



How to prepare the client list

First step: preparing the list of customers to visit

Download our [Excel template of clients](#). And fill it with the list of customers to visit in a workday. It is very important to keep the format of the cells and do not change the name of the columns.

1.- Customer opening hours

- Indicate when the customer can be visited, its visiting hours (in the fields “StartTime1” and “EndTime1”)
- Indicate the duration of the visit, in minutes (in the field “Duration”)

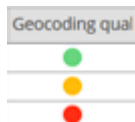
Possible Visit From	Possible Visit Until	Visit Duration
09:00	18:00	0:35
09:00	18:00	0:45

2.- Customer addresses

- Indicate the complete address (“Street”, “Number”, “City”, “PostalCode”, “Province” and “Country”).
- You must fill in all fields and avoid street names with errors.

Name	Street	Number	City	Postal Code	Province	Country
Hotel1	Eaton Square	112	London	SW1W-9AQ	London	United Kingdom
Hotel2	Piccadilly	210	London	W1J-0LF	London	United Kingdom
Hotel3	Kensington Gore	84	London	SW7-2AW	London	United Kingdom

After you add your customers, Routing Reparto geolocates the addresses and assigns geographical coordinates. Then, you can check the quality of the geolocalization on the display:



- **Green:** Correct location. You don't have to do anything.
- **Yellow:** Only the street is located. This vehicle's route will be planned but the vehicle is located at the start of the street. Make sure you only use one number (e.g. 12 in instead of 12-32)
- **Red:** The street or the city are not located. You should revise the address or use coordinates.

3.- Resolve addresses that are not found by street, province or country

Routing Reparto has two tools to manually resolve addresses: moving them on the map and correcting the texts. After making the changes, you can download the list of coordinates to Excel (and continue your planning).

A: Moving the pointer icon on the map

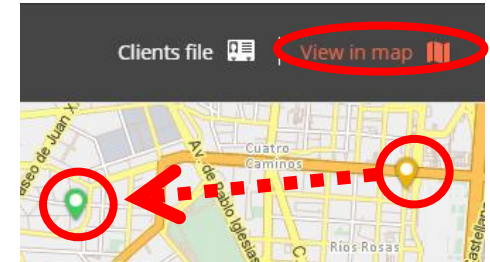
1) Choose the option “view in map”

View in map



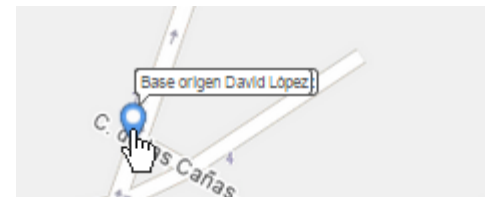
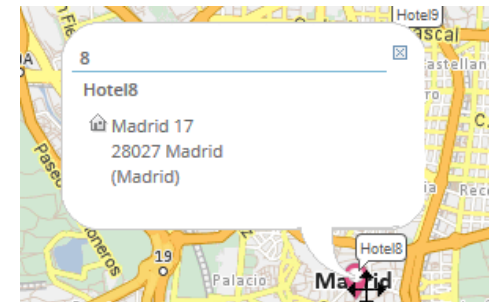
There, you will be shown different pointers, that show where every address has been located.

The goal is to get all the pointers green, as it shows that the address has been correctly located.



Below, we explain you how to move the pointer on the map and modify the address.

- 1 First, we have to double-click (left button) on the pointer we want to move. It will appear a dialogue showing the address.
- 2 Now, the pointer changed and is showing us we are able to drag it along the map.
- 3 We drag the pointer to the correct address: the address has been automatically corrected.



B: Changing the address text

- 1) Select the “addresses with geocoding pending”.
- 2) If we found similar addresses. Please choose one from the list.
- 3) If you can't find the address in the list, please write another one (as illustrated in the image on the right).



4.-Geographic coordinates, the solution to geolocate address not found

For complicated postal addresses, we recommend using geographical coordinates X-Y (columns "X Origin Coord" and "Y Origin Coord"). The main causes of problems with postal addresses tend to be:

Some field is empty: “Name”, “Street”, “Number”, “City”, “PostalCode”, “Province” or “Country” are empty.

Mistyped or incomplete address: for example the street name is abbreviated (“St James W”, instead of “Saint James Walk”)

Unspecific or remote address: like for example, “Industrial Park West Side” or “Smithfield Market”.

City	PostalCode	Province	Country	StartTime1	EndTime1	Duration	CoordY	CoordX
London	SW1W-9AQ	London	United Kingdom	09:00	18:00	0:15	51,497326	-0,150377
London	W1J-0LF	London	United Kingdom	09:00	18:00	0:20	51,509419	-0,135609
London	SW7-2AW	London	United Kingdom	09:00	18:00	0:15	51,500909	-0,176015

To add coordinates, download the following customers' template "Coordinates-Customers". We strongly recommend using this new Excel template but you can also add new columns to your old Excel template. Always remember that it is very important to keep the format of the cells and do not change the name of the columns.

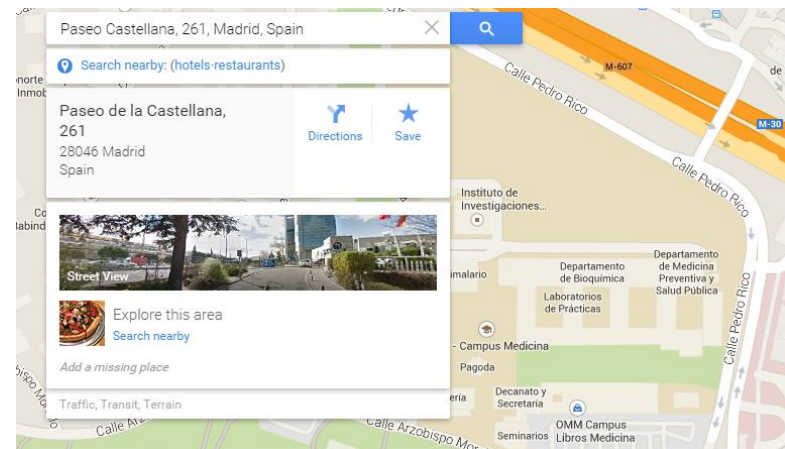


Remember that your Excel can have rows with or without coordinates. If a row has both an address and coordinates, Routing Reparto will only use the coordinates.

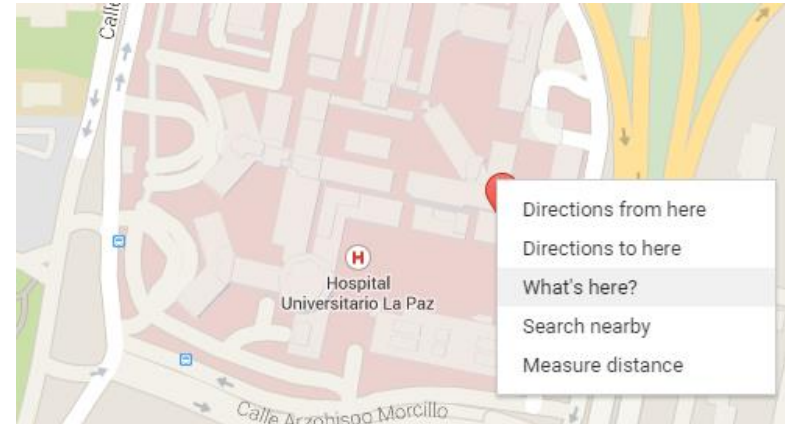
5. -How to look for coordinates

If you can not found any address, you can look for its coordinates:

- 1 To start searching for coordinates, click here:
<http://www.google.com/maps>



- 2 Type the address, e.g., "Paseo Castellana 261, Madrid".
- 3 Click on the pointer with the right button and click "What's here?".



- 4 Coordinates will be shown: 40.480936 (CoordY), -3.686391 (CoordX). Click on the numbers and copy the text from the address finder.

Attention! While placing the coordinates into the Excel file, you should use commas (,) in stead of dots.

CoordY	CoordX
40,480871	-3,685634
40,439598	-3,610832
40,468859	-3,706871

