen specifies the database location and user authentication parameters, and provides diagnostic and troubleshooting tools.



Edit Database Settings

Successfully connected to localhost:1433;databaseName=FleetLinkRouteSystem

Standard (This is returned for Standard and Workgroup)

Database URL localhost:1433;databaseName=FleetLinkRouteSystem

User name file

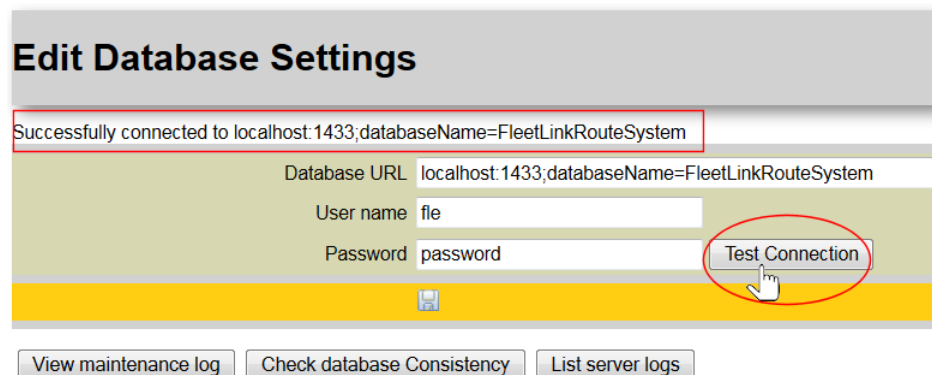
Password ••••••••

Test Connection

This feature tests whether there is a communication link with the FleetLink Route Management System database. It gives you the ability to verify the connection string and credentials.

Only users in the admin role can modify information on this page.

 After changing any information on this page, the Apache server needs to be restarted.



Edit Database Settings

Successfully connected to localhost:1433;databaseName=FleetLinkRouteSystem

Database URL localhost:1433;databaseName=FleetLinkRouteSystem

User name file

Password password

The **Test Connection** button enables you to verify the connection string and credentials.

- Click the Test Connection button.
Connection test results display in the header area of the screen.

View Maintenance Log

This feature displays the database maintenance log, listing for each operation the timestamp, procedure name, and description.

View maintenance log | Check database Consistency | List server logs

Timestamp	Procedure ID	Log
2014-02-14 10:00:00.833	flrs_createArchiveTables	Reorganize indexes done
2014-02-14 10:00:00.837	flrs_createArchiveTables	Updating statistics serviceExecutionArch
2014-02-14 10:00:01.427	flrs_archiveStops	Excuted flrs_archiveStops [records archived: 0]
2014-02-14 10:00:02.063	flrs_createArchiveTables	Updating statistics done
2014-02-14 10:00:02.063	flrs_createArchiveTables	Excuted flrs_createArchiveTables
2014-02-14 10:00:02.063	flrs_createArchiveTables	Reorganize indexes for serviceExecutionArch_2014
2014-02-14 10:00:02.067	flrs_createArchiveTables	Reorganize indexes done
2014-02-14 10:00:02.067	flrs_createArchiveTables	Updating statistics serviceExecutionArch_2014
2014-02-14 10:00:02.070	flrs_createArchiveTables	Updating statistics done
2014-02-14 10:00:02.070	flrs_createArchiveTables	Excuted flrs_createArchiveTables
2014-02-14 10:15:01.207	flrs_archiveStops	Excuting flrs_archiveStops
2014-02-14 10:15:02.787	flrs_archiveStops	Excuted flrs_archiveStops [records archived: 0]

Use the maintenance log for debugging and troubleshooting.

Check Database Consistency

This feature enables you to validate the data in the database according to all defined rules.

Edit Database Settings

DataBase consistency check successful

Successfully connected to localhost:1433;databaseName=FleetLinkRouteSystem

Database URL

User name

Password

View maintenance log | Check database Consistency | List server logs

Inconsistency #	Original	Actual
-----------------	----------	--------

List Server Logs

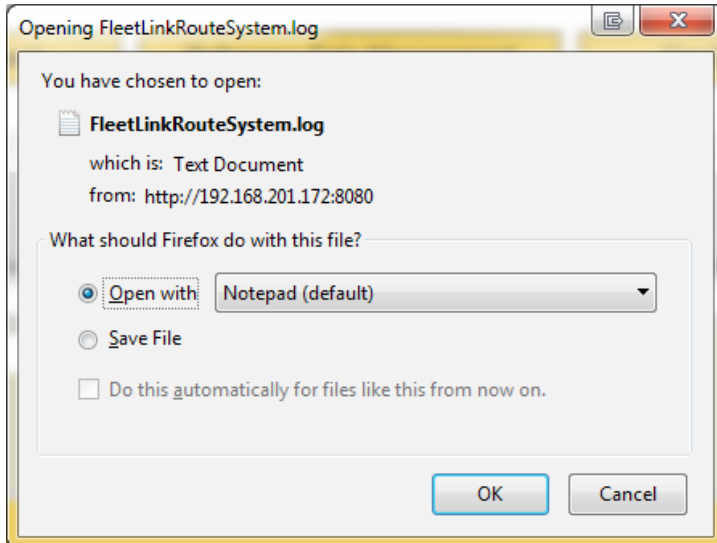
This feature lets you view the server logs, both current and historical.

View maintenance log | Check database Consistency | List server logs

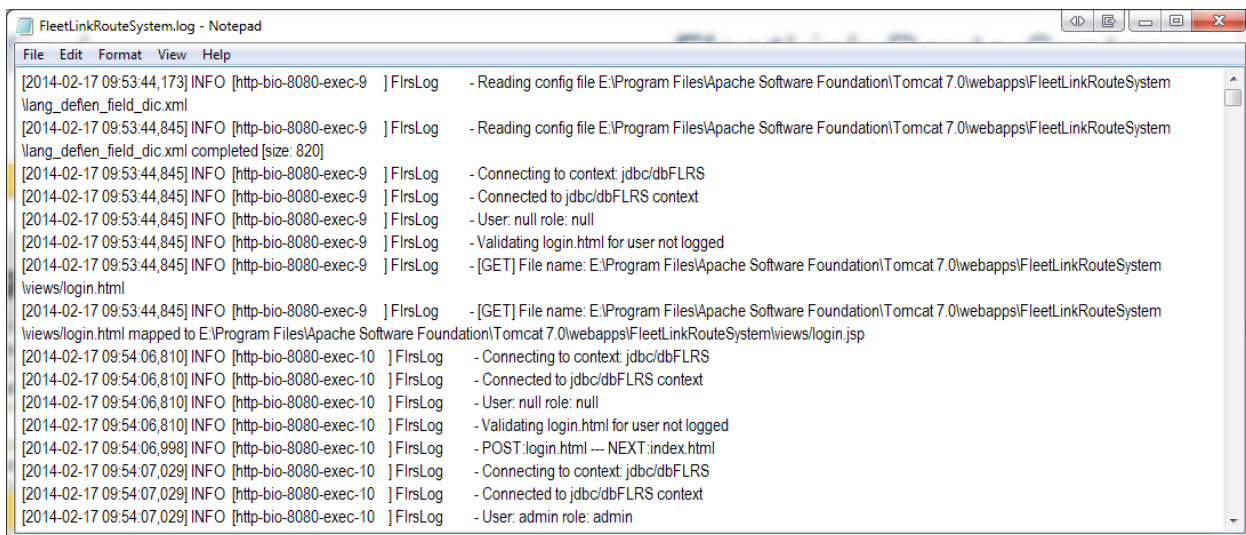
File name	File size in bytes
FleetLinkRouteSystem.log	10,440
FleetLinkRouteSystem.log.2014-02-10.log	2,204,234
FleetLinkRouteSystem.log.2014-02-11.log	1,722,126
FleetLinkRouteSystem.log.2014-02-12.log	109,286
FleetLinkRouteSystem.log.2014-02-13.log	57,625
FleetLinkRouteSystem.log.2014-02-14.log	262,385


The logs are presented in reverse chronological order, i.e., the first log in the list is the most current.

1. To view the current log, click on the highlighted link.
2. Choose **Open with** or **Save File**, and then select **OK**.




A sample server log is shown below.



3. To view previous logs, click the **Unzip**  icon. The list refreshes, displaying a highlighted zip file that you can open with file compression utilities such as WinZip or WinRAR.

View maintenance log Check database Consistency List server logs


File name	File size in bytes
FleetLinkRouteSystem.log	241,151
FleetLinkRouteSystem.log.2014-02-10.log.zip	130,521
FleetLinkRouteSystem.log.2014-02-11.log	1,722,126

- To delete a log, click its **Delete**  icon.
When the confirmation dialog displays, click **Yes** to confirm the operation.

Confirm deletion

Are you sure you want to delete the record FleetLinkRouteSystem.log.2014-02-10.log.zip!

User Management

 As of software release 3.5, User Management is done exclusively through the *Platform Web Services (PWS) User Portal* or *Active Directory*. RMS no longer provides *List User* and *Add User* menu options.

For information purposes, this section describes the user properties and privileges that can be defined using those applications.


Languages

Preferred language is the language used on the user interface. The FleetLink Route Management System currently supports English, French and Spanish.

Roles

Every user must be assigned a role, which defines their access privileges.

Five roles are defined for FleetLink Route Management System users:

- **Admin** has full privileges.
 Only an Admin can view and edit the list of users.
- **Billing** defines billing plans, processes billing data.
- **Dispatcher** manages daily assignment dispatch, handles assignment exceptions/problems.
- **Provision** provisions customer service subscription to specific routes.
- **Reader** has very limited read-only privileges.

A user assigned the role of Reader can perform only the following operations:

READER PERMISSIONS
Search Associations
Search Stops
Search Containers
Search Customers
List GeoZones

If the Reader attempts to perform any unauthorized operations, he/she will be logged out automatically and the following message will display.


Access denied [listFlrsUsers.html] to user: reader [read]

Login

Password

Login

The other roles and their associated privileges are listed in the following table.

 The privileges assigned to each role are hard-coded in the application and are not user-configurable in the current software release.

	Dispatch-er	Provi-sion	Bill-ing	Ad-min
Add Activity Code		Yes	Yes	Yes
Add Assignment		Yes	Yes	Yes
Add Building Category		Yes	Yes	Yes
Add Color		Yes	Yes	Yes
Add Container		Yes	Yes	Yes
Add Container Maker		Yes	Yes	Yes
Add Container ype		Yes	Yes	Yes
Add Customer			Yes	Yes
Add Customer Prfx		Yes	Yes	Yes
Add Customer Type		Yes	Yes	Yes
Add Facility		Yes	Yes	Yes
Add Flrs Users				Yes
Add Frequency		Yes	Yes	Yes
Add Location		Yes	Yes	Yes
Add Material		Yes	Yes	Yes
Add Operator		Yes	Yes	Yes
Add Route		Yes	Yes	Yes
Add Service Add On			Yes	Yes
Add Service Type			Yes	Yes
Add State		Yes	Yes	Yes
Add Truck		Yes	Yes	Yes
Add Unit		Yes	Yes	Yes
Add Wkt		Yes	Yes	Yes
Add WorkGroup		Yes	Yes	Yes
Dispatch Route	Yes	Yes	Yes	Yes
Edit Activity Code		Yes	Yes	Yes
Edit App Settings				Yes
Edit Assignment		Yes	Yes	Yes

Edit Assignment Status		Yes	Yes	Yes
Edit Building Category		Yes	Yes	Yes
Edit Color		Yes	Yes	Yes
Edit Container		Yes	Yes	Yes
Edit Container Maker		Yes	Yes	Yes
Edit Container Type		Yes	Yes	Yes
Edit Customer			Yes	Yes
Edit Customer Prfx		Yes	Yes	Yes
Edit Customer Type		Yes	Yes	Yes
Edit DB Settings				Yes
Edit Facility		Yes	Yes	Yes
Edit Frequency		Yes	Yes	Yes
Edit List Wkt		Yes	Yes	Yes
Edit Location		Yes	Yes	Yes
Edit Material		Yes	Yes	Yes
Edit Operator		Yes	Yes	Yes
Edit Route		Yes	Yes	Yes
Edit Service AddOn			Yes	Yes
Edit Service Type			Yes	Yes
Edit State		Yes	Yes	Yes
Edit Truck		Yes	Yes	Yes
Edit Unit		Yes	Yes	Yes
Edit Wkt		Yes	Yes	Yes
Edit WorkGroup		Yes	Yes	Yes
exportAllData				Yes
exportAssignment				Yes
exportReferenceData				Yes
Import AllData				Yes
Import Assignment				Yes
Import Containers				Yes
Import Customers				Yes
Import Reference Data				Yes
Import Routes				Yes
Import Wkt				Yes
List Flrs Users				Yes
List Prepared Routes	Yes	Yes	Yes	Yes
List Prepared Stops	Yes	Yes	Yes	Yes
List Route		Yes	Yes	Yes
List Routes To Close	Yes	Yes	Yes	Yes
Remove Activity Code		Yes	Yes	Yes
Remove Assign		Yes	Yes	Yes

Remove Building Category		Yes	Yes	Yes
Remove Color		Yes	Yes	Yes
Remove Container Maker		Yes	Yes	Yes
Remove Container Type		Yes	Yes	Yes
Remove Customer Prfx		Yes	Yes	Yes
Remove Customer Type		Yes	Yes	Yes
Remove Facility		Yes	Yes	Yes
Remove Flrs Users				Yes
Remove Material		Yes	Yes	Yes
Remove Operator		Yes	Yes	Yes
Remove Route		Yes	Yes	Yes
Remove Service AddOn		Yes	Yes	Yes
Remove Service Type		Yes	Yes	Yes
Remove State		Yes	Yes	Yes
Remove Stop		Yes	Yes	Yes
Remove Tmp Route	Yes	Yes	Yes	Yes
Remove Truck		Yes	Yes	Yes
Remove UnitT ype		Yes	Yes	Yes
Remove WorkGroup		Yes	Yes	Yes
View Server Log Files				Yes

APPENDIX A - CUSTOMER SERVICE REPRESENTATIVE (CSR) DASHBOARD

Welcome to the FleetLink CSR Dashboard User Guide.

This guide is intended for Customer Service Representatives—who may be Operations or Dispatch personnel—using the FleetLink Route Management System. It provides the information you need to use the CSR Dashboard solution to manage your customer service issues.

What is the CSR Dashboard?

The CSR Dashboard is a Customer Case Management solution that is a value-added, fully integrated component of the FleetLink Route Management System.

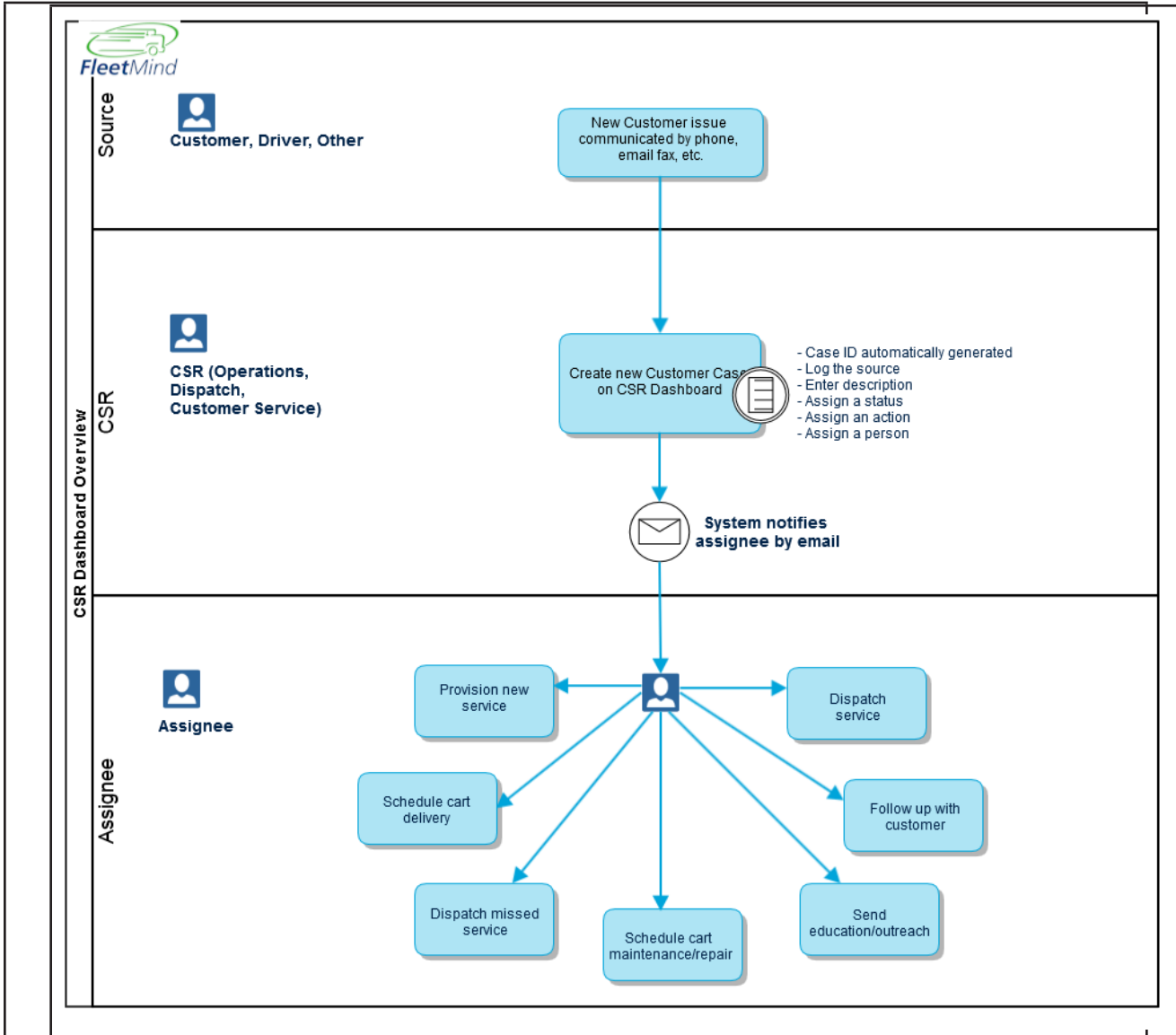
Using the CSR Dashboard, a Customer Service Representative can:

- Manage issues such as customer complaints.
- Create new Customer Cases.
- Modify existing Customer Cases.
- Act on complaints.
- Dispatch missed services.
- Provision new services.
- Schedule on-demand customer services.
- Schedule cart delivery, maintenance, and repair.
- Search and filter customer service instances (by name, address, or date).
- Assign a Case ID (or job ticket) that can be shared outside of the system.
- Generate reports:
 - Private Curbside Collection
 - Multi-Family Collection

Because it is integrated into the FleetLink Route Management System, the CSR Dashboard takes advantage of FleetLink Mobile's real-time fleet tracking, data collection, and service verification capabilities to provide your Dispatch or Operations personnel with a tool to streamline your customer service management.

Customer and Location information is already integrated into the Route Management System, making it immediately accessible for customer case management, and alleviating the need to use multiple applications to do so.

How it Works



Getting Started with the CSR Dashboard

Your initial setup and subsequent use of the CSR Dashboard will involve, for the most part, the use of the following FleetLink Route Management System menus:

- [Customer Menu](#)
- [Reference Data](#)
- [Reports](#)

Customer Menu

The features of the CSR Dashboard are accessible via the FleetLink Route Management System's Customers menu.

The screenshot displays the 'Customers' menu on the left, with 'List customer cases' highlighted. The main interface shows the 'List Customer Cases' screen, which includes a table of cases and two modal windows for editing and adding cases.

Customers Menu:

- Customers
- Search Customers
- Add New Customer
- Edit last viewed location
- List of Not GeoCoded Customers
- List customer cases
- Import Customer
- Import/Export Customer Contracts
- Import/Export Customer Documents
- Unsubscribed Customers

List Customer Cases Table:

Case ID	Date/Time
Contains	Contains
N3XC7BN-95PPWJ-0004	2017-07-19 11:11
NTIQA-VIVU-FAAA-0001	2016-08-15 11:11
NTIQA-CSWQ-FAAA-0001	2016-06-17 12:12
YKCSA-KTQH-EAAA-0001	2016-01-24 17:17
YKCSA-LWBO-DAAA-0001	2015-12-08 11:11
YKCSA-HKRP-DAAA-0001	2015-11-12 13:13
YKCSA-HJAP-DAAA-0004	2015-10-16 16:16
YKCSA-DLYP-DAAA-0003	2015-10-16 16:16
YKCSA-RVYP-DAAA-0002	2015-10-16 16:16
YKCSA-RVYP-DAAA-0001	2015-10-16 15:15
YKCSA-BCDO-CAAA-0001	2015-09-18 12:12
YKCSA-LLIN-CAAA-0001	2015-09-17 13:13

Edit Customer Case Modal (NTIQA-VIVU-FAAA-0001):

Case ID: NTIQA-VIVU-FAAA-0001
 Customer ID: Richard29
 Address: 1100 OLYMPIA BLVD, SEASIDE, CA 94132
 Contact Name: [Empty]
 Contact Phone: [Empty]
 Service Date: [Empty]
 Source: Telephone
 Case Type: Complaint

Add new Customer Case Modal:

Case ID: [Empty]
 Customer ID: 6903WWOODSTFQENXAZ
 Address: 6903 W WOOD ST, PHOENIX, AZ 85018
 Container RFID: FRR2409708316000032c
 Container Serial #: [Empty]
 Contact Name: [Empty]
 Contact Phone: [Empty]
 Service Date: [Empty]
 Source: [Empty]
 Status: [Empty]
 Driver: [Empty]
 Requestor #: [Empty]
 Add Attachment: Choose File No file chosen
 Case Type: [Empty]
 Case Action: [Empty]
 Assigned To: [Empty]
 Service Area: [Empty]
 Case Reason: [Empty]
 Other: [Empty]
 Description if reason is 'Other': [Empty]
 Send email: [Empty]









Using the Customer menu options, CSRs can list all current cases, search for specific cases, edit/update cases, and add new ones.

i CSR functions are accessible via several locations on the Route Management System's user interface.

For further details, refer to [Working with Customer Cases](#).

Reference Data Menu

As with other features of the FleetLink Route Management System, CSR Dashboard requires its own supporting [Managing Reference Data](#), which is accessible via the Reference Data menu.






Reference Data	
 Activity Codes	+
 Material Types	+
Organization	▶
Address/Location	▶
Carts/Containers	▶
Customers	▶
Customer Cases	 Case Actions
Rates, Services and Work Flows	 Case Reasons
Routes	 Case Source Types
Vehicles/Drivers	 Case Statuses
 Import Reference Data	 Case Types

Reference Data must be defined before you begin using the Customer Management menu's CSR options.

For details, refer to [Defining CSR Reference Data](#).

Reports Menu

The Reports menu is where you generate Customer Service Reports.

Reports	
 Rolloff Revenue/Disposal Charges	
 Billing Charges	
 Prospects	
Customer Service Reports	 Curbside CSR
	 Multi-Family CSR

From the Reports menu, you can generate Curbside or Multi-Family reports of cases. See [Generating Customer Service Reports](#).

Configuring eMail Notification Settings

eMail Settings

Not all authorized users of the FleetLink Route Management System will require email communication with the system. However, in order to ensure that assignees of Customer Cases in the CSR Dashboard receive the necessary email notifications, you must ensure that the following settings are configured:

- The SMTP server identification (the sending party).
- A user email address for the assignee (the receiving party).

To configure these settings, you will use the **Help** and **Users** menus.

Configuring SMTP

To configure SMTP settings:

1. Select **Help > Application Settings**.
The Edit Application Settings page displays.

Edit Application Settings	
pictureUrlBase	http://192.168.201.156/images
telogisGeobaseUrl	http://192.168.201.156/GeoStream
fleDatabaseUrl	localhost,dbName=fleetlinkenterprise,username=file,password=password
mailServer	imail.fleetmind.com
defaultMapLatLon	45.483898,-73.562263

2. Ensure that the setting **mailServer** is correctly identified.

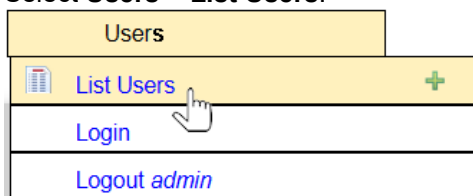


This information can be provided by your computer system administrator.

3. Click **Save**  when done.

Specifying Assignee eMail Address


1. Select **Users > List Users**.



The List of Users page displays.


List of Users							
Login	Role name	Last access	Session duration	Expiration date	Preferred language	Email	
admin	admin	2014-05-12 15:21:31	0		English	222@222.com	
DannyGendron	dispatcher		60		English	123@fleetmind.com	✘
DELIVERY	dispatcher	2014-04-23 16:54:19	15		English	mdemers@fleetmind.com	✘
DISPATCH	dispatcher	2014-05-05 11:30:36	15		English	mdemers@fleetmind.com	✘
FIXER	admin		0		English	jackmontreal1@gmail.com	✘
fleetmind	admin	2014-01-20 13:33:44	0		English		✘
JackCarley	dispatcher		0		English	jackmontreal1@gmail.com	✘
jatintandon	admin		60		English		✘
MAINTENANCE	dispatcher	2014-04-25 12:28:28	15		English	mdemers@fleetmind.com	✘
nevlidavies	admin		60		English		✘
PROVISION	provision	2014-05-05 11:31:13	15		English	mdemers@fleetmind.com	✘
SALES	billing	2014-05-05 11:31:13	15		English	mdemers@fleetmind.com	✘
15			Total: 15				Export
Screen name	read [40]	dispatcher [30]	provision [20]	billing [10]	admin [0]		
Add Activity Code							

- For all intended users of the CSR Dashboard who require notification of Customer Cases, ensure that there is a valid email address in the Email column.

 The email address may be that of a group, or *distribution list*.

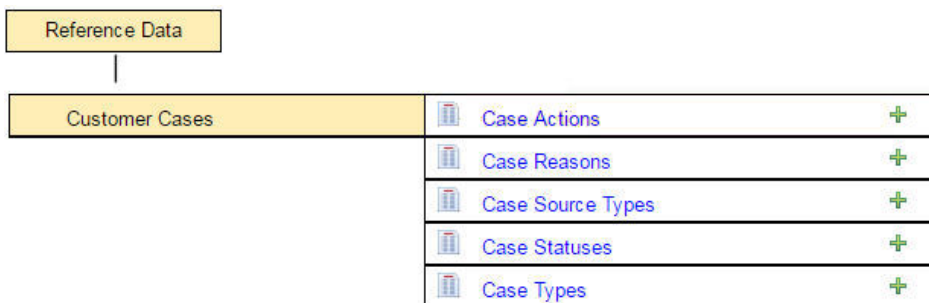
Defining CSR Reference Data

Defining Reference Data is the starting point when setting up your CSR Dashboard. Using the CSR options of the Reference Data menu, you define the list of sources for customer cases, their status, and the list of possible actions to be taken.

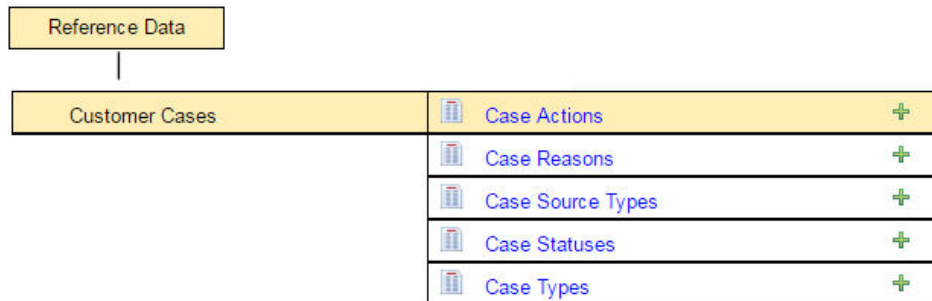
 All Reference Data elements defined here represent the menu options that will be available when you add or edit Customer Cases.

You can define 5 types of CSR Reference Data:

- [Case Actions](#)
- [Case Types](#)
- [Case Reasons](#)
- [Case Source Types](#)
- [Case Statuses](#)



Case Actions



Case Actions are the actions that can be taken to process or resolve a Customer Case.

List of Case Actions		
	Case Action	Description
	<input type="text"/>	<input type="text"/>
	A1DISPATCH	Dispatch Service
	A2REPAIR	Dispatch Repair and Maintenance
	A3VERIFY	Verify if Service Rendered
	A4AUDIT	Dispatch Audit
	A5MONITOR	Monitor Service
	A6SUSPEND	Suspend Service
	A7UNSUSPEND	Unsuspend Service
	B1ADDREV	Review Add Service Request
	B2SHARE	Plan Shared Container Service
	B3SURVEY	Dispatch Site Survey
	B4NOTE	Add Notes
	B5DELIVER	Deliver new Cart / Bin
	B6ROUTE	Add to Routes
	B7REMREV	Review Remove Service Request
	B8REMOVE	Remove Cart / Bin
	C1ANALYSE	Investigate Customer Complaint
Total Item: 41		


Adding a Case Action

To add a Case Action:

- From the List of Case Actions screen, select the **Add New** button.
- OR
- From the Customer Management menu, select the Case Actions menu option, ensuring that you click the **Add** icon ().
The Add Case Action screen displays.











3. Enter a Name and Description, and then select **Save Case Action**.

Editing a Case Action:

1. From the List of Case Actions screen, select the **Edit** button.  The Edit Case Action screen displays.

2. Modify the information as required, and then select **Save Case Action**.

Case Reasons

Reference Data	
Customer Cases	 Case Actions 
	 Case Reasons 
	 Case Source Types 
	 Case Statuses 
	 Case Types 

Case Reasons represent predefined descriptions of the case that the Customer Service Representative will be able to select from a pull-down menu when entering or editing a case.

List of Case Reasons		Description
		R1 Missed Collection
		R10 Information Request
		R101 Driver not wearing pants
		R10COMPLNT
		R11 Praise
		R11BILLINGQU
		R12 Complaint

Adding a Case Reason

To add a Case Reason:

- From the List of Case Reasons screen, select the **Add New** button.
 - OR
 - From the Customer Management menu, select the Case Reasons menu option, ensuring that you click the **Add** icon ().
- The Add Case Reason screen displays.

◀ ▶
Add Case Reason

Case Reason

Description:

- Enter a Name and Description, and then select **Save Case Reason**.

Editing a Case Reason:

- From the List of Case Reasons screen, select the **Edit** button.
- The Edit Case Reason screen displays.






◀ ▶
Edit Case Reason *R101 Driver not wearing pants*

Case Reason

Description:

- Modify the information as required, and then select **Save Case Reason**.


































Case Source Types

Reference Data	
Customer Cases	<ul style="list-style-type: none">  Case Actions +  Case Reasons + <li style="background-color: #ffffcc;"> Case Source Types +  Case Statuses +  Case Types +

Customer Cases will usually be initiated by a communication from the customer—via various means, such as email, telephone, web interface, and so on—to register a complaint or request a service.

Customer Cases may also, on occasion, originate with a driver. For example, a driver may notice that a customer's bin is missing a wheel or is damaged to the point that it cannot be lifted with a side-loader. The driver may then relay this information to the back office so that a Customer Case may be created.


The Case Source Types menu option enables you to define sources of Customer Cases.

List of Case Source Types		
	Case Source	Description
 	S1Driver	Driver
 	S2Mail	Mail
 	S3Email	Email
 	S4Meeting	Meeting
 	S5Other	Other
 	S6Telephone	Telephone
 	S7Vmail	Voicemail
 	S8WebFrm	Web Form
 	S9InPerson	In Person
 	S10Director	Dept Director
 	S11Council	City Council Member
 	S12Mayor	Mayor Office
 	S13CityMgr	City Manager Office
 	S14OtherCityEmp	Other City Employee
 	T1FmToBilling	FleetMind RMS
 	T2BillingToFM	Billing System

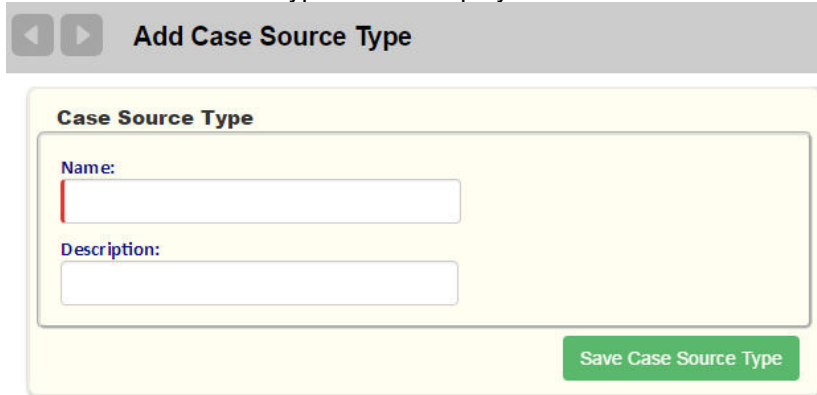
Total Item: 19

Adding a Case Source Type

To add a Case Source Type:


- From the List of Case Source Types screen, select the **Add New** button. 
- OR**

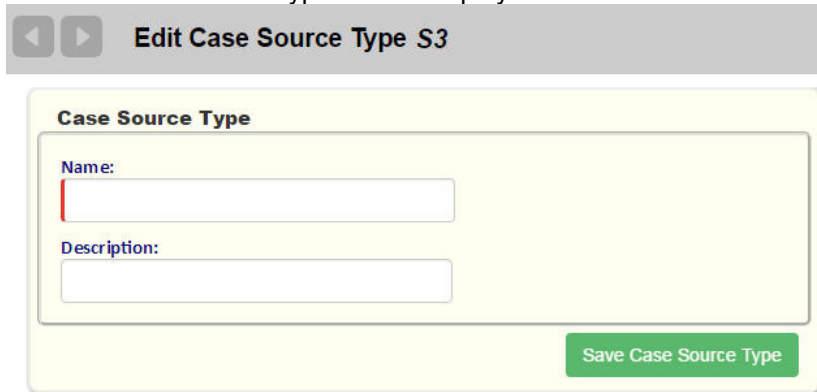
- From the Customer Management menu, select the Case Source Types menu option, ensuring that you click the **Add** icon ().
The Add Case Source Type screen displays.



- Enter a Name and Description, and then select **Save Case Source Type**.
















Editing a Case Source Type:

- From the List of Case Source Types screen, select the **Edit** button. 
The Edit Case Source Type screen displays.




































- Modify the information as required, and then select **Save Case Source Type**.

Case Statuses

Reference Data																
Customer Cases	<table border="1"> <tr> <td></td> <td>Case Actions</td> <td>+</td> </tr> <tr> <td></td> <td>Case Reasons</td> <td>+</td> </tr> <tr> <td></td> <td>Case Source Types</td> <td>+</td> </tr> <tr> <td></td> <td>Case Statuses</td> <td>+</td> </tr> <tr> <td></td> <td>Case Types</td> <td>+</td> </tr> </table>		Case Actions	+		Case Reasons	+		Case Source Types	+		Case Statuses	+		Case Types	+
	Case Actions	+														
	Case Reasons	+														
	Case Source Types	+														
	Case Statuses	+														
	Case Types	+														

Case status indicates the current state of a customer case within the CSR's work flow. Three statuses are predefined in the CSR Dashboard:



- Open - Unassigned
- Open - Assigned
- Closed

List of Case Statuses		
 Add New	Case Status	Description
 	CLCO	Closed - Completed
 	DUP	Closed - Duplicate
 	PEND	Open - Pending
 	INPRO	Open - In Progress
 	OUASN	Open - Unassigned
 	OASN	Open - Assigned
 	CLSD	Case closed
 	U1CLCO	Closed - Complete
 	U2DUP	Closed - Duplicate
 	U3OASN	Open - Assigned
 	U4PEND	Open - Pending
 	U5OUASN	Open - Unassigned
 	U6CLDS	Closed - Dismissed
 	U7INPRO	Open - In Progress
 	dsfgsdg	dsgdsg
 	123	12345

Total Item: 18


Adding a Case Status

To add a Case Status:

1. From the List of Case Statuses screen, select the **Add New** button. 
OR
2. From the Customer Management menu, select the Case Statuses menu option, ensuring that you click the **Add** icon ().
The Add Case Status screen displays.
















3. Enter a Name and Description, and then select **Save Case Status**.

Editing a Case Status:

1. From the List of Case Statuses screen, select the **Edit** button. 
The Edit Case Status screen displays.

2. Modify the information as required, and then select **Save Case Status**.

Case Types

Reference Data											
Customer Cases	<table border="1"> <tr> <td> Case Actions</td> <td>+</td> </tr> <tr> <td> Case Reasons</td> <td>+</td> </tr> <tr> <td> Case Source Types</td> <td>+</td> </tr> <tr> <td> Case Statuses</td> <td>+</td> </tr> <tr> <td> Case Types</td> <td>+</td> </tr> </table>	 Case Actions	+	 Case Reasons	+	 Case Source Types	+	 Case Statuses	+	 Case Types	+
 Case Actions	+										
 Case Reasons	+										
 Case Source Types	+										
 Case Statuses	+										
 Case Types	+										

Case Types indicate the nature of the customer case, as different types will determine the course(s) of action and may be accorded different priorities.

List of Case Types		
	Case Action	Description
	<input type="text"/>	<input type="text"/>
	T1CASE	Case
	T2WO	Work Order
	INFO	Information Only
	T3ASAP	Urgent High Priority
	importCT	test import case type
	tCTnw	test new Case Type update

Adding a Case Type

To add a Case Type:

- From the List of Case Types screen, select the **Add New** button.
- OR**
- From the Customer Management menu, select the Case Types menu option, ensuring that you click the **Add** icon ().

The Add Case Type screen displays.

◀ ▶ **Add Case Type**

Case Type

Name:

Description:

- Enter a Name and Description, and then select **Save Case Type**.

Editing a Case Type:

- From the List of Case Types screen, select the **Edit** button.
- The Edit Case Type screen displays.

◀ ▶ Edit Case Type T3ASAP

Case Type

Name:
T3ASAP

Description:
Urgent High Priority

Save Case Type

2. Modify the information as required, and then select **Save Case Type**.

Working with Customer Cases

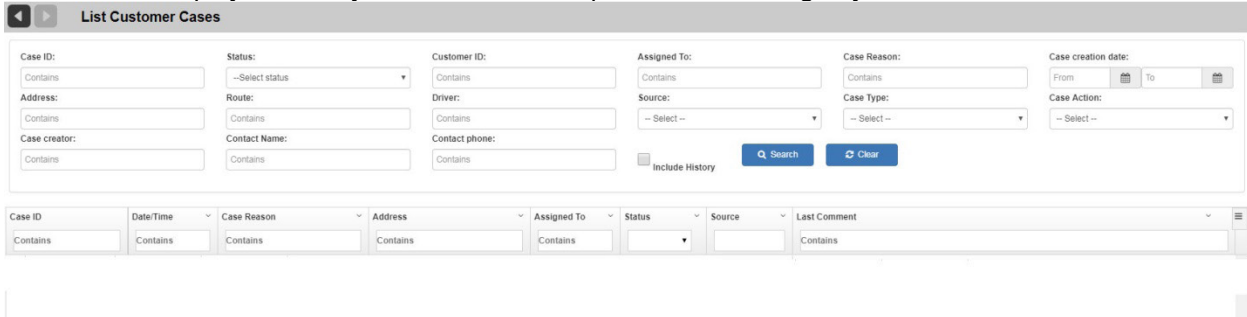
Viewing Customer Cases



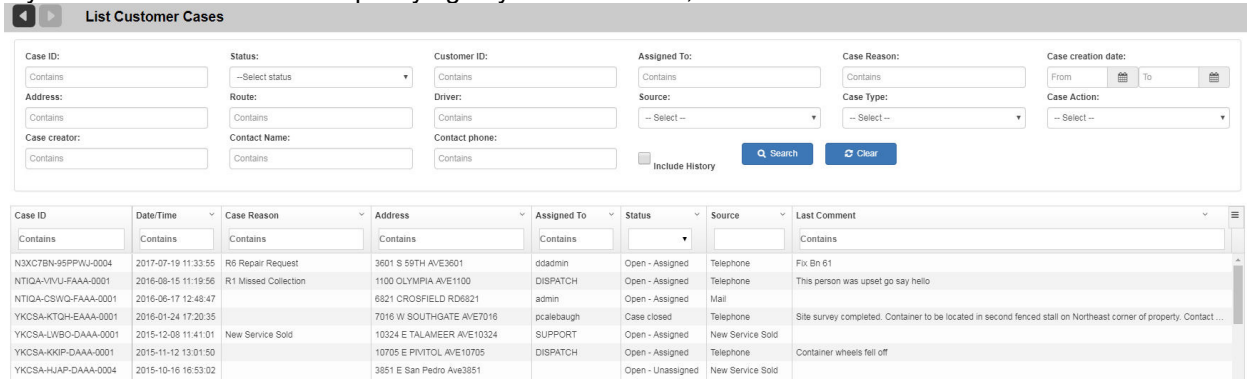
To view Customer Cases:

1. Select **Customers> List Customer Cases**.

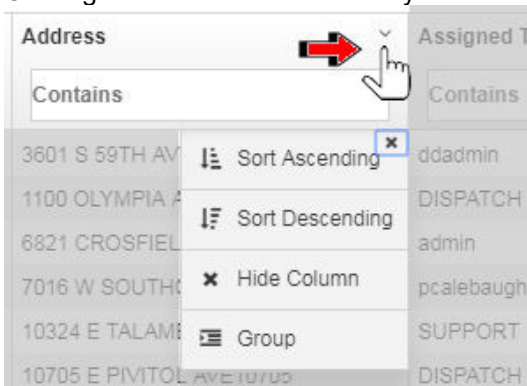
A blank form displays, where you can search for specific cases using any of the fields as search criteria.



If you select **Search** without specifying any search criteria, all customer cases are returned.



Clicking on the chevron icon in any column header displays a drop-down menu with sort and show/hide options.



From the List of Customer Cases, you can access any case by clicking the highlighted links, which will bring you to the Edit Customer Case page. [Editing a Customer Case](#)
See [Editing a Customer Case](#).

Adding a Customer Case

You add a Customer Case using the Add Customer Case page.

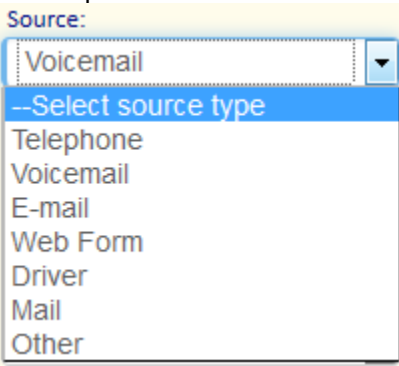
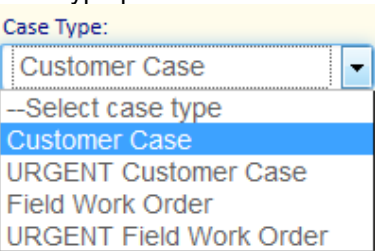
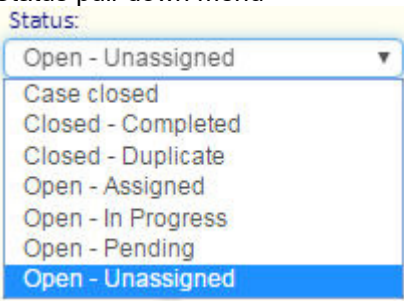
The Add Customer Case page is accessible via the following screens:

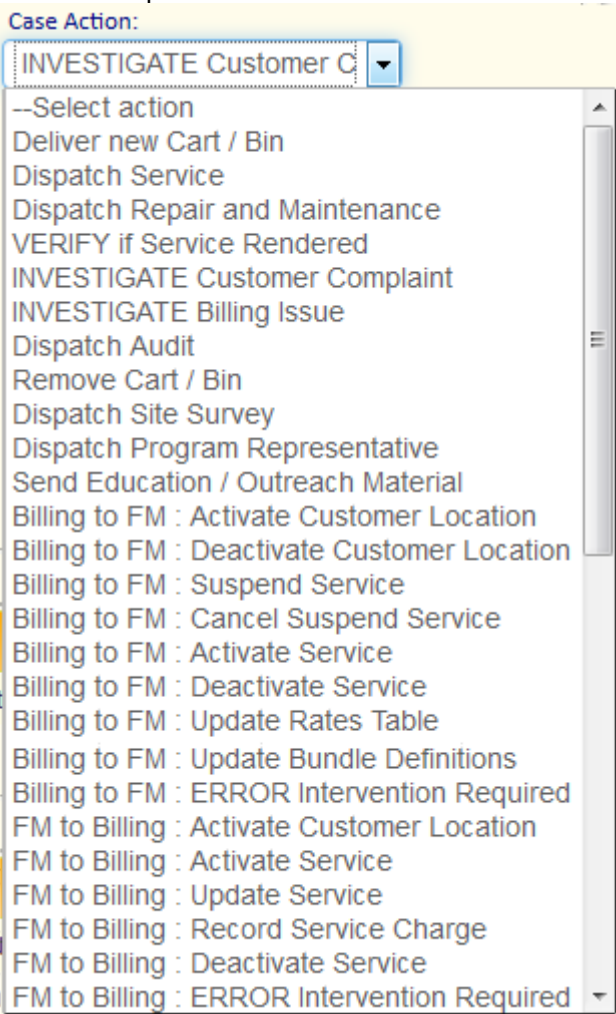
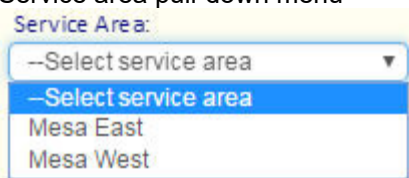
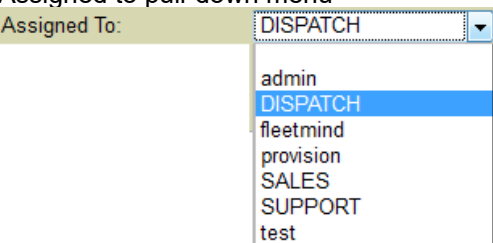
- [Edit Location page](#)
- [Edit Customer page](#)


Field Descriptions

Select the source of the complaint from the menu. These options represent entries defined in Case Reasons Reference Data.

Field	Description
Is Multi-family check box. Is Multi-family: <input type="checkbox"/>	If the case refers to a container that is shared by multiple parties (e.g., residents of an apartment or townhouse complex, select this check box. Otherwise, leave it unselected.
Case Reason pull-down menu Case Reason: A1 Missed Collection Other A1 Missed Collection A2 Can/Bin Delivery Request A3 Can/Bin Repair Request A4 Special Service Request A5 Change in Service A6 Program Rep Service Request A7 Billing Question A8 Special Events (HHW/Electronics Recycling) A9 Collection Date AA Service Complaint B1 Update FleetMind to Billing B2 Update Billing to FleetMind	Select a reason for the complaint from the menu. These options represent entries defined in Case Reasons reference data.

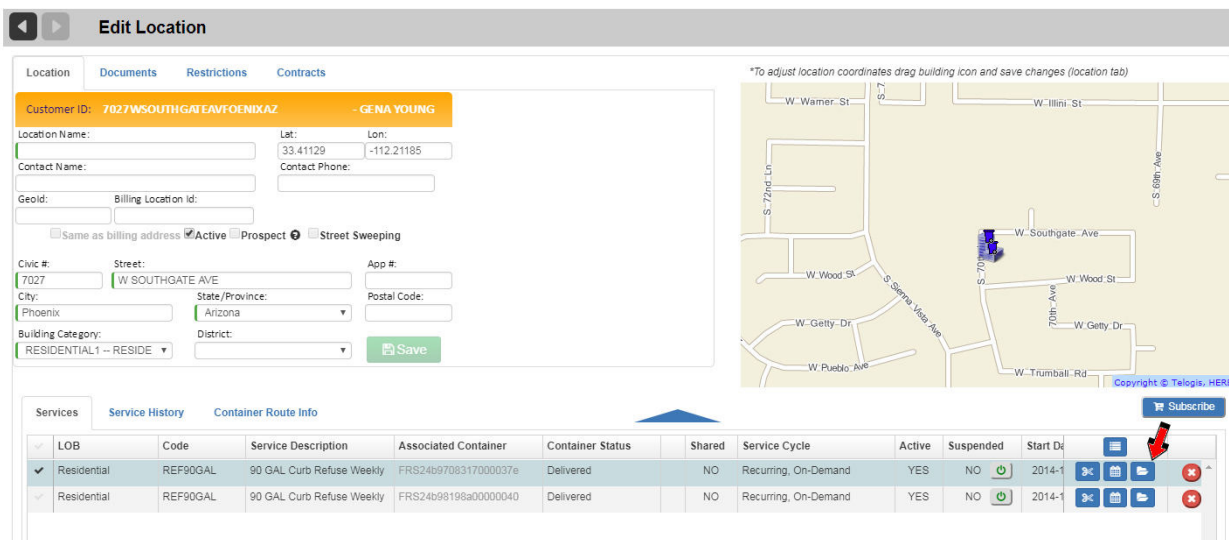
<p>Source pull-down menu</p> 	<p>Select a complaint source from the menu. These options represent entries defined in Case Source Types reference data.</p>
<p>Case type pull-down menu</p> 	<p>Select a case type from the menu. These options represent entries defined in Case Types reference data.</p>
<p>Status pull-down menu</p> 	<p>Select a status from the menu. These options represent entries defined in Case Statuses reference data.</p>



<p>Case action pull-down menu</p> 	<p>Select an action from the menu These options represent entries defined in Case Actions reference data.</p>
<p>Service area pull-down menu</p> 	<p>Select a service area from the menu. This represents service area of the route, which is configured by the Company Reference Data.</p>
<p>Assigned to pull-down menu</p> 	<p>Select an assignee from the menu. These assignees represent entries/roles defined in the List of Users. See Defining CSR User Permissions.</p>
<p>Send email check box</p> <p>Send email: <input checked="" type="checkbox"/></p>	<p>Select this check box to send email notifications to assignee(s).</p>


<p>As html/text radio buttons As html <input checked="" type="radio"/> As text <input type="radio"/></p>	<p>Select a format for the email notifications according to users' preference.</p> <p> These buttons display only once the Send email check box has been selected.</p>
<p>Add Attachment: <input type="button" value="Choose File"/> No file chosen <input type="button" value="Clear Attachment"/></p>	<p>Use the Choose file button to browse for a file to attach to the customer case. Use Clear Attachment to remove the attachment from the case.</p>

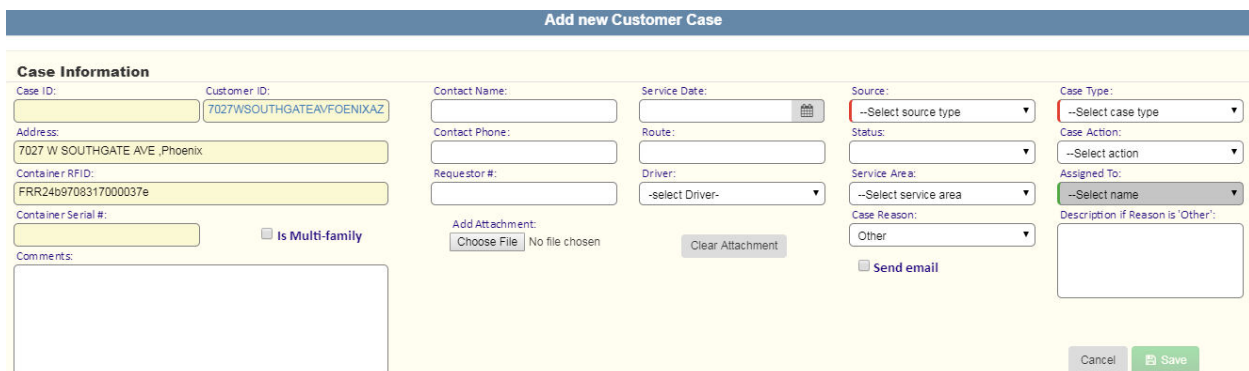
Adding a Customer Case from the Edit Location Page

The lower area of the Edit Location page lists the services associated with the location. Opening a Customer Case from this page will open the Add Customer Case page, with the case automatically associated with the container for that service.



LOB	Code	Service Description	Associated Container	Container Status	Shared	Service Cycle	Active	Suspended	Start Date	Actions
Residential	REF90GAL	90 GAL Curb Refuse Weekly	FRS24b9708317000037e	Delivered	NO	Recurring, On-Demand	YES	NO	2014-1	
Residential	REF90GAL	90 GAL Curb Refuse Weekly	FRS24b98198a0000040	Delivered	NO	Recurring, On-Demand	YES	NO	2014-1	

- Locate the desired container and click its **Open new case** button. 
 The Add Customer Case page opens.



Add new Customer Case

Case Information

Case ID: Customer ID:

Address:

Container RFID:

Container Serial #: Is Multi-family

Comments:

Contact Name: Contact Phone: Requestor #:

Add Attachment: No file chosen


Service Date: Route: Driver:

Source: Status: Service Area: Case Reason:

Case Type: Case Action: Assigned To:

Description if Reason is 'Other':

Send email


 Note that the container association is made automatically (**Container** field).

Adding a Customer Case from the Edit/View Customer Page

The lower area of the Edit Customer and View Customer pages lists the customer's location(s).

The screenshot shows the 'Edit Customer' interface. At the top, there are fields for Customer Id (7027WSOUTHGATEAVFOENIXAZ), Active, Prospect, and Billable checkboxes. Below are fields for Last Name (YOUNG), First Name (GENA), Business Name, Customer Prefix, Customer Class, Office Phone, Home Phone, Email, and Fax. A Billing Address section includes Civic #, Street, Apt/Suite, City, District, State/Province, and Postal Code. A 'Save Customer' button is at the bottom right.

Below the form is a 'Customer Locations' table with columns: Civic #, Street, Contact Name, Contact Phone, District, City, State/Province, and an 'Open new case' button. The table contains one entry: Civic # 7027, Street W SOUTHGATE AVE, City Phoenix, State/Province AZ. A red arrow points to the 'Open new case' button.

- Locate the desired location and click its **Open new case** button.  The Add Customer Case page displays.

 Note that, unlike opening a Customer Case from the Edit Location, there is no container association when you use this method

The screenshot shows the 'Add New Case' page. It has a title bar 'Add New Case' with a close button. The main area is titled 'Case Information' and contains several fields: Case ID, Customer ID (7027WSOUTHGATEAVFOENIXAZ), Contact Name, Service Date, Source, Case Type, Address (7027 W SOUTHGATE AVE ,Phoenix), Contact Phone, Route, Status, Case Action, Container RFID, Requestor #, Driver, Service Area, Assigned To, Container Serial #, Add Attachment (Choose File, No file chosen, Clear Attachment), Case Reason, Other, Description if Reason is 'Other', and a 'Send email' checkbox. There are 'Cancel' and 'Save' buttons at the bottom right.

Editing a Customer Case

To edit a Customer Case, for example, to reassign a case, change its status, or enter additional comments:

1. Select **Customer Management > List Customer Cases**.

List Customer Cases

*Maximum 10 000 records shown below. Click 'Advanced Filter' button to refine search. More columns available - use ☰ button in grid header to access

Case ID	Date/Time	Case Reason	Address	Assigned To	Status	Last Comment
NOUWA-IMPJ-BAAA-0001	27-May-2015 1...		366 OAKLAND AVE ,Winnipeg ,MB	MessageDispatchg...	Open - Assigned	
NOUWA-WMLH-BAAA-0002	25-May-2015 1...		1000 WILKES AVE #UNIT 104 ,Winni...	MessageDispatchg...	Open - Unassigned	
NOUWA-KTCR-BAAA-0003	08-May-2015 1...		104 MINIKADA BAY ,Winnipeg ,MB		Open - Unassigned	
NOUWA-YACR-BAAA-0002	08-May-2015 0...		104 MINIKADA BAY ,Winnipeg ,MB		Open - Unassigned	
NOUWA-QVBR-BAAA-0001	08-May-2015 0...		1354 BORDER ST ,Winnipeg ,MB		Open - Unassigned	
NOUWA-FGAR-BAAA-0004	08-May-2015 0...		314 LINDSAY ST ,Winnipeg ,MB		Open - Unassigned	
NOUWA-HWYQ-BAAA-0003	08-May-2015 0...	Collection staff spilled recyclables...	314 LINDSAY ST ,Winnipeg ,MB		Open - Unassigned	
NOUWA-DSYQ-BAAA-0002	08-May-2015 0...		279 BOREBANK ST ,Winnipeg ,MB	11111	Open - Assigned	
NOUWA-WLXQ-BAAA-0004	08-May-2015 0...	www	3 COLEBROOK DR ,Winnipeg ,MB	DISPATCH	Open - Assigned	333
NOUWA-VXWQ-BAAA-0002	08-May-2015 0...	333	3 COLEBROOK DR ,Winnipeg ,MB	MessageDispatchg...	Open - Assigned	333
NOUWA-QSQW-BAAA-0001	08-May-2015 0...	Collection container is too heavy/b...	10147 E STARION AVE ,MESA ,AZ	MessageDispatchg...	Open - Assigned	
NOUWA-NHTQ-BAAA-0001	08-May-2015 0...	Collection staff damaged my recyc...	108 MINIKADA BAY ,Winnipeg ,MB		Open - Unassigned	
NOUWA-HLRQ-BAAA-0010	07-May-2015 1...		1001 LORETTE AVE ,Winnipeg ,MB	MessageDispatchg...	Open - Assigned	
NOUWA-MURQ-BAAA-0009	07-May-2015 1...	3456	1051 N DOBSON RD ,MESA ,AZ	MessageDispatchg...	Open - Assigned	egefg
NOUWA-RBQQ-BAAA-0008	07-May-2015 1...	Collection staff spilled recyclables...	1001 LORETTE AVE ,Winnipeg ,MB	MessageDispatchg...	Open - Assigned	33333333333333333333333333333333
NOUWA-YSPO-BAAA-0003	07-May-2015 1...	Collection staff were rude or disco...	213 MCKAY AVE ,Winnipeg ,MB	MessageDispatchg...	Open - Assigned	
NOUWA-TNPQ-BAAA-0002	07-May-2015 1...	Collection staff spilled recyclables...	55 BAIRDMORE BLVD #UNIT 23 ,WI...	MessageDispatchg...	Open - Assigned	

Advanced Search

- Locate the desired case in the list, and then click a highlighted link in any column. The Edit Customer Case page displays.

Edit Customer Case : NOUWA-WLXQ-BAAA-0004

Case Information

Case ID:

Customer ID:

Address: Is Multi-family:

Container: Route:

Driver: Service Date:

Comments:

Source:

Status:

Service Area:

Case Reason:

Send email:

Case Type:


Case Action:

Assigned To:


Description if Reason is 'Other':

Case History

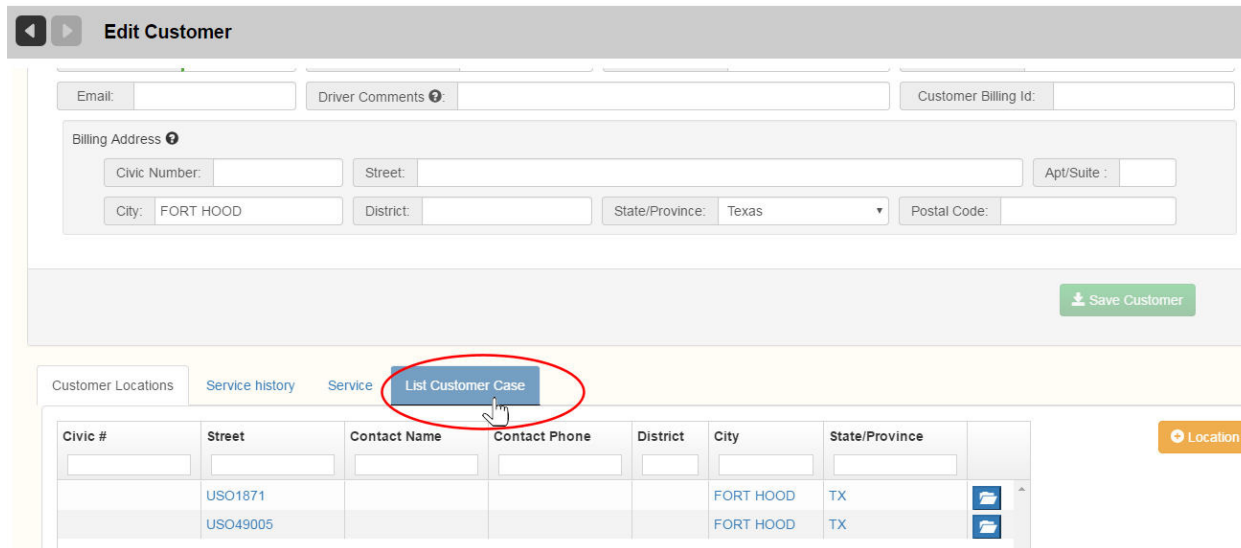
Date/Time	Modified By	Status	Case Action	Case Type	Is Multi-Family	Assigned To	Case Reason	Comments
08-May-2015 08:54...	tsears	Open - Assigned		Complaint	NO	DISPATCH	www	333
08-May-2015 08:54...	tsears	Open - Assigned		Complaint	YES	DISPATCH	www	333
08-May-2015 08:53...	tsears	Open - Assigned		Complaint	NO	DISPATCH	www	333
08-May-2015 08:51...	debug	Open - Assigned		Complaint	NO	DISPATCH	www	22
08-May-2015 08:51...	debug	Open - Assigned		Complaint	NO	DISPATCH		22

- The lower area of the page displays a complete history of the Customer Case. These items are not editable.
- The information in the upper area of the page is editable. After making any changes here, click **Save** . Once you have saved your edits, your update is added to the list of historical items in the lower area of the page.
- Clicking the highlighted **Customer** link in the header brings you to Edit Customer screen for that customer.

Deleting a Customer Case


 You cannot delete a Customer Case. However, once you change a case status to **Closed**, the case is removed from the List of Customer Cases.

You can view a customer's case history by navigating to the Edit Customer page and selecting the **List Customer Cases** tab in the lower area of the page.



Edit Customer

Email: Driver Comments: Customer Billing Id:

Billing Address 

Civic Number: Street: Apt/Suite:

City: FORT HOOD District: State/Province: Texas Postal Code:

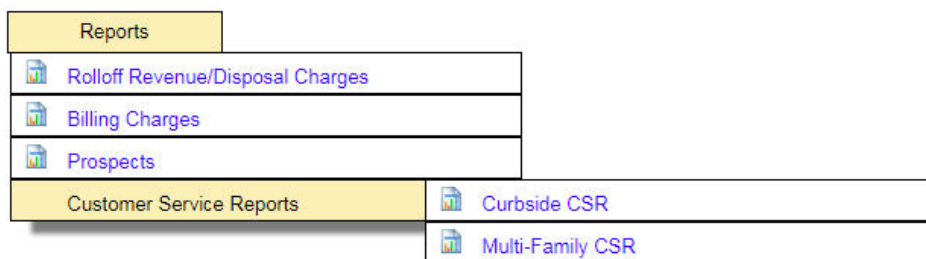
[Save Customer](#)

Customer Locations Service history Service **List Customer Case**

Civic #	Street	Contact Name	Contact Phone	District	City	State/Province
	USO1871				FORT HOOD	TX
	USO49005				FORT HOOD	TX

[Location](#)

Generating Customer Service Reports



Reports

- Rolloff Revenue/Disposal Charges
- Billing Charges
- Prospects
- Customer Service Reports**
 - Curbside CSR
 - Multi-Family CSR

From the Reports, menu the Route Management System user can generate Curbside or Multi-Family reports of cases. The data extracted in either of these reports is determined by whether the **is Multi-Family** option is selected when the customer case is created or edited. See [Adding a Customer Case](#).

Private Curbside Collection Report

To generate a Private Curbside Collection Report:

1. Select **Customer Management > Customer Service Reports > Curbside CSR**.

The Customer Service Report - Private Curbside Collection page displays.

Customer Service Report - Private Curbside Collection

Collector Name: Fleetmind Test
 Collector ID Number: 2341
 Service Area: All Service Areas
 Reporting Period: 2014-07-01 TO 2014-07-15
 Contact Person: CSR owner
 Phone Number: 888391666
 Email Address: CSR@fleetmind.com

Select date range
 Date from: 2014-07-01 Date to: 2014-07-15
 Generate Report Export to csv

Drag a column header here and drop it to group by that column.

Sequence Nr	Resident Reference Nr	Service Area	Resident Name	Address	Unit #	City / Community	Postal Code	Telephone Number	Email Address	Communication Method	Open Time	Open Date	Complaint or Request Type	Description, including resident details as required	Resolution	Status	Close Time	Close Date
1	MMKV-IJAA-0001	Canada2	Tim Sears	1751 RICHARDSON RD	7200	Montreal	h3k1g6		sears@fleetmind.com	Telephone	08:00:15	2014-07-09	Complaint	Collection staff spilled recyclables on the ground and did not remove them		Open - Assigned		
2	LBRW-IJAA-0004	Canada2	Tim Sears	1751 RICHARDSON RD	7200	Montreal	h3k1g6		sears@fleetmind.com	Mail	11:51:45	2014-07-09	Information request	This program is too confusing-restrictive /complicated etc.		Open - Assigned		
3	QYMA-IJAA-0008	Canada2	Tim Sears	1751 RICHARDSON RD	7200	Montreal	h3k1g6		sears@fleetmind.com	Driver	14:13:00	2014-07-14	Complaint			Open - Unassigned		

Total Items: 3

- Select a date range using the **Date from** and **Date to** calendar menus.

Date from: 2014-07-01 Date to: 2014-07-15

July 2014 July 2014

Su	Mo	Tu	We	Th	Fr	Sa
29	30	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

- Select a Service Area from the **Service Area** menu.

Service Area: All Service Areas
 Reporting Period: All Service Areas
 Contact Person: Canada2 changed
 Phone Number: FM service area 2
 Email Address: CSR@fleetmind.com

- Click **Generate Report**.
 The report for the selected period and Service Area displays.

The following controls are provided in the report:

- You can search for a text string contained in any column by clicking the search arrow in the far right of the report and entering a string in the text field.

Search...

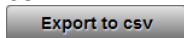
- You can sort report results by any column by clicking on the column header.
- You can group report results by any column by dragging the column header to the area above the report data.



You can drag multiple column headers to this area for further grouping.



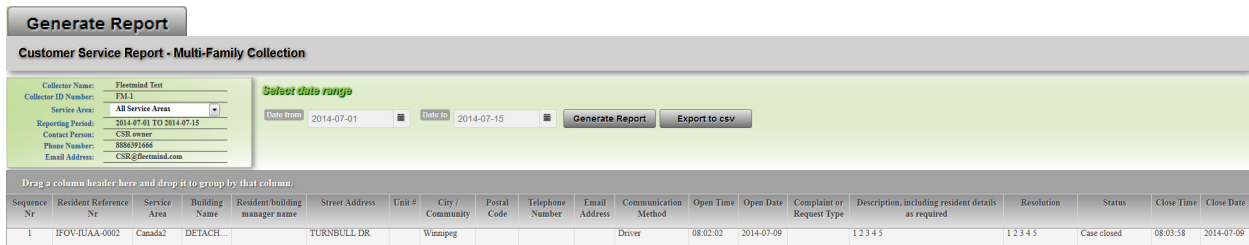
- You can export the report to a CSV file for use in Excel or other spreadsheet applications by pressing **Export to CSV**.



Multi-Family Collection Report

To generate a Multi-Family Collection Report:

- Select **Customer Management > Customer Service Reports > Multi-FamilyCSR**. The Customer Service Report - Multi-Family Collection page displays.
- Specify your report criteria as described for [Private Curbside Collection Report](#), and then click **Generate Report**.



All the same controls as described for [Private Curbside Collection Report](#) are provided here. Refer to that section for details.

APPENDIX B - WORKFLOWS

Industrial Work Flows

The INDUSTRIAL (or ROLL-OFF) line of business uses a truck chassis to transport large containers that “roll-on” and “roll-off” the truck. These containers will vary in size and function, and may include compactors.



In some cases, the truck not only carries a container, but also pulls a trailer with a second container. This approach is especially useful when servicing two customers that are close to each other but far from the yard or disposal site, allowing the driver to make a single trip to the disposal site.

Usually, less than 10 customers will be serviced in a day since in most cases, each “load” involves a trip to the disposal site.

Each load is a high-value service. Both the distance traveled and the time spent on a load can influence the price being charged for the service and/or productivity of the operation. Because so few customers are processed in a day, measuring durations and distances precisely is key to maximizing profitability.

There are 10 common types of services associated with this line of business and supported by the FleetLink Route System.

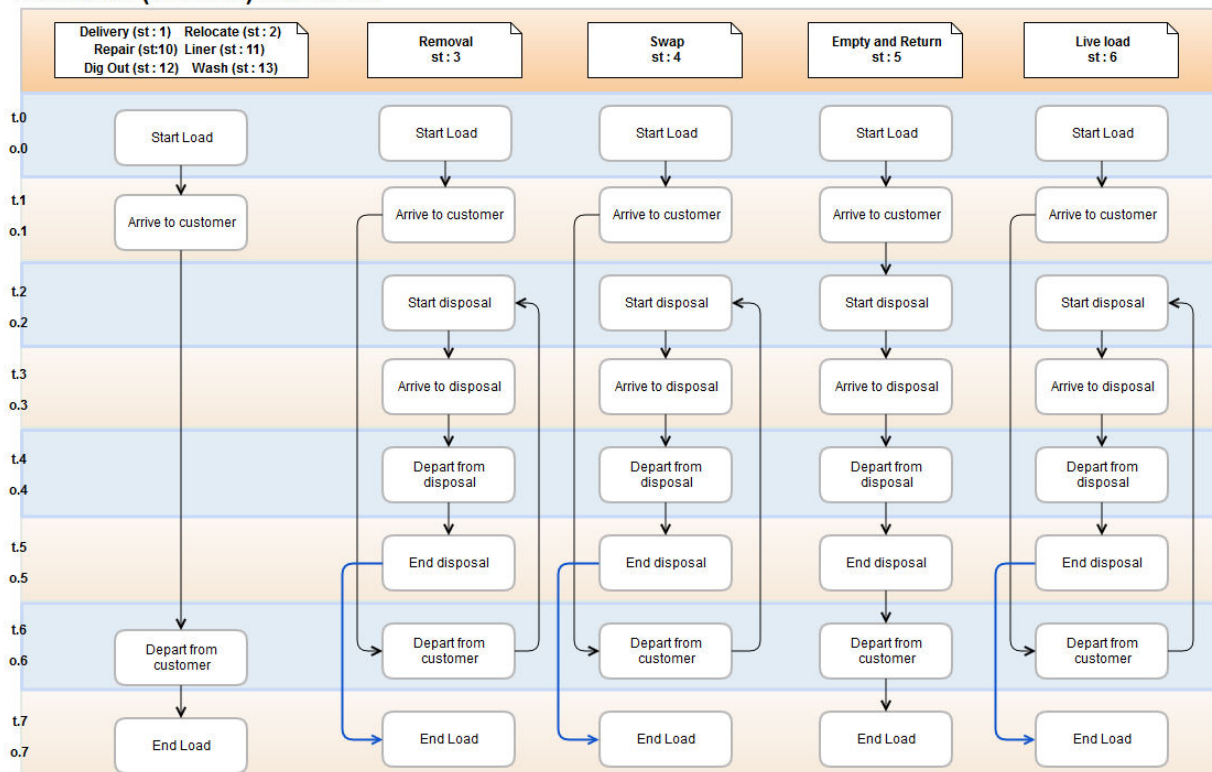
1. **DELIVERY:** The driver leaves the yard or a customer’s site with an empty bin. He arrives at the customer site and delivers the empty bin. He then either returns to the yard or goes to service the next customer.
2. **RELOCATION:** The driver either leaves the yard or a customer’s site. He arrives at the customer site, picks-up the bin and repositions it at the customer site. He then either returns to the yard or goes to service the next customer.
3. **Dig Out:** The driver either leaves the yard or a customer’s site. He arrives at the customer site, and digs out the bin. He then either returns to the yard or goes to service the next customer.
4. **Wash:** The driver either leaves the yard or a customer’s site. He arrives at the customer site, and washes the bin. He then either returns to the yard or goes to service the next customer.
5. **REMOVAL:** The driver either leaves the yard or a customer’s site. He arrives at the customer site, picks-up the bin, goes to the disposal site to empty it and either returns to the yard or goes to service the next customer.
6. **SWAP:** The driver leaves the yard or a customer’s site with an empty bin. He arrives at the customer site, delivers

the empty bin, picks-up the full bin, goes to the disposal site to empty it and either returns to the yard or goes to service the next customer.

7. **EMPTY and RETURN:** The driver leaves the yard or a customer's site. He arrives at the customer site, picks-up the bin, goes to the disposal site to empty it and returns it to the customer. He then returns to the yard or goes to service the next customer.
8. **LIVE LOAD:** The driver leaves the yard or a customer's site with an empty bin onboard. He arrives at the customer site, the customer loads up the bin, the driver leaves and goes to the disposal site to empty it and either returns to the yard or goes to the next customer.
9. **REPAIR:** The driver either leaves the yard or a customer's site. He arrives at the customer site, and repairs the damaged container. He then either returns to the yard or goes to service the next customer.
10. **LINER:** The driver either leaves the yard or a customer's site. He arrives at the customer site, and installs a liner in a container. He then either returns to the yard or goes to service the next customer.

Industrial (Roll Off) Workflow

st* - Service Type t.* - Activity time stamp o.* - Activity odometer value



Commercial/Residential Workflows




For the Commercial and Residential lines of business, the following workflows can be selected via the user interface:

- **Cart to be serviced**, a regular, recurring pickup service for garbage or recycling.
- **No cart**, special service where no cart is involved, for example, a pickup of waste cooking oil from a restaurant, or a septic tank cleaning.
- **Cart Maintenance**, involving the following operations:
 - Removal
 - Delivery
 - Exchange
 - Repair

Appendix C - Setting up Shared Container Service


In multi-family dwellings—such as an apartment building or townhouse complex—it is not uncommon for several subscribers to share a single container. The same arrangement may apply to some commercial subscribers, such as small businesses in a strip mall.

In order to set up shared container service in the FleetLink Route Management System (RMS), you must create a *Default Customer Account*. ALL shared Containers are owned by the Default Customer (i.e., the Municipality). In addition, all non-shared containers revert to Default Customer ownership when a subscriber moves out and cancels his/her subscription (“container pullback”).

 You need to set up only one Default Customer Account in RMS in order to accommodate shared container service. You may, optionally, create other accounts for your Municipality, as required, for different purposes.

This document explains how to:

- Set up shared container service under the Default Customer Account
- Subscribe customers to shared container service at their locations.


 The procedures described here assume that you are familiar with creating customer accounts in RMS and subscribing customers to services.

The Default Customer Account

In the Edit Customer screen shown below, a Default Customer Account has been created.

- The customer is **Active**,
- Not a **Prospect**,
- Business Name is **DEFAULT MUNICIPAL ACCOUNT**.

The next task is to add a location to which the container will be delivered.

1. Select the **Add Location** button .
2. Specify the location details on the Add Location screen. For purposes of this demonstration, we are using *SHARED CONTAINER A* as the Location Name, and *Asset Address* as the Building Category.

3. Select **Save** when done.
4. Next, add a service. Use the **New Service** option (not *New Shared*), as the container is not yet shared.

5. Specify the service subscription details, as shown in the following figure:

Code	Service Description	LOB	Material	Weight Limit	Workflow	Basic Service	Extra Pickup	Extra Weight	Refused Service	Cancel Cost
4JA2	R3.2 4 YD 7XWK	Front-Load Bin	Trash	1000 Pounds	Add Casters	\$20.15	\$0.00	\$0.00	\$0.00	\$0.00
4JA5	R3.5 4 YD 7XWK	Front-Load Bin	Trash	1000 Pounds	Add Casters NoChrg	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
4JAC	R6.1 4 YD 7XWK	Front-Load Bin	Trash	1000 Pounds	Add NoChrg Casters	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
4JAH	R7.1 4 YD 7XWK	Front-Load Bin	Trash	1000 Pounds	Remove Casters	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
4JAS	R8.1 4 YD 7XWK	Front-Load Bin	Trash	1000 Pounds	Remove NoChrg Casts	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

- Service:** 4 YD front-load trash bin, 7X/week
 - Container Selection:** Deliver new container
 - Container delivery workflow:** Deliver Bin
6. Select **Complete**.
Your Edit Location screen now looks like this.

Edit Location

Location Documents Restrictions Contracts

Customer ID: 730NMESADRMESAAZ85201
DEFAULT MUNICIPAL ACCOUNT - PUBLIC WORKS

Location Name: SHARED CONTAINER A
Contact Name: [Empty]
Geoid: [Empty] Billing Location Id: [Empty] Active Prospect
 Use customer's billing address

Street/Civic #: 9902 Street: E GRANDVIEW CIR App #: [Empty]
City: Mesa State/Province: Arizona Postal Code: 85207
Building Category: AA -- Asset Address District: WEST

*To adjust location coordinates drag building icon and save changes (location tab)

Services Service History Container Route Info

LOB	Service	Associated Container	Shared	Service Cycle	Active	Suspended	Start Date	End Date
Front-Load Bin	R3.2.4 YD 7xWK	FRSFLBBLU272	NO	Recurring , On-Demand	YES	YES <input type="button" value="Power Off"/>	03-Jun-2016	

Note that, initially, the **Suspended** value is **YES**, as the container has not yet been delivered. Once delivery is confirmed, this value will be set to **NO**. **NO**

Subscribing a Location to Shared Container Service

In the following procedure, we will subscribe an actual customer at or near the location where the container has been delivered (9902 E Grandview).

In this case, the customer is at 9903 E Grandview, as shown below.

Edit Location

Location Documents Restrictions Contracts

Customer ID: 603863
-- DARA HENNING

Location Name: 289996 Lat: 33.43974877 Lon: -111.617824
Contact Name: DARA HENNING Contact Phone: 480-985-5098
Geoid: [Empty] Billing Location Id: 289996 Active Prospect
 Use customer's billing address

Street/Civic #: 9903 Street: E GRANDVIEW CIR App #: [Empty]
City: MESA State/Province: Arizona Postal Code: 85207
Building Category: NA -- Not Applicable District: WEST

*To adjust location coordinates drag building icon and save changes (location tab)

Services Service History Container Route Info

LOB	Service	Associated Container	Shared	Service Cycle	Active	Suspended	Start Date	End Date
Automated Sidelo...	BLUE 90 GAL WEEKLY	FRSBRLBLU305793	NO	Recurring , On-Demand	YES	NO <input type="button" value="Power On"/>	12-Sep-2012	
Automated Sidelo...	R1.2 RES 90 Gal Tras...	FRSBRLBLU305794	NO	Recurring , On-Demand	YES	NO <input type="button" value="Power On"/>	12-Sep-2012	

1. Select **New Shared** from the Subscribe menu.
2. From the **Subscribe to Service for Shared Container** menu, search for a nearby container by selecting the **Search** button.

Subscribe to Service for Shared Container

Search Locations by Address

Street/Civic #: Street: Postal Code:

City: State/Province: Q Search

Search Locations by proximity

Latitude: Longitude:

Max distance from location: Q Search

Matching locations - select one to display associations

Billing Location Id	Name	Address

Existing Associations - select one to share

Service	Active	LOB	Container	End Date

Available Services

Code	Description	LOB
4HAN	R7.2 4 YD 6xWK	Front-Load Bin
4HAS	R8.1 4 YD 6xWK	Front-Load Bin
4HAT	R9.1 4 YD 6xWK	Front-Load Bin
4JA2	R3.2 4 YD 7xWK	Front-Load Bin
4JAS	R3.5 4 YD 7xWK	Front-Load Bin

New Shared Subscription Details

Service Code:

Service Description:

Start Date:

Rate Discount %:

Active: Prospect:

3. When the search results display, do the following:
 - a. Locate and select the shared container in the **Matching locations** panel.
 - b. Select an association from the **Existing Associations** panel.
 - c. Choose a service from the **Available Services** panel
 - d. Select a **Start Date** and set the subscription to **Active**.
 - e. Select **Complete**.

Subscribe to Service for Shared Container

Search Locations by Address

Street/Civic #: Street: Postal Code:

City: State/Province: Q Search

Search Locations by proximity

Latitude: Longitude:

Max distance from location: Q Search

Found 17 locations matching selected address

Matching locations - select one to display associations

Billing Location Id	Name	Address
283810	283810	9902 E GRANDVIEW CIR, MESA, AZ 85207
285525	285525	9927 E GRANDVIEW CIR, MESA, AZ 85207
286010	286010	9926 E GRANDVIEW CIR, MESA, AZ 85207
299297	299297	9938 E GRANDVIEW CIR, MESA, AZ 85207
	SHARED CONTAI...	9902 E GRANDVIEW CIR, Mesa, AZ 85207

Existing Associations - select one to share

Service	Active	LOB	Container	End Date
R3.2 4 YD 7xWK	YES	Front-Load Bin	4 Yards - FLBIN	

Available Services

Code	Description	LOB
4HAN	R7.2 4 YD 6xWK	Front-Load Bin
4HAS	R8.1 4 YD 6xWK	Front-Load Bin
4HAT	R9.1 4 YD 6xWK	Front-Load Bin
4JA2	R3.2 4 YD 7xWK	Front-Load Bin
4JAS	R3.5 4 YD 7xWK	Front-Load Bin

New Shared Subscription Details

Service Code:

Service Description:

Start Date:

Rate Discount %:

Active: Prospect:

✖ Cancel
✔ Complete

The shared container service is added to the location.

◀ ▶
Edit Location

Location | Documents | Restrictions | Contracts

Customer ID: 603863 - DARA HENNING

Location Name: 289996 Lat: 33.43974877 Lon: -111.617824

Contact Name: DARA HENNING Contact Phone: 480-985-5098

Geoid: 289996 Billing Location Id: 289996 Active Prospect Use customer's billing address

Street/Civic #: 9903 Street: E GRANDVIEW CIR App #: []

City: MESA State/Province: Arizona Postal Code: 85207

Building Category: NA -- Not Applicable District: WEST Save

*To adjust location coordinates drag building icon and save changes (location tab)

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Services | Service History | Container Route Info Subscribe

LOB	Service	Associated Container	Shared	Service Cycle	Active	Suspended	Start Date	End Date	
Automated Sidelo...	BLUE 90 GAL WEEKLY	FRSBRBLU305793	NO	Recurring , On-Demand	YES	NO <input type="radio"/>	12-Sep-2012		<input type="button" value="⌂"/> <input type="button" value="📄"/> <input type="button" value="📅"/> <input type="button" value="✖"/>
Automated Sidelo...	R1.2 RES 90 Gal Tras...	FRSBRBLU305794	NO	Recurring , On-Demand	YES	NO <input type="radio"/>	12-Sep-2012		<input type="button" value="⌂"/> <input type="button" value="📄"/> <input type="button" value="📅"/> <input type="button" value="✖"/>
Front-Load Bin	R3.2 4 YD 7xWK	FRSFLBBLU272	YES	Recurring , On-Demand	YES	NO <input type="radio"/>	03-Jun-2016		<input type="button" value="⌂"/> <input type="button" value="📄"/> <input type="button" value="📅"/> <input type="button" value="✖"/>

You can add additional subscribers to the shared container service by repeating the above steps.

In the above example, we subscribed the customer to a new service (i.e., a service type that he/she did not already have). To replace a customer's existing (non-shared) service with a shared service of the same type, use the above procedure to add the shared service, and then delete the customer's existing service. Doing so will generate a workflow to have the existing container removed.