

## Generating Routing Sequence Numbers in **Visual Clip**

### [Manual Routing](#), [Routing with \*Microsoft MapPoint\*](#), [Renumber Routing Sequence Numbers](#), and [Routing Daily Schedule using MapPoint or Manually Choosing your Routing Order](#)

In order to understand the routing functions in **Visual CLIP**, you must first make sure that you do not confuse routing with scheduling. They are not the same. Scheduling answers the question: "What day, week, season, or year should I do this job?". Whereas routing answers the questions: "What geographical position is this job in relation to other jobs? In what order should the jobs on a route sheet be?". This difference between routing and scheduling is very important to remember.

There are two ways of doing this, Manual Routing and Routing with Microsoft MapPoint©. If you own **Microsoft MapPoint** you can have **MapPoint** automatically route all your customers. You can purchase **Microsoft MapPoint** at almost any retail store that sells software or from Sensible Software.

### Manual Routing

To arrive at the best routing for your company, follow these steps:

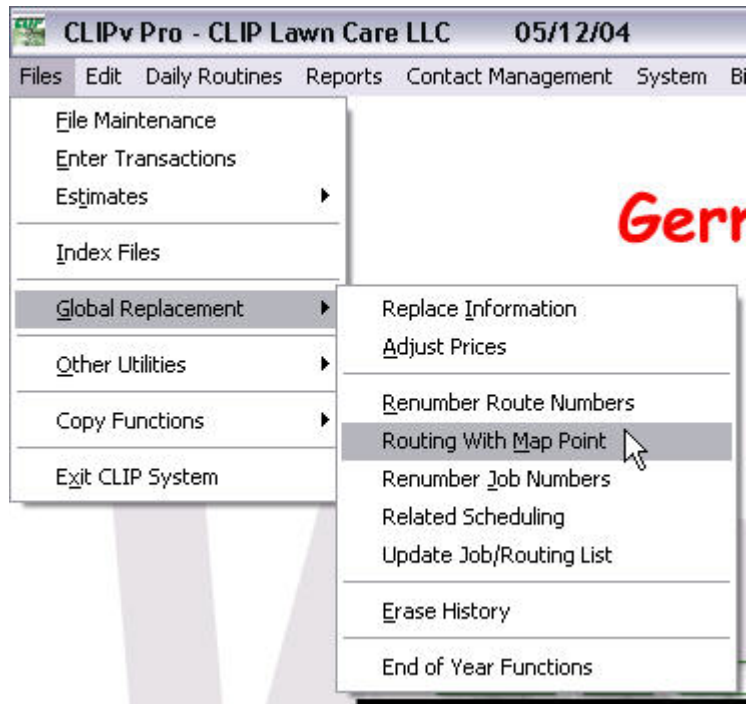
- Lay out a map of the area you service.
- Place markers for every property you service.
- Decide which route you would take if you were going to visit **each and every property in one day**.
- Assign the first property a routing sequence number of 10, assign the second 20, the third 30, and so on.
- After this initial assignment of numbers, adding a new customer is simple: just add him to the map and assign him an appropriate unused number. If he is located between number 20 and 30, assign him 25. It does not matter whether or not this new job will be done on the same day as 20 or 30 (that is scheduling). What does matter is that this customer's property is between 20 and 30, and should have a corresponding routing sequence number. Eventually, as your company grows, you will run out of "in between" numbers to use and will have to [Renumber Routing Sequence Numbers](#).

You now have your routing sequence numbers. You can now enter the appropriate routing sequence number for this job.

The routing sequence numbers will determine which job will come out at the top and which on the bottom of that day's route sheet. The lower the routing sequence number, the closer to top of the route sheet the job will appear, and of course

## Routing with Microsoft MapPoint

1. Select **Files>Global Replacement>Routing with MapPoint**



2. Make sure you have a good Backup prior to doing this process!!! Click 'OK' to continue.



### 3. Select the Options in Step #1

- Start with:** - This is the Starting Number for your Routing Sequence
- Spaced out by:** - The increment between Sequence numbers
- Only Active Customers** - Select if only routing Active customers
- All Crews** - Select if routing all crews
- All Job Numbers** - Select if routing all jobs
- Include Jobs on Hold?** - Select to include jobs on hold

The screenshot shows the 'Renumber Route by MapPoint' window. It is divided into two main sections: 'Step # 1 - Filter Options' and 'Step # 2 - Map the Route'. In Step #1, there are input fields for 'Start with:' (2000) and 'Space out by:' (10). Below these are four checkboxes: 'Only Active Customers' (checked), 'All Crews' (checked), 'All Job Numbers' (checked), and 'Include Jobs on Hold?' (unchecked). Step #2 contains two buttons: 'Generate List' and 'Re-Route with MapPoint'. At the bottom of the window, there are two buttons: 'Replace In Jobs' and 'Replace In Customer Defaults'. A 'Return' button with a left arrow is also visible in the top right corner.

If you did not select All Crews or All Job numbers, enter the Crew # or Job # in the **Crew #** or **Only Job #** fields

This is a close-up of the 'Step # 1 - Filter Options' section. It shows the 'Start with:' field set to 1000 and 'Space out by:' set to 10. The 'Only Active Customers' checkbox is checked. The 'All Crews' checkbox is unchecked, and next to it is the text 'Enter Crew #' followed by a text box containing the number 3. The 'All Job Numbers' checkbox is unchecked, and next to it is the text 'Only Job #' followed by a text box containing the number 0. The 'Include Jobs on Hold?' checkbox is unchecked.

4. Click Step 2a 'Generate List'

**Renumber Route by MapPoint**

**Step # 1 - Filter Options**

Start with:  Space out by:

Only Active Customers  
 All Crews  
 All Job Numbers  
 Include Jobs on Hold?

**Step # 2 - Map the Route**

Step 2a

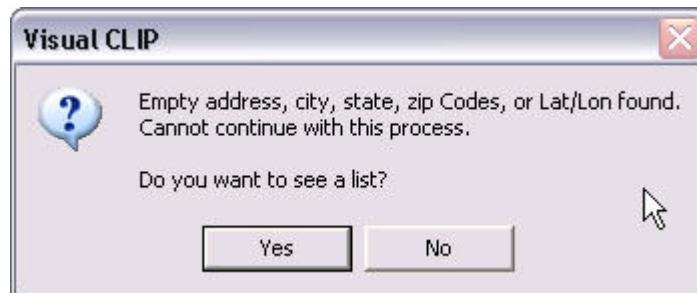
Step 2b

**Step 3a - Check the new order**      **Step # 3 - Check the Order and Save**

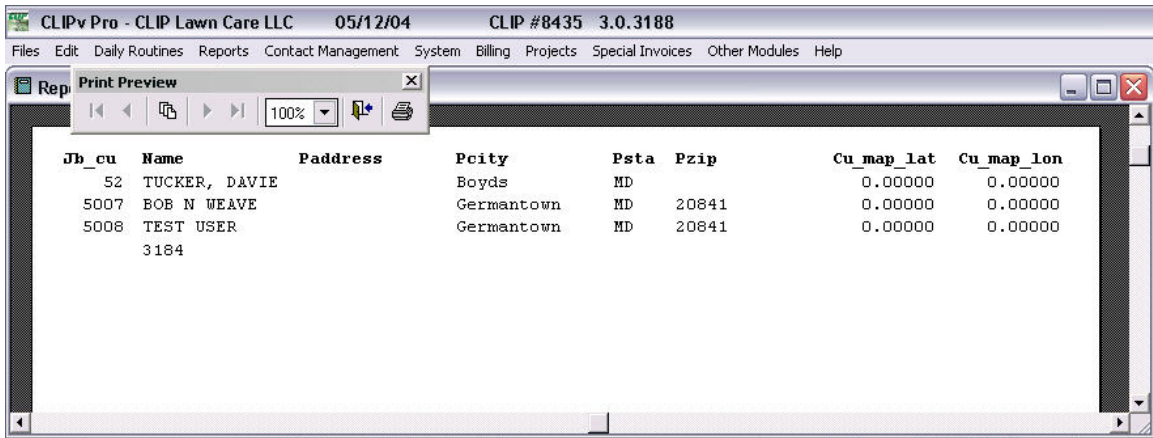
New Order	Old Route #	Name	Address	City State
2010	2010	ZIOR, GLENN	808 Festival Ave	Mount Airy MD
2020	2020	CHAINANI, SUJATA	12007 Milestone Manor Ln	Germantown MD
2030	2030	BOWEN, KENNETH	19125 Staley Bridge Road	Germantown MD
2040	2040	SHAHANI, SUNIL	19902 Knollcross dr	Germantown MD
2050	2050	ALLENSPACH, FREDERICK	8617 Atwell Rd	Potomac MD
2060	2060	TSOY, ANNE-MAURA	8612 Atwell Rd	Potomac MD
2070	2070	DONOGHUE, KEVIN	2410 Chilham Place	Rockville MD
2080	2080	PETRILLO, MIKE	1405 Stratton Dr.	Potomac MD
2090	2090	WIRNSTEIN, JACK	1392 Stratton Dr.	Rockville MD
2100	2100	FINN, MIKE	1396 Kersey Lane	Rockville MD
2110	2110	WHISENHUNT, MARK R.	1393 Kersey Lane	Potomac MD
2120	2120	GARCIA, GRACIELA	1394 Kersey Lane	Potomac MD

Step 3b - Write it to your Jobs

You may receive this when generating List



Click 'Yes' to see the list of bad addresses. You will get a list of bad addresses. These addresses do not contain enough information to map the address. Make sure you have street address and zip code.



The screenshot shows a software window titled "CLIPv Pro - CLIP Lawn Care LLC" with a menu bar including "Files", "Edit", "Daily Routines", "Reports", "Contact Management", "System", "Billing", "Projects", "Special Invoices", "Other Modules", and "Help". The main content area is a "Print Preview" window displaying a table of customer data.

Jb_cu	Name	Address	Pcity	Psta	Pzip	Cu_map_lat	Cu_map_lon
52	TUCKER, DAVIE		Boyds	MD		0.00000	0.00000
5007	BOB N WEAVE		Germentown	MD	20841	0.00000	0.00000
5008	TEST USER		Germentown	MD	20841	0.00000	0.00000
	3184						

Select 'Yes' to continue



5. Click on Step 2b 'Re-Route with MapPoint'

**Renumber Route by MapPoint**

**Step # 1 - Filter Options**

Start with:  Space out by:

Only Active Customers  
 All Crews  
 All Job Numbers  
 Include Jobs on Hold?

**Step # 2 - Map the Route**

Step 2a

Step 2b

**Step 3a - Check the new order**      **Step # 3 - Check the Order and Save**

New Order	Old Route #	Name	Address	City State
0	0	GERSTNER, STEPHEN	18001 Black Gold Way	Boysd MD
0	0	PETERSEN, S	415 Leaning Oak St.	Gaithersburg MD
0	0	SADDLER, CORNELL	14410 Foolish Pleasure Rd	Boysd MD
0	0	DESATNICK, BRUCE	15133 Rollinmead Dr.	Darnestown MD
0	0	SEMINARA, DOMINIC	18112 Northern Dancer Ln	Boysd MD
0	0	MALAUSEFENA, OLIVER	18407 Clear Smoke Road	Boysd MD
0	0	SCHUELLER, KEITH	18412 Ashmeade Road	Boysd MD
0	0	PACKAL, SUSAN	18005 Coachman's Road	Germantown MD
0	0	ADAMS, GARY	18414 Ashmeade Road	Boysd MD
0	0	WEXLER, ZEP	13942 Bromfield Rd	Germantown MD
0	0	STJOHNS, MIKE	13939 Bromfield Rd	Germantown MD
0	0	CHERNOFF, MICHELLE	13935 Bromfield Rd	Germantown MD

Step 3b - Write it to your Jobs

6. Enter your starting location for routing. This is typically your office or Workshop. Click on 'Generate Route'

**Generate a Route Map**

Starting Location

City State Zip

You may receive this message:

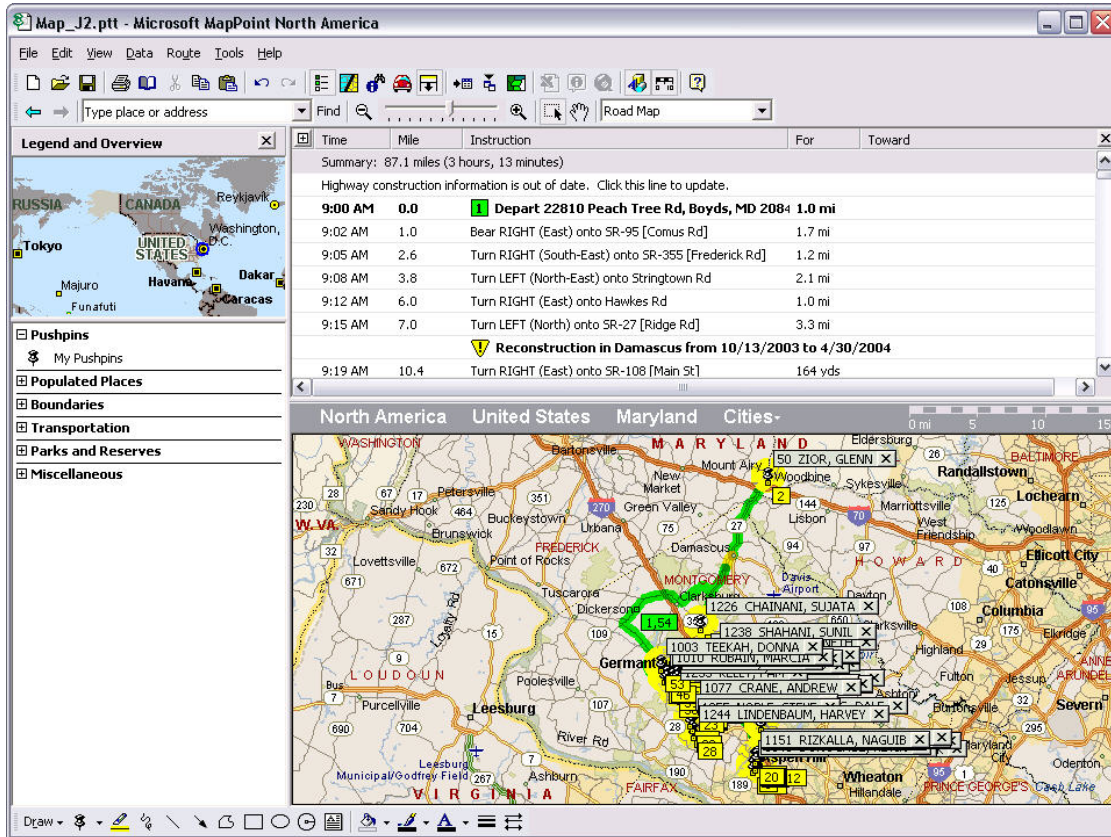


Select 'Yes' to see the list of addresses. These are addresses that could not be located on the map. They will not be included in the routing

The screenshot shows the CLIPv Pro software interface. The title bar reads "CLIPv Pro - CLIP Lawn Care LLC 05/12/04 CLIP #8435 3.0.3188". The menu bar includes "Files", "Edit", "Daily Routines", "Reports", "Contact Management", "System", "Billing", "Projects", "Special Invoices", "Other Modules", and "Help". A "Print Preview" window is open, displaying a table of addresses. The table has columns: "Jb\_cu\_nu", "Name", "Address", "Pcity\_st", "Pzip", "Cu\_map\_lat", "Cu\_map\_lon", and "Cu".

Jb_cu_nu	Name	Address	Pcity_st	Pzip	Cu_map_lat	Cu_map_lon	Cu
1021	1021 GERSTNER, STEPHEN	18001 Black Gold Way	Boys MD	20841	39.15422	-77.29887	N
1052	1052 PETERSEN, S	415 Leaning Oak St.	Gaithersburg MD	20878	39.11703	-77.22945	N
1059	1059 SADDLER, CORNELL	14410 Foolish Pleasure Rd	Boys MD	20841	39.15447	-77.29927	N
1064	1064 DESATNICK, BRUCE	15133 Rollinmead Dr.	Darnestown MD	20878	39.10051	-77.27702	N
1089	1089 SEMINARÀ, DOMINIC	18112 Northern Dancer Ln	Boys MD	20841	39.15531	-77.29576	N

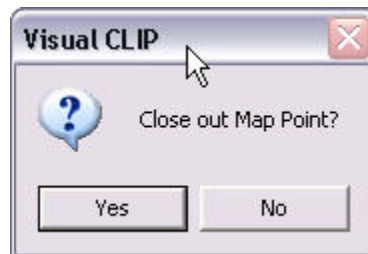
7. Next you will be presented with MapPoint and a Map of the route. Note: **Do Not Close MapPoint.**



8. Switch back to the **Visual Clip** Software by clicking Clipv on the taskbar



Click on 'Yes' to Close out Map Point.



9. Now you can Confirm the order MapPoint has selected or make changes under Step #3a. The new order will be listed next to the old route numbers, and you can change the new order by changing the numbers in the column labeled **New Order**.

**Renumber Route by MapPoint**

**Step # 1 - Filter Options**

Start with:  Space out by:

Only Active Customers  
 All Crews  
 All Job Numbers  
 Include Jobs on Hold?

**Step # 2 - Map the Route**

Step 2a

Step 2b

**Step 3a - Check the new order**      **Step # 3 - Check the Order and Save**

New Order	Old Route #	Name	Address	City State
2010	2010	ZIOR, GLENN	808 Festival Ave	Mount Airy MD
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2040	2040	SHAHANI, SUNIL	19902 Knollcross dr	Germantown MD
2050	2050	ALLENSPACH, FREDERICK	8617 Atwell Rd	Potomac MD
2060	2060	TSOY, ANNE-MAURA	8612 Atwell Rd	Potomac MD
2070	2070	DONOGHUE, KEVIN	2410 Chilham Place	Rockville MD
2080	2080	PETRILLO, MIKE	1405 Stratton Dr.	Potomac MD
2090	2090	VIRNSTEIN, JACK	1392 Stratton Dr.	Rockville MD
2100	2100	FINN, MIKE	1396 Kersey Lane	Rockville MD
2110	2110	WHISENHUNT, MARK R.	1393 Kersey Lane	Potomac MD
2120	2120	GARCIA, GRACIELA	1394 Kersey Lane	Potomac MD

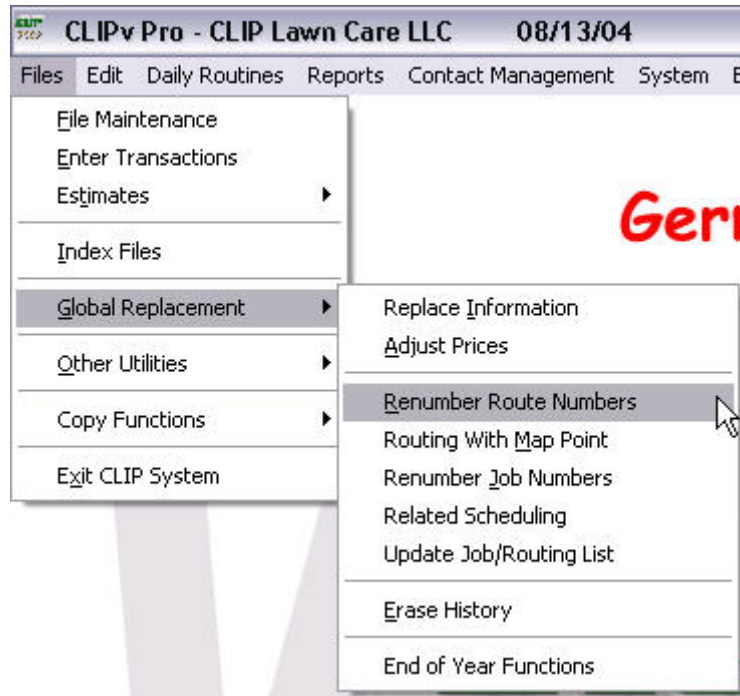
**Step 3b - Write it to your Jobs**     

Step 3b Allows you to now Replace in Jobs your new routing sequence and in **Visual Clip Pro** you can '**Replace in Customer Defaults**' by clicking on the buttons available.

## Renumber Route Numbers

Renumbering Routes may need to be done after you have been using **Visual Clip** and adding new customers to your routes. Your original spacing or routing sequence numbers may need to be spaced out more so that as new customers are added you can easily insert them into your routing sequence.

1. Select **Files>Global Replacement>Renumber Route Numbers**



2. Make sure you have a good Backup prior to doing this process!!! Click 'OK' to continue.



3. Select the Options in Renumber Route Sequence Numbers windows

**Start with:** -This is the starting number for your Routing sequence

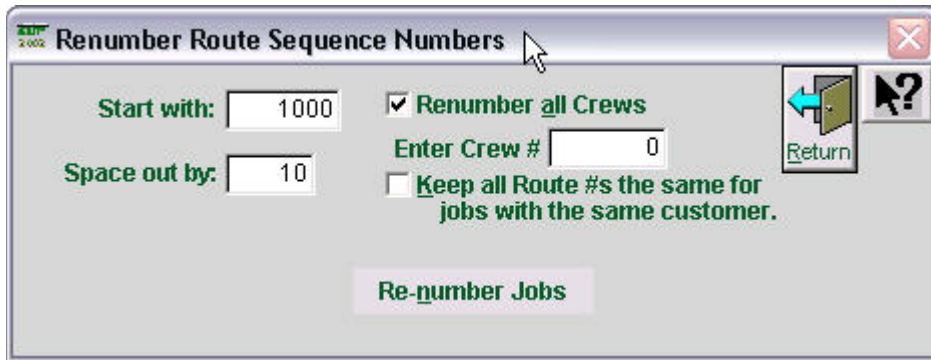
**Space out by:** -Indicates how much space to leave between the new sequence numbers

Select '**Renumber all Crews**' if you would like to renumber all crews at the same time.

Otherwise, enter a Crew Number in the '**Enter Crew #**' field

Select '**Keep all Route #s the same for jobs with the same customer.**' If you would like all of the Jobs for a Customer to have the same routing sequence number.

Click on '**Re-number Jobs**' to start the re-numbering process.



4. When the process is finished you will receive the message below:



5. To view the new routing Sequence you can go to **Reports>Job Reports>Crew/Route** to view the routing information.

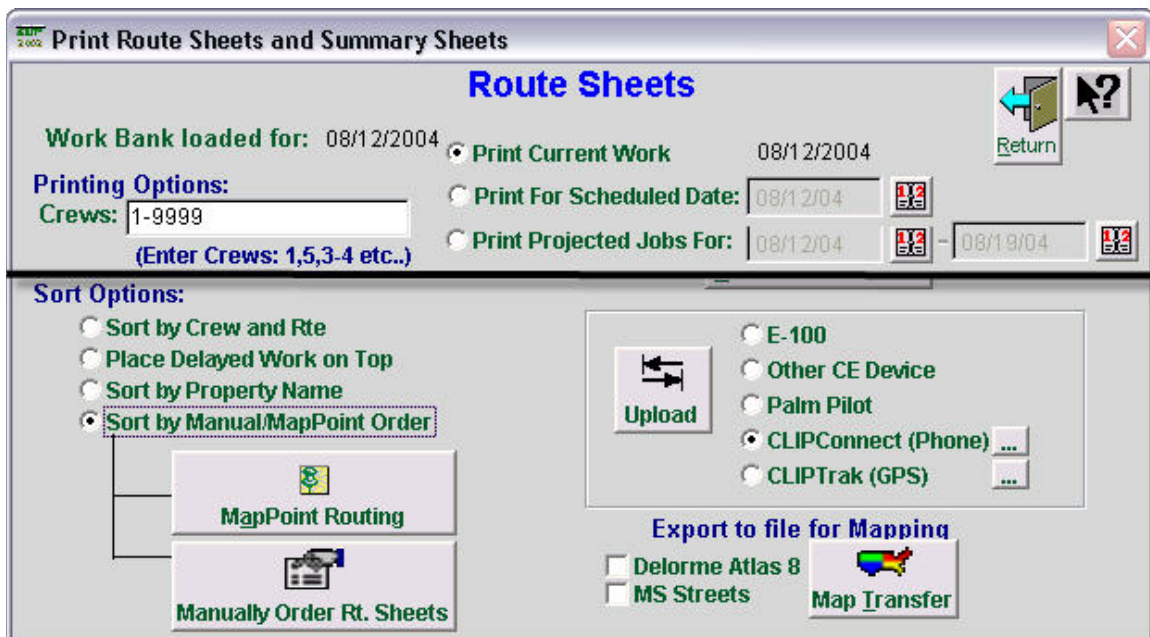


## Routing Daily Schedule using MapPoint or Manually Choosing your Routing Order

1. After you have your Workbank refreshed, Select **Daily Routines>Route Sheets>Print Route Sheets**



2. Select '**Sort by Manual/MapPoint Order**' under **Sort Options** and Click on **MapPoint Routing** ( for Manual routing see [Manual Option](#) explained at the end of the MapPoint process )



3. Fill in the Information needed to route your jobs

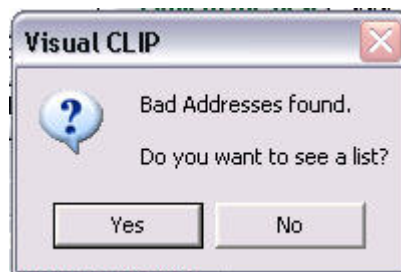
- Crew #** Enter the Crew Number to Route
- Limit to the First** Selects how many jobs to route
- Starting Location** Street Address of Starting Location
- City State Zip** City, State and Zip of Starting Location
- Custom Map Title** (optional) This can be used to name the map generated by MapPoint
- Map Type** Type of Map to Display in MapPoint
- Map Only** Leave this deselected if you would like Directions and Map
- Directions Only** Will only Display a Map in MapPoint
- Turn by Turn** Will only Display Directions in MapPoint
- Optimize Route** Select this option if you want MapPoint to re-route your jobs
- Show Map** Select this option if you would want to Display a Map in MapPoint

Click on **Generate Route**

The screenshot shows the 'Generate a Route Map' dialog box with the following details:

- Crew #:** 1
- Limit to the first:** 999,999
- Starting Location:** 22810 Peach Tree Road
- City State Zip:** Boyd's, MD 20841
- Custom Map Title:** (empty)
- Map Type:**  Map Only,  Directions Only,  Turn by Turn
- Optimize Route:**
- Show Map:**
- Buttons:** Return, Generate Route

4. When the route is generated you may receive the following message. Click 'Yes' to see the list of addresses MapPoint was unable to map.

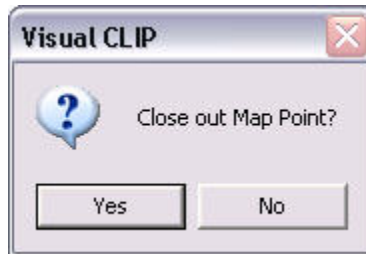




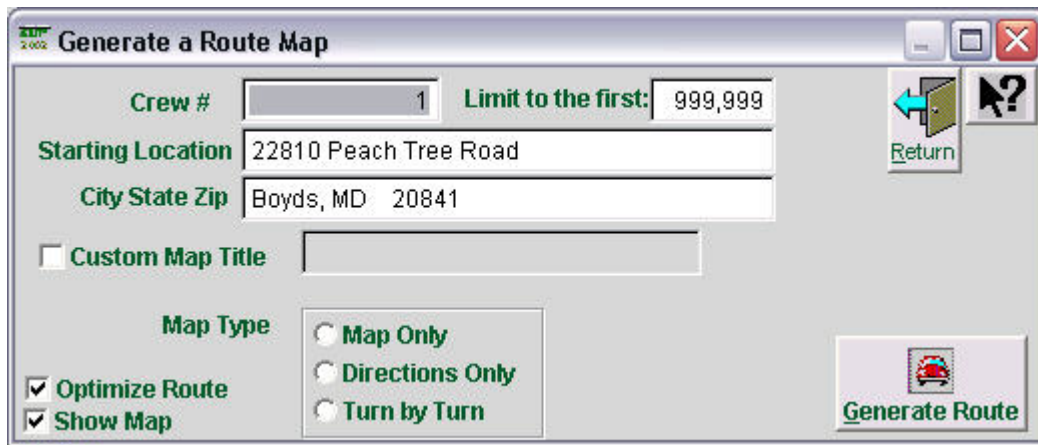
6. Switch back to the **Visual Clip** Software by clicking Clipv on the taskbar



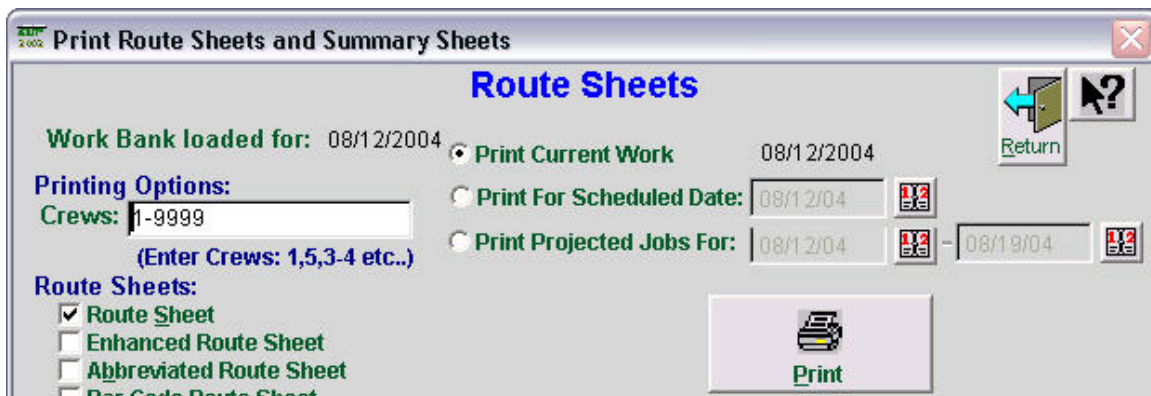
Click on **'Yes'** to Close out Map Point.



7. Click on **Return** to Close the **'Generate a Route Map'**

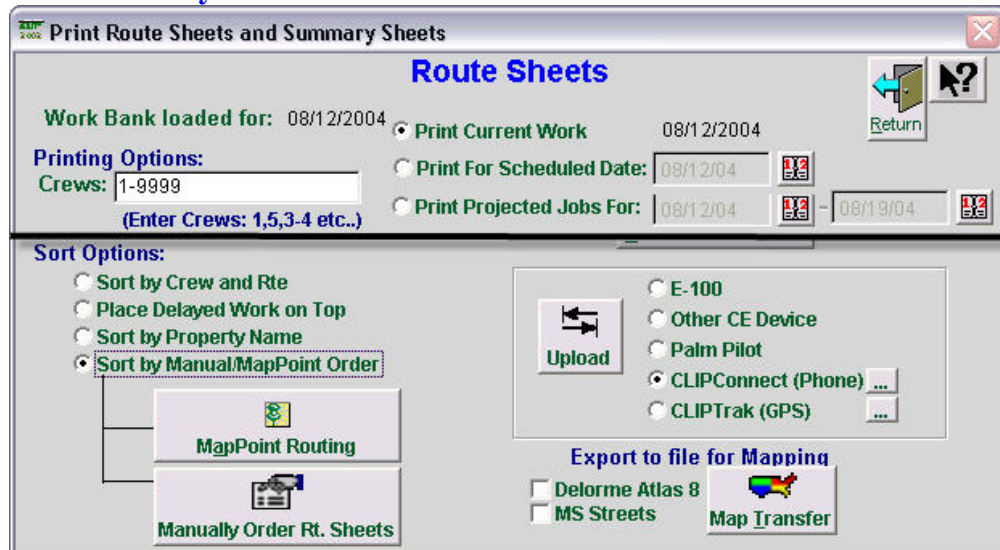


8. **Print** your Route Sheet



## Manually Ordering Your Route

1. Click on **Manually Order Rt. Sheets**



2. Click and Hold on the Grey Square next to the job and move it up or down in your order
- . Click on **Return** when finished.

2002 Arrange Jobs

Arrange the Jobs for the Route Sheet

*****	Start Crew 1		1	0-0
STEIN, MARK	Lawn Maintenance		1	1067-1
PETERSON, CARTE	Lawn Maintenance		1	1163-1
O' HALLORAN, MI	Lawn Maintenance		1	1164-1
SCHAEFER, LYN	Lawn Maintenance		1	1318-1
SEALS, BERNARD	Lawn Maintenance		1	1334-1
3191 TEST	Lawn Maintenance		1	1405-1
FINAL 3192 TEST	Lawn Maintenance		1	20002-1
DUGGAL, SANJIV	Misc- Weeding		1	1017-50
*****	Start Crew 2		2	0-0
MASON, DON	Spring Clean Up		2	1297-10
PACKAL, SUSAN	Overseeding		2	1112-31
AGAMIR, SPARTIC	Spring Clean Up with		2	1388-15
*****	Start Crew 3		3	0-0
SCHUELLER, KEIT	Lawn Maintenance		3	1100-1
ADAMS, GARY	Lawn Maintenance		3	1121-1
KESHMIRI, SARI	Lawn Maintenance		3	1175-1
DASHTI, AGHDAS	Lawn Maintenance		3	1196-1
IBARRA, OLGA	Mow & Trim All-Speci		3	1389-2
DAVIS, MARSHA	Lawn Maintenance		3	1269-1
CHOI, MYONG	Lawn Maintenance		3	1356-1
LEE, STEVE	Lawn Maintenance		3	1373-1
ALTAIE, SOUSAN	Lawn Maintenance		3	1267-1
SANGALANG, EFRE	Lawn Maintenance		3	1361-1
HARRIS, SHARON	Lawn Maintenance		3	1357-1
CORDINER, PATRI	Lawn Maintenance		3	1284-1
GROSSMAN, MIKE	Lawn Maintenance		3	1106-1
SHOCKEY, THOMAS	Lawn Maintenance		3	1158-1

Return