

### **Creating New Route**

Purpose: Aspire uses the term Route to describe a crew of employees set up to perform work on scheduled work tickets for a given time period.

### **Prerequisites:**

1. System Admin or Branch Admin role Permissions

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<ul> <li>Work Tickets</li> <li>Reports</li> </ul>	12/10/20 Property The Bluffs	Valence 12/02001 Last passe 12/02001 Valence No. data to		12/10/20 Property The Bluffs	No data to	Carropaner bronner 162432 Av
<ul> <li>Invoicing</li> <li>Purchasing</li> </ul>	12/10/20 Contact James Dell (AM) 12/10/20 Contact A/F JMC	display		12/10/20 Contact James O'Dell (AM) 12/10/20 Contact A/RJMC	display	
	12/10-20 <u>Contact</u> John AspireS 12/10/20 <u>Contact</u> Melanie Warner	0 0 25 27	🧿 Support 🔆 🎘 Log an issue	12/10/20 Contact John AspireS 12/10/20 Contact Melanie Warner	0	0 25 27
Settings	12/9/20 Opportunity Adams Residence - 26 - Maintenance -	Opportunities :	<ul> <li>Settings</li> <li>Log Out</li> </ul>	12/9/20 Opportunity Adams Residence - 26 - Maintenance -	Opportunities	*

To create a new Route, follow these steps:

- 1. Click on settings on the main menu.
- 2. Click on Administration.

System Overv	view					P
Application	24	1 🗐 🦧	$e \gg \sqrt{x}$	CRM	🛷 🗿 🔰	
Estimating	5 E	3 🧭 🖻	i 🦓 🗟 🔣	Scheduling	<i>i</i>	
Purchasing				Organization	i i i i i i i i i i i i i i i i i i i	
Equipment		. 🔨 😹	🔊 🔊			

3. Click on the Manage Routes.



Search Routes	٩	Default Search [System]	~ 🎕	<b>-</b> 😣	
Drag a column header	and drop it here to grou	p by that column			
Route _	Branch	Crew Leader	Manager	Color	Н
Danny's Route	Columbia	Danny Plower	Snow Manager Columbia		
Emanuel's Shovelers - Columbia	Columbia	Emanuel Atem	Snow Manager Columbia		
Enh Route 1	Saint Louis	Analise Jones	Kevin Kehoe		
Enhancement Crew North	Saint Louis	Greg CrewleaderEnh	Gage Roberts		2
Gavin's Route	Saint Louis	Gavin Roberts	Gage Roberts		
Joe Crewleader	Saint Louis	Joe Crewleader	Kevin Kehoe		
Maintenance Crew North	Saint Louis	Bob CrewleaderMaint	Gage Roberts		1
Maintenance Crew South	Saint Louis	Lenny CrewleaderWild	Aspire System15		1
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4. Click the green plus to add a new Route to the available list.



	Route   Ma	intenance Crew West					
Rout	e Crew Pro	perty Services					
Rou	te Name 5	Maintenance Crew West		Active	J		
Brai	nch 6	Saint Louis	~	Display Order	10	11	12
Man	ager 7	Benjamin Account Manager	~	Man Hours Per Da	у		8.00
Crev	w Leader 8	Chris Crew Leader	~	Color 13			~
Divi	sion 9	Maintenance	~	Route Size	3		
Pero	centage of Travel		0 %	14			
	10						
4						15	

5. Enter in a Route Name.

Note: Keep the naming convention consistent. Examples of route names include: Using the crew leaders name (John), Mow1, PHC, and Fert Sub.

- 6. Select the Branch.
- 7. Select the Manager who oversees the route.
- 8. Select the Crew Leader who will oversees the crew.
- 9. Select the Division where this crew will generally work.
- 10. If desired, enter in a Percentage of Travel time.

*Note: The Aspire scheduling system will automatically calculate travel time between jobs as long as this is 0.* 

Note: If a 10 is put in for a Percentage of Travel Time, then when a 10 hour job is scheduled, Aspire will subtract 1 hour from the scheduler as well as the Work Ticket screen in Mobile Time, meaning that the crew will only have 9 hours budgeted for the visit.

11. Enter in a Display Order.

Note: The lower the number, the higher the route will appear on the schedule board. It is recommended to order all routes in multiples of 10. If the routes are numbered, 1,2,3, etc., then there is no space for when a new route is created and needs to be viewed higher up on the schedule board.

- 12. Enter in how many Man Hours per Day the crew is expected to work. Note: This is man hours per man, not the entire crew. 8 – 12 hours is normal.
- 13. Pick a color to distinguish the crew on the schedule board.
- 14. Enter in how many employees will make up the crew in the Route Size.



*Note: This number should include the crew leader.* 15. Press Save.

## **Adding Crew Members to a Route**

Purpose: Adding crew members to a route will automatically place those employees on the time entry screen for that route. This is not mandatory but is helpful when managing employee time. Important: Aspire suggests only setting up the crew when doing paper time sheets. Aspire does not suggest setting up the crew on a route if the crew members change routes consistently or if the company is using Mobile Time for daily time entry by the crew leader. Crew members must clock in.

Search Routes	9	Default Search [System]	ı • 🙀	- 🔒	¢
rag a column head	der and drop it here t	o group by that columr	1		
Route	Branch	Crew Leader	Manager	Color	Hours
√laintenance Crew North	Saint Louis	Bob CrewleaderMaint	Gage Roberts		16.00
Maintenance Crew South	Saint Louis	Lenny CrewleaderWild	Aspire System15		16.00
Maintenance Crew West	Saint Louis	Chris Crew Leader	Benjamin Account Manager		8.00
Plow Route 1	Saint Louis	Johnny Plow	Kevin Kehoe		8.00
Plow Route Sub	Saint Louis	Nick Plowman Sr.	Kevin Kehoe		8.00
Snow Columbia 1	Columbia	PlowCol1 Showme	Gage Roberts		9.00
Snow Plow Internal (Binky)	Saint Louis	Binky Crewleader	Snow Manager North		10.00
Snow Plow Sub - Bill's	Saint Louis	PlowSPB Bill's	Snow Manager North		8.00
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To add crew members to a route, follow these steps:

#### 1. Click on the route.



bule Crew Property Services	
	(
Crew Member	
Bill Branman	8
Billy Labor	8
Bill Branman	* mc
Bill Crew Member	1115
Billy Crewmember	
Billy Labor	
Binky Crewleader	
Bob Crew Leader	
Bob CrewleaderMaint	
Branch (All) Adminonly	
Beerek (Ost Off) Officeruset	•

- 2. Click on the Crew tab.
- 3. Click the Green plus for however many members make up the crew.
- 4. Select the crew member from the dropdown. Note: If the crew member is not listed, then a Contact record with a Contact Type of Employee needs to be created.
- 5. Press Save.



# Adding a Property to a Route

Purpose: Adding a property to a route is often used for snow routes but can be used as well for other work performed during the summer months. This option is used when companies are not scheduling tickets on the schedule board for that route.

Search Routes       Default Search (System)       Image: Color       Image: Color       Hours         Route _       Branch       Crew Leader       Manager       Color       Hours         Maintenance Crew       Saint Louis       Bob CrewleaderMaint       Gage Roberts       16.00         Maintenance Crew       Saint Louis       Lenny CrewleaderWild       Aspire System15       16.00         Maintenance Crew       Saint Louis       Lenny CrewleaderWild       Aspire System15       16.00         Maintenance Crew       Saint Louis       Lenny CrewleaderWild       Aspire System15       16.00         Maintenance Crew       Saint Louis       Johnny Plow       Kevin Kehoe       8.00         Plow Route 1       Saint Louis       Johnny Plow       Kevin Kehoe       8.00         Sow Columbia 1       Columbia       PlowCol1 Showme       Gage Roberts       9.00         Snow Plow Internal (Binky)       Saint Louis       Binky Crewleader       Snow Manager North       10.00         Snow Plow Sub - Bill's       Saint Louis       PlowSPB Bill's       Snow Manager North       1.20 of 22 items         (mather of 1 2 (1 2 (2 (2 (2 (2 (2 (2 (2 (2 (2 (2 (2 (2 (	Routes				ج 🦻	Benjamin
Drag a column head-rand drop it here to group by that column         Route _       Branch       Crew Leader       Manager       Color       Hours         Maintenance Crew       Saint Louis       Bob CrewleaderMaint       Gage Roberts       Imager       16.00         Maintenance Crew       Saint Louis       Chris Crew Leader       Manager       Imager       16.00         Maintenance Crew       Saint Louis       Chris Crew Leader       Benjamin Account Manager       Eenny       Revin Kehoe       Saint Bob         Plow Route 1       Saint Louis       Johnny Plow       Kevin Kehoe       Saint Bob       8.00         Plow Route 1       Saint Louis       Johnny Plow       Kevin Kehoe       Saint Bob       8.00         Sow Columbia 1       Columbia       PlowCol1 Showme       Gage Roberts       Saint Bob       9.00         Snow Plow Sub- Bill's       Saint Louis       Binky Crewleader       Snow Manager North       10.00       8.00         K< 1       2       X       X       X       X       1-20 of 22 items       X	Search Routes	٩	Default Search [System]	~ @	<b>-</b>	Ð
Route       Branch       Crew Leader       Manager       Color       Hours         Maintenance Crew North       Saint Louis       Bob CrewleaderMaint       Gage Roberts       Imager	Drag a column heac	der and drop it here to	group by that column			
Maintenance Crew North       Saint Louis       Bob CrewleaderMaint       Gage Roberts       Image: Comparison of the	Route	Branch	Crew Leader	Manager	Color	Hours
Maintenance Crew South       Saint Louis       Lenny Crewleader/Vild       Aspire System 15       Image: Crew       Saint Louis       Saint Bain         Maintenance Crew West       Saint Louis       Chris Crew Leader       Benjamin Account Manager       Saint Bain       8.00         Plow Route 1       Saint Louis       Johnny Plow       Kevin Kehoe       Saint Bain       8.00         Plow Route 3ub       Saint Louis       Nick Plowman Sr.       Kevin Kehoe       Saint Bain       8.00         Snow Columbia 1       Columbia       Columbia       PlowCol1 Showme       Gage Roberts       9.00         Snow Plow Internal (Binky)       Saint Louis       Binky Crewleader       Snow Manager North       10.00         K<	Maintenance Crew North	Saint Louis	Bob CrewleaderMaint	Gage Roberts		16.00
Maintenance Crew West       Saint Louis       Chris Crew Leader       Benjamin Account Manager       East       8.00         Plow Route 1       Saint Louis       Johnny Plow       Kevin Kehoe       8.00         Plow Route Sub       Saint Louis       Nick Plowman Sr.       Kevin Kehoe       8.00         Snow Columbia 1       Columbia       PlowCol1 Showme       Gage Roberts       9.00         Snow Plow Internal (Binky)       Saint Louis       Binky Crewleader       Snow Manager North       10.00         Snow Plow Sub - Bill's       Saint Louis       PlowSPB Bill's       Snow Manager North       8.00         K<<1	Maintenance Crew South	Saint Louis	Lenny CrewleaderWild	Aspire System15		16.00
Plow Route 1       Saint Louis       Johnny Plow       Kevin Kehoe       8.00         Plow Route Sub       Saint Louis       Nick Plowman Sr.       Kevin Kehoe       8.00         Snow Columbia 1       Columbia       PlowCol1 Showme       Gage Roberts       9.00         Snow Plow Internal (Binky)       Saint Louis       Binky Crewleader       Snow Manager North       10.00         Snow Plow Sub - Bill's       Saint Louis       PlowSPB Bill's       Snow Manager North       8.00         (K<<1	Maintenance Crew West	Saint Louis	Chris Crew Leader	Benjamin Account Manager		8.00
Plow Route Sub       Saint Louis       Nick Plowman Sr.       Kevin Kehoe       Image: Columbia 1       Solution	Plow Route 1	Saint Louis	Johnny Plow	Kevin Kehoe		8.00
Snow Columbia 1 Columbia PlowCol1 Showme Gage Roberts 9.00   Snow Plow Internal (Binky) Saint Louis Binky Crewleader Snow Manager North 10.00   Snow Plow Sub - Bill's Saint Louis PlowSPB Bill's Snow Manager North 10.00   K<<12<>>> >> >> 1.20 of 22 items	Plow Route Sub	Saint Louis	Nick Plowman Sr.	Kevin Kehoe		8.00
Snow Plow Internal (Binky) Saint Louis Binky Crewleader Snow Manager North 10.00   Snow Plow Sub-Bill's Saint Louis PlowSPB Bill's Snow Manager North 10.00   k<<12	Snow Columbia 1	Columbia	PlowCol1 Showme	Gage Roberts		9.00
Snow Plow Sub - Bill's   Bill's     Saint Louis        PlowSPB Bill's   Snow Manager North     1 - 20 of 22 items     I - 20 of 22 items	Snow Plow Internal (Binky)	Saint Louis	Binky Crewleader	Snow Manager North		10.00
K       1       2       >>>       >>>       1 - 20 of 22 items         Image: Contract of the second se	Snow Plow Sub - Bill's	Saint Louis	PlowSPB Bill's	Snow Manager North		8.00
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#### To add Properties to a route, follow these steps:

1. Click on the route.



Route   Maintenance Crew West	
Route Crew Property Services	
Property 2	Display Order
Boones Hospital Center	4 10 🐼 🕯
Chesterfield Mall	20 🐼 🗸
Select One	
	5

- 2. Click on the Property tab.
- 3. From the dropdown menu, select the property.
- 4. Enter in the Display Order.

Note: The lower the number, the higher the property will appear on the crew leader's phone. It is recommended to order everything in multiples of 10. If the properties are numbered, 1,2,3, etc., then there is no space for when a new route is created and needs to be viewed higher up on the schedule board

5. Press Save.



### Adding a Service to a Snow Route

Purpose: Adding services to a route is often used for snow routes but can be used for other work performed during summer months. This set up is used only in conjunction with adding properties to a route. If no services are added, then the route can support all services

To add Services to a snow route, follow these steps:

earch Routes		Default Search [System]	ı · 🏹	🔒 🚷	C
)rag a column head	der and drop it here to	o group by that column	1		
Route	Branch	Crew Leader	Manager	Color	Hours
Maintenance Crew North	Saint Louis	Bob CrewleaderMaint	Gage Roberts		16.00
Vaintenance Crew South	Saint Louis	Lenny CrewleaderWild	Aspire System15		16.00
Maintenance Crew	Saint Louis	Chris Crew Leader	Benjamin Account Manager		8.00
Plow Route 1	Saint Louis	Johnny Plow	Kevin Kehoe		8.00
Plow Route Sub	Saint Louis	Nick Plowman Sr.	Kevin Kehoe		8.00
Snow Columbia 1	Columbia	PlowCol1 Showme	Gage Roberts		9.00
Snow Plow Internal (Binky)	Saint Louis	Binky Crewleader	Snow Manager North		10.00
Snow Plow Sub - Bill's	Saint Louis	PlowSPB Bill's	Snow Manager North		8.00
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1. Click on the route.



Choose the services this route can handle. Leave blank if the route supports all services	i.
Service	
SN - Snow Clearing w/ Blower	8
SN - Snow Plowing w/ Truck < 8"	8
SN - Snow Clearing w/ Shovel and/or apply chemicals/salt by hand	8
Select One	
SN - Salting 6-9"	
SN - Snow Clearing w/ Blower	
SN - Snow Clearing w/ Loader	
SN - Snow Clearing w/ Loader & Protech	
SN - Snow Clearing w/ Rubber Tire Loader	
SN - Snow Clearing w/ Shovel and/or apply	
chemicals/salt by hand	
SN - Snow Operations and Standby	
SN - Snow Removal w/ Dump Truck	

- 2. Click on the Services tab.
- 3. From the dropdown menu, select the service.
- 4. Press Save.