

Service **Autopilot**[™]

MULTI-DAY JOBS

User Guide

Version 1.5

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Overview

Service Autopilot (SA) offers an enhanced Multi-Day functionality for you to use when setting up services for clients. The biggest benefits of using the multi-day feature are the flexibility and ease of administration it gives you in setting up jobs that last more than one day. SA automatically modifies the Dispatch Board as well as the Calendar to accommodate the set requirements for specific jobs.

Creating multi-day jobs is similar to creating other jobs, with one key difference:

- **Days** – The number of days assigned for a specific service. If more than one, the system automatically recognizes it as a multi-day job.

Getting Started

To get the most out of the Multi-Day functionality, you need to modify some of your company settings. The settings you choose will be the default and affect the multi-day jobs you create.

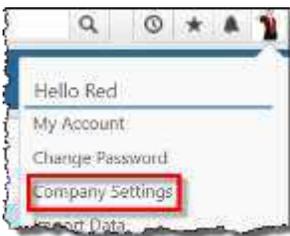
Global Multi-Day Settings

Currently, with the Multi-Day feature you can manipulate **Maximum Man Hours Per Day** and **Multi-Day Include Days** from the **Company Settings** overlay. Here's how:

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



2. Click **Company Settings** from the Account Quick Links.



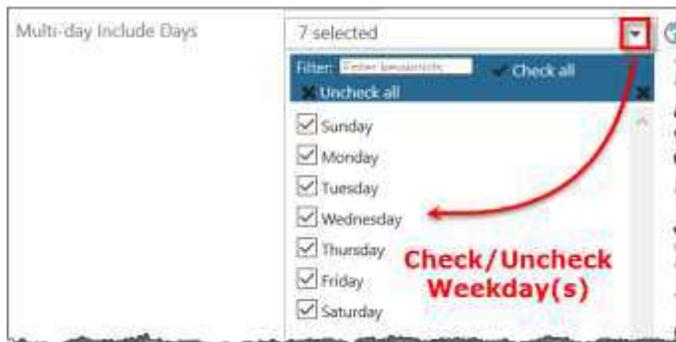
3. In the upper right of the **Company Information** overlay, click the **Settings** tab.



4. Choose **Maximum Man Hours Per Day**. This setting determines how many hours are allocated per day when setting the projected end date.



5. Click the **Multi-Day Include Days** dropdown arrow. Select the days of the week you want to include for multi-day functionality by checking or unchecking the boxes next to each day of the week. This setting determines how multiple days are handled. If the day of the week is unchecked, the system skips it and continues scheduling on the next available day.



6. Don't forget to save your changes.

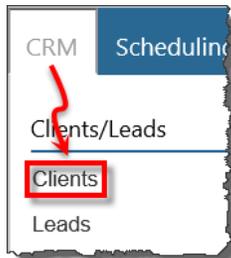


Creating Multi-Day Jobs

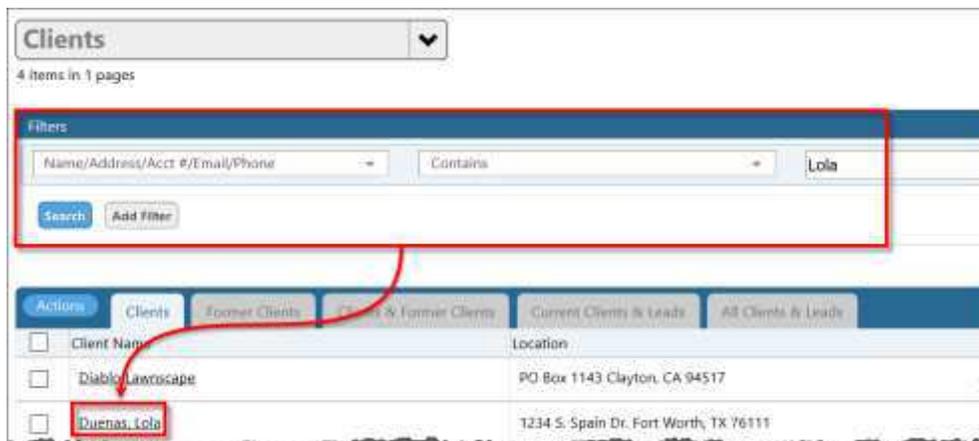
There are a few areas within SA where you may set up a multi-day job.

One-Time Jobs

1. Go to **CRM > Clients**.

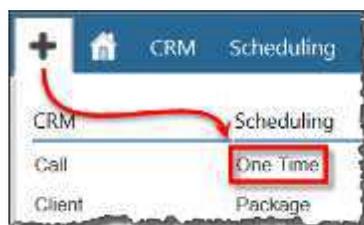


2. From the **Clients** List, search for a client in the **Filters** section.
3. Select a client from the results.



4. Do one of the following to schedule a job:

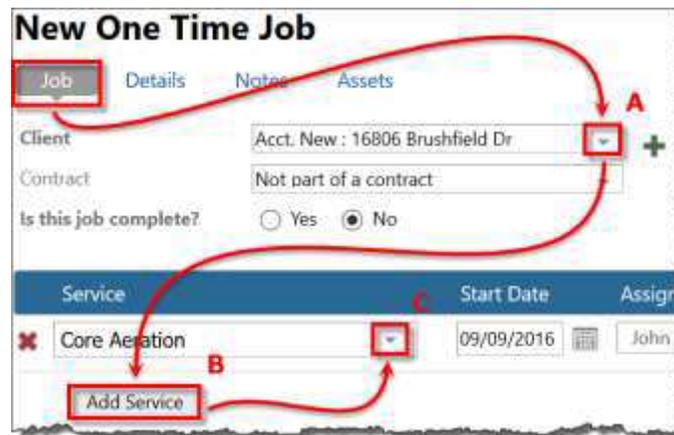
Click the **Add (+)** icon in the header and click **One Time**.



Or

On your chosen client's account screen, click the **Scheduled Jobs** tab, hover over the **Add** button, and click **Add a one time job**.

5. On the **New One Time Job** overlay, fill in the **Job** tab information and add a service. In the top section:
 - A. On the **Job** tab, select **Client** from the dropdown list.
 - B. Click Add Service.
 - C. Click the dropdown arrow and select a service from the list.



In the bottom section:

- a. Use the calendar tool to add a service from the dropdown list.
- b. If needed, change the **Start Date** by clicking the calendar icon. This defaults to today's date.
- c. Select a **Complete By** date by clicking the calendar icon.
- d. Assign the job to a Resource from the dropdown list. You also can do this later on the Dispatch Board.
- e. Enter a quantity (**Qty.**) for the service.
- f. Enter a **Rate** for the service.
- g. Enter the budgeted hours (**B. Hrs.**) for the service.
- h. Enter the **Days** needed for this service type. This will determine if the job is a multi-day job or not.
- i. If the job is already complete, enter a **Start** and **End** time.
- j. Select each of these icons to do the following:
 - Percentage (%) Icon: Add/Edit Discounts
 - Gear Icon:
 - Update notes
 - Add product(s) to service
 - Edit budgeted hours override

Service	Start Date	Complete By	Assigned To	Qty	Rate	U. Hrs	Days	Start	End
a	01/11/2011	c	Select by address	0.00	0.00	0.00	h 1	i	

Add Service Service Total: 0.00

6. Click the **Details** tab at the top of the **New One Time Job** screen and fill in the following as needed:
- If necessary, modify the **Maximum Man Hours Per Day**. This setting defaults to your company settings, determining how many hours are allocated per day. Based on those hours, the system sets a projected end date.
 - If necessary, modify **Multi-day Include Days**. This setting defaults to your company settings, determining how multiple days are handled. If a day of the week is unchecked, the system continues scheduling on the next available day.

New One Time Job

Job **Details** Notes Assets

Job

Work Order #

Call Ahead

Arrival Window

Chemical Areas Treated

Maximum Man Hours Per Day

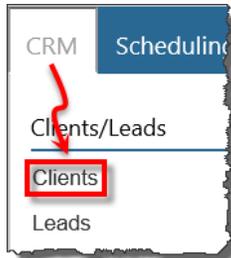
Multi-day Include Days

7. Click **Save** at the bottom of the overlay.

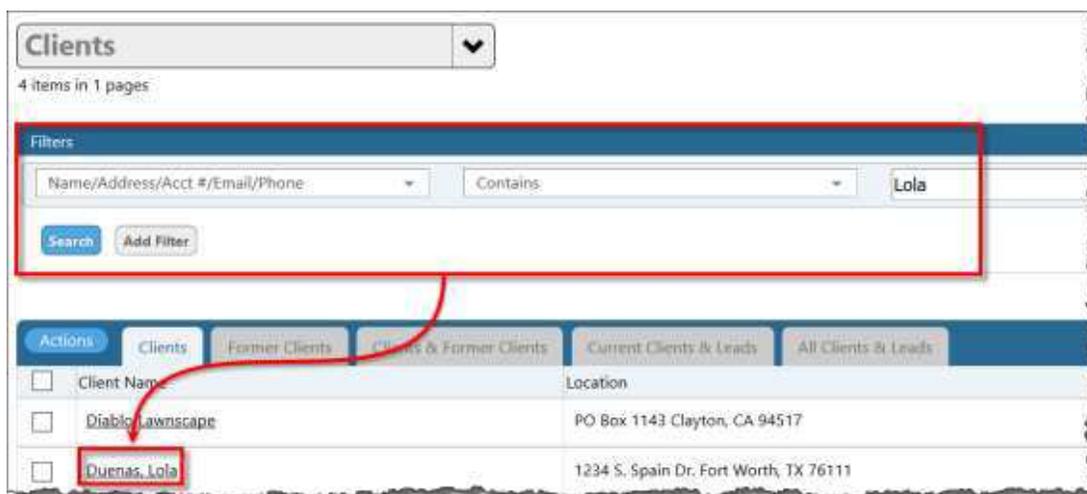


Package Jobs

1. Go to **CRM > Clients**.

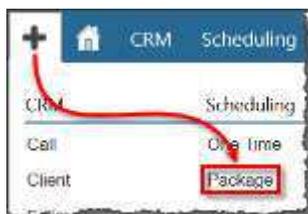


2. From the **Clients** List, search for a client in the **Filters** section.
3. Select a client from the results.



4. Do one of the following to schedule a job:

Go to the **Add** icon in the header and click **Package** to add a package job.



OR

On the client account screen, click the **Scheduled Jobs** tab, hover over the **Add** button, and click **Add a package job**.

5. On the upper part of the **New Package** overlay, fill in the **Job** tab information (**bold** fields – listed below -- are required).
 - a. Select a **Client** from the dropdown list.
 - b. Select a **Package** from the dropdown list.
 - c. Select a **Package Renewal** from the dropdown list.
 - d. Select **Conflict Days** from the dropdown list.
 - e. Select a **Package Discount** from the dropdown list.
 - f. Edit the **Package Service** list.

New Package

Job Details Notes Assets

Client: Select Client

Contract: Select Contract

Package: Select Package

Package Renewal: Select Package Renewal

Assigned To: Select Resource(s)

Conflict Days: Select Days

Package Discount: Select Discount

Inc Service Start End

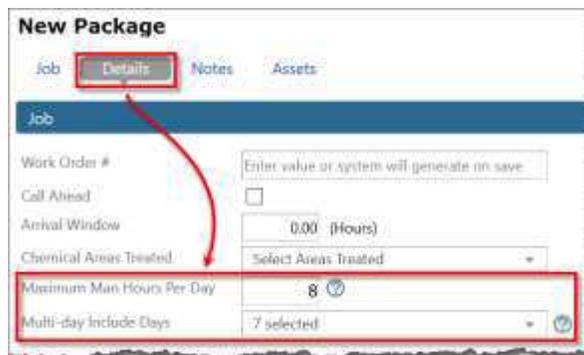
On the lower part of the **New Package** overlay:

- i. Choose to include specific services using the check box next to the service line.
- ii. Modify the quantity (**Qty.**) for the specific round or service.
- iii. Enter the rate.
- iv. Enter the budgeted hours (**B. Hrs.**).
- v. Enter the **Days** needed for this service. This will determine if the job is a multi-day job or not.
- vi. Select each of these icons to do the following:
 - Downward Arrow: Autofill
 - Percentage (%) Icon: Add/View Discount
 - Gear Icon:
 - Update notes
 - Add product(s) to service
 - Edit budgeted hours override

Inc	Service	Start	End	Min Days	Misc	Qty	Rate	B. Hrs	Days
<input type="checkbox"/>	First Mow Mowing	6/3/2016	6/11/2016	0	Schedule	1.00	100.00	100.00	1
<input checked="" type="checkbox"/>	Second Touchup Edging	6/18/2016	6/24/2016	0	Schedule	1.00	100.00	0.00	1
						2.00	160.00	0.00	2
Amt: 173.20									

Go to the **Details** tab at the top of the **New Package** overlay and fill in the following, if necessary:

- **Maximum Man Hours Per Day.** This setting defaults to your company settings, determining how many hours are allocated per day. Based on those hours, the system sets a projected end date.
- **Multi-Day Include Days.** This setting defaults to your company settings, determining how multiple days are handled. If a day of the week is unchecked, the system continues scheduling on the next available day.



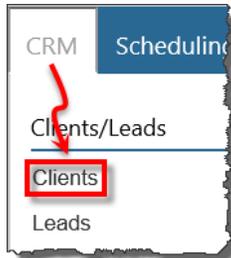
The screenshot shows the 'New Package' overlay with the 'Details' tab selected. The 'Maximum Man Hours Per Day' field is set to 8, and the 'Multi-day Include Days' field is set to 7 selected. A red box highlights these two fields, and a red arrow points from the 'Details' tab to the 'Maximum Man Hours Per Day' field.

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

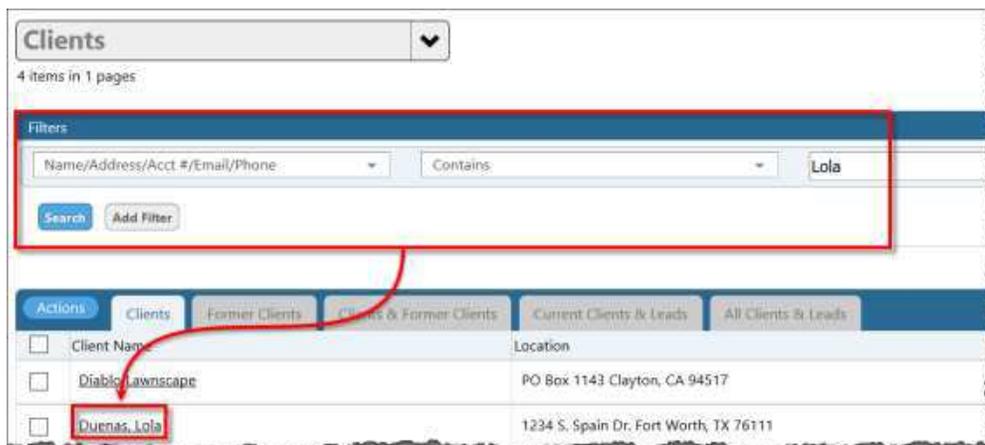


Waiting List Jobs

1. Go to **CRM > Clients**.

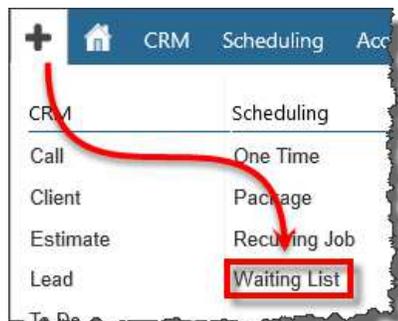


2. From the **Clients** List, search for a client in the **Filters** section.
3. Select a client from the results.



4. From the client account, choose the **Scheduled Jobs** tab.
5. Hover over the **Add** button and click **Add a waiting list job**.

Alternatively, you can go to from the Add (+) icon to the **Waiting List**.



6. From the **New Waiting List Job** overlay, fill in the job information on the **Job** tab.
7. Select a client from the dropdown list.

- a. Add a Service from the dropdown list.
- b. If needed, change the **Start Date** by clicking the calendar icon. This defaults to today's date.
- c. Select a "**Complete By**" date by clicking the calendar icon.
- d. Assign to a Resource from the dropdown list. You also can do this later on the Dispatch Board.
- e. Enter a quantity (**Qty.**) for the specific service.
- f. Enter a rate for the specific service.
- g. Enter the budgeted hours (**B. Hrs.**) for the specific service.
- h. Enter the Days needed for this service type. This will determine if the job is a multi-day job or not.
- i. If the job is already complete, enter a Start and End time.
- j. Select each of these icons to do the following:
 - Percentage (%) Icon: Add/Edit Discounts
 - Gear Icon:
 - Update notes
 - Add product(s) to service
 - Edit budgeted hours override

Service	Start Date	Complete by	Assigned To	Qty	Rate	B. Hrs	Days	Start	End
a	01/15/2017	c	Select Area(s)	e.00	f.00	g.00	h	i	
Service Total									0.00

8. Click the **Details** tab at the top of the **New Waiting List Job** overlay and fill in the following, if necessary:
 - **Maximum Man Hours Per Day.** This setting defaults to your company settings, determining how many hours are allocated per day. Based on those hours, the system sets a projected end date.
 - **Multi-Day Include Days.** This setting defaults to your company settings, determining how multiple days are handled. If a day of the week is unchecked, the system continues scheduling on the next available day.

New Waiting List Job

Job **Details** Notes Assets

Job

Work Order #

Call Ahead

Arrival Window

Chemical Areas Treated

Maximum Man Hours Per Day

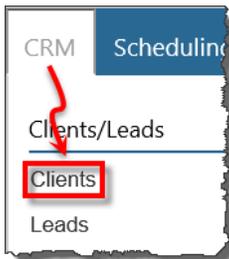
Multi-day Include Days

9. Don't forget to click **Save** at the bottom of the overlay.

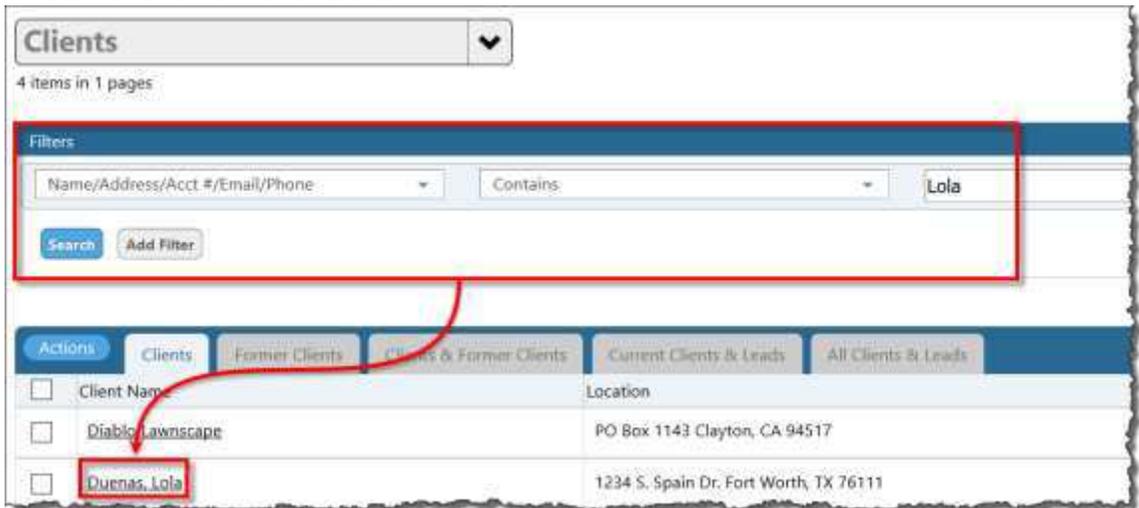


Recurring Jobs

1. Go to **CRM > Clients**.



2. From the **Clients** list, search for a client in the **Filters** section.
3. Select a client from the results.

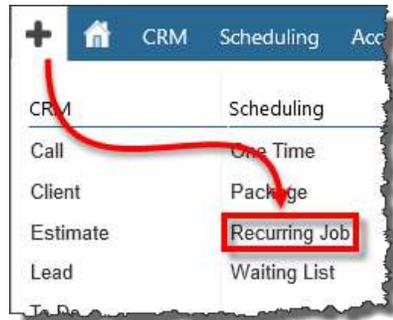


4. From the client account, go to the **Scheduled Jobs** tab and do one of the following to add a recurring job:

Hover over the **Add** button and choose **Add a recurring job**.

Or

Go to from the **Add** icon in the header to **Recurring Job**.



5. On the **New Recurring Job** overlay, fill in the job information on the **Job** tab.
 - a. Select a **Client** from the dropdown list.
 - b. Select a **Schedule** from the dropdown list.



6. Add a Service to the job.
 - i. Assign Resources if you like. You also can do this on the **Dispatch Board** later.
 - ii. Enter a service quantity (**Qty.**).
 - iii. Enter a service rate.
 - iv. Enter the budgeted hours (**B. Hrs.**) if required.
 - v. Enter the days needed for this service type. This determines if the job is classified as multi-day.
 - vi. If the job is already complete, enter a Start and End time.
 - vii. Select each of these icons to do the following:
 - Percentage (%) Icon: Add/Edit Discounts
 - Gear Icon:
 - Update the notes
 - Add products to a service
 - Stop the service from reoccurring
 - Edit budgeted hours override

Service	Assigned To	Qty	Rate	B. Hrs	Days	Start	End
Aeration & Overseeding	Why You Lying (Why?)	1.00	0.00	0.00	2		

7. Add additional services by clicking the **Add Service** button.



8. Go to the **Details** tab and fill in the following, if necessary:
 - **Maximum Man Hours Per Day.** This setting defaults to your company settings, determining how many hours are allocated per day. Based on those hours, the system sets a projected end date.
 - **Multi-Day Include Days.** This setting defaults to your company settings, determining how multiple days are handled. If a day of week is unchecked, the system continues scheduling on the next available day.

9. Click **Save** at the bottom of the overlay.



Projects

With Projects, the Multi-Day functionality offers the **Duration** field, which works the way **Number of Days** does. When you change the **Days** field using the dialog, the system will change the Duration (number of days) to that number. After you set up the project, SA will use the duration number to schedule the actual job.

Multi-day jobs are automatically flagged, or marked, when you create a Project with a duration of more than one day. After you've started the project, editing the duration of the job will switch the multi-day flag on or off. For example, if the duration is less than or equal to 1, the multi-day flag stays off, if more than 1, the flag will appear.

Dispatching a Multi-Day Job

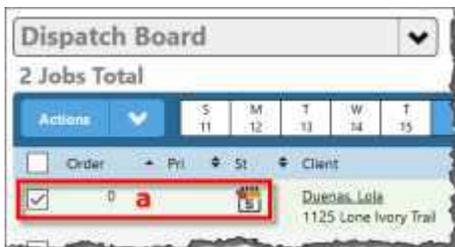
SA allows you to dispatch multi-day jobs from different sections within the Scheduling function, depending on the type of job you created.

Dispatching a Job from the Dispatch Board

1. Go to: **Scheduling > Dispatch Board**.



2. From the Dispatch Board, select the multi-day job by checking the empty check box next to it. A multi-day job is designated by a status icon that resembles a calendar with a pin.



Note: On the Dispatch Board you can now include a **Daily Amount** column. This column divides the service total by the multiday instance to give a realistic value of the total revenue for the given day.

3. Hover over the **Actions** button and click the **Dispatch** option.



4. Once dispatched, the job shows the following **Status Icon** in the job information:



Note: After dispatch, you will see multiple instances of the same job on the **Dispatch Board** and **Dispatch Calendar** (depending on the parameters or days set during the creation of a multi-day job).

Dispatching a Job from the Dispatch Calendar

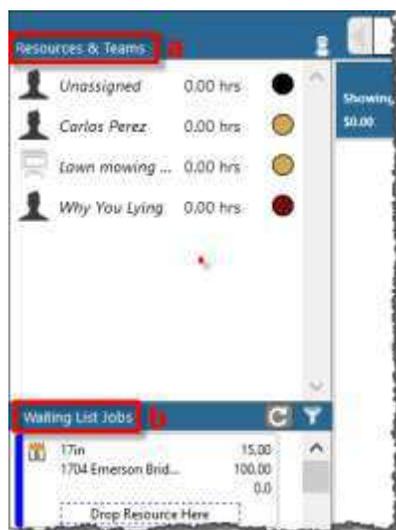
You can do this in two ways.

Method 1

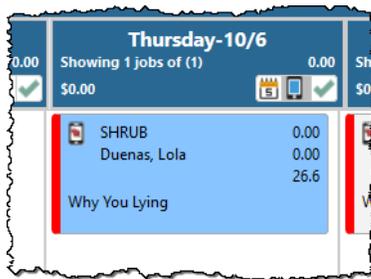
1. Go to **Scheduling > Dispatch Calendar**.



2. From the Dispatch Calendar's left panel, select one of the following options:
 - **Resources & Teams**. Lets you see jobs assigned to specific resources or teams.
 - **Waiting List Jobs**. Lets you see all the waiting list jobs, which you can drag and drop over the desired date.



3. Click a job card.



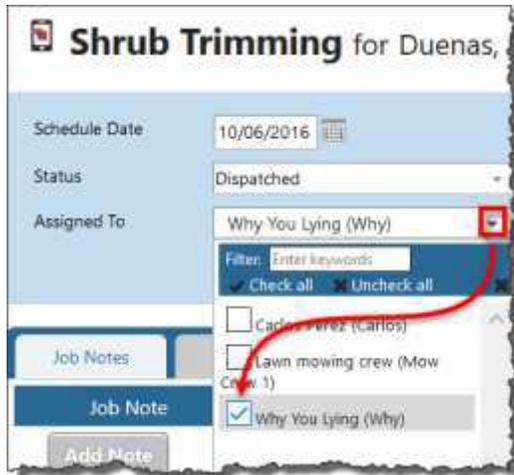
You can also drag and drop a job card from the Waiting List Jobs onto a calendar day and click on it. This opens the **Job Editor**.



4. From the **Status** dropdown, select **Dispatched**.



5. If the job isn't already assigned to a Resource, click on the **Assigned To** dropdown and select a Resource.



- Don't forget to click **Save** at the bottom of the editor.

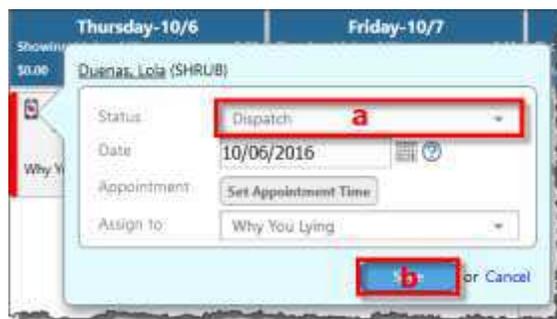


Method 2

- Follow steps 1-4 from [Method 1](#).
- Click the **Multi-Day Job – Scheduled Icon** on the top-left corner of any job card.



- In the dialog that appears containing job information:
 - Click on the **Status** field and select **Dispatch** from the dropdown.
 - Click **Save**.



4. Confirm that the status icon has changed to **Multi-Day Job – Dispatched**.



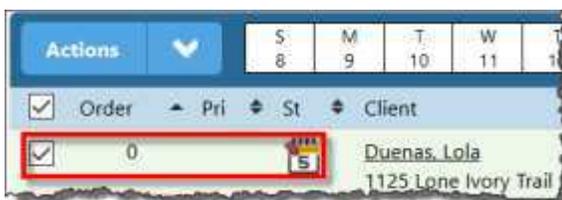
Note: After dispatch, you will see multiple instances of the same job on the **Dispatch Board** and **Calendar**, depending on the parameters or days set during the creation of a multi-day job.

Dispatching a Job from the Waiting List

1. Go to **Scheduling > Waiting List**.

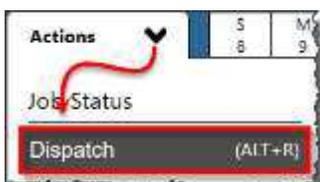


2. From the Waiting List, select the job by checking the empty check box next to it.



Note: The job will not appear to be a multi-day job until it has been dispatched.

3. Hover over the **Actions** button.
4. Click **Dispatch**.



5. Once the job is dispatched, you will see this **Status Icon** in the job information, showing that the job has been dispatched:

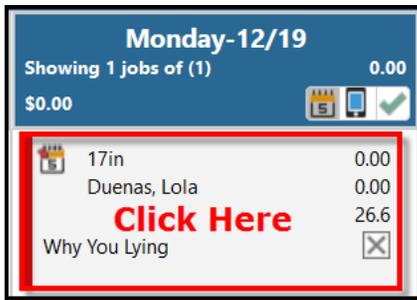


Note: After dispatch, you will see multiple instances of the same job on the **Dispatch Board** or **Calendar**, depending on the parameters or days set during the creation of a multi-day job.

Using the Job Editor Screen

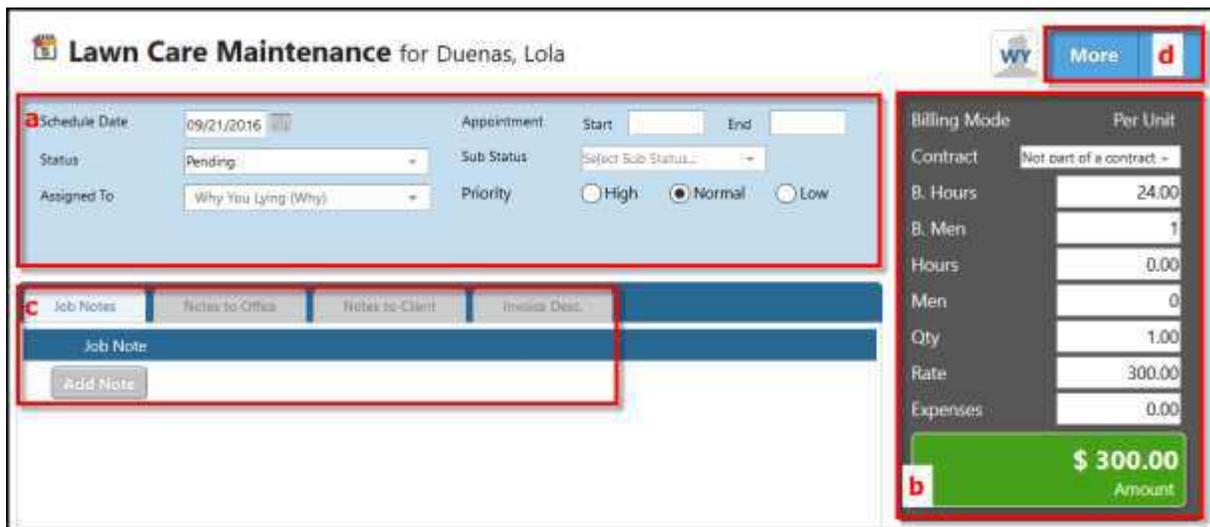
There are several ways to access the **Job Editor** screen. For this example, we'll use the **Dispatch Calendar**.

1. Go to **Scheduling > Dispatch Calendar**.
2. Click a dispatched job card inside the Dispatch Calendar to see the **Job Edit** screen.



The Job Editor contains four sections that allow you to manipulate different aspects of a job:

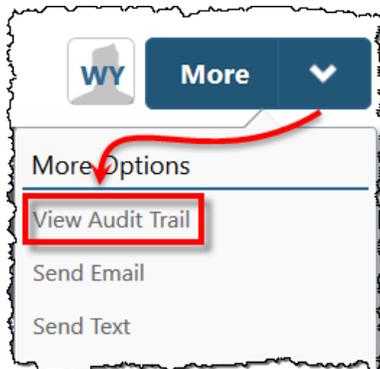
- Job Scheduling Information** – From this section you can modify the job's scheduling date, appointment time, status, assigned resources, and priority.
- Job Details**– This section lists details associated with the job at the time of its creation. These details can be modified here as well.
- Notes**– In this section you can create job-related notes targeted to internal and external audiences.
- More** – This dropdown lets you choose different options associated with the job, such as view the audit trail, send email or text, access the master job, cancel the job, and add days to the job.



Checking the Audit Trail

The Audit Trail always tracks change history. With few exceptions, anything inside the blue area on the Job Editor (“a” in the image above) is tracked in the Audit Trail. You can get to the Audit Trail for a specific multi-day job from the **Job Editor** screen.

1. Click **More** on the top right corner of the **Job Editor** screen (“d” in the above image).
2. Click **View Audit Trail** under the **More** dropdown.



3. The **Audit Trail** dialog appears, where you can see the Change History of the multi-day job.



Date/Time	Description	Changed By
09/21/2016 3:46 PM	Route Order was changed from 0 to 1	Roel Hinojosa
09/21/2016 3:46 PM	Service Item was created	Roel Hinojosa

Editing a Multi-Day Job

You can edit multi-day jobs in various ways to meet your business needs. Changes that occur in a particular instance of a multi-day job will affect only that instance, unless the job is canceled. You can edit a job in different ways, but this section describes editing a multi-day job using the Dispatch Board and Calendar.

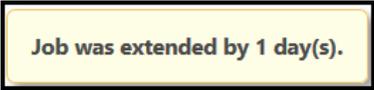
Adding Additional Days to Multi-Day Jobs

Dispatch Board

1. Go to **Scheduling > Dispatch Board**.
2. Set the **Date Range**.
3. Click either **Load Date Range** or **Load Today Only**.
4. The Dispatch Board appears. Select a scheduled multi-day job instance from the job list.
5. Hover over the **Actions** button.
6. Click the **Extend Job (Multi-Day)** option.
7. From the dialog, select the number of days you want to extend this job.
8. Click **Apply**. The additional day appears on the Dispatch Board.

Dispatch Calendar

1. Go to **Scheduling > Dispatch Calendar**.
2. In the Dispatch Calendar, click the dispatched job card to access the **Job Edit** screen.
3. Click **More** on the top right of the screen.
4. Click the **Extend Job (Multi-day)** option.
5. On the **Add Days to Job** dialog, click the up arrow to increase the number of days.
6. Once you have selected the number of days to add, click the **Add Days** button at the bottom of the dialog. The system automatically adds the selected days for the job in the **Dispatch Board** or **Calendar** overlay (this will vary depending on the day of the week and the business days set on the **Company Settings** screen). A message like the following appears, confirming the action:



Job was extended by 1 day(s).

7. When the **Add Days** dialog disappears, click **Save** at the bottom of the **Job Edit** screen.

Skipping a Day from a Multi-Day Job

You can do this from the **Dispatch Board** or **Dispatch Calendar**.

Important Note: Skipping all Multi-Day job instances will result in skipping the entire job.

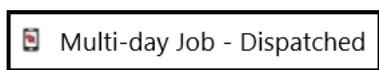
Dispatch Board

1. Go to **Scheduling > Dispatch Board**.
2. Set the date range by clicking **Load Date Range**, or **Load Today Only**.
3. From the results on the grid, select a scheduled multi-day job instance.
4. Hover over the **Actions** button.
5. Click the **Skip Job** option.
6. On the **Skip Work** dialog, type in a reason for skipping the job. Note that the information you enter here will appear in **Notes to Office**.
7. Click **Skip**.
The instance of the multi-day job disappears from the Dispatch Board.

Note: Skipping a day for a multi-day job removes that specific instance from the Dispatch Board. The skip icon will not appear on the Dispatch Board until you skip the last instance for the multi-day job.

Dispatch Calendar

1. Go to **Scheduling > Dispatch Calendar**.
2. Click the “**Multi-Day Job – Dispatched**” icon for any of the dispatched job cards in the Dispatch Calendar.



3. Select **Skip** from the **Status** dropdown list.
4. Click **Save**.



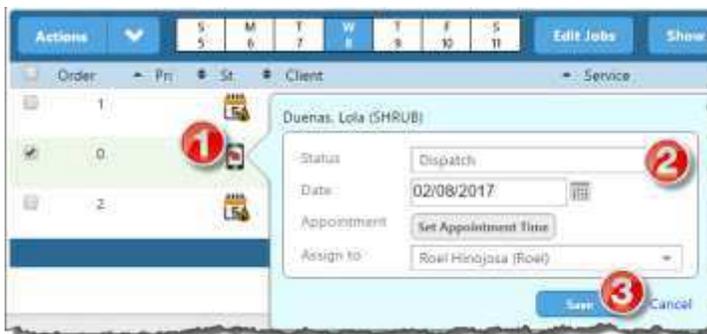
Completing a Multi-Day Job

You can complete a Multi-Day Job from the **Dispatch Board** or **Dispatch Calendar**. There are two different ways to accomplish this depending on what board you are using.

1. From the **Dispatch Board**, select a job instance and click **Complete** from the **Actions** dropdown. You can also complete the job from the **Status Pop-up**.



Or...



2. From the **Dispatch Calendar**, click on a job instance tile and click **Complete** from the **Status Pop-up**. Make sure to **Save** changes.



3. Once a job is complete, specify the date of completion on the dialog box.



Note: If a completion date is set after the last date of a Multi-Day job, it will set it to the last date of the original schedule. On the other hand, if the completion date is set during the original scheduled period, it will recalculate and adjust the days accordingly.

Deleting a Day from a Multi-Day Job

You can do this from the **Dispatch Board** or **Dispatch Calendar**.

Dispatch Board

1. Go to **Scheduling > Dispatch Board**.
2. Select a job instance from the job list.
3. Hover over the **Actions** button.
4. Select **Shorten Job** from the **Actions** list.



5. Select the number of days by which you want to shorten the job.



6. Click **Apply**.

Dispatch Calendar

1. Go to Scheduling > Dispatch Calendar.
2. Click a dispatched job card inside the Dispatch Calendar.
3. Click the **More** button on the top right of the **Job Edit** screen.
4. Click the **Cancel Day** option.
5. A **Cancel Day** dialog will prompt you to confirm your selection. Click **OK**.
6. Once you confirm the selection, the system will bring you back to the Dispatch Board.

Understanding Multi-Day Job Invoicing

Multi-Day job invoicing differs from standard invoicing in that the system will invoice only once for the entire multi-day job, even though it creates multiple instances of the job on Dispatch. This simplifies your invoices. Your clients see the job as a single, multi-day event, even though the system divides it into individual jobs on different days to make dispatching and scheduling easier.

The example shows three instances of the same job (Lawn Care Maintenance) on the Dispatch Calendar.

Wednesday-9/21	Thursday-9/22	Friday-9/23
Showing 1 jobs of (1) \$300.00	Showing 1 jobs of (1) \$300.00	Showing 1 jobs of (1) \$300.00
✓ LAWN Duenas, Lola 300.00 26.5	✓ LAWN Duenas, Lola 300.00 26.5	✓ LAWN Duenas, Lola 300.00 26.5
Why You Lying	Why You Lying	Why You Lying

Since the job is complete, the invoice shows only the one job instance and its total – regardless of how many job cards appear on the Dispatch Board or Dispatch Calendar.

Name	Invoice Description	Date	Tax	Rate	Hours	Men	Qty	Total
 Lawn Care Maintenance Class:	Lawn Care Maintenance	09/22/2016	Tax	300.00	16.00	1	1.00	300.00 ✖

Routing Multi-Day Jobs

The system's practice of dividing multi-day jobs into daily instances helps keep routing easy. Since each routing option is dedicated to a job instance within a multi-day job assignment, you can route multi-day jobs the way you route one-day jobs.

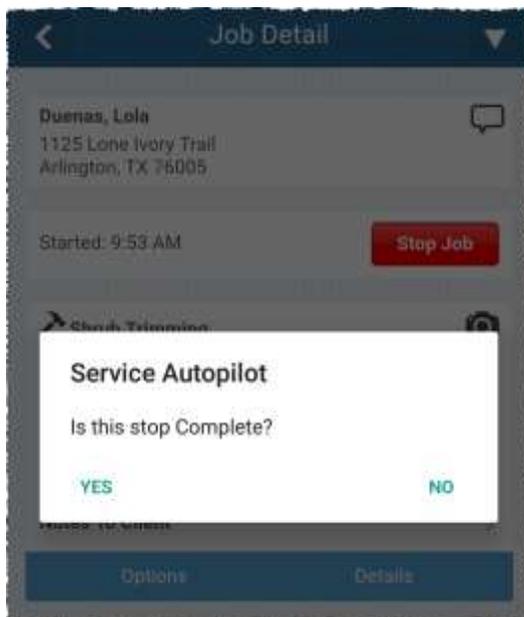
Managing Multi-Day Jobs on Mobile App

You can manage a **Multi-Day** job from the **Mobile App** once it has been dispatched. Assigned resources can modify the following multi-day job elements:

- Appointment Time
- Job Route
- Resource Reassignment
- Job Sub-status

Important Note: If a Multi-Day job has been initiated, it will continue to appear on My Schedule until it has been completed or canceled. On the other hand, if a Multi-Day job is not initiated within its original scheduled time frame, it will no longer show up indefinitely unless you scroll back to one of the scheduled days.

Completing a Multi-Day Job



When you back out of any multiday instance, SA mobile app will prompt you whether the stop has been completed or not. Press **Yes** to complete the job instance.

Skipping a Multi-Day Job

When skipping a multi-day job instance on the mobile app, if not started, it will disappear without affecting the rest of the multi-day job instances. In this case, the **Skip** icon will not appear on the mobile app; but the main site will show a lower day count.

You can skip a multi-day job instance in two ways:

1. **My Schedule > Job Instance > Skip**



2. **Job Detail > Options > Skip**



Important Note: The system will convert a multi-day job to a one-day job if all but one day is skipped. For example, if two days are skipped from a three-day job, the system will recognize it as a one-day job, and all its rules and dependencies will apply to this job instance.
