

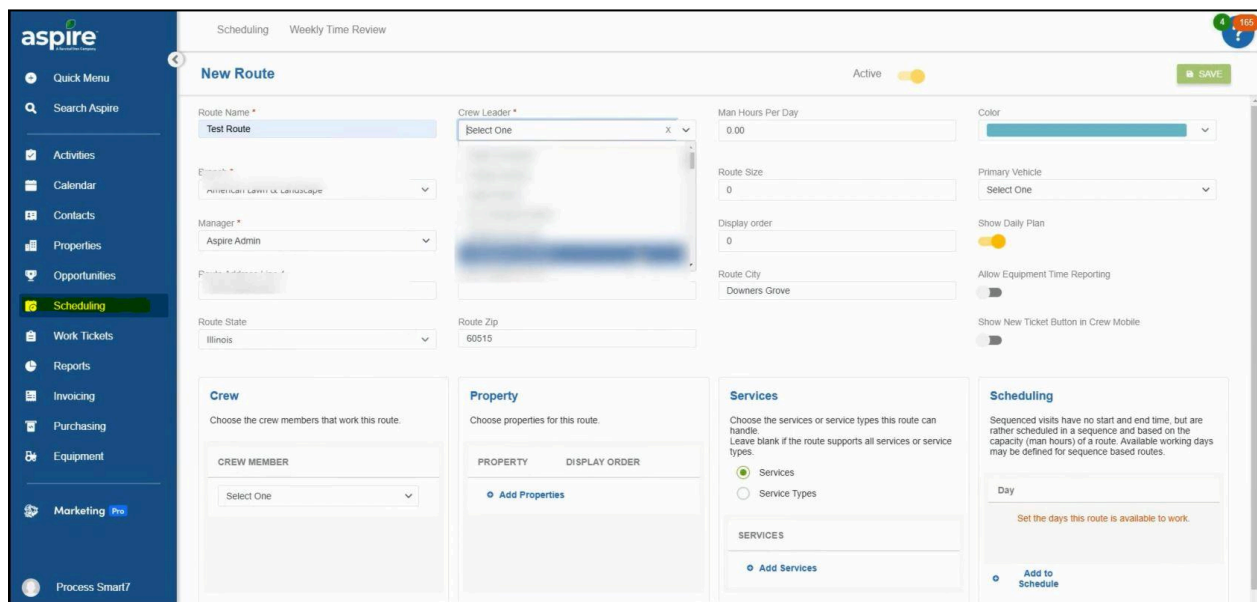
Route Creation in Aspire

Creating and managing routes in Aspire's scheduling module is essential for organizing crews and efficiently assigning tasks. Routes define which crew members will work on specific tasks for a given period and help visualize work on the Schedule Board. This guide will walk you through the steps needed to create a new route, assign crew members, and customize its settings to meet your team's needs in Aspire.

Steps to Create a New Route:

1. Access the Scheduling Module:

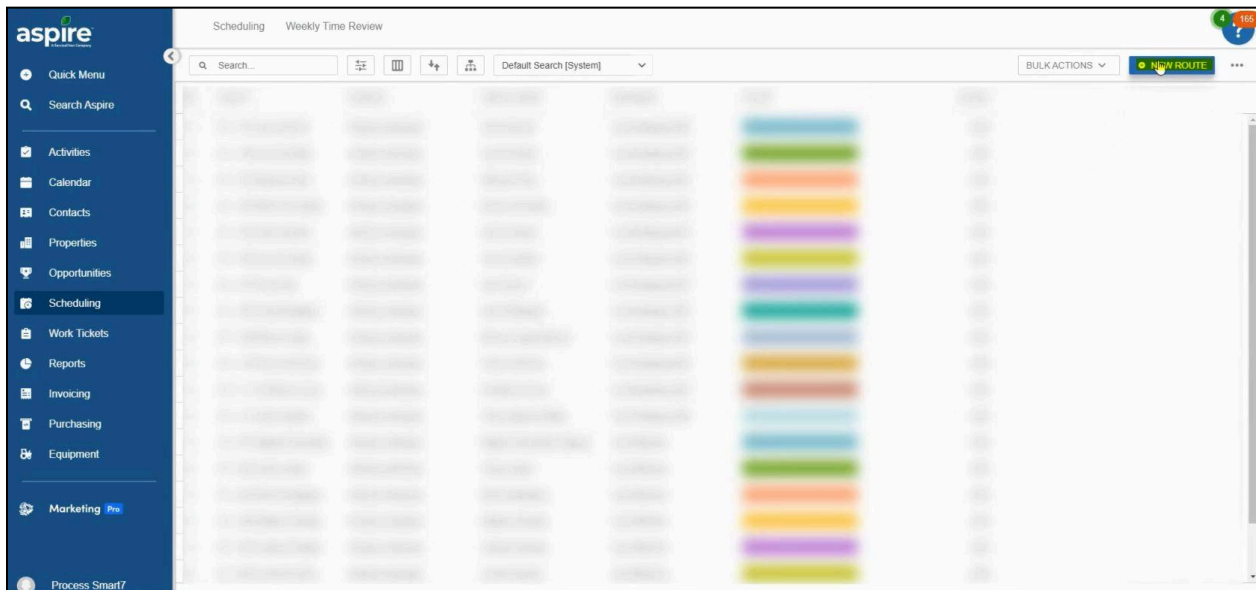
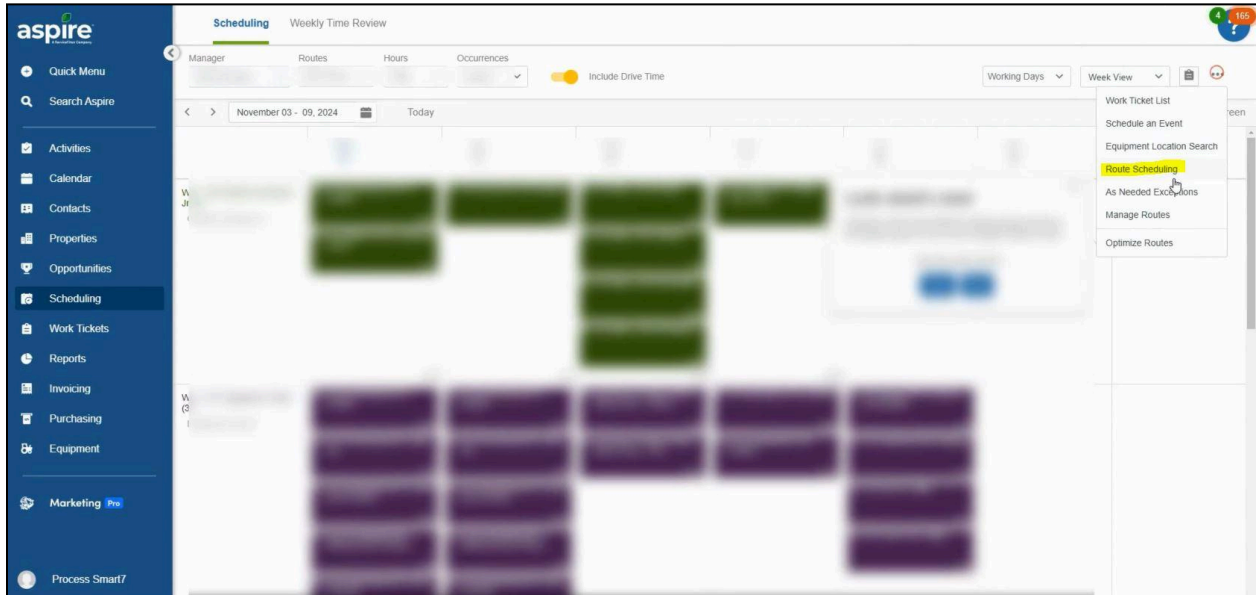
- Begin by going to the Scheduling section within Aspire. In the top right, click on the three dots to open additional options.



The screenshot displays the 'New Route' form in the Aspire scheduling module. The interface includes a left-hand navigation menu with options like 'Quick Menu', 'Search Aspire', 'Activities', 'Calendar', 'Contacts', 'Properties', 'Opportunities', 'Scheduling' (highlighted), 'Work Tickets', 'Reports', 'Invoicing', 'Purchasing', 'Equipment', 'Marketing', and 'Process Smart7'. The main form area is titled 'New Route' and features a 'SAVE' button in the top right. The form is organized into several sections: 'Route Information' (Route Name: 'Test Route', Crew Leader: 'Select One', Man Hours Per Day: '0.00', Color: a color picker), 'Location' (Route Size: '0', Display order: '0', Route City: 'Downers Grove', Route State: 'Illinois', Route Zip: '60515'), 'Crew' (Choose the crew members that work this route, with a 'Select One' dropdown), 'Property' (Choose properties for this route, with an 'Add Properties' button), 'Services' (Choose the services or service types this route can handle, with radio buttons for 'Services' and 'Service Types', and an 'Add Services' button), and 'Scheduling' (Sequenced visits have no start and end time, but are rather scheduled in a sequence and based on the capacity (man hours) of a route. Available working days may be defined for sequence based routes. Includes a 'Day' dropdown and an 'Add to Schedule' button). The form also includes an 'Active' toggle switch and a 'Show Daily Plan' checkbox.

2. Select Manage Route:

- From the dropdown, choose "Manage Route." On this screen, click "New Route" to start setting up a new route.



3. Enter Route Details:

- **Route Name:** Input a unique and recognizable name for the route.
- **Manager and Crew Leader:** Choose the manager who will oversee the route and the crew leader responsible for supervising the work. Remember, only one crew leader can be assigned per route.
- **Man Hours:** Specify the daily man hours each crew member is expected to work.
- **Crew Members:** Select team members who will be part of this route.

The screenshot shows the 'New Route' form in the Aspire software. The form is titled 'New Route' and includes a 'SAVE' button in the top right corner. The form is divided into several sections:

- Route Name:** A text input field containing 'Test Route'.
- Crew Leader:** A dropdown menu.
- Man Hours Per Day:** A text input field containing '6.00'.
- Color:** A color selection dropdown.
- Branch:** A dropdown menu.
- Division:** A dropdown menu containing 'Maintenance'.
- Route Size:** A text input field containing '0'.
- Primary Vehicle:** A dropdown menu containing 'Select One'.
- Manager:** A dropdown menu containing 'Aspire Admin'.
- Percentage of travel time:** A text input field containing '0%'.
- Display order:** A text input field containing '0'.
- Route Address Line 1:** A text input field.
- Route Address Line 2:** A text input field.
- Route City:** A text input field containing 'Downers Grove'.
- Route State:** A dropdown menu containing 'Illinois'.
- Route Zip:** A text input field containing '60515'.
- Show Daily Plan:** A toggle switch.
- Allow Equipment Time Reporting:** A toggle switch.
- Show New Ticket Button in Crew Mobile:** A toggle switch.

Below the main form, there are four panels:

- Crew:** A section titled 'Choose the crew members that work this route.' with a 'CREW MEMBER' dropdown.
- Property:** A section titled 'Choose properties for this route.' with a table for 'PROPERTY' and 'DISPLAY ORDER', and an 'Add Properties' button.
- Services:** A section titled 'Choose the services or service types this route can handle. Leave blank if the route supports all services or service types.' with radio buttons for 'Services' (selected) and 'Service Types', and an 'Add Services' button.
- Scheduling:** A section titled 'Sequenced visits have no start and end time, but are rather scheduled in a sequence and based on the capacity (man hours) of a route. Available working days may be defined for sequence based routes.' with a 'Day' dropdown and an 'Add to Schedule' button.

4. Customize Display Settings:

- **Daily Plan:** Untick the "Show Daily Plan" option if you prefer not to display the daily material plan to the crew leader.
- **Route Color:** Choose a distinct color for the route to make it easily recognizable on the Schedule Board.

The screenshot shows the 'New Route' form in the Aspire software. The form is divided into several sections: 'Route Information', 'Crew', 'Property', 'Services', and 'Scheduling'. The 'Route Information' section includes fields for Route Name (Test Route), Crew Leader, Man Hours Per Day (8.00), Branch, Division (Maintenance), Route Size (0), Manager (Aspire Admin), Percentage of travel time (0%), Display order (0), Route Address Line 1, Route Address Line 2, Route City (Downers Grove), Route State (Illinois), and Route Zip (60515). The 'Crew' section has a 'CREW MEMBER' list. The 'Property' section has a 'PROPERTY' list and an 'Add Properties' button. The 'Services' section has a 'SERVICES' list and an 'Add Services' button. The 'Scheduling' section has a 'Day' dropdown and an 'Add to Schedule' button. The 'Show Daily Plan' toggle is highlighted in yellow, and the 'Color' dropdown menu is also highlighted in yellow.

5. **Save the Route:** Once all details are entered, click "Save" in the upper right corner to create your new route.

The screenshot shows the 'New Route' form in the Aspire software, identical to the previous one. The 'Save' button in the upper right corner is highlighted in green, indicating it is the next step in the process.

Following these steps will help you efficiently set up and manage routes for your crews within Aspire's scheduling system. Properly configured routes ensure organized crew assignments and optimized scheduling, enhancing your team's productivity and making it easier to manage resources on the Schedule Board.