



Dispatch Geo-coordinates

Megan De Freitas - 2024-11-22 - Dispatch

Overview

When creating a Dispatch Appointment from a Sales Document, it is possible to set the geo-coordinates for that appointment based on the Sales Document Ship To Address. These geo-coordinates can be used to estimate distances between subsequent appointments during scheduling.

In this document, you will learn how to set up and use the geo-coding functionality of SalesPad Desktop. Before proceeding, please visit the Application Settings sections of this document to ensure that you won't run into difficulties.

Table of Contents

- [Overview](#)
- [Setup](#)
- [Usage](#)
- [Distance to Previous Appointment](#)
- [Application Settings](#)

Setup

Currently, SalesPad only supports geocoding with Google.

First, sign up for a Google API Key. For instructions on how to do this, please refer to Google's help entry.

Enter your key into the *Geocoding API Key* setting in SalesPad. Set the *Geocoordinate Service Provider* setting to GoogleGeoCoords.

Settings

Close Save Export Settings Import Settings Export Settings List

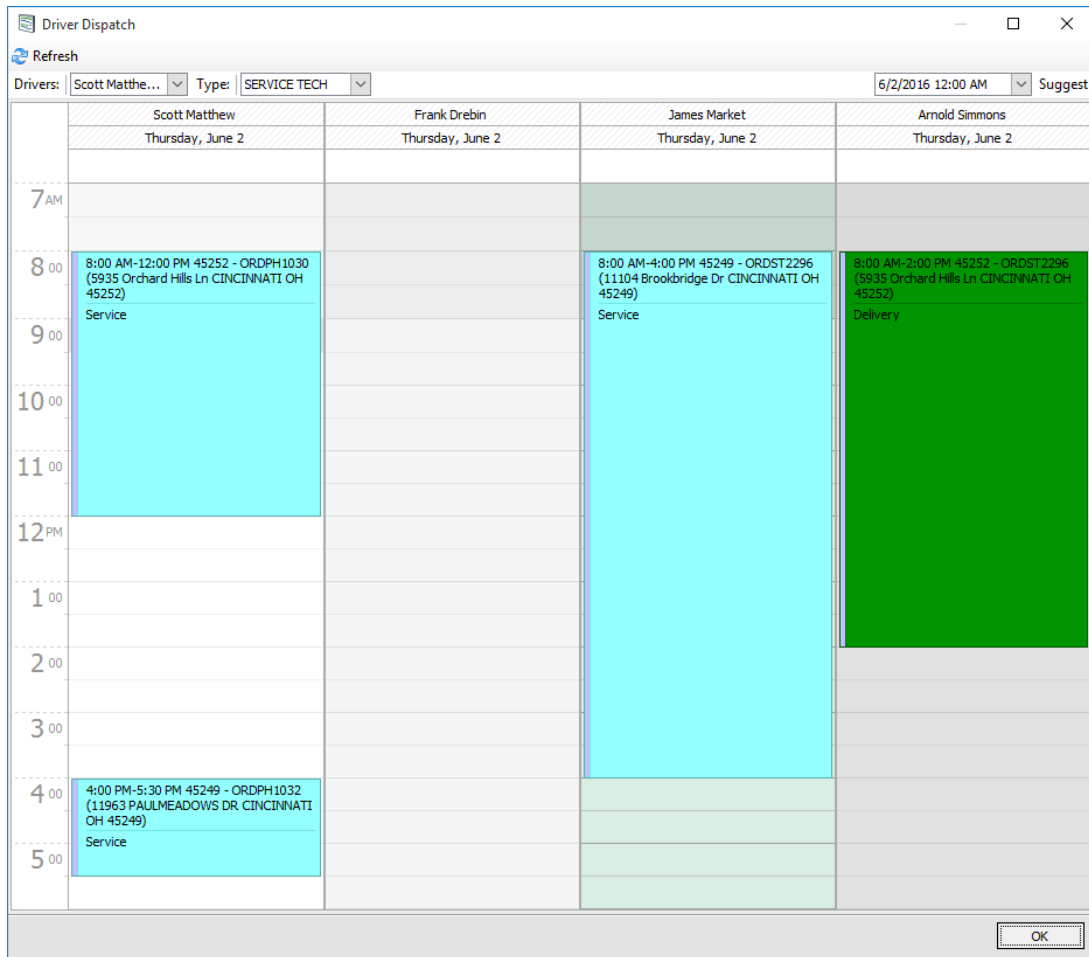
Filter: *Dispatch

Dispatch Api Integration	
Geocoding API Key	AizaSyCFdmmEn03i0i7w6R000ILKP31Vj6KRxTZ
Geocoding Retry Count	5
Geocoordinate Service Provider	GoogleGeoCoords
Routing Service Provider	WorkWaveService
Dispatch Calendar Options	
Allow Overlapping Calendar Appointments	False
Calendar End Time	6:00:00 PM
Calendar Start Time	7:00:00 AM
Show Previous/Next Appointment Navigation	False
Show Start/End Time on Calendar Appointments	True
Dispatch Driver	
Dispatch Driver Fields To Include In Audit	
Dispatch Route	
Appointment Subject Expression	{Zip} - {Sales_Doc_Num}
Appointment Subject Expression From Route Stop	{Customer_Num}
Dispatch Route Stop Columns To Include In Audit	Stop_ID; Stop_Type; To_Address_Line_2; To_Address_Line_3; To_Address_Line_4
Route Stop Time Roll Option	Always
Dispatch Route UDFs	
Route Item Weight UDF	
Dispatch Schedules	
Number Of Days To Check For Conflicting Schedules	7
Dispatch Vehicle	
Dispatch Vehicle Fields To Include In Audit	

Usage

When scheduling a Driver or Vehicle from a Sales Document with the Sales Document Dispatch Vehicle or Sales Document Dispatch Driver plugins, the Ship To Address will be geocoded and saved to the new appointment.

You can compare the distance from the current Sales Document Ship to Address to the Visible Schedules in the Calendar using the **Suggest** button in the upper right-hand corner.



For example, if we want to schedule a stop for 4:30 PM on 6/2/2016, we can enter the Date and Time in the dropdown just to the left of the **Suggest** button, then click the **Suggest** button.

For each Driver visible on the Calendar, the first appointment that ends prior to 4:30 PM will be considered. SalesPad will then compare that appointment's geo-coordinates against the geo-coordinates of the Sales Document.

If any of the drivers do not have appointments yet for the day, the geo-coordinates will be retrieved for the Sales Document Warehouse Address and compared against the Sales Document Ship To Address.

The calendar will then rearrange the Drivers, either from left to right or top to bottom, with the predicted closest driver as of 4:30.

Driver Dispatch

Refresh

Drivers: Scott Matthe... Type: SERVICE TECH 6/2/2016 4:30 PM Suggest

	Arnold Simmons Thursday, June 2	Frank Drebin Thursday, June 2	James Market Thursday, June 2	Scott Matthew Thursday, June 2
7 AM				
8:00	8:00 AM-2:00 PM 45252 - ORDST2296 (5935 Orchard Hills Ln CINCINNATI OH 45252) Delivery		8:00 AM-4:00 PM 45249 - ORDST2296 (11104 Brookbridge Dr CINCINNATI OH 45249) Service	8:00 AM-12:00 PM 45252 - ORDPH1030 (5935 Orchard Hills Ln CINCINNATI OH 45252) Service
9:00				
10:00				
11:00				
12 PM				
1:00				
2:00				
3:00				
4:00				4:00 PM-5:30 PM 45249 - ORDPH1032 (11963 PAULMEADOWS DR CINCINNATI OH 45249) Service
5:00				

OK

The distance of the previous appointment (in miles) from the Sales Document Ship To Address will appear in a log.

Previous Stop Distance at 2016/06/08 11:36 AM

Print

Previous Stop Distance at 2016/06/08 11:36 AM

Caption	Previous Location	Previous End Time	Distance From Previous
Arnold Sim...	5935 Orchard Hills Ln CINCINNATI OH 45252	6/2/2016 2:00:00 PM	4.30772738250615
Frank Drebin	Warehouse: OH		11.0557519538868
James Mar...	11104 Brookbridge Dr CINCINNATI OH 45249	6/2/2016 4:00:00 PM	15.9969844655593
Scott Matt...	Conflicting Appointment at: 6/2/2016 4:30:00 PM		0

OK

In this case, the closest driver is Arnold Simmons. His appointment is over at 2 PM, and he is about 4.5 miles away at that time.

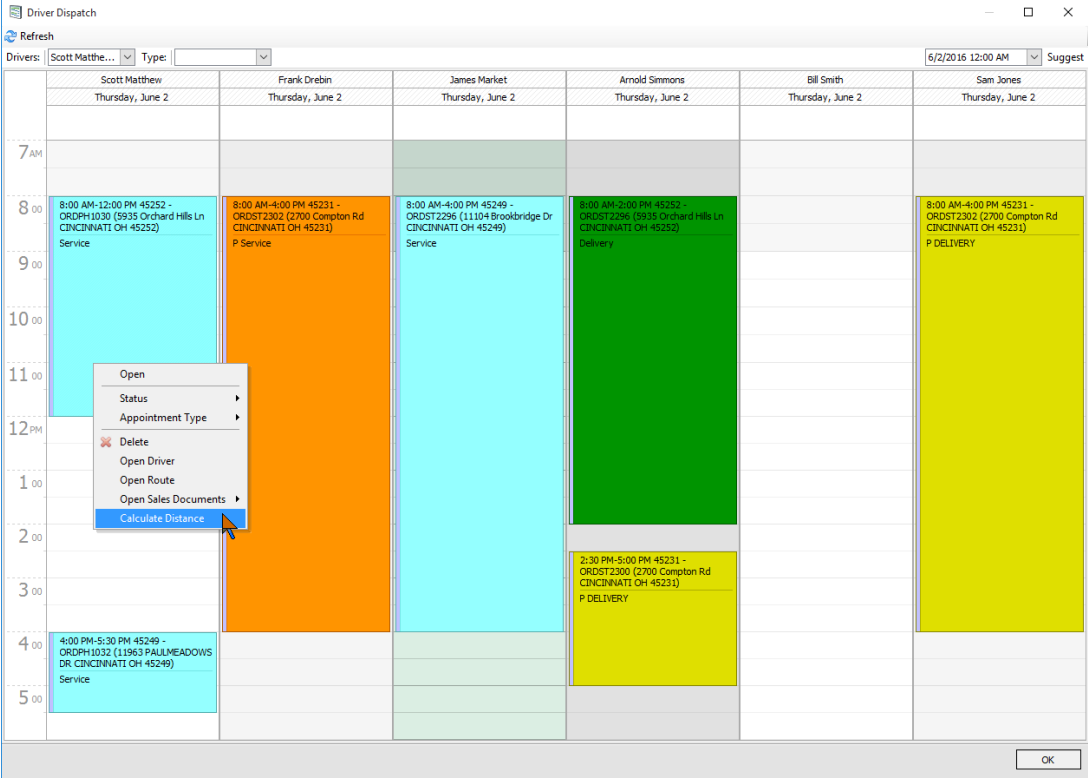
Since Frank Drebin does not have any appointments yet that day, the Sales Document Ship

To Address is compared to the Sales Document Location geo-coordinates. Warehouse: OH is 11 miles from the Sales Document Ship To Address.

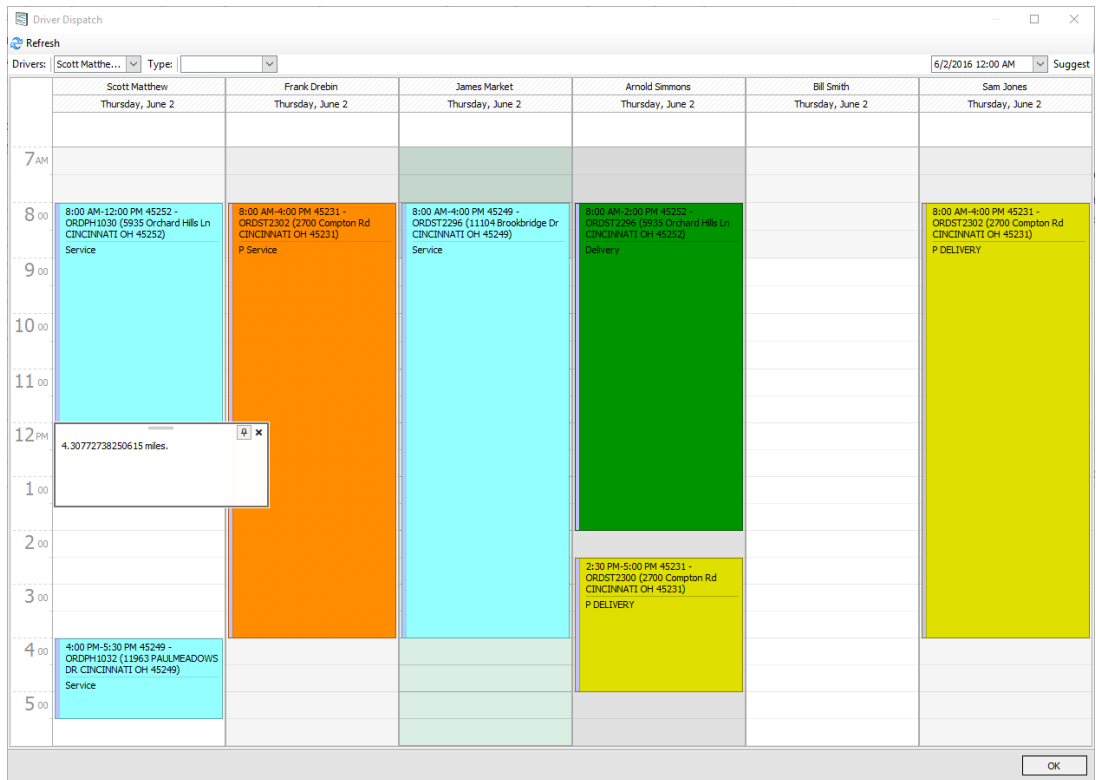
Scott Matthew has a conflicting appointment, so he is placed at the bottom of the list, and it is noted that there is a conflicting appointment at 4:30 PM.

Distance to Previous Appointment

Right-click a calendar appointment to view the Calculate Distance context menu.



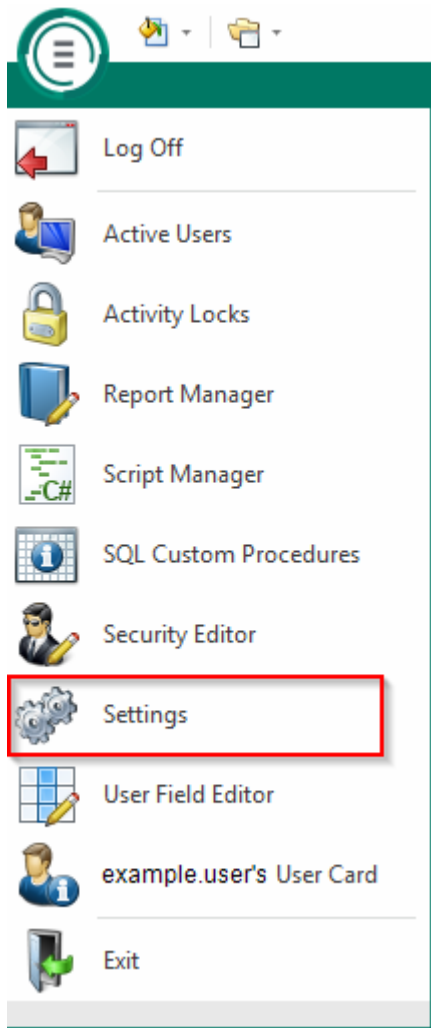
Selecting Calculate Distance will compare the geo-coordinates of the selected appointment and the geo-coordinates of the Sales Document Ship To Address. The distance (in miles) between them will display in a popup window.



Application Settings

Make sure you have optimal settings enabled to perform the tasks outlined in this document.

Navigate to **Settings**.



Type "geo" into the search bar to reveal the necessary securities.

- *Geocoordinate Service Provider* - Service provider used to route Sales Documents.
- *Geocoding API Key* - Enter Geocoordinates API Key.
- *Geocoding Retry Count* - Number of retries to contact the Geocoding service in event of Error.
 - Default Value: 5