ZIP Optimized #2 - Interactive Assignment Tool

User Guide

Overview

The ZIP Optimized #2 view provides an interactive tool for reviewing and reassigning the 33 pools that require manual decisions after the automated optimization process. This tool allows you to visualize pool locations, compare them to existing route stops, and make informed reassignment decisions.

Getting Started

1. Navigate to **Miami** from the location selector
2. Click the **ZIP-OPTIMIZED #2** button (cyan colored)
3. The view will load with the territory map and two key sections:
   - **Remaining Manual Decisions** (amber border)
   - **Technician Pool Count Changes**

Viewing a Pool on the Map

1. Find the pool you want to review in the **Remaining Manual Decisions** table
2. Click the **eye icon** (👁) or anywhere on the row
3. The map will:
   - Pan and zoom to center on the selected pool
   - Display a **red arrow marker** at the pool's location
4. Click the red arrow to see pool details (name, address, current route, territory)

Viewing Other Route Stops in the Territory

To see where other pools in the same territory are located:

1. First, select a pool from the Manual Decisions table
2. Click the **"Show [Territory] Territory Stops"** button that appears above the map
3. Small colored dots will appear showing all route stops in that territory

4. **Click any dot** to view that stop's details:
   - Customer name and account number
   - Full address
   - Current route assignment
   - Day of service

This helps you identify which technician's route is closest to the pool you're reassigning.

Viewing a Technician's Current Route

1. Scroll down to the **Technician Pool Count Changes** table
2. Click on any technician row
3. The map will display **numbered blue markers** showing all stops on that technician's current route
4. Click any marker to see customer details
5. The selected row will highlight in blue with an eye icon

Reassigning a Pool

1. In the **Remaining Manual Decisions** table, find the pool to reassign
2. Use the **"Assign To"** dropdown in the last column
3. Select a technician from the list (color-coded by territory)
4. The row will turn green to indicate assignment
5. The **Technician Pool Count Changes** table updates automatically:
   - "After" column shows new total
   - Cyan badges show manual additions in the "Incoming" column
   - Header shows total manual assignments

To undo an assignment, select **"Undecided"** from the dropdown.

Exporting Your Decisions

Two export options are available:

1. **Export Remaining** - Downloads pools still marked as "Undecided"
2. **Export Assigned** - Downloads pools you've reassigned with their new route assignments

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Tips for Effective Reassignment

1. **Use territory stops** to find the nearest technician route to the pool

2. **Check the "After" column** to ensure you're not overloading any technician
3. **Consider the day of service** when reviewing route stop details
4. **Use the "Clear Selection" button** above the map to reset your view

Quick Reference

Action	How To
View pool on map	Click eye icon or row in Manual Decisions table
See territory stops	Click "Show Territory Stops" button
View stop details	Click any marker on the map
View technician route	Click row in Technician Pool Count Changes table
Reassign pool	Use "Assign To" dropdown
Clear map selection	Click "Clear Selection" button
Export decisions	Use export buttons above the table

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