Dispatch Geo-coordinates

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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.

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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.

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.

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

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