Service Autopilot™

PROJECTS

User Guide

Version 1.1

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Summary

Some Jobs are too big for a multi-day pin; likewise, grouping Jobs together under a Work Order isn't always enough. **Projects** allow you an interface through which you can build and work a large, complicated Job that includes several Services, may include down-payments or periodic payments, and has distinct Milestones or phases that are dependent upon each other. Since all of this might take place over a longer period of time, dates can shift as well.

Converting an interior, open-air, windowed Atrium without foundation into an enclosed Hot Tub Room with a skylight, for example, would require a considerable amount of time and work, perhaps comprising different crews, and certainly dependent at some points upon weather and access to materials. The Project itself would include roofing, insulating, window removal, new walls, sheetrock, plaster, paint, some excavation, foundation-pouring, flooring, venting, electricity, and more. Making that a Project allows you to manage it more effectively, and you can still group Jobs in any Milestone together into a Work Order on Dispatch.

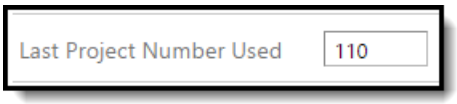
Getting Started

Getting started with Projects is a two-step endeavor. You must have the feature enabled at the Company level and must also give your chosen User Roles the permission to interact with Projects.

Enabling Projects

A Service Autopilot Support Rep will enable Projects after you have completed the live webinar requirements with our trainers: *Intro. I*, *Intro. II*, and *Projects*.

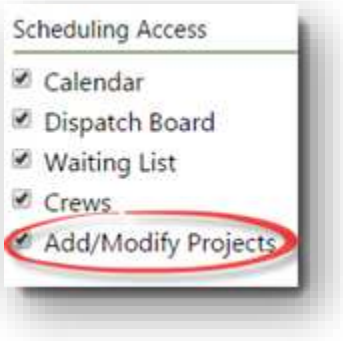
Once this is done, you can set the numbering for Projects by going to **Home>Settings>Company Information,** "Settings," just above "Logos."



By default, the first Project will be #100, the second #101, etc. This number appears with the Project on individual Client Screens.

Permissions

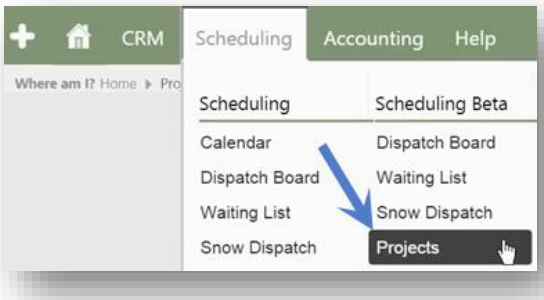
There is a Permission that must be turned on in **Home>Settings>User Roles and Rights** for anyone who will be using Projects. You'll find it under the **Scheduling** tab's "Scheduling Access" area. Without this access, even if you have Projects enabled at the Company level, you won't be able to see Projects.



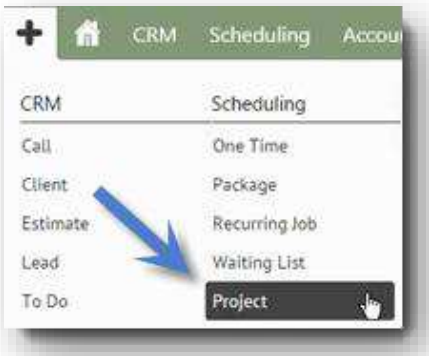
Where to See Projects

You can add a Project from three places in Service Autopilot™.

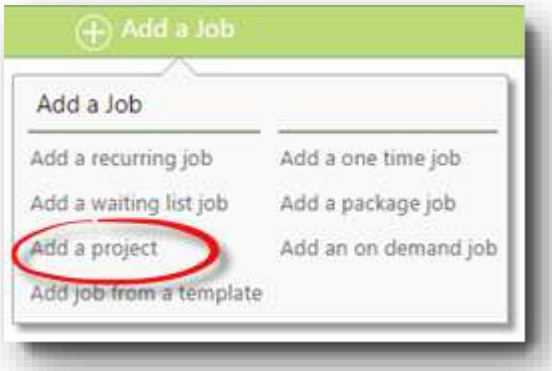
1. Mouse over the **Scheduling** tab, go down to Projects under "Scheduling Beta," and click on "Projects" to go to the **Projects Home** screen.



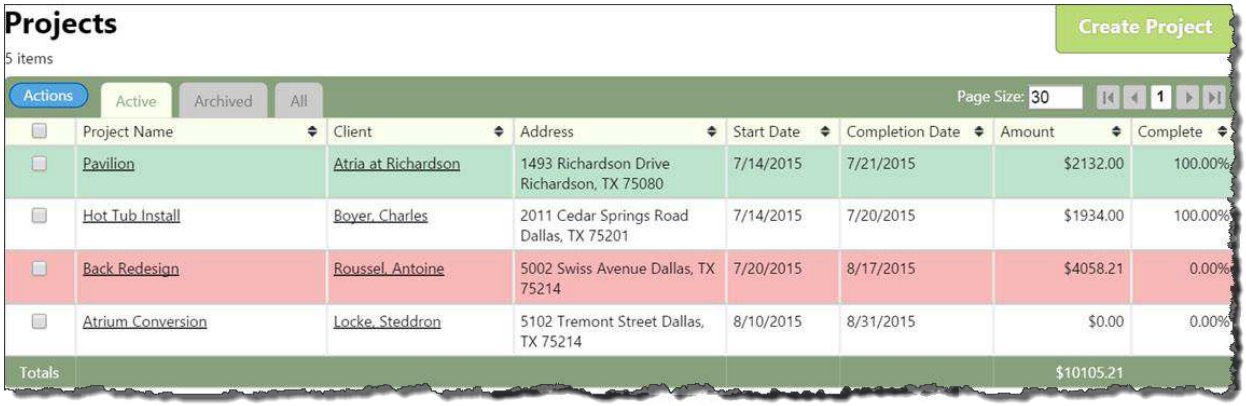
2. Go to the **Add** icon in Service Autopilot's™ header to pull up a new Project overlay, leaving the original screen in the background.



3. Go to the **Client Record** of the Client for whom you will be creating a Project. If you "Add a Job," you'll see an option to "Add a Project." Choosing this will pull up an overlay on that Client Record.



Projects Home



The **Projects** home screen lists out Projects in three tabs. See which Projects are completed and/or ready to be invoiced (green), completed and paid (white), overdue (pink), or not yet started (white). If you have chosen to Bill Per Milestone, each Milestone will turn green when completed as well, prompting you to generate an invoice for it.

Projects remain Active until you choose to Archive them from the Actions button.

Filters

There are several Filters available for Projects. As you complete Projects and the list of Projects in various stages grows, these Filters will help you to, among other things, seek out areas where you've performed more Projects, see who worked on the most Projects, track Completion rates, and locate specific Customers.

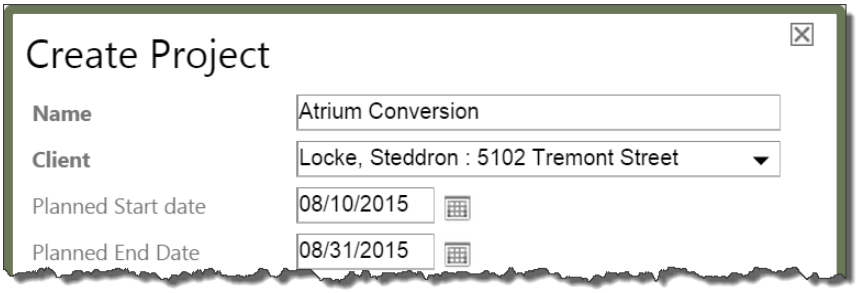
Actions

This top level "Actions" button can be used to manage Projects generally or for specific Projects that you select in the checkbox next to the Project itself. This is one of many places where you can generate an invoice, but you can only create, archive, activate, or delete Projects at this level.

"Actions" buttons within specific Project screens will have different uses for you, and occasionally the status of a Project will affect what you see in the "Actions" dropdowns. Be sure to take a look at each screen's "Actions" options.

Creating A Project

The first screen you see for a new Project is the "Create Project" popup. Enter the Name of the Project and choose a Client.



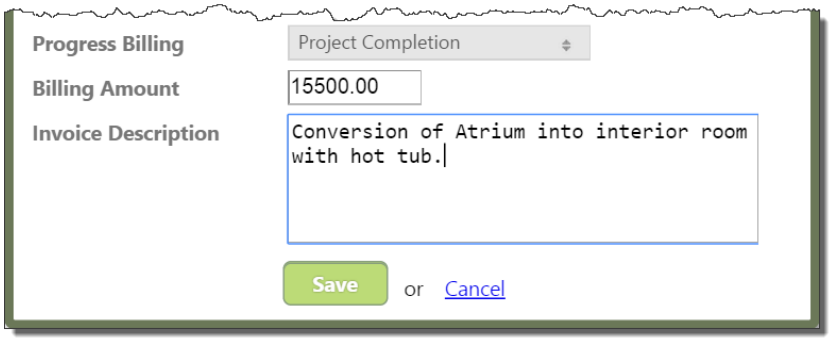
You do not need to enter planned start and end dates on this screen. You may choose to enter dates whenever you like as you build a Project, but before you can start it, a popup will prompt you to confirm a start date.

Progress Billing

There are three options for **Project Billing**, which occupies the bottom half of the "Create Project" popup. The duration, cost, and scope of the Project will likely drive how you choose to Bill for it.

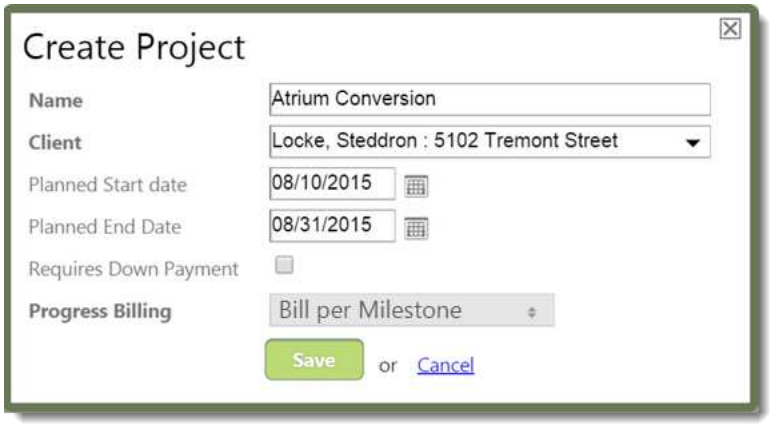
Bill Upon Project Completion

Billing upon Project completion allows you to enter the “Billing Amount” and “Invoice Description” in this original popup. When you generate the invoice for the completed Project, the information you enter here will be pre-loaded.

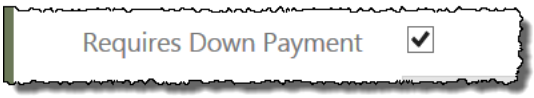


Bill Per Milestone

Billing per Milestone will remove the bottom two fields, as you will be generating invoices for each Milestone, or Project Phase.



Requires Down Payment



If you check the “Requires Down Payment” box, you will not be permitted to start the Project until a payment has been received and recorded in Service Autopilot™.

Building A Project in the Project Overlay

You may build out each Project as much or as little as you like before officially starting it, and you can edit it and add items as you go. Be aware, though, that none of the work you place into a Project will display on Dispatch until the Project has been started.

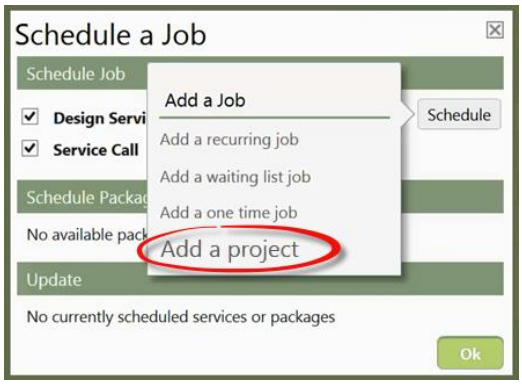
Clicking "Save" from the "Create Project" popup will open that new Project's **Project Overlay**, which contains all of a Project's information and is where you will build Projects. The Project's name and the Client's name display here, as well as the weather gadget that allows you to click to find out the current weather conditions based on the Project property's zip code. Clicking the "Edit" link will open the original "Create Project" popup, where you can change the Project Name or other initial information if necessary.

Estimates and Projects

The Estimating portion of Projects is still in progress and we are working toward a deeper integration.

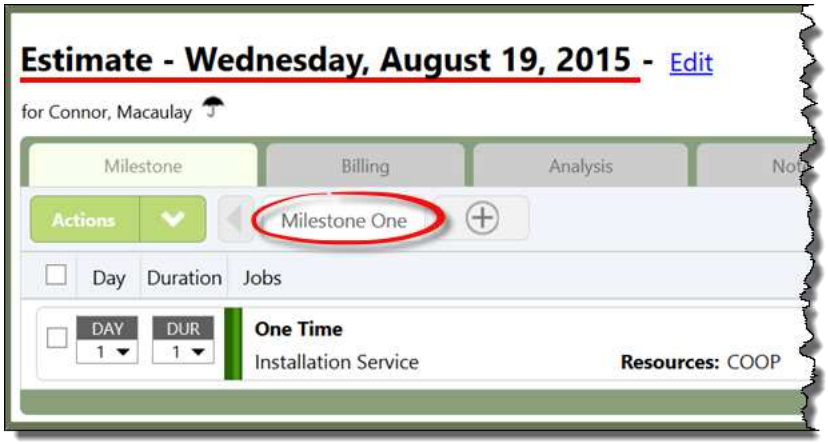
At the moment, from the "Analysis" tab, you can build an Estimate and schedule Jobs from it that will place the Jobs into the current Milestone of a Project either in the building stage or in progress.

If you build a new Estimate outside of Projects, when you schedule the Jobs for that Estimate, you will be able to place them on a new Project.



Having chosen the "Add a Project" option, complete the scheduling of the Jobs in the new Job Dialog that pops up, and save.

This will open the **Project Overlay** with the Jobs scheduled into a new Project with the Estimate's Description at the top. The Jobs will be scheduled under a generic "Milestone One," the name of which you can change from the "Actions" drop-down.



This is the first phase of integrating Estimates and Projects. In the future, Projects and Estimates will work together to allow you to schedule Projects with more detail from a won Estimate and also to add Milestones or Jobs during the progress of Projects more efficiently based on Jobs scheduled from a new Estimate.

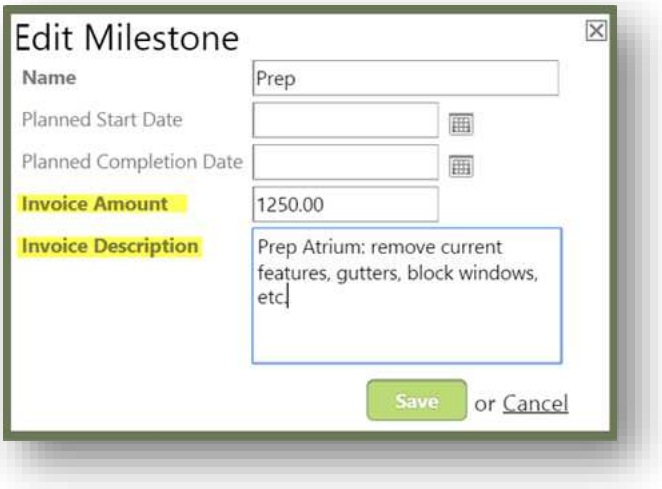
Milestone Tab

The Milestone tab contains all of the information you need to build and edit the phases (Milestones) in a Project. From this screen, you can generate invoices, edit Milestones, see the Milestone diagram, and access the particular features of the Milestones "Actions" tab.

Add A Milestone

The first step to getting a Project built is to add a Milestone that contains one or more Services or other items, like a To Do or an Event. Click the plus button on the left of the red "Add a Milestone" text to begin. After you've created one Milestone, the red text will disappear, and you will see only the plus icon in the Milestones row. That is where you will click to add more Milestones.

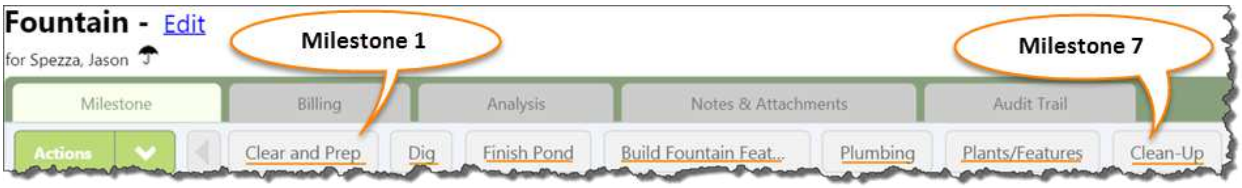
The Add Milestone icon opens a popup similar to the "Create Project" one, in which you name and give dates to each Milestone. You can choose descriptive names for Milestones, or you can opt for Phase 1 or Milestone 1, etc.



You are not required to enter dates in order to save a Milestone. This is partly because, as you are building a Project that hinges on several pieces getting finished in order, it is more difficult to nail down dates for each piece. The materials you purchased for Phase 1 may not come in on time, in which case you would have to alter the start dates. This allows you to wait for things to be in order before starting a project and assigning dates.

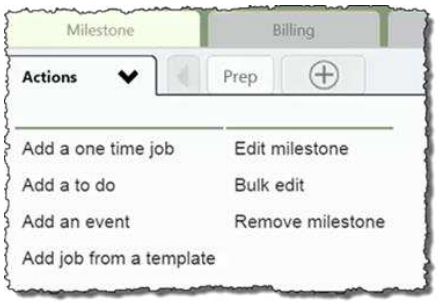
If you have chosen not to bill per Milestone, the Invoice Amount and Invoice Description will **not** appear on this popup.

Saving a Milestone takes you back to the Edit Overlay, where you now have an "Actions" button from which you may add Jobs, To Do's, Events and otherwise edit the Milestone. As you build out a Project, Milestones line up next to each other next to the "Actions" button.

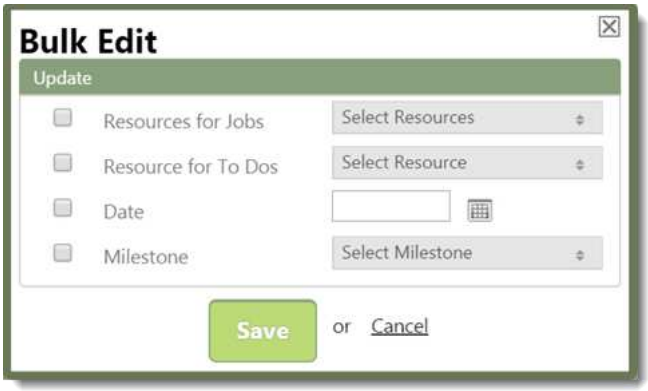


Add Jobs to Milestones

The Actions drop-down will only be available while a Milestone is pending or in progress. When a Milestone has been completed, you can no longer complete the actions in the drop-down, so it does not show.



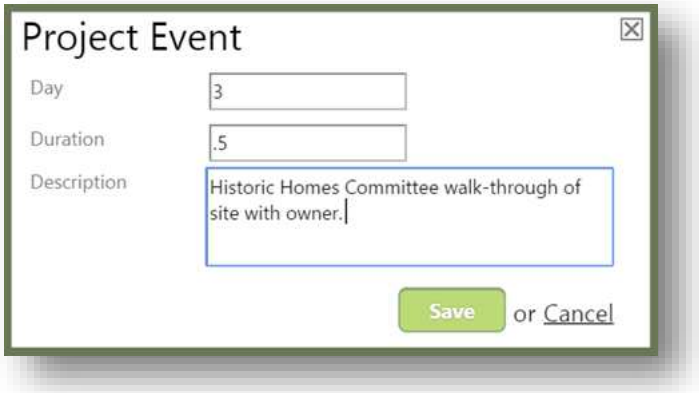
The drop-down contains familiar options in Service Autopilot™. The “Bulk Edit” option gives you the ability to move Jobs from one Milestone to another as well as assign Resources for both To Dos and Jobs.



Within a Milestone, the Job options are “One-Time” or “Template.” You can also create a To Do or “Add an Event.” “Add an Event” is specific to Projects and different from adding an Event to your Calendar.

Add an Event

You may find that you have something to complete in a Milestone that doesn’t necessarily fall under any specific Services and that you prefer not to term as a To Do. It may be very specific to the Project. For an Event, as for all Project Milestones, you may choose the starting day of the Project and how long you anticipate this Event lasting.



If you add an Event after starting the Project, the Events popup will ask for dates and times and give you the option of checking the “Is Completed” box.

When the Event is complete, you <u>must</u> open the Event and check the “Is Completed” box in order for the Milestone to be completed so that you can generate an invoice.

Saved Events and all other Jobs appear as line items in the Milestone Tab in the Project Overlay. Events will not show on the Dispatch Board or the Calendar.

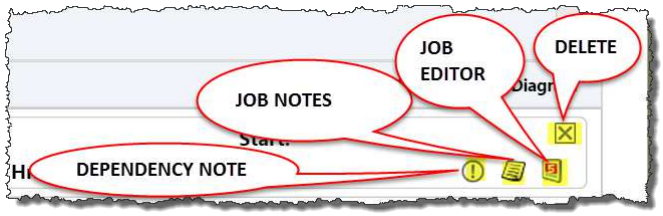
Day and Duration drive Jobs/Events without having a hard date attached, so that if you end up starting later than planned or if you can begin early, the Project will still run smoothly through Dispatch and the dates will update for you when you decide to begin a Project.

Services associated with a Milestone will all sit under each other as line items in order of their "Day" association. If you change the Day and close the dialog, reopening it will show Services moved into the new Day order.

IMPORTANT NOTE: "Day 1" currently refers to the first day of the Project, not the Milestone. When you start a Project, you must update the dates for the various Milestones as necessary. All "Day 1" Jobs will appear on Dispatch on the first scheduled day of the Project, all "Day 2" Jobs on the second day, etc. This was done for those Members who work their Milestones concurrently. In the future, we will have a range of options for dates and Milestones in order to accommodate everyone's preferences.

Job Icons

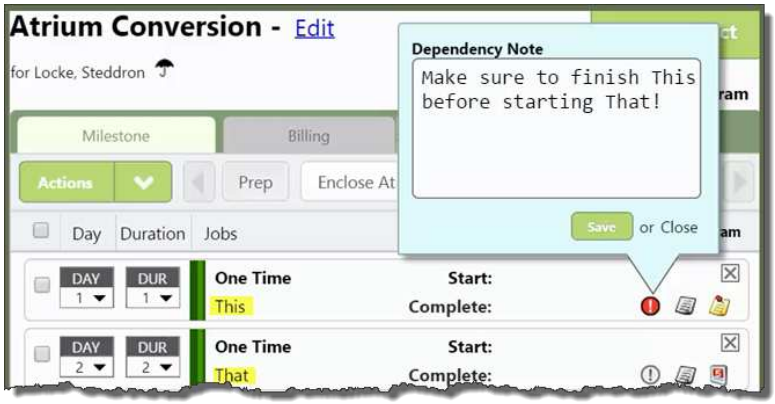
Use the icons on the right side of the Editor Overlay to Delete the line item or Service, view and edit the original Service set-up in the Job Editor, and view and create Job Notes for the Service.



The Job Editor Icon will reflect the current status of the Job, so that when you have begun a Project and dispatched Jobs, the calendar note will turn to the Dispatched icon, etc.

You can also create a "Dependency Note."

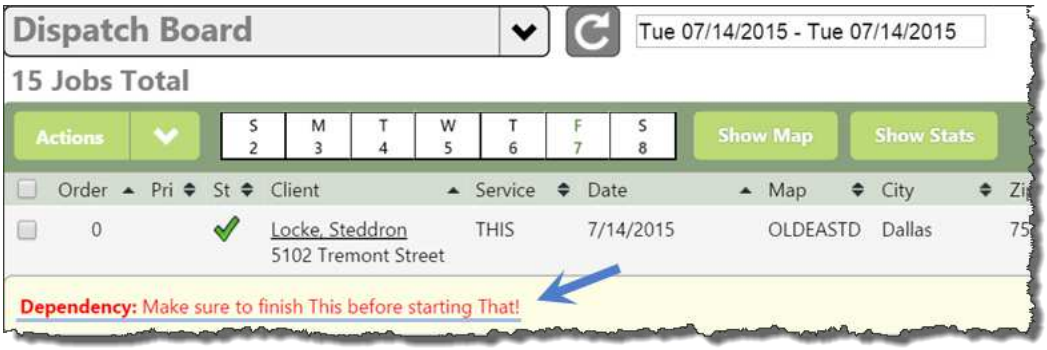
Dependency Note



Creating a Dependency Note helps to ensure that you do not begin one Service until another one has been completed. You may choose to do this in one of two ways.

1. Put the Note on the first Job, explaining its priority and letting your Crew know not to begin the next Job without completing the first one.
2. Place the Note on the second/dependent Job, warning the Crew not to begin it without having first completed the previous one.

Dependency Notes appear on Dispatch where Office Notes appear: below the line item for the Service.



View Milestone Diagram

Having added Jobs to a Milestone and ascribed their order by assigning a start Day (not necessarily a Date) to them, you might view the Milestone Diagram, the link for which is just above the icons on the right side of the Project Overlay.

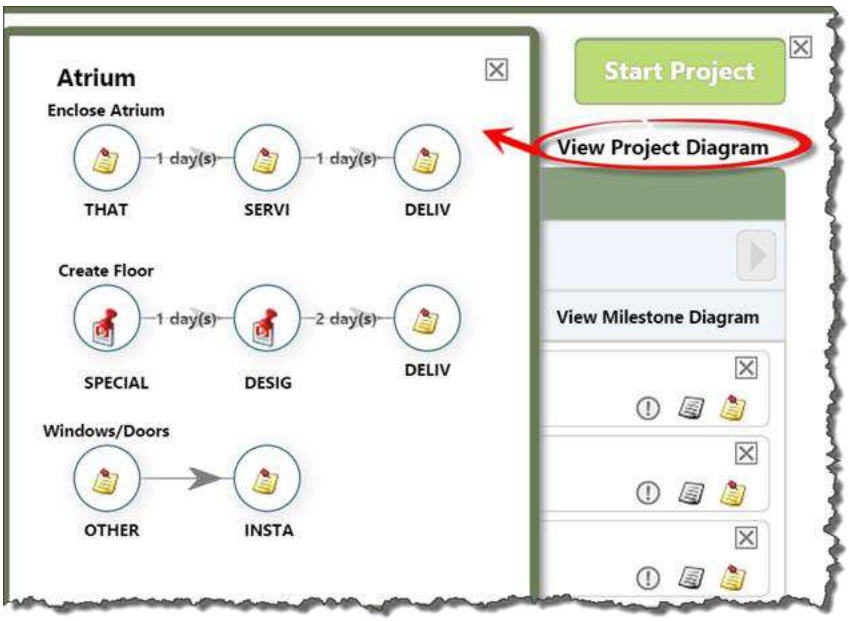
The diagram shows Jobs vertically based on the first start day and horizontally if there is more than one Job scheduled for a specific day.

Mousing over a Job icon on this popup will highlight it. Click on it to open the Job Dialog.

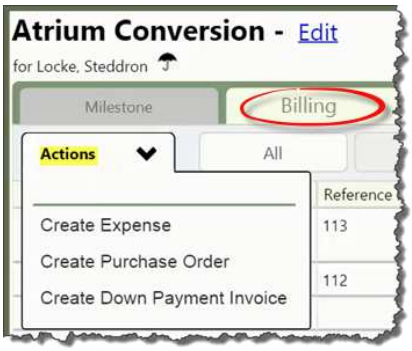
Notice that Jobs you have scheduled for a duration of more than a day show as pinned to remind you that they are Multi-Day Jobs. Job icons will always reflect the current status of a Service.

View Project Diagram

To view a diagram of the entire Project, view the Project Diagram, the link for which sits on the right just above the tabs in the Project Overlay. It works like the Milestone Diagram, save that you can see all Milestones at once.



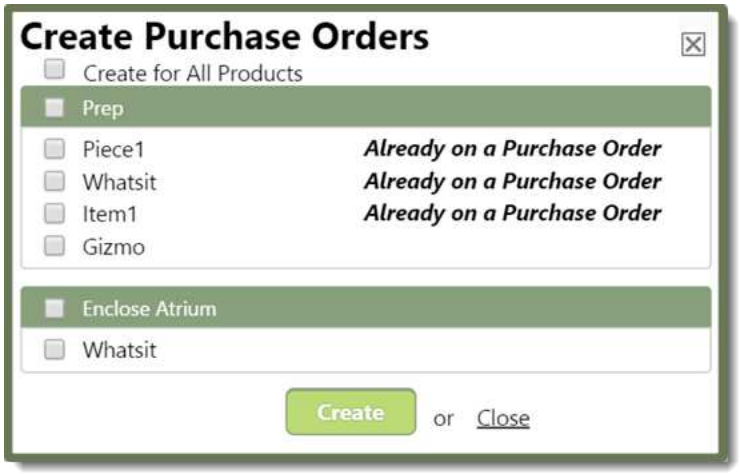
Billing Tab



The **Billing** tab shows a Project's Invoices, Payments, and Credits. From this tab, you can create Expenses, Purchase Orders, and Down Payment Invoices.

Purchase Orders

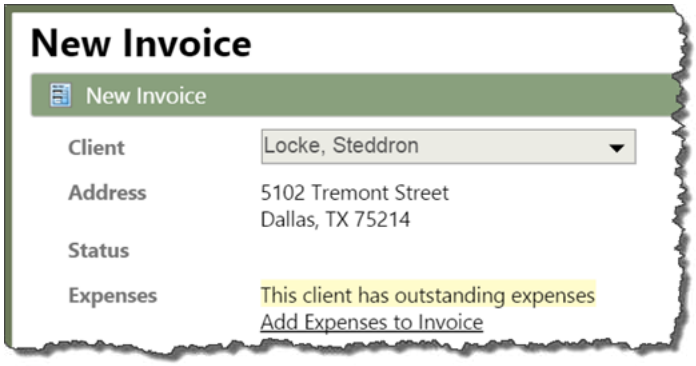
You may want to create Purchase Orders for a Project. Any Milestone in a Project which contains Jobs with which there are Products associated will appear in the Create Purchase Orders popup. If you've already created a Purchase Order with those Products, text will show to that effect, though you may still create a new P.O.



Once you've created a P.O., you can create an Expense from that Purchase Order to bill to your Client. This can be particularly helpful if you are basing the Down Payment on Products and/or Materials, as it allows you to set up the Down Payment as an invoice line item and attach an "Expense for Products/Materials" to the Invoice to create a dollar amount, which keeps you from having to go through and add up all the Product totals to create a Down Payment based on those.

Expenses

Expenses can be tied to a Project so that if you create an invoice within a Project, those Expenses will attach to the invoice and prompt you to add them.



Create Expenses directly from the "Actions" drop-down (in both the "Billing" and "Analysis" tabs) and also from Purchase Orders.

Make sure to assign an Expense to a Client.

You will notice that when you click on the Client icon to assign the Expense, Projects as well as Jobs will show up in the Client's drop-down. This way, you can choose to assign the Expense generally to the current Project.

Check “Bill Expense to Client” in order to pull up the Products drop-down, and in order to get the Expense to show as an option on any invoices you build. You can also add a non-inventory product to an Expense.

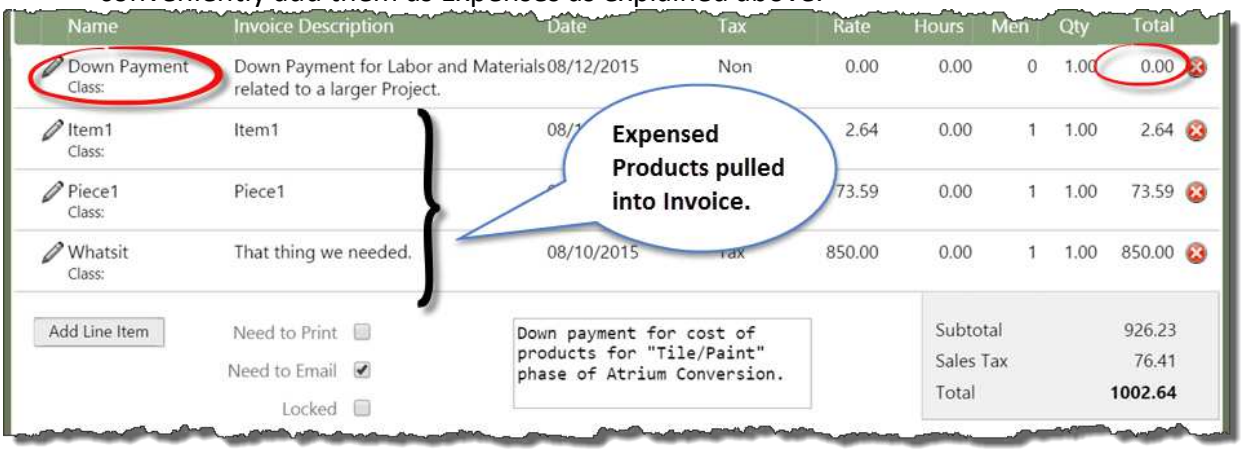
Having created Expenses for a Project, you can create a Down Payment invoice, as mentioned above. You might create a service called “Down Payment,” for instance, and then pull in those Expenses you created, which will tally up and list out for you as line items.

Creating a Down Payment

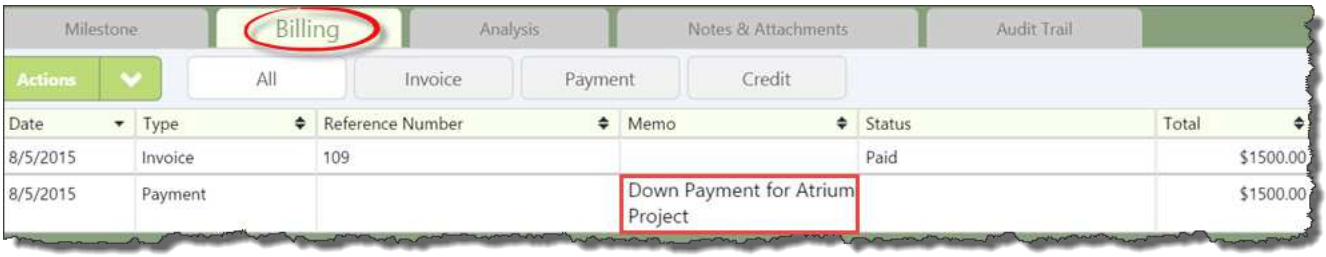
Choosing “Create Down Payment Invoice” from the “Actions” drop-down, opens a new Invoice Overlay to work in.

Depending upon your preference, you may have chosen a few ways to handle Down Payment invoicing. You might have a Service called Down Payment, in which case you can choose that Service and enter an amount based on Project cost and an Invoice Description of your choice.

-
- You might be basing the Down Payment on the cost of materials for the whole Project or for a certain portion, like the first Phase/Milestone. If that is the case, you can choose Products/Materials as you would usually do or conveniently add them as Expenses as explained above.



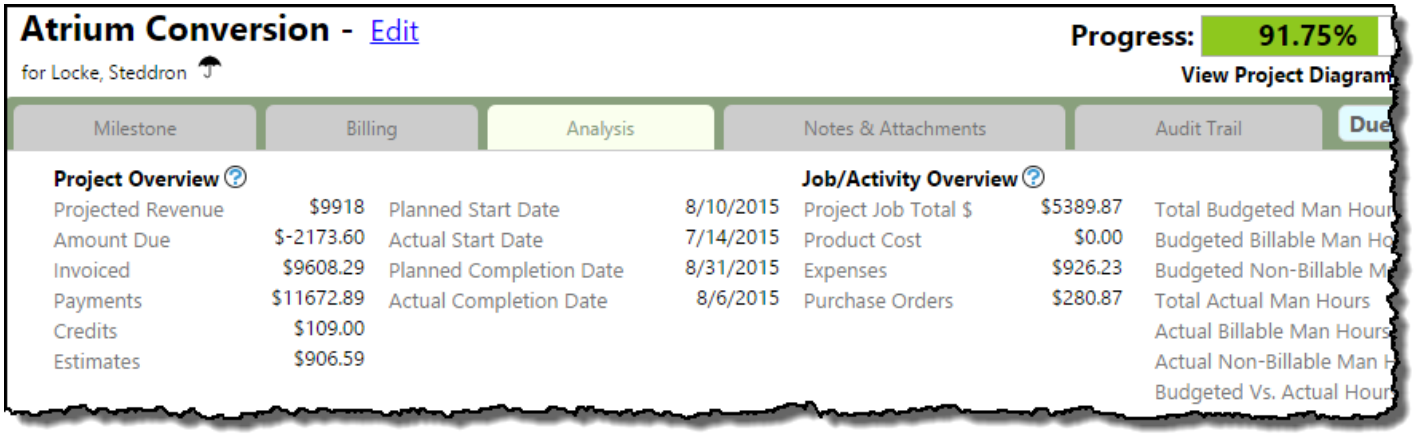
After you record a Down Payment, both the Invoice and the Payment are displayed in the Billing and Analysis tabs.



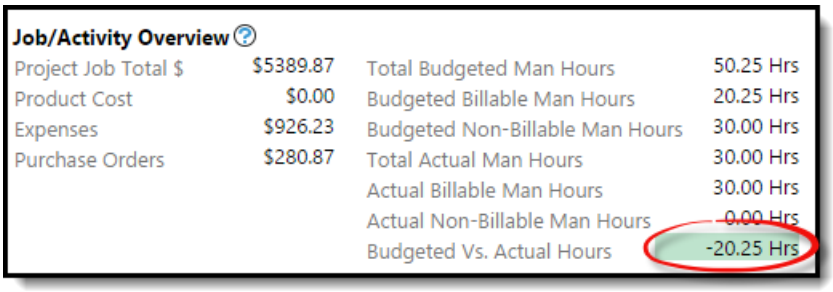
Analysis Tab

The Analysis tab in the **Project Overlay** gives you the numbers for a Project. Each Milestone is broken down into its various costs based on the information you provide, and the totals for a Project in terms of Cost, Hours, Expenses, etc. are all laid out on this screen. The more detail you put into the Jobs on a Project in terms of Budget Hours and Costing, the more useful this tab will be for you. For a break-down of each field in this tab, see the end of the chapter.

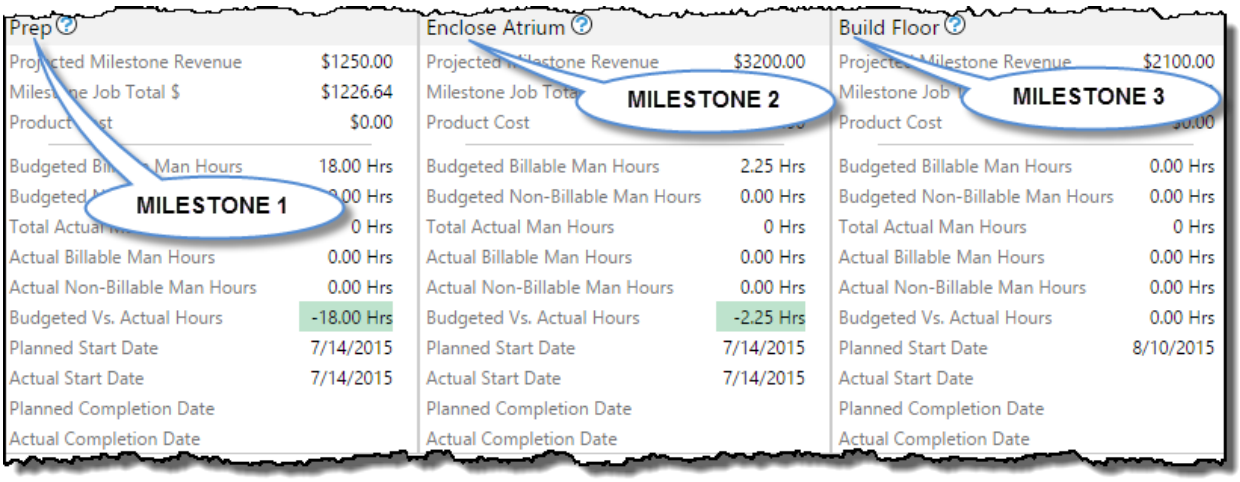
The top portion of the screen shows Overviews of both the Project and the Milestones (Job/Activity).



The **Budgeted Vs. Actual Hours** number that appears in the top portion of the Analysis Screen will calculate the hours for each Milestone, telling you how the Project fared in terms of meeting your Budgeted Hour estimates.



The middle of the screen contains the details of each Milestone in a Project.

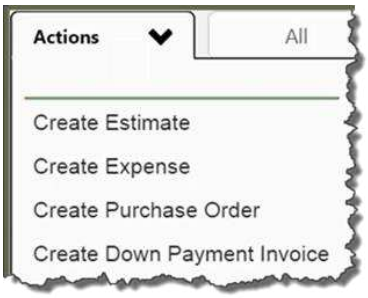


Mouse over the help icon next to the Milestone Title to get definitions of each field.

The **Budgeted Vs. Actual Hours** area will be highlighted in green (see above image) if you came in under your Budgeted Hours (a negative number) and red if you spent more time on the Milestone than you had planned (a positive number).

The lowest portion of the Analysis screen -- below the statistics for each Milestone and for the Project in general -- contains the various accounting items for the Project, listed out in an "All" interior tab; these items also have their independent tabs for easier searching.

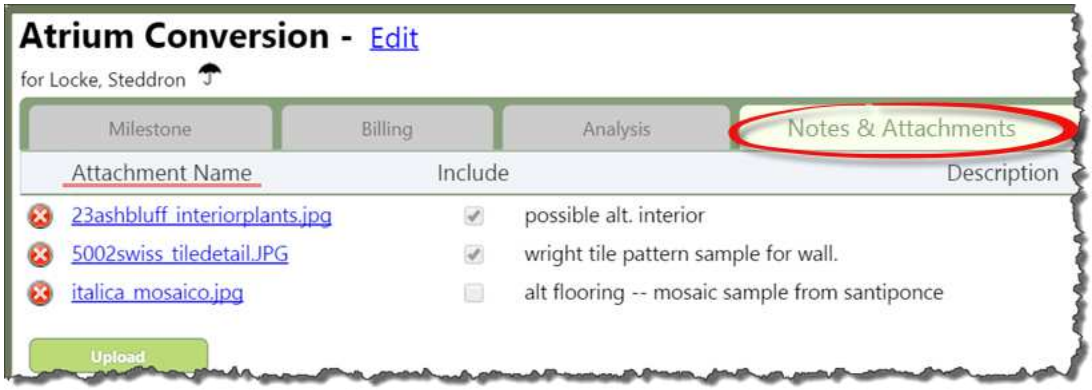
An "Actions" button sits at the left of this area. From here, as well as from the **Billing** tab, you can create Expenses and Purchase Orders. Here, as mentioned above in the **Building A Project** section, you can create Estimates to associate with a Project and create Down Payment invoices.



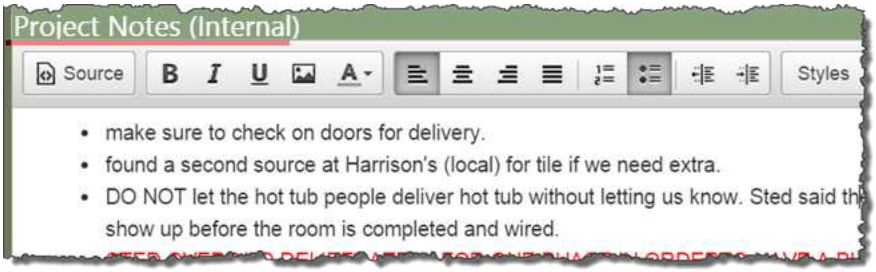
The Notes & Attachments Tab

All of the accumulated Notes and Attachments for a Project display in this tab.

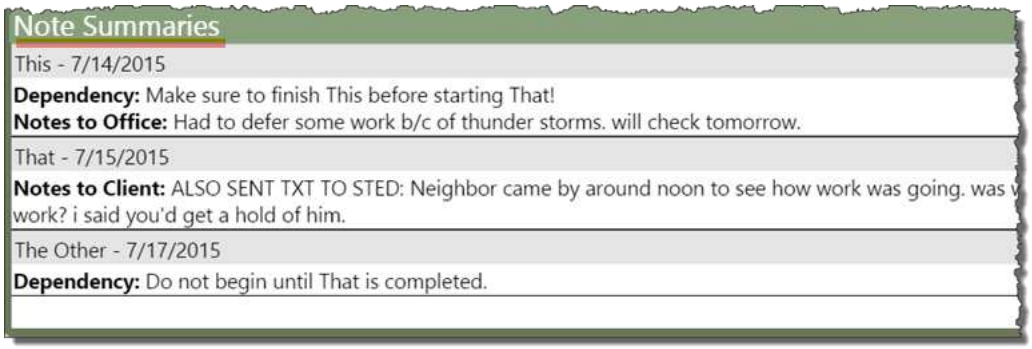
The top portion contains all Attachments you have added at the Project level. Currently, only Project level Attachments display on this screen.



Internal Notes for the Project appear below the Attachments section. These are always open for updating and changes save immediately.

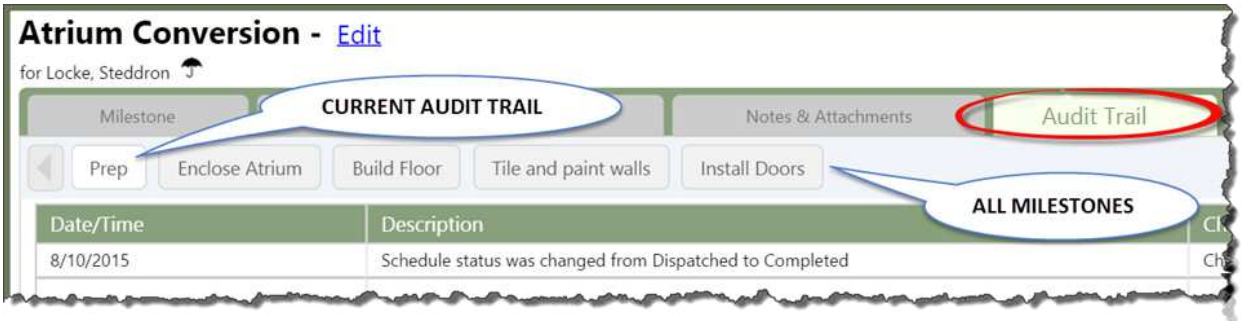


Currently, all other Notes show chronologically per Service for the entire Project. In the future, these Notes will display broken out for each Milestone. They are comprised of Notes to Client, (field) Notes to Office, Dependency Notes, and Job Notes.



The Audit Trail Tab

As we move forward with Projects, you will see a more detailed Audit Trail. Currently, the Audit Trail is grouped by Milestone.



The Audit Trails are pulled from all of the independent Jobs in that Milestone. At this point, they are simply listed chronologically without sub-heading. In the future, you will be able to filter by keyword and break down an Audit Trail not only by Milestone but also by Job.

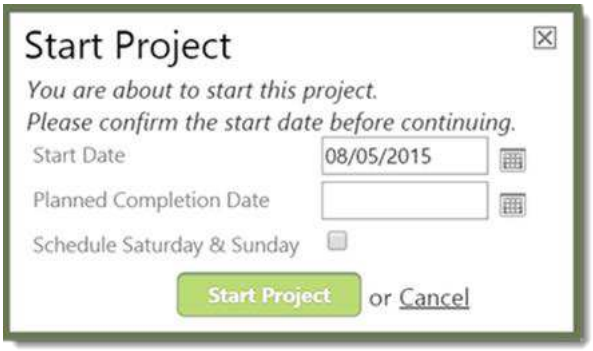
Starting A Project

Until a Project has been started, no Jobs or To Dos will appear on the Calendar, the Dispatch Board, or the Mobile App. Once a Project has begun, Services and To Dos move to the Dispatch Board based on their date scheduled in the **Project Overlay**.

If you decided to require a Down Payment for a Project, clicking the “Start Project” button before entering a payment will return an error message floating at the top of the screen.

You will need to go to the Billing or Analysis tab and “Create [a] Down Payment Invoice” before proceeding with the Project.

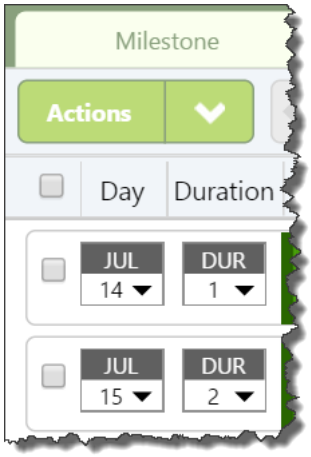
When a Down Payment has been recorded, or if you initially chose to bill upon Project completion, you will see a final “Start Project” popup, prompting you to enter a start date and planned completion date and letting you choose whether or not you want to schedule work on the weekend.



DON'T FORGET: "Day 1" refers to the first day of the Project, not the Milestone. When you start a Project, you must update the dates for the various Milestones as necessary. All "Day 1" Jobs will appear on Dispatch on the first scheduled day of the Project and likewise for "Day 2" and "Day 3," etc.

Projects in Progress

Starting a Project will place the dates in Milestones, replacing the generic "Day X" placeholder and based on the Day/Duration you assigned to Jobs.



In the top right corner of the Project Overlay, Job Progress displays, as well as the planned Project Completion Date below that.

The Dispatch Board displays individual Services as it does for any other Jobs. On the Client Screen, you will see both the Project itself and the collections of Jobs that you grouped together under Milestones.

Remember that Projects is essentially a way to take a series of Services for a Client and pull them into a screen to help you organize. The Projects Home itself lets you see the full scope of a long-term or large-scale Job, while the individual pieces generally work the way they normally do in Service Autopilot™.

Invoicing A Project

Invoicing for Projects works a little differently from regular invoicing. Jobs on Projects do not invoice individually. You will not see incomplete Project Invoices in the Accounting tab, for

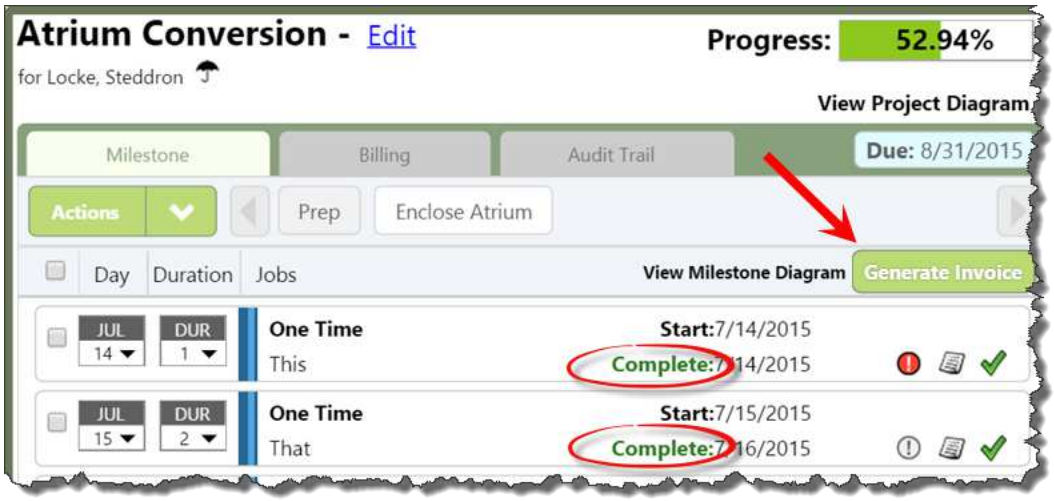
instance, even though you see a green “Complete” checkmark next to the completed Services for a Project on the Dispatch Board.

Billing by Milestone

If you are billing by Milestone, a Project will turn green when all of the Services, To Dos, and Events associated with that Milestone have been completed.

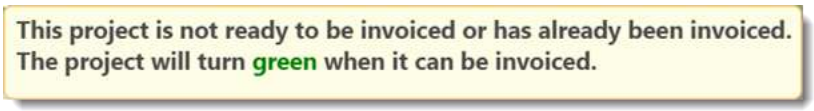
You can generate invoices in two ways.

1. From **Projects Home**, open a Project to a Milestone to generate an invoice by clicking on the “Generate Invoice” button that appears when the Milestone is complete. This opens a “Generate Invoice” popup.

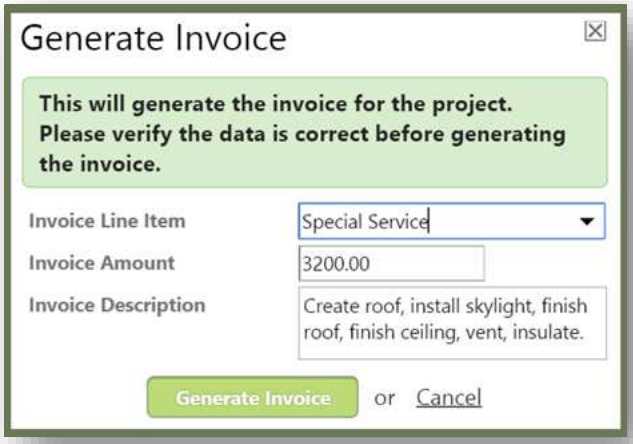


2. Again, from **Projects** Home, checkmark the Project you wish to invoice and choose “Generate Invoice” From the **Actions** drop-down. This opens the same “Generate Invoice” popup.

- If you cannot invoice at this time, you will receive an error/help message floating at the top of the screen.

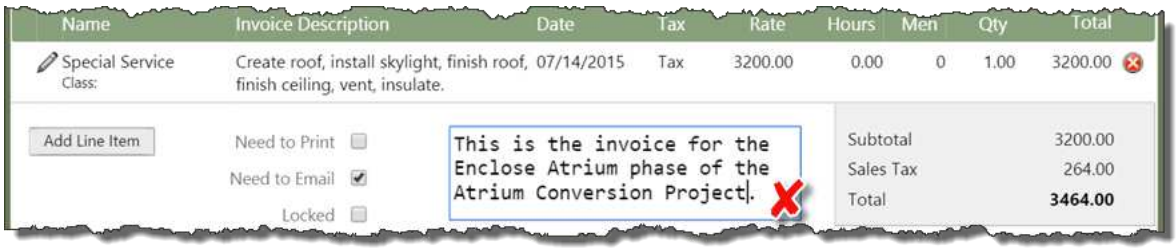


The Generate Invoice popup requires you to choose an Invoice Line Item under which to bill this Milestone.



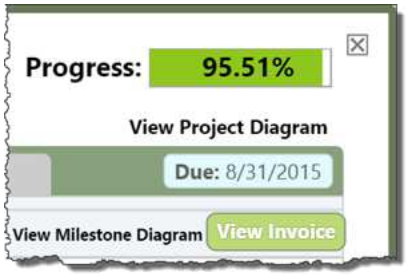
You can create a specific Service to associate with Projects if you like, for terms of tracking and Reporting. The information you placed in the original Milestone Edit will populate an Invoice Amount and an Invoice Description.

When you click "Generate Invoice" from the popup, you can enter into the Memo area specific notes about the Milestone to further clarify the charges.



At this point, the Invoice will display under the Billing Tab in **Projects** and also on the **Accounting** screen. All Project Invoices display text below their Invoice Number indicating that they belong to a Project.

After an invoice has been generated, the “Generate Invoice” icon on the Milestone screen in Projects becomes a “View Invoice” icon.



Billing upon Project Completion

If you are billing at Project Completion only, Projects will turn green upon completion and will show at 100% in the “Complete” column on the **Projects Home** screen.

Clicking into that Completed Project opens the **Project Overlay** with a “Generate Invoice” button at the top right of the screen.

Follow the same steps you would for Milestone billing to complete invoice generation.

Projects on the Mobile App

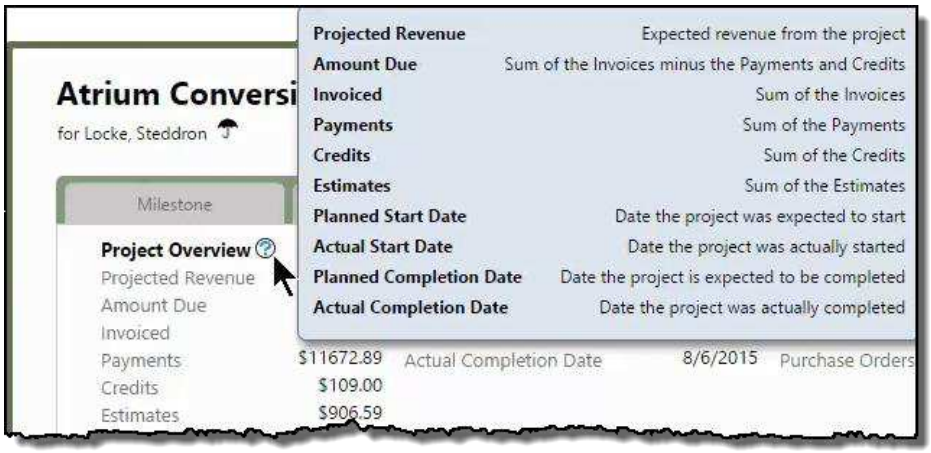
Project Jobs appear as regular Jobs on the Mobile App. You cannot edit or otherwise interact with the Projects screen at this point from the App. Also, since invoices are created from within the Project Overlay in the Desktop version of Service Autopilot™, you cannot invoice from the Mobile.

Reports for Projects

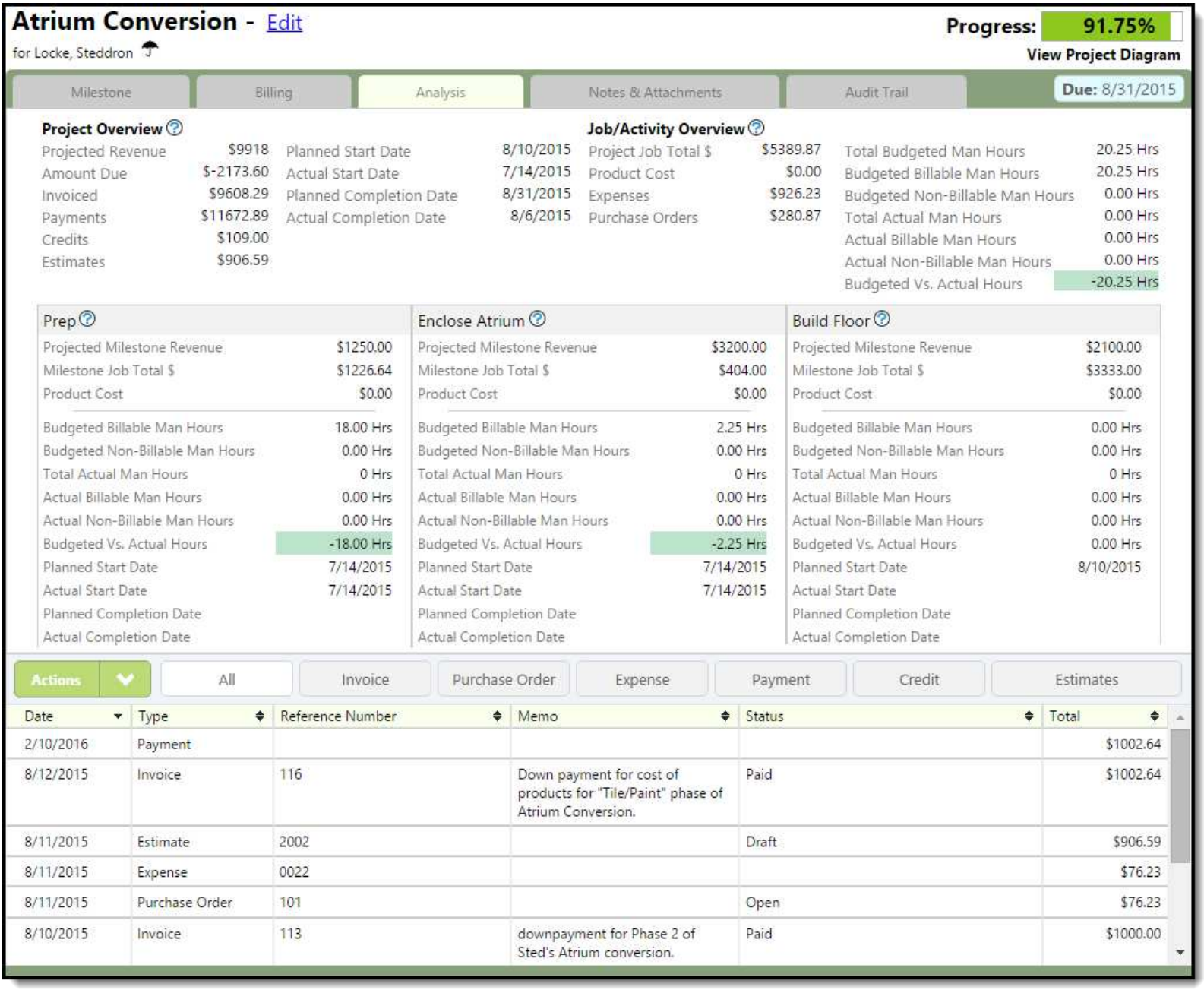
There are currently no Reports specifically tied to the information in Projects. Future enhancements to Projects may include Reporting options.

Supporting Information: Detailed Breakdown of Analysis Screen

Each question mark icon pulls up a dialog with descriptions of the fields in that area of the screen.



For those of you who would like a detailed breakdown of each field on the Analysis Screen, see below.



Project Overview

Projected Revenue: Expected revenue from the Project.
Amount Due: Sum of the Project's Invoices minus the Payment and Credits.
Invoiced: Sum of the Project's Invoices.
Payments: Sum of the Project's Payments.

Credits: Sum of the Project's Credits.
Estimates: Sum of the Project's Estimates.
Planned Start Date: Date the Project was expected to start.
Actual Start Date: Date of the Project's real start.
Planned Completion Date: Date the Project was expected to be completed.
Actual Completion Date: Real end date of the Project.

Job/Activity Overview

Project Job Total $: Sum of the Job totals on the Project.
Product Cost: Sum of the Product totals on the Project.
Expenses: Sum of the Project's Expenses.
Purchase Orders: Sum of the Project's Purchase Orders.
Total Budgeted Man Hours: Sum of the budgeted hours for the Project's Jobs and To Dos.
Budgeted Billable Man Hours: Sum of the budgeted hours for the Project's Jobs.
Budgeted Non-Billable Man Hours: Sum of the budgeted hours for the Project's To Dos.
Total Actual Man Hours: Sum of the real hours spent on the Project's Jobs and To Dos.
Actual Billable Man Hours: Sum of the real hours spent on the Project's Jobs.
Actual Non-Billable Man Hours: Sum of the real hours spent on the Project's To Dos.
Budgeted Vs. Actual Hours: Sum of the Project's budgeted hours minus the sum of the Project's actual hours.

- If this total is **red**, the total is positive, indicating that there were more real hours spent on the Project than were budgeted for.
- If this total is **green**, the total is negative, indicating that there were fewer real hours spent on the Project than projected in the budgeted hours.

Individual Milestone Overview

Projected Milestone Revenue: Expected revenue for the Milestone.
Milestone Job Total $: Sum of the Milestones' Job totals.
Product Cost: Sum of the Milestone's Product totals.
Budgeted Billable Man Hours: Sum of the budgeted hours for the Milestone's Jobs.
Budgeted Non-Billable Man Hours: Sum of the budgeted hours for the Milestone's To Dos.
Total Actual Man Hours: Sum of the real hours spent on the Milestone's Jobs and To Dos.
Actual Billable Man Hours: Sum of the real hours spent on the Milestone's Jobs.
Actual Non-Billable Man Hours: Sum of the real hours spent on the Milestone's To Dos.
Budgeted Vs. Actual Hours: Sum of the Milestone's budgeted hours minus the sum of the Milestone's actual hours.

- If this total is **red**, the total is positive, indicating that there were more real hours spent on the Milestone than were budgeted for.
- If this total is **green**, the total is negative, indicating that there were fewer real hours spent on the Milestone than projected in the budgeted hours.

Planned Start Date: Date the Milestone was expected to start.
Actual Start Date: Read start date of the Milestone.
Planned Completion Date: Date the Milestone was expected to be completed.
Actual Completion Date: Read end date of the Milestone.