

Service **Autopilot**[™]

EMPLOYEE AND VENDOR SCREENS

User Guide

Version 1.1

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Summary

In the latest version of Service Autopilot, our **Employee and Vendor Screens** have been redesigned with new functionality intended to give our Members the ability to store more information about Employees and Vendors, manage Employees' time off (vacation, sick leave, and unexcused absences), and even register Compliments and Complaints from Clients. We've accordingly added new Permissions to allow Members to customize access for each Role in their organizations. Finally, as we move toward more integration with time tracking, the Dispatch Board now reflects approved Time-Off Requests for your Resources.

Terminology

Resource

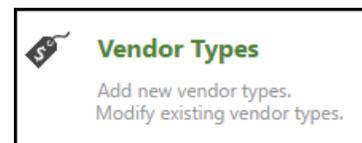
A Resource is any person to whom you may assign to a job. This always includes **Employees** but might also refer to **Vendors** if you pay Contractors for specific work and enter them into the system as employees.

Vendor

We use the term Vendor in SA as a blanket term to refer to someone *or something* to which your company pays money in exchange for goods or services. This could be a person, in the case of a Contractor who works for you. It might be a business, in the case of a nursery, a parts house, or a building supply company from which you receive products. Additionally, a Vendor might be an "entity" -- neither an individual nor a business. Most frequently, this would be an entity to which you pay taxes on the income you receive.

Tax Entity

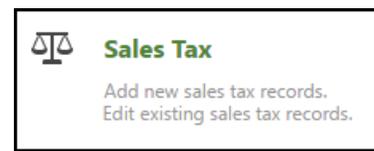
Tax Entity is a generic taxation agency under which your specific SA Sales Tax Records may fall. For instance, Washington State, the Federal Government -- these are the Vendors (blanket agencies) that you set up to associate with specific taxes that are charged. You create Vendor types from **Scheduling>Settings>Vendor Types**.



The Vendors that you set up will populate the **Vendor-Type** drop-down from a new Vendor's "Details" tab.



Having created Tax Entity Vendors, you can go to **Accounting>Settings>Sales Tax** to set up specific taxes that get paid to those Vendors, even creating tax groups when necessary. As you set up each sales tax 'record,' the system asks you to associate it with a Vendor type. In the system, you may choose to create as many Vendor types as you need.



Tax Entities in Action

Consider that you pay money to local, state, and/or federal government agencies. You might also pay taxes in multiple states due to your location.

Take the example of a Texarkana business. That business probably pays taxes in both Texas and Arkansas: City of Texarkana taxes in both the Texas town of Texarkana and the Arkansas town of the same name, and possibly county or state taxes. For this reason, you can set up several tax records and combine them into a group for SA to calculate on your invoices.

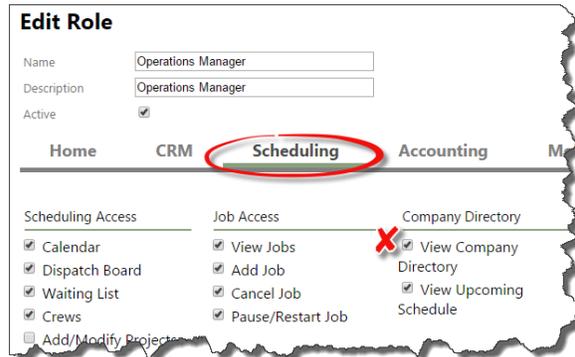
Setting up Roles

You will need to update your Company Roles to fully utilize the new Permissions that have been added to the **Employee** and **Vendor** views. If existing Roles previously had Permissions to view **Employee** and **Vendor Screens**, they have been upgraded to include the new Permissions automatically. Still, to customize these features to your specific needs, you will need to configure these Roles to turn on the new Permissions.

Let's start by examining the Employee Permissions. To modify the Permissions for any Role, Users need to have the Permission enabled for that Role. Go to the **Roles** screen by navigating to **Home>Settings>User Roles & Rights**. Then, select the Role you want to modify. You will find the Permissions for the Employee and Vendor Screens under the "Scheduling" tab.

Company Directory

The Permission for “View Company Directory” is found under the **Scheduling** tab of the **Edit Role** screen and turns on an option called **Company Directory**.



This is an alphabetical listing of all active Employees and all active Vendors who are marked as Contractors. It allows Members to let others access contact information without exposing sensitive information to the entire company.



The **Company Directory** lists your Resources’ names, type (Employee or Contractor), Roles, email addresses and phone numbers.



Users clicking on one of the entries in the list will be redirected to that person’s **Employee/Vendor Screen**. To prevent sensitive information from being disclosed to other Employees, we only show basic contact information on this page unless the User has Permissions turned on to view other information.

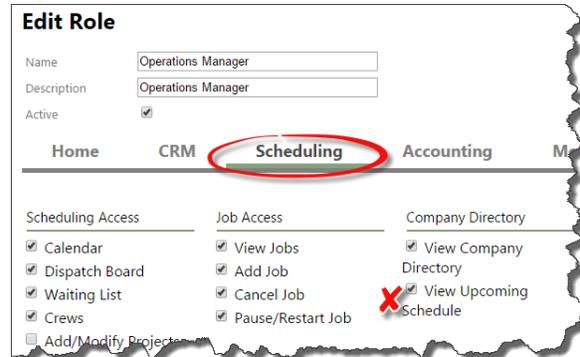
In the image at right, the User only has the “Company Directory” Permission turned on, so browsing Holden’s profile only shows minimal Personal and Contact Information.



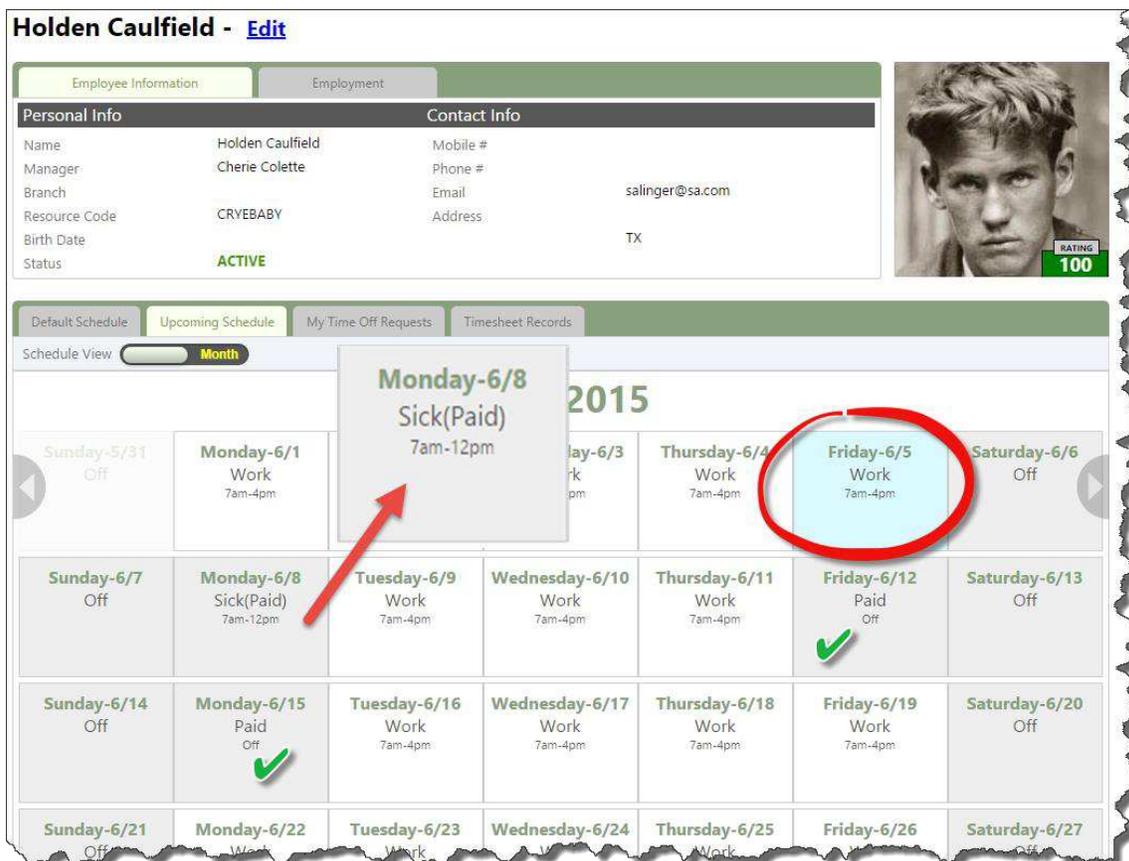
The “View Upcoming Schedule” Permission

Members may turn on the “View Upcoming Schedule” Permission for a Role. This is located under the **Scheduling** tab.

With “View Upcoming Schedule” Permission enabled, Users can view the “Upcoming Schedule” for all Employees and Vendors. This can be beneficial to Users who are trying to schedule an Employee for an upcoming job or plan for a big project.



If this Permission is turned on for example, users can see that Holden is only working a partial day on June 8. Holden has a doctor’s appointment on that date and will leave early. Also, Holden’s approved **Time-Off Request** for June 12 and the 15th is viewable. The calendar cell turns grey to indicate that the employee has an approved **Time-Off Request**, and the “Type” is noted as “Paid.” The current date will always be blue.



The “Manage Employees” Permission

The “Manage Employees” Permission serves two purposes. First, it will turn on access to the **Employee List** as in previous versions of Service Autopilot; in addition, it changes how the remainder of the Permissions under **Employee Access** are interpreted.



When the “Manage Employees” Permission is Turned Off

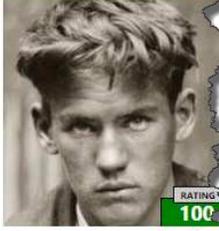
If the “Manage Employees” Permission is turned off for a Role, any of the remainder of the **Employee Access** Permissions that are checked will apply only to the current User logged into the system. For example, if you turn off the “Manage Employees” Permission for the Office Manager Role, any other Permissions granted in the **Employee Access** screen apply only to the record for the currently logged-in User. That User will not be able to see this information for other Employees. If a User in the Accounting Role were to view her or his Employee records from the **Company Directory**, s/he would only see the information enabled for the Accounting Role in the **Employee Access** section.

When the “Manage Employees” Permission is Turned On

When the “Manage Employees” Permission is turned on for a Role, users assigned to that Role will have the ability to see the specified information for all the Employee records in the system. For example, turning on the “View Rating,” “Resource Notes,” “View Time Off,” “View Default Schedule,” “View Upcoming Schedule” will give every user assigned to that Role the

Holden Caulfield - [Edit](#)

Employee Information		Employment	
Personal Info		Contact Info	
Name	Holden Caulfield	Mobile #	
Manager	Cherie Colette	Phone #	
Branch		Email	salinger@sa.com
Resource Code	CRYEBABY	Address	
Birth Date			TX
Status	ACTIVE		



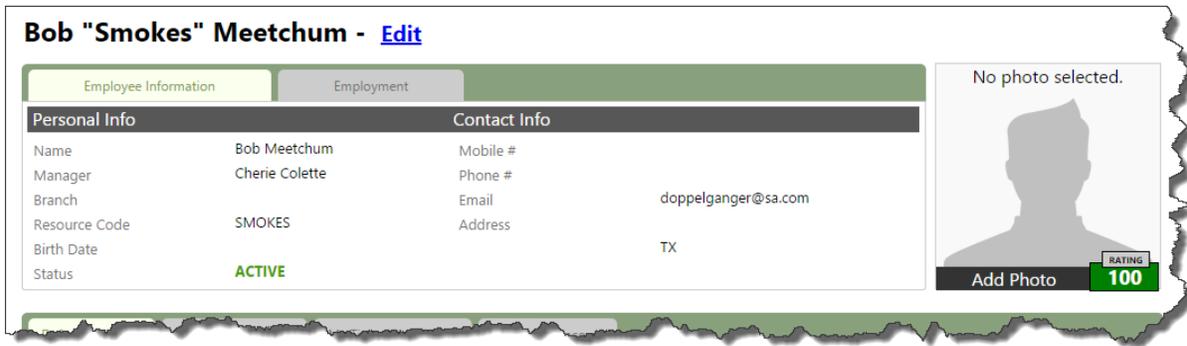
Default Schedule	Upcoming Schedule	My Time Off Requests	Timesheet Records
Sunday Off	Monday 7am - 4pm	Tuesday 7am - 11am 12:30pm - 4pm	Wednesday 7am - 11am 12:30pm - 4pm
			Thursday 7am - 4pm
			Friday 7am - 11am 12:30pm - 4pm
			Saturday Off

Resource Notes	Compliments	Complaints
Date Range: Wed 05/20/2015 - Wed 06/03/2015 Apply		
No Records to display.		

ability to view the Ratings, Resource Notes, Time-Off Requests and Schedules for all Employees in Service Autopilot™.

Uploading and Editing Photos

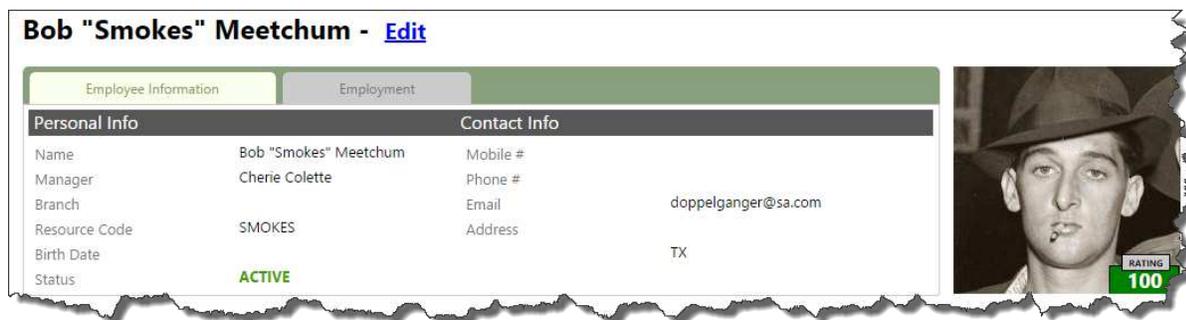
To **Add** or **Edit** an Employee or Vendor photo, navigate to the **Employee** or **Vendor** view. Note that the User’s Role must have the “Edit Photo” Permission enabled to add or change a photo. Click anywhere in the “Add Photo” image.



A small dialog box will appear prompting you to upload a photo. Click the **Attach File** button and browse to the location of the photo on your computer. Typically, images are stored in the Pictures folder.



Once the photo is uploaded you can click the “X” in the upper right corner of the dialog to close it. Now, when you mouse over the photo, it will grey out and offer an “Edit Photo” option, should you wish to change the image at any time.



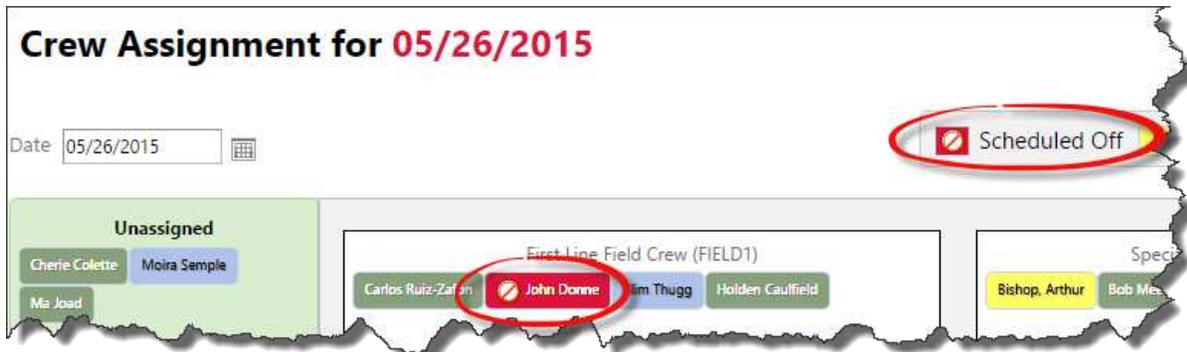
Default Schedules

The **Default Schedule** section of the **Employee** and **Vendor** views allows you to specify when a Resource typically works. To view or change an Employee or Vendor’s **Default Schedule**, the User’s Role must have the “View Default Schedule” and “Edit Default Schedule” Permissions enabled.

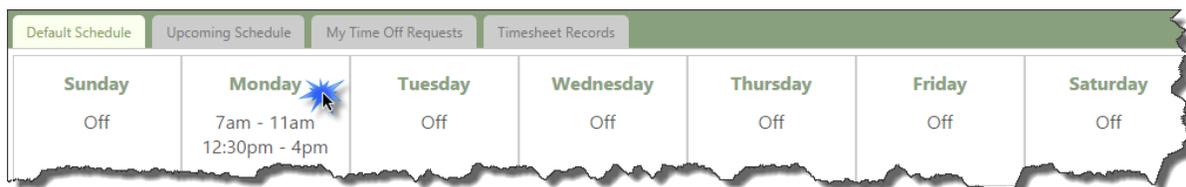
The **Default Schedule** allows Members to define what days of the week and time a Resource is typically available for work. Service Autopilot™ uses this information to determine if the Resource can be scheduled from the Dispatch Board and provide availability metrics for Resource planning.

NOTE: Any Resource will default to show as available on the Assign Crews button on your Dispatch Board unless at least ONE DAY has been entered into that Resource’s Default Schedule.

If a Resource has a scheduled day off during the week, that day off will be reflected in the Assign Crews option in Dispatch, meaning that anyone assigning Jobs for a given day will see which Resources should be taken off the Crews for that day.



Employees and Vendors will not have **Default Schedules** when you view the screen for the first time. To add a **Default Schedule**, click on one of the days in the row to configure a **Default Schedule** for that day.



A dialog will open allowing you to specify the **Default Work Schedule**. You can add up to two time ranges for each Employee. Enter a “Start Time A” and an “End Time A.” If you need to specify a second time, click the plus (+) icon to add another time window. When you have finished entering times, you may choose to click the “Mark as Default Schedule on” box, which will pull up the rest of the days in the week, allowing you to quickly replicate this schedule for any day you click. Click the **Save Day** button to save your changes. Once saved, the times for that day will be shown in the **Default Schedule** section.

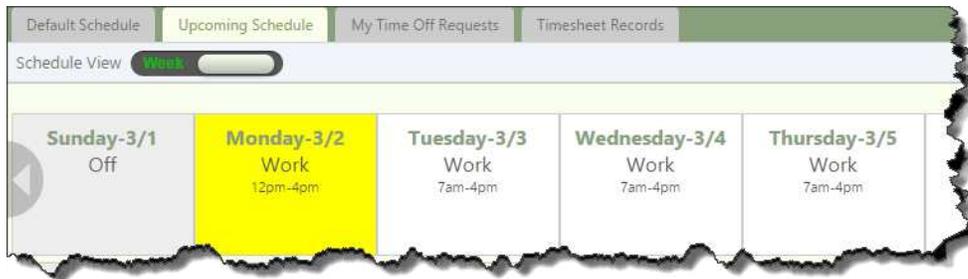
Overriding a Schedule

A user’s Role must have the “Override Scheduled Days” Permission selected in order to override an Employee or Vendor’s **Default Schedule**.

Service Autopilot™ allows Users to override a day’s schedule on the **Upcoming Schedule** view. This view can show the **Upcoming Schedule** for the week or month. It will show any overridden **Default Schedule** days or approved “Time-Off Requests.” To override a **Default Schedule** for a specific day, click on that day in the **Calendar**. An override dialog box will appear.

For example, if Bob “Smokes” Meetchum has a doctor’s appointment on “Monday – 3/2,” click that day in the Calendar. Select **Schedule Override** and enter the altered hours that Smokes will be working for that day. You can also enter an optional Comment as a reminder that Christy is taking time off for a doctor’s appointment. Click **Save Override** to update the calendar.

You will notice that “Monday – 3/2” is now yellow. This is a visual reminder that Smokes’ schedule has been overridden on that day.



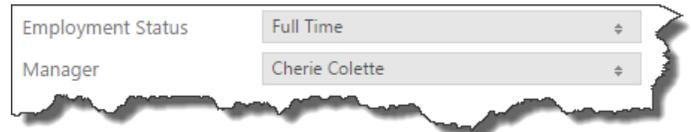
Click on the day again if you need to delete the override or reschedule the time off. Select the “Delete Override” box and click **Delete Override** to proceed. The schedule will be set back to the default values.



Time-Off Requests

The new **Time-Off Request** section allows Employees and Managers to enter **Time-Off Requests**. Generally, only Managers have the Permission to approve or deny a **Time-Off Request**. The User's Role must have the "View Time Off," "Add Time Off" and "Edit Time Off" Permissions enabled.

Within the **Employee and Vendor Edit Screens**, at the bottom right of the Employment Tab, you may specify a Resource's Manager. Once this field is set, all requests for time off are sent to a Resource's Manager for approval.



If Members want to allow Resources to add their own **Time-Off Requests**, the "Add Time Off" Permission should be enabled; however, to prevent people from changing their previous requests for time off, Members may not want to enable the "Edit Time-Off Request" Permission.



Managers may add "Time-Off Requests" for other Employees and approve them without the Employees needing system access.

Bob "Smokes" Meetchum wants to take a day off in June. He can go to his **Employee Screen** by opening the **Company Directory** and clicking on his name. Once in his **Employee Record** he can click the **My Time-Off Requests Tab** and add a request by clicking the **Add Request** button. The **Request Time Off** dialog will open. Notice that the "Resource" and "Status" fields are greyed out, because Smokes does not have the Permission to approve his own time-off request.

 A screenshot of a "Request Time-off" dialog box. The title bar says "Request Time-off" with a close button. The main content area has a header "Time Off" and contains the following fields:

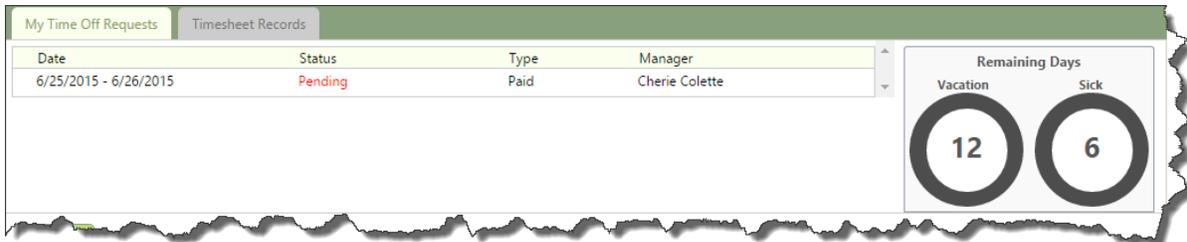
- Resource:** Bob "Smokes" Meetchum (greyed out)
- Status:** Pending (greyed out)
- Type:** Paid (dropdown menu)
- Duration:** All Day Partial Day
- Start Date:** 06/25/2015 (calendar icon)
- End Date:** 06/25/2015 (calendar icon)
- Notes:** Taking my best gal out of town for the day for our anniversary: making breakfast, taking a picnic lunch to the Hill Country lakes, going to a moving picture show and dinner in the evening.

 At the bottom, there are "Save" and "Cancel" buttons.

He can now specify the days in June for which he is requesting time off and enter an optional note about the request.

The list box under the **Resource** is where type of time off is specified. Users have the following choices; “Holiday,” “Other (Paid),” “Other (Unpaid),” “Paid,” “Sick (Paid),” and “Sick (Unpaid).” These are system-defined options and cannot be modified by users at this time.

Once Smokes has saved the **Time-Off Request**, it is added to his **My Time-Off Requests** section. He can come back and check periodically to see if the request was approved and will be sent an Alert once his Manager approves or rejects the request.

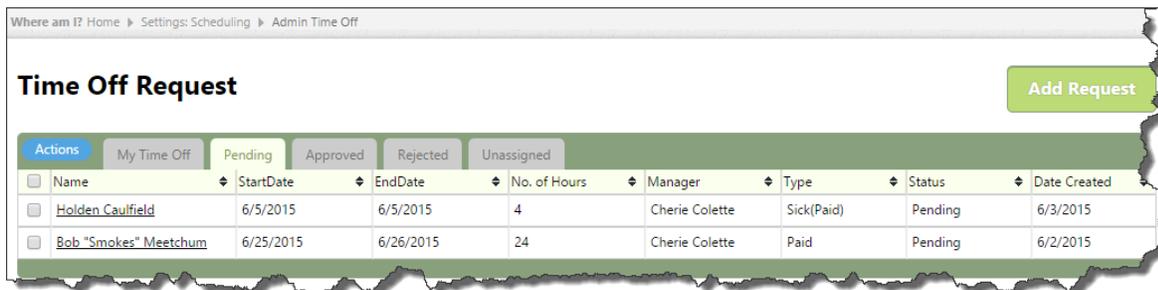


Smokes can view his Alerts by clicking the bell icon in the page header. This will display a list of his recent Alerts. Also, the bell icon shows a count of how many unread Alerts he has.



What the Manager Sees

Meanwhile, once a **Time-Off Request** is completed the Manager is notified with an Alert and can go to one of two places to view that request: the **Time-Off Requests Tab** on the Employee’s screen or **Scheduling>Settings>Employee Time Off**. From the **Scheduling Tab**, Managers will see requests from all Employees broken into Tabs based on the status of the request. Managers can also add a Time-Off Request from this location.



Clicking on an individual **Time-Off Request** from either location opens the **Edit Time Off** dialog. Here, Managers – for whom the drop-down Status menu will be active instead of greyed out -- can change the status from “Pending” to “Approved,” “Rejected” or “Cancelled” and click **Save**. The Employee will be notified of the change in status for the **Time-Off Request**.

The **My Time-Off Requests** section on the **Employee View** is updated with the approved status once an Employee’s Manager has approved the request.

Date	Status	Type	Manager
6/25/2015 - 6/25/2015	Approved	Paid	Cherie Colette

Remaining Days Section

There are two graphs on the right side of the **My Time-Off Requests** screen. These graphs calculate how much vacation or sick time has been taken by an Employee. To utilize this feature, you need to enter how much vacation and sick time your Employees get each year. The Vacation and Sick Days Per Year fields are located under the **Payroll / Job Costing Tab** on the **Employee Edit Screen**. The system will calculate the number of days accrued each month by dividing the number entered by 12 and rounding up. Once **Time-Off Requests** are approved (paid or sick), the graphs will reflect how much time has been taken vs. how much is left.

My Scheduled Work

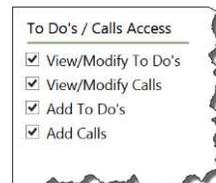
To see the **My Scheduled Work** section on the **Employee or Vendor** screen, the User's Role needs to have the "View Scheduled Work" Permission enabled. Currently, the work is shown on the **Employee or Vendor** view but there is no interaction available. This will be a future enhancement to allow the Resource to complete work, enter **Job Notes**, and clock in/out.

My Scheduled Work						
Date Range: <input type="text" value="Fri 06/05/2015 - Fri 06/05/2015"/> <input type="button" value="Apply"/>						
Pri	Date	St	Client	Address	Service	Assigned
	6/5/2015		Connor, Macaulay	1874 Quail Lane Richardson - TX, 75080	THIS	SMOKES
	6/5/2015		Connor, Macaulay	1874 Quail Lane Richardson - TX, 75080	THAT	SMOKES
	6/5/2015		Connor, Macaulay	1874 Quail Lane Richardson - TX, 75080	OTHER	SMOKES

The Timeline View

To see the **Timeline** view on the Employee and Vendor screens the User's Role needs to have **View Timeline Section** enabled.

Each tab is also dependent on Permissions that may or may not be in the **Employee Access** section. For example, the **Calls** and **To Do's** tabs will not display if the "View/Modify To Do's" and "View/Modify Calls" Permissions are not enabled.



The new **Timeline View** allows those with Permissions to see the most recent activity of a Resource. It is a similar concept to the **Timeline** on the **Client** and **Lead** screens. It is a quick overview of all the activity by a Resource for the specified date range.

To edit items in the **Timeline**, click on the **Record**.



The appropriate editor will open to allow the User to make changes.

#100 (1 open)

Notify more people
0 people on the list

Follow Add Print

Connor, Macaulay
1874 Quail Lane
Richardson, TX 75080
Map Code: PCREEK

No phone # on file (w)
mail: sautopilotdocs@gmail.com

5/15/2015

Contacts - (Add Contact) All

Change Service

100.1 ● Change Service - [Connor, Macaulay](#) Due: 7 Days

Need to get with Macaulay to discuss changing the Other Services that we do for him.

Assigned To: [Bob "Smokes" Meetchum](#)

Created By: Cherie Colette

Date Created: 06/05/2015

+ Add a Comment + Add an Email Start Timer

Attachment Name	Description	Date
-----------------	-------------	------

Compliments, Complaints, and Resource Notes

The new **Employee** and **Vendor** views allow Users to log **Resource Notes**, **Compliments**, and **Complaints** about Resources. For example, a user may need to log a **Resource Note** about an Employee who left the company, such as information about the competitor who employs that person now. You may just want to remind yourself of a Resource’s strengths when assigning work.

Resource Notes Compliments Complaints

Date Range: Apply

Bob does excellent detail work and has an amazing eye for color and balance.

Friday, June 05, 2015
Cherie Colette

Compliments

A **Compliment** is a positive note about the Employee or Vendor. It could stem from a Client calling in and relaying how professional and helpful the Employee was today while onsite. Compliments are added by selecting the **Compliment** tab and clicking **Add Compliment**.

Compliment has a **Note Type** that defines how much the Employee’s rating is increased (rating points) and when the compliment expires. When the compliment expires, the rating is reduced by the rating points. Members can also specify which Client left the **Compliment** about the Employee or Vendor.

Each Employee and Vendor starts with a Rating of 100. **Compliments** and **Complaints** adjust the Resource's Rating based on the value of the rating points assigned to each **Note Type**. Once expired, the **Compliment** no longer affects the Employee's or Vendor's Rating.



Add Compliment ✕

Date **Rating Points** 50

Customer

Note Type

Expiration Days

Description

Mac called in today to mention how impressed he was with Bob's level of professionalism. He says he seems to always be direct and honest, and manages his crew deftly without creating conflict.

or [Cancel](#)

Complaints

A **Complaint** is a negative note about an Employee or Vendor and has the same functionality as a **Compliment**. A Client could call into the office to report that an Employee destroyed a tree while onsite or might have a more personal objection to a particular Resource. In either case, the User might log a **Complaint** against that Employee.

As with **Compliments**, **Complaints** affect your Resource's rating, but bring it down instead of raising it. Smokes' Rating, which went up 150 points from Macaulay Connor's **Compliment**, will drop to 130 due to the **Complaint**.

Add Complaint ✕

Date **Rating Points** -20

Customer

Note Type

Expiration Days

Description

Mac also thinks Bob smokes too much, and although he never leaves butts on the ground, the gazebo often smells like smoke when he leaves.

or [Cancel](#)

Resource Notes

Users have the ability to add a **Note Type** from the **Add/Edit Compliment** dialog box. To add a **Note Type**, click the “+” icon next to the **Note Type** drop-down list. This will open the **Resource Note Type** dialog box.

The “Description” is what shows in the **Compliment** section on the **Employee View**. You can create Complaint or Compliment **Types**. Typically, a Compliment’s Rating Points are positive, while a Complaint’s Rating Points are negative.

Service Autopilot™ does not impose any restrictions on “Rating Points.” The “Expiration Days” refer to how long the Rating Points will affect the Employee or Vendor’s Rating from the creation date of the compliment or complaint.

Setting the Expiration Days to “0” will make the Compliment or Complaint permanent.

Ratings

Ratings are calculated automatically based on the **Compliments** and **Complaints** logged for a Resource. It is a good mechanism for comparing Employees and Vendors to each other and finding ineffective Resources.

Custom Fields

Employees and Vendors can now have **Custom Fields** associated with them. First, make sure your Role has the “View Custom Field” Permission turned on under **Home>Settings>User Roles & Rights**, so that you’ll be able to see the Custom Fields you create.

To set up a Custom Field for an Employee or Vendor, go to **CRM>Settings>Custom Fields**.

Custom Fields allow you to define and track additional pieces of information about a Resource.

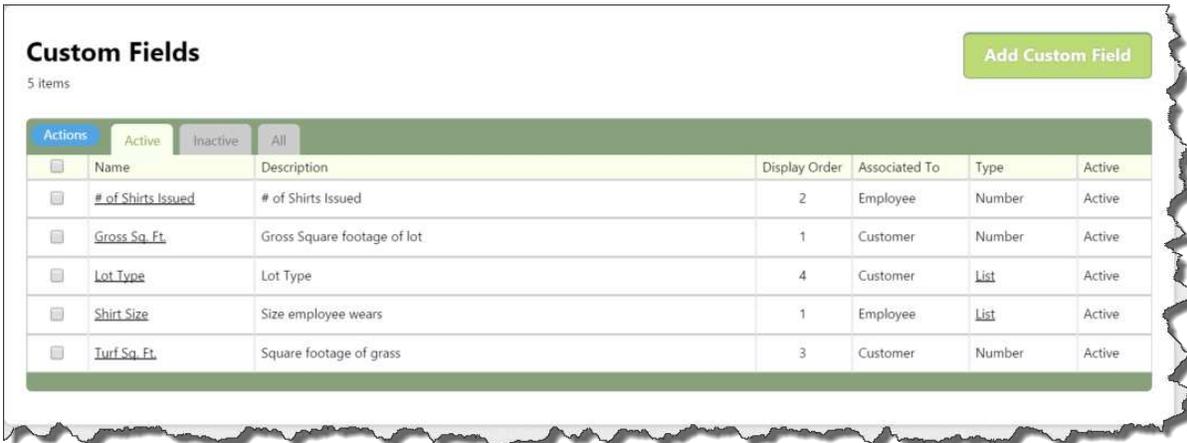
1. Click on the **Add Custom Field** button to display the **Add Custom Field** dialog.
2. Enter the name and description of the Custom Field.
3. Next to **Associated To** select “Employee” or “Vendor.”
4. Next to **Value Type**, specify if the field is a “Text,” “Numeric” or “List” selection field.

The **Display Order** determines where the **Custom Field** will appear in the list of other **Custom Fields** on the Employee or Vendor screen.

Let’s add some sample **Custom Fields** to the **Employee Screen**: “Shirt Size” (“List”) and “# of Shirts Issued.” When you select “List” as the **Value Type**, a second tab called **List Items** will appear. Click the **List Items** tab to see the **Description** box. This where you would click the **Add List Items** button to enter – for our example -- shirt size options.

Click **Save** to finish editing the **Custom Field** or **Save & New** to save this **Custom Field** and add another.

Your **Custom Field List** screen should look like the following screen shot.



Navigate back to an Employee’s screen and scroll to the bottom. Click on the **Custom Fields** tab. New **Custom Fields** will have no values associated with them. Click on one of the **Custom Fields** and the **Employee Edit** screen will appear. Select a “Shirt Size” and enter a number for the “# of Shirts Issued.” Click **Save** and scroll back to the bottom of the screen. You should see that the values are now populated.



Time Sheet Records

Time Sheet Records can now be viewed on the **Employee and Vendor Screens**. The User’s Role must have the “View Timesheets” Permission enabled for the **Timesheet Records** tab to appear.

This Permission is located under the **Accounting Access** section in the **Roles & Rights** page.

Once the “View Timesheets” Permission is enabled, you will be able to view Timesheet Records from the **Employee and Vendor Screens**.



Estimate Section

Estimates prepared by a Resource can be viewed on the **Employee** and **Vendor Screens**. The **Estimate** section only appears if the “Is a Sales Rep” checkbox is checked on the **User Settings** tab. To do this, **Edit** the Employee or Vendor and click the **User Settings** tab. Check the “Is a Sales Rep” checkbox and click **Save**.

Notice the **Estimate** section now appears on the Employee or Vendor view.



Edit the **Estimate** by clicking on the item in the **Estimates** section. This provides a quick, easy way to find all the **Estimates** created by a Resource within a specified date range.

Damage Cases

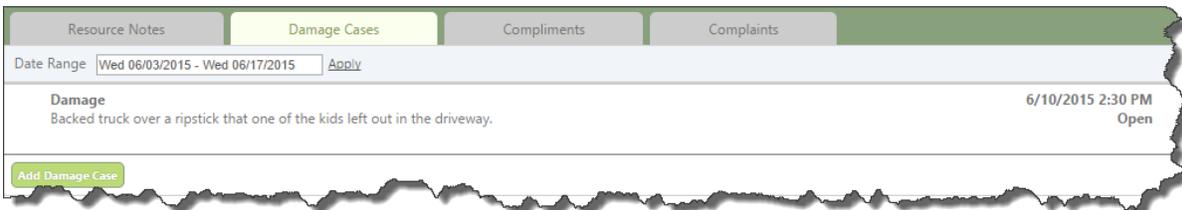
Damage Cases allow you to track damage or other issues caused by Employees or Vendors. For example, if an Employee dents, scratches, or destroys something at a Client’s property, you need to record that incident in Service Autopilot™.

Damage Cases are a special type of “To Do’s.” This way, you can schedule a follow-up to resolve the issue with your Client.

To enable **Damage Cases**, you need to create at least one **To Do** type that has the **Is Damage** checkbox enabled.

5. Go to **CRM>Settings>To Do & Call Types**.
6. Click the **Add Type** button to pull up a new editing window.
7. For the **Description**, you could enter “Damage.”
8. Next, choose which screens to display the item in – “To Do and Calls” will cover both bases.
9. The **System Type** will likely be “Account Issue” or “Contact Us.” Finally, check the **Is Damage** box.

Once you have completed these steps, when you visit an Employee’s or Vendor’s screen, a new **Damage Cases** section will be enabled.



Click the **Add Damage Case** button to create a **Damage Case** for the Employee. The **To Do** dialog will be displayed. The **Type** drop-down list will only contain **To Do** types that are marked as **Damage Types**.

There are two additional required fields on a **Damage Case To Do**: “Damaged By” and “Damage Date.” These fields are on the **Details** tab. You can also specify a time when the damage occurred, but it is not required.

You can assign and schedule the **Damage Case** just like a non-damage **To Do**. This helps ensure the **Damage Case** is resolved in a timely manner and creates a historical record that is associated with the Employee or Vendor.

