

Routing Reporto

Clients' priority: set preferences for some customers

Set preferences for some clients

To begin, you must download the template named "priority" for the clients' Excel . We recommend using the new Excel spreadsheet (that is mainly the same Excel that was already being used, but to which we added the "Priority" column). If you prefer to, you can also add the new column to its previous Excel. Always remember that it is very important to keep the formatting of cells and not to rename columns.



The "Priority" field of your clients' Excel allows you to prioritize which customers to visit and to determine which customers can be discarded and no. It's a useful tool for those days when you can not fit all the visits.

Possible settings:

- 1 Value 1: no priority
- 2 Value 2: medium priority
- 3 Value 3: high priority

Province	Country	Possible Visit From	Possible Visit Until	Visit Duration	Priority
London	United Kingdom	09:00	18:00	0:35	1
London	United Kingdom	09:00	18:00	0:20	1
London	United Kingdom	09:00	18:00	0:15	3
London	United Kingdom	09:00	18:00	0:25	2
London	United Kingdom	09:00	18:00	0:20	1

If giving a customer a priority value 3 is still putting him off the planning, we must give the client a higher value, e.g., 50.