

Headlight 101: Quick Start

Welcome to Quick Start

Quick Start lets you learn Headlight in an organized manner. Each lesson consists of a brief explanation, short video tutorial (typically 2 to 4 minutes) and a spot for questions and comments. These build progressively, but feel free to dive in anywhere or skip ones that aren't needed immediately. You can always come back any time for a refresher course.

Quick Start #1: Using the Headlight Dashboard

This lesson covers the basics of using Headlight. It includes searching for orders, Info Balloons, finding addresses and places, screen layout, map display options and some "hidden" map features. Since most Headlight features rely on the Dashboard, it's highly recommended for new users.

Quick Start #2: Getting orders on the map

Learn to add individual orders, deliveries and service calls and place them accurately on the map. Although most will match properly (a process called "geocoding" or "pinning"), there's usually a few mistakes along the way. Learn how to quickly identify and correct missing, incomplete or invalid delivery addresses.

Quick Start #3: Changing the start location for routes

A depot is any place where the routes start and finish. It could be an office location, warehouse, processing plant or service center. You'll learn how to change the default location, add new ones and pick different symbols for displaying depots and routes. If the depots aren't pinned accurately, the route mileage won't be accurate. This lesson also covers customizing the Map Markers used for displaying orders on the map.

Quick Start #4: Importing orders, deliveries and service call

You'll probably be pulling data from another system into Headlight. That could include CSV files, Excel spreadsheets or a standalone billing, order entry or CRM system. This is a short and invaluable lesson.

Quick Start #5: Using the Fleet Manager

Fleet Manager is used for planning daily routes, reviewing existing routes and creating route scenarios. Topics include changing display options, renaming product categories, customizing Route Statistics and filtering routes. Knowing your way around will save considerable time when planning routes.

Quick Start #6: Planning daily routes

Alrighty - it's routing time! This lesson starts by importing a file with new orders and finishes with a street-ready route scenario. For companies with multiple vehicles and depots, we recommend watching this lesson before moving onto Multiple Vehicle Routing.

Quick Start #7: Routing multiple vehicles

This lesson explains how to route multiple vehicles out of multiple depots. It includes assigning drivers to specific areas, balancing routes by different criteria (stops, hours, revenue) and useful tips for getting the job done quickly. The three examples can easily be adapted to handle almost any routing situation. For anyone spending hours each day on route planning, this is the must-watch lesson.

Quick Start #8: Driving directions and route books

Most companies expect drivers to sequence each day's order and add special deliveries manually. That takes at least 30-45 minutes each day. Instead, try handing out daily route books with maps and driving directions. You'll make everyone's workday shorter, drop the fleet mileage by 20-40% and make things easy for relief drivers (like the office manager!).

Quick Start #9: Inviting additional users

This lesson explains how to add (and remove) additional users. It's particularly useful across different departments and office locations. Learn how sales and service can take advantage of different Headlight features to make their jobs easier.

Quick Start #10: Answer common service questions

Use Headlight to quickly answer common service questions. Customer service reps can instantly find a driver assignment, ETA (Estimated Time of Arrival), locate nearby drivers for same-day orders, email a delivery schedule and even print directions for an emergency delivery from the office.

Quick Start #11: Routing last minute orders and emergency deliveries

Do your customer ever call and ask: "I need something right away. When can you be out here?" This lesson explains how to efficiently route last minute deliveries. Different industries have different terms (e.g. will call, ASAP, special, emergency, on demand), but it all means the same thing. Here's how to **look** like you're going out of the way without **actually** going out of the way.