Carrier Routes and the Visual Route Designer
What is a Carrier Route?

A Carrier Route is a subdivision of a zip code or a mail carriers daily route. The population density of the zip code determines how many Carrier Routes are defined within that zip code.
And why should I use it?

Auto Route Assignment for New Sales.

Improved Geocoding to Carrier Route, instead of a city or zip result.

Improved Neighbor Searches by Carrier Route.

Address Standardization

Improved Data Entry - At the street number and street name level.

The ability to run Block Leading by Carrier Route.
Import Carrier Route Utility

The Import Carrier Route Utility is located under Tools/ Utilities/ Mapping & Routing Utilities. You will need to put in the Carrier Route Data disk that you received from us.

***This utility could take a long time, we advise doing this during off hours.***
Carrier Route Disk

A dialog box will appear, you must select your CD-ROM drive, if you have the disk in, it will be labeled USPS (date). For example the one listed here which is USPS06/07.
You will see a listing of all zip codes you have in your data as well as your zip code parameter table. This dialogue is used to manage your carrier routes. All zip codes will default to Import. If you do not want to import data for a zip code, click on Do Nothing. You can also delete any previously loaded carrier route data by clicking Delete.
Address Correction

Once the import has finished you will be asked if you want to correct customer addresses. Click YES. If you don’t want to, select NO to bypass this portion.
The addresses listed can be changed globally. If you choose to do this, please review them first as there could be errors in the carrier route data. You can print the list and then go back later through the customers, so you can review the change to see if you really want to change the customers’ address.
Adjacent Carrier Route

This is the next step in importing your carrier routes. This will build the table required to perform neighbor searches.
Adjacent Carrier Route

Once you click on Yes, this utility will run unattended. You will receive a prompt when it is done. This utility is needed for neighbor searches and using the Black Box Routing module.

We can now move on to the Visual Route Designer.
Visual Route Designer

Before you can run the VRD. You must have the following steps completed.

The Zip Codes for New Growth Areas have been added to the Zip Code Parameter Table.
Your Carrier Route Data has been installed.
The Adjacent Carrier Route Utility has been run.
That you have Mapping Assistant 3.
That the route codes we are going to use have been setup in parameters.
What is the Visual Route Designer going to do for me?

The Visual Route Designer (VRD) is used to create routes based on Service, Carrier Route, Season, Dollars or Number of Customers.

This procedure will lead to the Automatic Routing of New Sales based on Location and the Type of Service.
The Visual Route Designer is going to update routes based on service and location.

All existing customers will have their Default Routes (Customer page) and Service Routes (Program page) updated automatically based on the newly created routes.

All new sales will automatically be assigned to the correct route based on their location and the type of Service scheduled. In the example, we are going to use Lawn Care.
The Visual Route Designer is located under Tools/ Utilities/ Mapping & Routing Utilities/ Visual Route Designer.
If this is your first time running the VRD, you will want to clear all default Routes that are setup, you can do this by clicking these two buttons.
Now you want to choose which services you are going to route for and what zip codes. In this example I’m going to route for my Custom Care and Complete Care Programs.
The season should be set to the current year. The season performs two functions, it determines which services are going to pull into the VRD as well as how the estimate and cancelled status customers will be updated. If a cancel or estimate status customer does not have a service within this season, only the customer route will be updated.
Once we have our selections done, click on the globe to launch the Visual Route Designer.
On the map we will see all our Carrier Routes. Each Zip Code is a different color and symbol, each symbol of the same color is the center of a carrier route within that zip code.
Carrier Route Detail

To reveal the statistics for a Carrier Route, double click on the symbol. The name of the Carrier Route, the Zip Code, as well as the Program Count, Standard Price and Size.
We are now ready to define our routes. Position yourself on the map where you want to start, draw a box around a selection of carrier routes. I prefer to use the freeform button on the bottom.
Next click on Add to Route within the Route Planner. You will now see the totals of the selected carrier routes in the window. We need to examine the totals and see if it is enough or too much. We can add or delete single carrier routes to adjust the totals.
Once our totals are correct, it is time to assign a Route Code. Choose which fields you want to update. When you are finished click on Update Route, this will remove the updated carrier routes from the map. We can then continue on with the rest of our carrier routes.
Tweaking

Once all of the routes have been created and all of the Carrier Routes have been removed from the map, minor load balancing can begin.

Choose the route from the drop down list and then click on Select Route which will bring those carrier routes back onto the map for you to load balance that route.
Visual Route Designer

Procedure when starting the VRD then quitting before you are done.

The first time you enter the Visual Route Designer, select all zip codes. Track which zip codes have been routed during the first session. Avoid quitting the utility in the middle of a zip code.

The next time you enter the VRD only select the remaining zip codes that need to be routed.