

# Service **Autopilot**<sup>™</sup>

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## CUSTOM PACKAGES

Quick User Guide

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Version 1.0

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## Custom Packages

As a member of Service Autopilot (SA) you have the ability to create custom packages for your clients. You may use this feature to create a package consisting of your choice of services which you can then tailor to individual clients on a yearly basis.

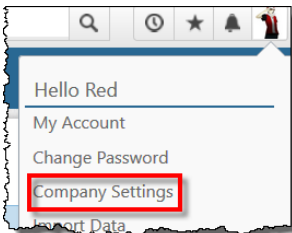
### Enabling Custom Packages

You will need to enable Custom Packages from you Company Settings before you can begin using this feature. To do this, follow these instructions:

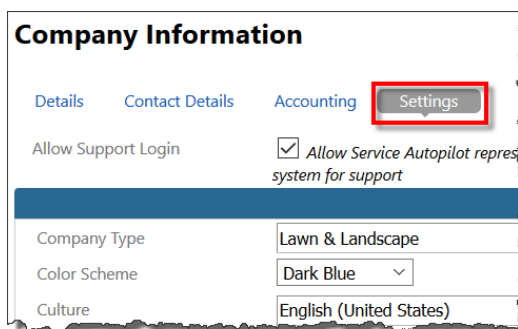
1. Access Service Autopilot.
2. Hover over the **Account Access Icon** (avatar).



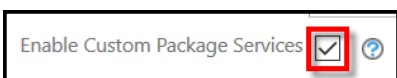
3. Click on **Company Settings** from the Account Quick-links. The Company Information overlay will appear.



4. Click on the **Settings** tab located on the upper-right area of the overlay.



5. **Enable Custom Package Services** by clicking on the checkbox next to it. This option will enable the ability to create custom package services by selecting the “Create Custom Package” check box on new waiting list services.



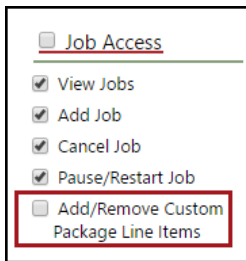
6. Click **Save Changes** at the bottom of the overlay.



## Granting Permission for Custom Packages

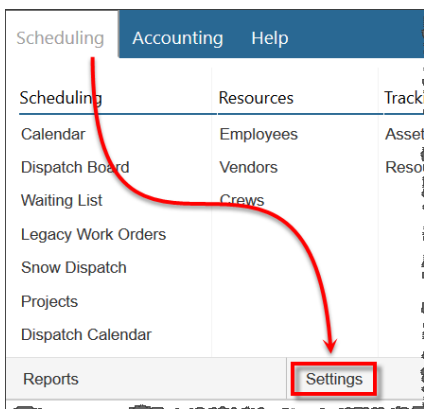
Before you start creating Custom Packages, you will first have to grant permissions to Add/Remove Custom Package Line Items. This will allow you to modify the custom package when creating a job for a client by adding or removing a particular service (line items) that may not be required at the moment. Follow these instructions to grant permissions for custom packages:

1. Access Service Autopilot.
2. Go to: **Home > Settings**
3. Click on: **User Roles & Rights**
4. Select a role name.
5. Go to: **Scheduling > Job Access**
6. Click in the **Add/Remove Custom Package Line Items** option to enable it.

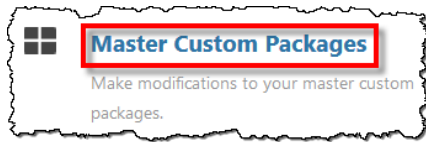


## Accessing Custom Packages

1. Access Service Autopilot.
2. Go to: **Scheduling > Settings**



3. Click on **Master Custom Packages**.



4. Clicking on the custom package option will take the user to the Custom Package List Page.

## Understanding the Custom Package List Screen

Name	Description	Date Created	Total	Status
Debris Removal - 3X	Debris Removal - 3X	08/01/2016	\$150.00	Active
Gutter Cleaning 2X (June & Dec)	Gutter Cleaning 2X (June & Dec)	08/08/2016	\$200.00	Active
Gutter Cleaning 4X (May, Oct, Dec Mar)	Gutter Cleaning 4X	08/03/2016	\$400.00	Active
Test Custom Pkg	Test Custom Pkg	08/01/2016	\$420.00	Active

In addition to creating new custom packages, you may also manage existing packages via the Custom Packages Overlay. The custom packages overlay consists of the following:

- Custom Package List
  - Composed of three status tabs:
    - Active – Lists all active packages.
    - Inactive – Lists all inactive packages.
    - All – Lists both active and inactive packages.
  - Composed of information pertaining to individual custom packages:
    - Name – This is the name for the package.
    - Description – This is a description of the package.
    - Date Created – This will show the package date of creation.
    - Total – This is the sum of the line item default rate.
    - Status – The current status for the package (Active or Inactive)
  - Composed of Actions Button
    - Add (**Creates New Package**)
    - Copy – This will create a copy of the selected custom package. Denoted by a note below the custom package name stating “Copy (Date & Time).”
    - Delete – This will delete the selected custom package. Conversely, if the custom package that is attempted to be deleted is part of a customer’s schedule, it will be prevented. In this case, the custom package will be deactivated.

- Make Active – This action will make all selected custom packages active again (option only available in Inactive and All tab).
- Make Inactive – This will mark the custom package as inactive and move it to the inactive tab. Note that this function will not erase the package.
- Add Package Action Button (**Creates New Package**)

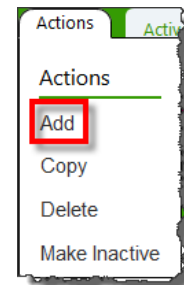
## Creating New Custom Packages

Creating new custom packages can be done in two different ways by [accessing the Custom Packages](#) (steps listed in Custom Packages section) list screen:

- **Actions** Button
- **Add Package** Action Button

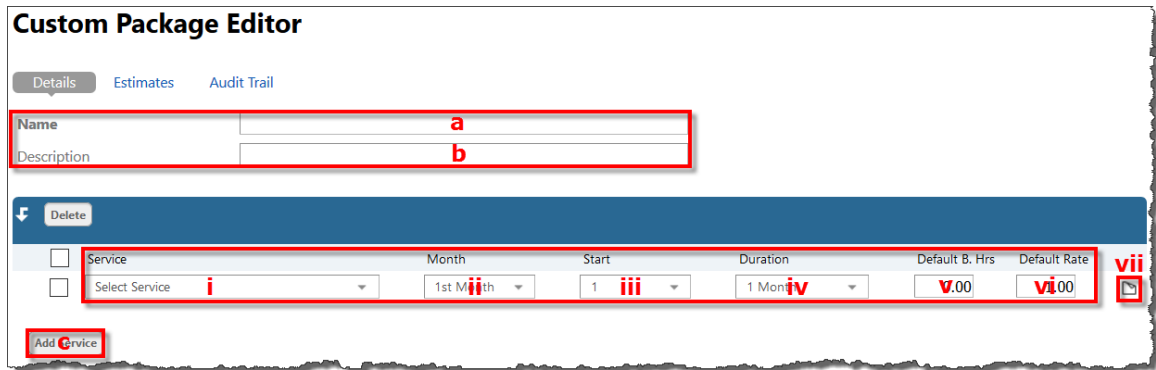
### Adding a New Custom Package

1. Access the [Custom Packages](#) (CP) list screen.
2. Hover over the **Actions** button on the custom package list and click on **Add**.
3. Or, click on the **Add Package** button on the top-right of the CP list screen.



4. The **Custom Package Editor** screen will appear.
5. Fill out the following (**bold** sections are required):
  - a. **Name** of Custom Package (required)
  - b. **Description** of Custom Package (optional)
  - c. Click on **Add Service** and do the following for every other service you add to this package:
    - i. Select Service from the downward arrow
    - ii. Select Month from the downward arrow:
      1. 1<sup>st</sup> Month – 12<sup>th</sup> Month
    - iii. Select Start day from the downward arrow – you may select a value for the day of the month that the service will be scheduled for. Select from the following options:
      1. 1-31 or Last
    - iv. Select Duration from the downward arrow:
      1. ½ Month
      2. 1 Month
      3. 1 ½ Months
      4. 2 Months

5. 2 ½ Months
  - v. Type in Default B. Hrs (Budgeted Hours) for the service.
  - vi. Type in the Default Rate for the service. This rate defaults to the default rate for the service type that is selected.
  - vii. Click on the Update notes icon (optional). The estimate and invoice notes default from the service type’s default notes.
    1. Type in Estimate notes
    2. Type in Invoice notes
    3. Click **Save**.

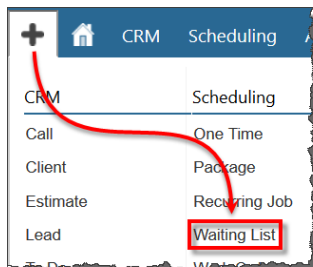


6. Click on **Save Changes**.



## Scheduling a Custom Package

1. Access Service Autopilot.
2. Click on: **Add > Waiting List**



3. The **New Waiting List Job** overlay will appear.

4. Select a **Client** from the drop-down list.
5. Select a Contract from the drop-down list (**optional**).
6. Select Yes or No if you want to create a Work Order. By default, this is set to No.
7. Click on the empty box next to the Create Custom Package section. This will enable the Custom Package feature.
8. Select a **custom package** from the drop-down list. This list will show all the active custom packages existing in your SA account.
9. Select a **Start Date** by clicking on the **calendar icon**. The start date is used to determine how to schedule the service's start dates and complete by dates. When updating the start date to a different month, it will update the service dates to start from the month selected.
10. Select a **Renew End Date** by clicking on the calendar icon. The renew end date determines when the renew button will display in the Master Job overlay.
11. Now review the service list associated to the selected custom package.
12. You may choose to deselect a specific round of service (only if a job is not complete) by clicking on the checkbox next to the line item to remove it from the schedule without erasing it.

	Service	Start Date
<input type="checkbox"/>	Gutter Cleaning	09/01/2016
<input checked="" type="checkbox"/>	Gutter Cleaning	03/01/2017

13. Adjust the service information depending on the situation.
  - a. Start Date
  - b. Complete By Date
  - c. Assigned To – This can be done by selecting a **resource** for the specific service by clicking on the drop-down arrow. This can be made at the time of dispatching from the Dispatch Board.
  - d. Quantity (Qty)
  - e. Rate
  - f. Budgeted Hours (B. Hrs)
  - g. Start – This refers to the start time for the appointment.



- h. End – This refers to the end time for the appointment.
- i. Optional settings:
  - i. Edit budgeted hours override
  - ii. Update notes
  - iii. Add product(s) to service
  - iv. Add/View Discount

Start Date	Complete By	Assigned To	Qty	Rate	B. Hrs	Start	End
09/08/2016	10/01/2016	Select Resource	d.00	0.00	f.50	g	h

14. Click on **Save**.

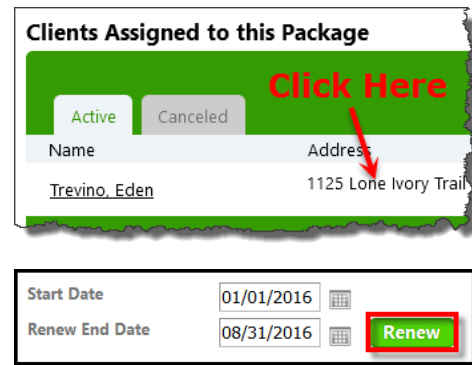


## Renewing Custom Packages

Custom Packages can be renewed through the Custom Package Editor. Renewal takes place on a client by client and package by package basis. If a custom package has reached an End Date for a particular client, a Renew button will appear next to the Renew End Date option of the editor. In addition, if services associated to the custom package are deleted or disabled, upon renewal they will reappear and will be highlighted in a green color as an alert to you or any other SA user.

Follow these steps to renew a custom package:

1. Access the [Custom Packages](#) (CP) list screen.
2. Select a custom package of choice.
3. Select a client from the **Client Assigned to this Package** section of the Custom Package Editor. Ensure to click under their address in order to access their custom package.
4. Click on the **Renew** button located next to the Renew End Date option of the editor.
5. All services associated to the custom package will reset to their original Master Custom Package settings. If any service was deleted or disabled, upon renewal these will reappear and will be highlighted in **green color** to alert you of the changes.



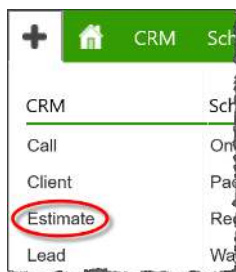
Service	Start Date	Complete By
✘ Spring Application	01/01/2016	03/16/2016
✘ Summer Application	03/01/2016	05/15/2016
✘ Fall Application	06/01/2016	08/15/2016
✘ Winter Application	12/01/2016	02/14/2017

6. Make any desired changes to the services listed in the custom package.
7. Click **Save**.

## Creating an Estimate Using Custom Packages

You may create Estimates that include custom packages when using Service Autopilot. The process for creating estimates is the same as any other estimate. The difference now is that when adding an item, the system will give you an option to choose from custom packages. Follow these steps to create an estimate using custom packages:

1. Access Service Autopilot.
2. Go to: **Add > Estimate**



3. The “New Estimate” overlay will appear.
4. Fill out the required information (**bold**) under the Details section of the overlay.

**New Estimate (#0) - Status: Draft**

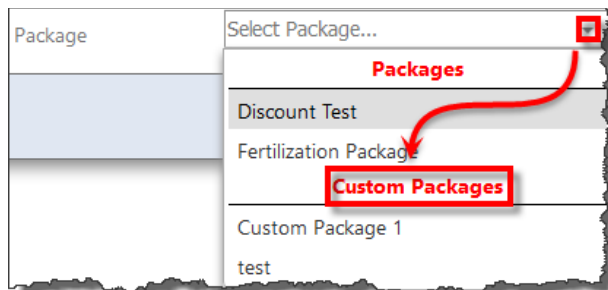
Details Notes **Complete bold sections (required)**

Description	<b>Estimate - Tuesday, August 16, 2016</b>	Estimate Date
Client/Lead	Select Client/Lead... +	Valid Until Date
Sales Rep	Select Sales Rep...	PO Number
Source	Select Source...	Work Order Number
Est. Document	Select Document...	Stage
Show Discounts	<input type="checkbox"/> (show discounts in the grid)	

5. Click on the **Add Item** button.
6. In the Add Item pop-up, select **Package** as the type.



7. Select a **Custom Packages** service from the drop-down list by clicking in the downward arrow.

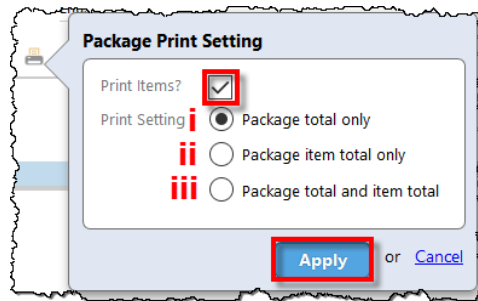


8. Once the custom package has been selected, click **Apply**.

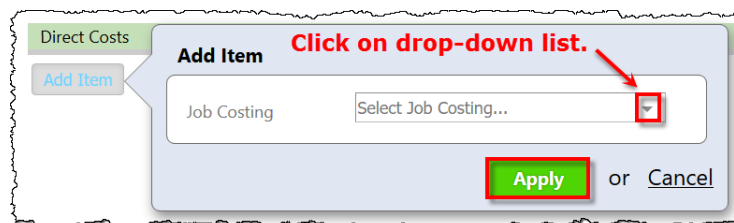


9. The custom package and its services will populate the Service/Package list. You may now edit the service/package information. Edit or adjust the following fields within the service list:
  - a. Service/Package Status:
    - i. Draft
    - ii. Quote
    - iii. Won
    - iv. Lost
  - b. Package Start Date – select a date by clicking on the calendar icon.
  - c. Budgeted Hours (B. Hrs)
  - d. Cost
  - e. Adjusted Rate (Adj Rate)
10. Click on the printer icon located at the bottom of the service/package list. When turned off, package items do not print on estimate. This is disabled by default.
  - a. If you would like to include the package items in the estimate, enable Print Items in the Package Print Setting pop-up.
  - b. Then select from the following:
    - i. Package total only
    - ii. Package item total only
    - iii. Package total and item total

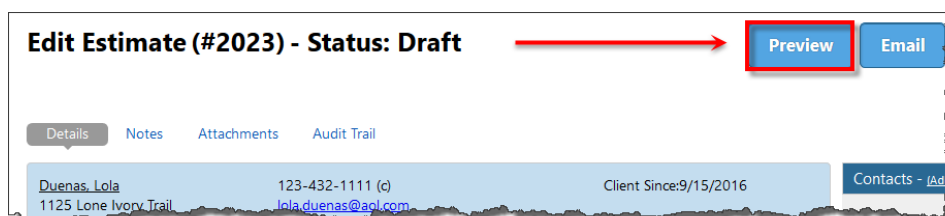
- c. Click **Apply**.



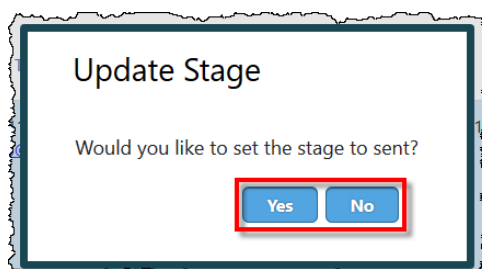
11. If needed, click on **Add Item** button to add additional services or packages.  
12. Add Job Costing items (if applicable) to the Estimate. Do this by doing the following:
- Click on **Add Item**.
  - Click on drop-down list and select job costing.
  - Click **Apply**.
  - Repeat actions if necessary for added job costing.



13. If the estimate has been saved as a quote, then you may click on the **Preview** button located on the top of the overlay to see the preview for the estimate letter based on the **Est. Document** chosen on the Details section of the New Estimate overlay.



14. After seeing the preview for the estimate, SA will prompt you to update the stage of the estimate (quote to sent). Click **Yes** or **No**.



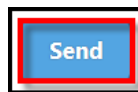
15. You may also choose to send the estimate via Email by doing the following:
- Click on the **Email** button.



- In the New Email overlay, revise and/or edit its content if necessary.

A screenshot of a "New Email" overlay form. The form has a white background and a grey border. It contains the following fields: "To" with the value "duenas, lola[lola.duenas@aol.com] x", "From" with the value "Company Email - ( )", and "Subject" with the value "The Estimate You Requested". Below these fields are two radio buttons for "Include Form", with "Yes" unselected and "No" selected. Below the radio buttons is a rich text editor toolbar with icons for Source, Bold (B), Italic (I), Underline (U), Image, Text Color (A), Background Color (ABC), Bulleted List, Numbered List, Indent, and Outdent. Below the toolbar are three dropdown menus for "Styles", "Format", and "Font" (set to "12pt"). The main text area contains the following text: "Hello [clientfname],  
Please click on the following link to view and accept your Estimate: [qu".

- Click on the **Send** button.



16. Click the **Save & Close** button located at the bottom of the overlay once you have finished making changes to the Estimate.

