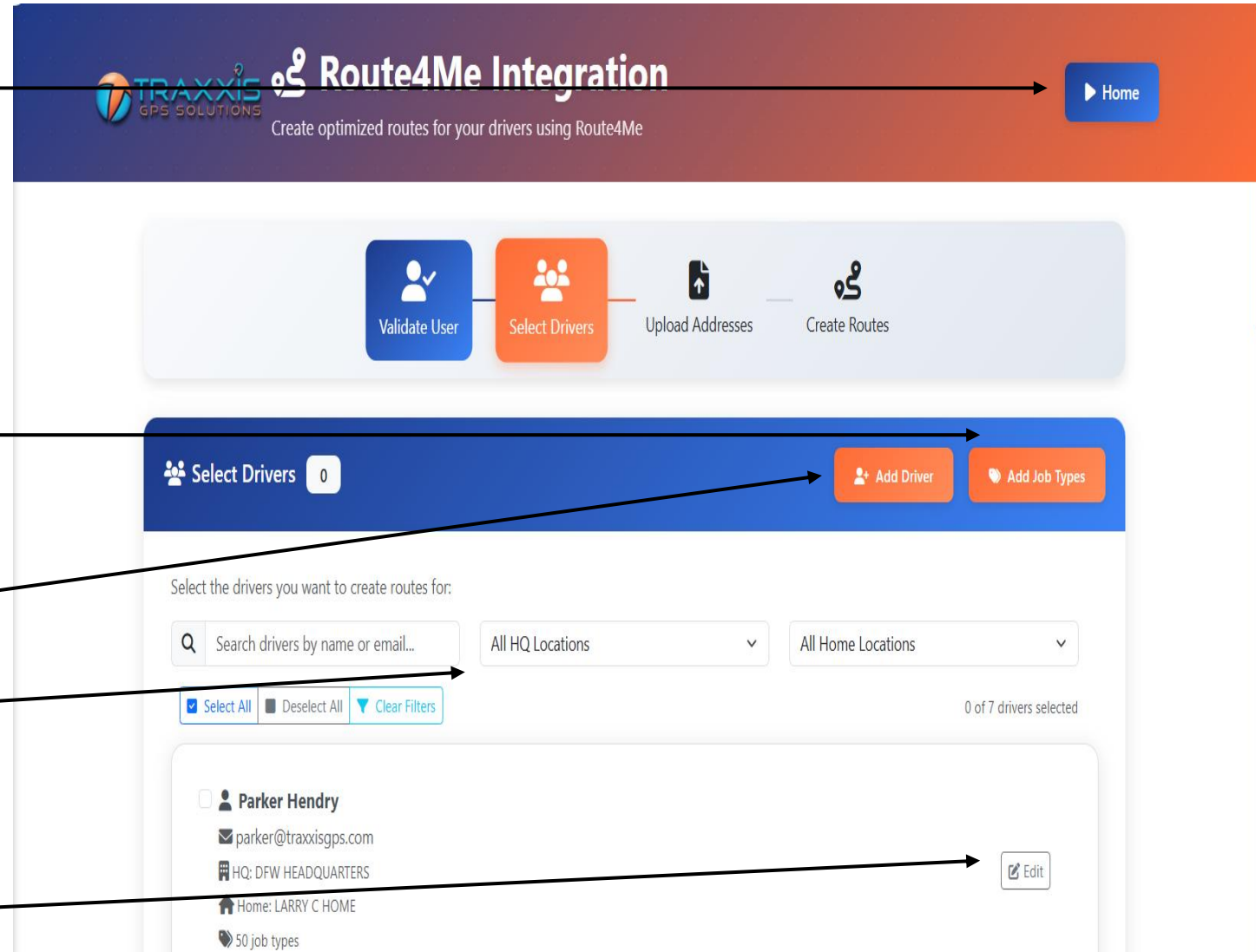




# Route4Me Upload Tool User Guide

- This is the first page you will see while using the app.
- Use the **Home** button at anytime while using the app to return to this screen.
- This page is used to select your drivers and their starting locations for routing.
- Use the **Add Job Types** button to add new job types to assign to drivers.
- Use the **Add Driver** button to add drivers to your selection.
- Use the filter options to filter drivers by your preferred starting location.
- Use the **Edit** button next to each driver to edit drivers.



- This is the page you will see when adding a driver.
- Use the **Route4Me Information** fields to enter user information.
- Enter preferred starting locations (Geotab zones) for the driver in the **Driver Configuration** fields.
- The **Max Destinations** field represents the maximum number of destinations this driver can be assigned in their route.
- Use the **Job Types** selection to assign this driver possible destination types. If you do not see one of your job types here, use the Add Job Types button on the Home page to add it.

The screenshot shows the 'Add New Driver' form with two main sections: 'Route4Me Information' and 'Driver Configuration'. Arrows from the text on the left point to specific fields in the form.

**Route4Me Information**

- Email Address
- First Name
- Last Name
- Password

**Driver Configuration**

- HQ Address
- Home Address
- Max Destinations: 25
- Job Types
  - ☒ Select All ☐ Deselect All
  - ☐ 10' SWALE (10 min)
  - ☐ AS-BUILT SURVEY (10 min)
  - ☐ BLDG ENVELOPE (25 min)
  - ☐ BOUNDARY SURVEY (60 min)
  - ☐ CONTROL FILE (180 min)

Select the types of services this driver can handle

- This is the page you will see when adding a job type.
- Enter job type names as they will appear in your uploaded file in the **Job Type Name** field.
- Enter the estimated duration that this job type will take in the **Duration** field. This will be used by the app's algorithm to determine optimal routes for your drivers.
- Browse job types you currently have in the app in the **Current Job Types** selection. You can also remove any unneeded job types here as well.

The screenshot shows the 'Manage Job Types' interface. It has a blue header with the title 'Manage Job Types'. Below the header, there are two main sections. The left section is for adding a new job type, with a '+ Add New Job Type' button at the top. It contains two input fields: 'Job Type Name' with a placeholder 'e.g., BOUNDARY SURVEY' and a note 'Job type will be converted to uppercase', and 'Duration (minutes)'. A blue '+ Add Job Type' button is at the bottom of this section. The right section is titled 'Current Job Types' and shows a list of three job types: '10' SWALE' (10 minutes), 'AS-BUILT SURVEY' (10 minutes), and 'BLDG ENVELOPE' (25 minutes). Each item has a red trash icon to its right. At the bottom right, there is a grey button labeled '← Back to App'. Three arrows from the text on the left point to specific elements: the first points to the '+ Add New Job Type' button, the second points to the 'Duration (minutes)' field, and the third points to the 'Current Job Types' list.

Manage Job Types

+ Add New Job Type

Job Type Name

e.g., BOUNDARY SURVEY

Job type will be converted to uppercase

Duration (minutes)

+ Add Job Type

Current Job Types


- 10' SWALE  
10 minutes
- AS-BUILT SURVEY  
10 minutes
- BLDG ENVELOPE  
25 minutes


← Back to App


- After choosing your drivers and their starting locations, the app may ask you to correct some of their starting locations.
- When correcting the addresses in the **Enter Corrected Address or Zone** field, a dropdown will appear showing available Geotab zones in your database.
- Use the **Validate Corrections** button to submit your address corrections once you are finished.
- **WARNING:** You can use the **Proceed with Current Addresses** button to proceed without your corrections, but this may cause the app to not route correctly!!!


The screenshot shows the 'Select Drivers' app interface. At the top, there's a blue header with 'Select Drivers' and a counter '1'. To the right are two orange buttons: 'Add Driver' and 'Add Job Types'. Below the header, the text 'Select the drivers you want to create routes for:' is displayed. A yellow warning box titled 'Driver Address Validation' states: 'Some driver addresses need attention. Please review and correct them:'. Below this, a driver entry for 'Parker Hendry' with an 'HQ' tag is shown. The 'Current Address' is 'DFW', and a red message says 'No coordinates found'. To the right of this entry is a text input field labeled 'Enter Corrected Address or Zone:' containing 'DFW'. At the bottom, there are four buttons: a grey 'X Cancel' button, an orange '→ Proceed to Address Upload' button, a yellow '▶▶ Proceed with Current Addresses' button, and an orange '✓ Validate Corrections' button. Three black arrows point from the text in the left-hand list to these buttons: one to 'Validate Corrections', one to 'Proceed with Current Addresses', and one to 'Proceed to Address Upload'.

- Use this page to upload your address file.
- For optimal routing, please ensure your file contains the columns **Address 1**, **Subdiv Name**, **Section**, and **Description of Problem**.

Validate User


Select Drivers

Upload Addresses

Create Routes


Upload Addresses


Upload an Excel file containing addresses in the "Address 1" column:



Drop your Excel file here  
or click to browse

- After uploading your file, the app may ask you to correct some of the addresses if it cannot find a zone with the name of the address or subdivision + section.
- The top tab will list the number of addresses that were successfully geocoded along with the number of addresses needing corrections.
- Use the **Enter Corrected Address or Zone** field to correct addresses. A dropdown will be available here to show available Geotab zones in your database.

 Upload Addresses

 Address Validation Results


File: 8-19-25 DFW.csv.xlsx  
Valid Addresses: 88  
Addresses Needing Attention: 32

Route4Me is not fully confident in the location of these addresses, would you like to make any corrections?

Please review the following addresses:


Riverside Homebuilders (DFW) - ENVELOPE STAKE  
Address: 1928 Velora Drive  
Subdivision: Northstar PH3S4  
Confidence: medium

Enter Corrected Address or Zone:

 No coordinates available


Riverside Homebuilders (DFW) - ENVELOPE STAKE  
Address: 14408 Shooting Star Drive  
Subdivision: Northstar PH3S4  
Confidence: medium

Enter Corrected Address or Zone:

 No coordinates available

Riverside Homebuilders (DFW) - ENVELOPE STAKE  
Address: 14417 Shooting Star Drive  
Subdivision: Northstar PH3S4  
Confidence: medium

Enter Corrected Address or Zone:

 No coordinates available

- Once you have finished correcting your addresses, use the **Validate Corrections** button to submit your corrections.
- **WARNING:** You can use the **Proceed with Current Addresses** button to proceed without submitting any changes, but this may cause the app to not route correctly!!!


The screenshot shows a user interface for address correction. It features three rows of address information, each with a text input field for corrections and a warning icon. At the bottom, there are three buttons: 'Cancel', 'Proceed with Current Addresses', and 'Validate Corrections'. Two arrows from the text on the left point to the 'Validate Corrections' button.


Subdivision	Address	Subdivision	Confidence	Corrected Address or Zone	Warning
Silo Mills PH1B			medium		
Lennar Homes (DFW) - LOCATE RODS	2708 Wispy Creek Dr	West Square PH2	medium	2708 Wispy Creek Dr	No coordinates available
Lennar Homes (DFW) - FINAL SVY SWALE	4949 Ivory Knoll Road	Landing at Creekside PH2	medium	4949 Ivory Knoll Road	No coordinates available
Taylor Morrison (DFW) - FINAL SVY SWALE	809 Cottontail Way	The Ranch at Uptown PH1	medium	809 Cottontail Way	No coordinates available

Buttons: ✕ Cancel ▶▶ Proceed with Current Addresses ✓ Validate Corrections



- After correcting addresses, the app will provide the problem type coverage.
- If your uploaded file contains job types that are not supported by your driver selection, you will be notified here.

 Upload Addresses

 **File:** 8-19-25 DFW.csv.xlsx  
**Addresses:** 120 validated

[→ Proceed to Route Creation](#)

**Problem Type Coverage:**

ENV WAELEV STK (11 addresses)	7 drivers
ENVELOPE STAKE (12 addresses)	7 drivers
F FILE (1 addresses)	0 drivers
FIELD VERIFICAT (1 addresses)	7 drivers
FINAL SURVEY (1 addresses)	7 drivers
FINAL SVY DRAIN (4 addresses)	7 drivers
FINAL SVY SWALE (47 addresses)	7 drivers
FORM SURVEY (19 addresses)	7 drivers
LOCATE RODS (11 addresses)	7 drivers
MISC (1 addresses)	7 drivers
RE-FORM SURVEY (3 addresses)	7 drivers
RE-LOCATE RODS (1 addresses)	7 drivers
SLAB REVIEW (6 addresses)	7 drivers
SLOPE SURVEY (2 addresses)	7 drivers

- The next page will provide a summary of your selections so far.
- The **Selected Drivers** section will contain your drivers and their starting locations.
- The **Uploaded Addresses** section will contain a breakdown of the job types that will be routed.
- The **Route Schedule** section will allow you to choose the date and time for your routes to begin.
- Use the **Create Routes** button to begin the routing optimization.

Create Routes

Selected Drivers

Parker Hendry

parker@traxisgps.com

HOME

Traxis Support

support@traxisgps.com

HOME

Hannibal Barca

hannibalbarca@gmail.com

HOME

Marcus Agrippa

magrippa@gmail.com

HOME

Marcus Lepidus

mlepidus@gmail.com

HOME

Octavian Augustus

oaugustus@gmail.com

HOME

Publius Scipio

pscipio@gmail.com

HOME

Uploaded Addresses

120 Total Addresses

Problem Types Distribution:

FINAL SVY SWALE

39.2% of total

47

FINAL SVY DRAIN

3.3% of total

4

FINAL SURVEY

0.6% of total

1

FORM SURVEY

12.0% of total

19

Route Schedule

Route Date

mm/dd/yyyy

Select the date for the routes

Start Time

09:00 AM

Select the start time for the routes

Create Routes

- After the route optimization has finished, the created routes will be listed below.
- To view a route in Route4Me, use the **View in Route4me** button.
- If any changes are made to the routes in Route4Me, be sure to use the **Sync with Route4Me** button. Otherwise, changes will not be reflected in the app.
- Each route will start and end at each driver's chosen starting location, which will be highlighted in green.
- The destinations will be listed in-between those points.
- Use the **Edit Routes** button to edit the routes while in the app.
- To download a CSV file for each route, use the **Download CSV** button.

The screenshot displays the Route4Me interface after route optimization. At the top, a blue button labeled "Create Routes" is visible. Below it, a green banner shows a "Route Creation Summary" with "Total Routes Created: 7". A yellow banner for "Route Reassignments" contains a warning: "Warning: No compatible driver found for F FILE job type at SOUTHAVEN. Address remains with hannibalbarca@gmail.com but may cause issues." The main section, titled "Routes", features a "Sync with Route4Me" button and an "Edit Routes" button. Below this, a route for "magrippa@gmail.com" is shown with a "Success" status. The route details include "Starting Location: HOME" and "Total Addresses: 18". A list of destinations follows: 1. CHAD W HOME (highlighted in green with a "Starting Point" button), 2. THE RANCH AT UPTOWN, 3. THE RANCH AT UPTOWN, 4. 317 Walker Parkway, and 5. (partially visible). At the bottom, another route for "pscripio@gmail.com" is partially visible, also showing "Starting Location: HOME". Annotations with arrows point from the text on the left to specific UI elements: "View in Route4me" button, "Sync with Route4Me" button, the green starting point, the destination list, the "Edit Routes" button, and the "Download CSV" button.

- When editing routes, you can choose an address to move using the **Move** button.
- Once you have an address highlighted, simply click the top of the route that you would like to move it to.
- The app will then re-optimize that route to ensure the destinations are in the optimal order.

The screenshot displays the 'Routes' management interface. At the top right, there are buttons for 'Sync with Route4Me', 'Cancel Edit', and 'Finalize Routes'. A yellow banner for 'Route Reassignments' contains a warning: 'Warning: No compatible driver found for F FILE job type at SOUTHAVEN. Address remains with hannibalbarca@gmail.com but may cause issues.'

The main content shows two route cards. The first card is for user 'magrippa@gmail.com' and shows a route with 18 total addresses. The 'Complete Route (in order)' list includes:

- 1. CHAD W HOME (Starting Point, HOME - magrippa@gmail.com)
- 2. THE RANCH AT UPTOWN (FINAL SVY SWALE) - This entry is highlighted in yellow and has a '+ Move' button to its right.
- 3. THE RANCH AT UPTOWN (FINAL SVY SWALE) - This entry has a '+ Move' button to its right.
- 4. 317 Walker Parkway (RE-FORM SURVEY) - This entry has a '+ Move' button to its right.
- 5. (Empty entry)

The second card is for user 'pscpio@gmail.com' and shows a route with 17 total addresses. The 'Complete Route (in order)' list includes:

- 1. NICOLAUS P HOME (Starting Point, HOME - pscpio@gmail.com)
- 2. (Empty entry)

Two black arrows originate from the text on the left. One arrow points from the word 'Move' in the first bullet point to the '+ Move' button next to the second address in the first route. The other arrow points from the phrase 'route that you would like to move it to' to the top of the second route card.