

Service **Autopilot**[™]

GLOSSARY

Table of Contents

Account Access Icon..... 5

Account Quicklinks..... 5

“Add” (+) 5

Adjust Balance..... 5

Alert..... 5

Asset..... 5

Asset Tracking 5

Asset Type 5

Audit Trail..... 6

Automations..... 6

Banner 6

Biweekly 6

Beta 6

Branch 6

Branches..... 6

Budgeted Hours (B. Hrs)..... 6

Budgeted Hours Override 7

Calendar 7

Calendar Event 7

Call..... 7

Cancel Client..... 7

Certified Advisors (CA) 7

Chemical Tracking 7

Client 7

Client Account Screen 7

Client Edit Screen 8

Client List..... 8

Client Portal..... 8

Client Source 8

Condition..... 8

Contact..... 8

Contact Types..... 8

Contract..... 8

Credit..... 8

CRM 8

Custom Fields..... 8

Custom Package 8

Custom Recurring Schedule 9

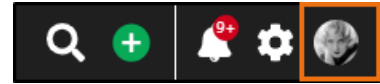
Damage Cases	9
Dashboard	9
Dialog	9
Discount	9
Dispatch Board	9
Dispatch Calendar	9
Document.....	9
Email Activity.....	9
Employee.....	9
Employee Time Off.....	9
Estimate	10
Estimate Grid.....	10
Estimate Reasons	10
Estimate Settings.....	10
Estimate Stages	10
Event	10
Expenses.....	10
Field.....	10
Filters.....	10
Form	10
Full User	10
Grid.....	10
Header.....	11
Installed Product	11
Invoice	11
Job	11
Job Comments.....	11
Job Editor	11
Job Notes.....	11
Job Overlay.....	11
Lead.....	12
Legacy.....	12
Legacy Reports	12
Map Code	12
Map Code Colors.....	12
Marketplace	12
Master Custom Package.....	12
Master Job.....	12
Master Package.....	12

Master Route	12
Master Schedule	13
Member	13
Mobile App.....	13
Mobile Only User	13
My Day Page.....	13
My Account Page	13
Navigation Bar.....	13
Non-Billable Items.....	13
Notes to Client	13
On Demand Job.....	13
One Time Job.....	13
Overlay	13
Package	14
Package job	14
Payment	14
Payroll Report	14
Pipeline.....	14
Product.....	14
Projects	14
Purchase Order	14
Quick Add.....	14
QuickBooks Online.....	14
QuickBooks Sync	14
QuickBooks Sync Connector	15
Rate Matrix.....	15
ReCAPTCHA.....	15
Recurring Job.....	15
Report Center.....	15
Resource.....	15
Resource Note Types	15
Resource Timeslot.....	15
Round	15
Route Sheets	15
Route Sheet & Work Order Formats.....	15
Rules.....	15
Sales Campaigns.....	16
Sales Rep	16
Sequence.....	16

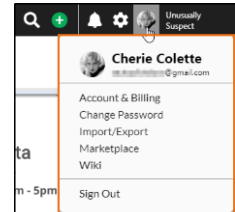
Service	16
Service Mode	16
Smart Maps	16
Snow Dispatch Board	16
Snow Invoicing	16
Subscriptions	16
Sub Status.....	16
Tags	17
Team.....	17
Team App	17
Team Directory.....	17
Team Tracking	17
Template	17
Timeline.....	17
Timesheets	17
To Do	17
Tool Tip.....	17
Touchpoint	17
Trigger	17
Unit.....	18
User	18
User Roles & Rights	18
Validation	18
Vendor.....	18
Vendor Types	18
Waiting List.....	18
Waiting List Job	18
Wall Clock.....	18
Websites.....	18
Work Order	18

A

Account Access Icon The icon at the far top right of the SA Header, which shows either the avatar of a currently logged in user, or a generic profile image.



Account Quicklinks A popup that appears when you hover over your avatar in the Header. From here, you can access important account and company information, and sign out of SA.

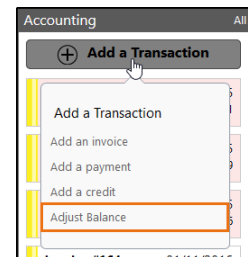


“Add” (+) Located in the Header, in the shape of a plus sign. Hover over this to quickly add new items from the screen you’re on.



Adjust Balance An accounting item that can be added to a client’s account to reconcile the client’s balance. This function cannot be applied to an Invoice and should be used only if necessary.

Adjustments are primarily used for transactions that do not sync from QuickBooks such as journal entries or payment discounts.



Alert Alerts appear in the Quick Access icons at the top right of the Header. If there are any active, unread alerts, a circled red number appears.

Alerts can appear when Invoices are mailed, credit cards are charged, a new lead is entered, a new client is entered, a new estimate is accepted, a new contact Request is submitted (through the client Portal), a new Estimate Request is submitted (through an integrated website), or a new To Do is assigned.



Asset Any non-human resource that a member uses to do business, for example, vehicles or lawn equipment.

Asset Tracking Found under “Team” in the Navigation Bar, this is where Assets such as machinery and equipment can be entered. Each item has a space to enter purchase and sales information for future reference.

Asset Type Found at **Settings > Asset Types**, these are the assets that must be set up for use with the Snow system. Assets entered here will appear on Snow jobs so they can be priced differently based on equipment used.

Audit Trail

The history of changes made to an item in SA. The Audit Trail displays the date and time, the change made, and the user who made the modification.



Audit Trail		
Change History		
Date/Time	Description	Changed By

Automations

A Pro Plus feature that lets you create a series of events or tasks that will automatically begin based on triggers and conditions. For example, if an employee adds a tag to a client's account then an email is automatically sent to the client.

B**Banner**

A message that appears at the top of a Service Autopilot window, typically displaying important updates. The banner remains on the screen until you dismiss it by clicking the **X**.

Biweekly

In Master schedules, this term means every two weeks. The Odd/Even week designations that appear on Master schedules refer to each week of the year if they were numbered from 1 to 52. The first week of January would be Odd, the second week of January would be Even. This pattern would continue regardless of the first date selected on the schedule.

Beta

New parts of SA that are subject to testing and improvements before being fully incorporated into SA.

Branch

In Automations, an IF event can be edited to have different outcomes based on different conditions, presented as ELSE conditions. We call this branching.

Branches

A feature that allows you to assign a primary work location to employees and clients. For example, if a lawn care company had two separate offices that serve two separate client bases, branches would be used so that resources have access to only the clients they service. Once branches are assigned, they cannot be removed, only changed. Branches are enabled at **Settings > Company Information > Settings**.

Budgeted Hours (B. Hrs)

This is the estimated length of time a job will take multiplied by the number of people doing the job. Another way to calculate budgeted hours is to estimate how long it would take one person to do the job. **B. Hrs** is an important calculation in accurate job costing.

Budgeted Hours Override A tool available on jobs to help calculate the budgeted hours and the rate to charge based on a benchmark rate. This tool also gives you the ability to override **B. Hrs** for different times of the year.

For example, you want to give a mow team more time during the rainy season, so from March 1 to May 31, on a particular job, you may estimate .5 hours (30 minutes) to complete the job, but during the rest of the season it may take them only .33 hours (20 minutes) to complete the job. This override will appear on the Mobile App and on printed Route Sheets. Each will divide the hours by the number of people on the team to estimate how much time it should take to complete the job. This override also reflects on job costing.

C

Calendar Found under the “Scheduling” tab in the Navigation Bar, a chart showing a span of time. Jobs appear on the Calendar as well as To Do’s and Calendar events.

Calendar Event An item that can be added to the Calendar for any event that does not directly involve clients, as it will not appear on the Dispatch Board. A Calendar event might be used for personal appointments or office meetings.

Call An item that can be logged for inbound and outbound calls. For example, an employee can log that a client has called the office, or that they called a client. Calls can be assigned to other employees with a date or date range to appear on the calendar.

Cancel Client This action makes the client inactive and places them on the “Former clients” tab. Clients can be cancelled from the Client List (from the **Actions** dropdown) or from a client’s account screen. Inactive clients can be reactivated at any time.

Certified Advisors (CA) A group of select product and industry experts who have been tested on their expertise in using Service Autopilot can offer guidance and exclusive content to new SA members. CAs consult with you upon request to set up and use the system more efficiently, using the level of access that you agree to. For more information, go to **Help > Certified Advisors**.

Chemical Tracking A system to track chemical products used on jobs and to give instructions to clients about chemicals used on the job, usually to comply with local and state laws.

Client The customers of SA Members.

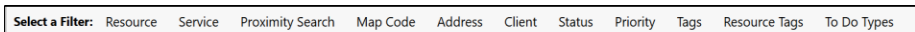
Client Account Screen An individual client’s page containing all information related to that client. This is also where client information can be edited.

Client Edit Screen	From a client account screen, the “Edit” link next to the name opens this overlay, where you can change the client’s account information.
Client List	This screen displays a comprehensive list of clients and former clients that you can filter to customize views. The Client List screen is at CRM > Clients .
Client Portal	A website where clients can log in to view Invoices, make payments, update account information, and make requests. This is an add-on feature with an additional subscription.
Client Source	How a client finds your company to contact you for service. “Client Source” is a field on the Client Account screen. To customize it, go to Settings > Client Source .
Condition	In Automations, the specific set of circumstances that cause another action to take place.
Contact	An additional person or entity who can be reached regarding a client’s property. A contact might be a spouse or child of a property owner.
Contact Types	A category for a contact that indicates the contact’s relationship to the property or property owner. You can customize contact types at Settings > Contact Types .
Contract	Any collection of services billed to a client at a predetermined, monthly amount, also known as “installment billing.”
Credit	An accounting item that can be applied to an invoice to reconcile the balance. Credits are similar to a payment, except that typically, money was not received.
CRM	<i>Customer Relationship Management</i> is a strategy for managing your organization’s relationships and interactions with customers and potential customers.
Custom Fields	Under Settings > CRM , you can add fields that include specific information about clients, leads, employees, or vendors. Examples include a gate code or property measurement for clients, or t-shirt size for employees.
Custom Package	A Waiting List job or collection of Waiting List jobs that you can put together to renew on an individual client basis, not based on the calendar year. Custom packages are renewable monthly, seasonally, or according to your preference. You can customize this type of package to the client, so if you are doing renewals, then each client is renewed one at a time. Custom packages are good for situations when a client will receive a set number of services regardless of what time of the year the work is started.

Custom Recurring Schedule	A schedule for a client’s recurring job that follows a pattern such as every week, every two weeks, or the first of day of the month.
D	
Damage Cases	A type of To Do used to document damages done to a client’s property during service. All Damage Cases are listed separately from other To Do’s at CRM > Damage Cases .
Dashboard	This multi-tab screen is a customizable collection of company data, including sales information, email delivery stats, Key Performance Indicators, and other financial information. The Dashboard is at Reports > Report Center . You can create multiple tabs and customize them by adding panels of data.
Dialog	Any popup with limited options for action, usually three or fewer. An overlay has a larger scope.
Discount	An item that can be added to an estimate, job, or Invoice to reduce the total price by either a percentage or a dollar amount. You can create and edit discounts at Settings > Accounting > Discounts .
Dispatch Board	The center of scheduling-based activities in SA where you can view jobs for a day or date range, manipulate those jobs, route jobs, and perform other actions related to the daily workflow.
Dispatch Calendar	The same data displayed on the Dispatch Board but in a graphical calendar format. The Dispatch Calendar is like a hybrid of the Calendar and the Dispatch Board. You can find it at Scheduling > Dispatch Calendar . Because this is an advanced feature, you’re required to successfully complete the webinar at Help > On Demand Classes before functionality is enabled.
Document	Templates that can be used for creating emails, letters, text messages and estimates. You can access documents at Settings > CRM > Documents .
E	
Email Activity	A list of all emails sent through SA. This screen shows requests, delivery statistics, and how many emails were opened at a glance. Emails sent through Automations will display on this screen as well as within the Automation Builder. Email Activity is at Marketing > Email Activity .
Employee	A resource in SA who is a member’s W-2 employee, not a subcontractor.
Employee Time Off	A list of requests made by employees for time off work. From this screen, you can make new requests or manage existing requests. Requests can also be created from the employee account screen on the “My Time Off Requests” tab. The Employee Time Off screen is at Settings > Employee Time Off .

Estimate	A document that you send to a client containing a service description and pricing information which the client can accept or reject.
Estimate Grid	The part of an Estimate Document that displays the services and products offered to a client or lead. You can add and edit estimate grids at Settings > Estimate Grids .
Estimate Reasons	Reasons why an estimate would be won or lost. These can be set internally, or a client/lead can be required to select one when accepting an estimate electronically. You can customize estimate reasons at Settings > CRM > Estimate Reasons .
Estimate Settings	Under Settings > Estimate Settings , these are options that affect all estimates.
Estimate Stages	Different statuses for estimates such as Draft, Won, or Lost. You can customize these at Settings > Estimate States .
Event	In Automations, an event is an action that takes place only under certain circumstances set up in the sequence rules. Rules trigger events.
Expenses	An accounting item that can be added to signify money paid by the company for something. An expense can be added to jobs and must be associated with a vendor. You also can bill expenses to a client.

F

Field	Any place in the system where a user can type input data.
Filters	Options across the top of a screen that allow you narrow down what the screen displays by selecting criteria by attributes. On the Dispatch Board, these might include resource, service, or Tags: 
Form	An online-only document that gathers specific, customized information about clients, leads, jobs, assets, or employees. Forms are a versatile tool that can be used to improve processes and services, create ratings for a company, and trigger Automations, among many other uses.
Full User	A user who can log into both Service Autopilot and the Service Autopilot mobile apps. See also <i>Mobile Only User</i> .

G

Grid	The portion of any screen showing the results of a query. This is the “board” part of the Dispatch Board or the “list” part of the client List. The grid layout is similar to a spreadsheet with rows and columns.
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H**Header**

The top portion of all SA screens that includes your company display name, the Search Bar, and the Quick Access icons.

**I****Installed Product**

A more costly or long-lasting item for which you need to keep warranty or purchase data or need to regularly maintain for a client. An example might be an irrigation system or a pool pump. The overlay for installed products contains fields for information like the date of installation, product description, serial number, and warranty information. This data can be kept for reference on the client account screen.

Invoice

A record of services and products supplied, usually to request payment from a client. Contract Invoices are automatically created based on the parameters set in the contract for a client. Snow invoices are manually created after Snow jobs and the Snow event are complete.

J**Job**

A service or services with a schedule attached. The three requirements to save a job are that it must be assigned to a client, a schedule must be assigned to the job, and a service must be assigned to the job.

Job Comments

A comment that can be added to a job from the SA Mobile App or the Dispatch Board to help field and office employees communicate.

Job Editor

The overlay that contains information about a job. It appears when you click on a job from a client screen or the Dispatch Board.

Job Notes

Information that you can add to job instances or master jobs that are job-specific. Job notes appear on Route Sheets and the Mobile App for the field resources to see, usually before the job is started.

Job Overlay

This overlay contains information related to a job including Accounting, Scheduling, Attachments, Notes, Details, Forms, and Products.

L

Lead	A potential client. Leads have fewer options in SA because they have not yet agreed to work from your company. For instance, you cannot schedule jobs, create Invoices, or accept payments for leads.
Legacy	The word “Legacy” before an item in SA indicates an older version of that feature. We sometimes phase out older designs over time to give Members a chance to get used to the new versions.
Legacy Reports	Older versions of pre-built reports that were available before the Report Center was released. All reports listed on this page are still functional but are no longer maintained.

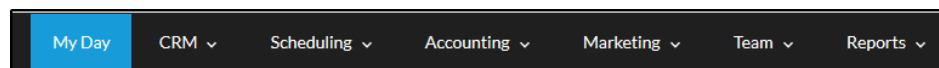
M

Map Code	An alphanumeric code that indicates a client or lead on a map. Map Codes are not based on any map in SA and are completely customizable. You might use Map Codes to reference different home owner’s associations or subdivisions.
Map Code Colors	Each Map Code can be assigned a color at Settings > Map Code Colors . You can see these colors on the Calendar for clients who both have jobs and a Map Code assigned to them.
Marketplace	Service Autopilot’s digital warehouse of helpful tools and templates. SA and Certified Advisors provide items like document templates and automations that you can download and customize.
Master Custom Package	A template for a custom package that can be created and applied to clients. Custom package rounds are based on when a client signs up, not the calendar year. See also Custom Package .
Master Job	The job record that appears on a client account screen. It appears under Add a Job or All History . This is different from the job instance, which you access on the Dispatch Board.
Master Package	A job consisting of one or more waiting list jobs (also called rounds or applications), which are based on the calendar year. Master packages are renewed on an annual basis.
Master Route	A type of route that can be completely customized and saved for future use, regardless of schedule or service. Master routes are useful for any jobs on which work needs to be done in a specific order, regardless of its proximity to the next job.

Master Schedule	A set of manually selected calendar dates that, once created, you can select on a recurring job. When a recurring job is created, each selected date on the calendar becomes a job on the Dispatch Board.
Member	Any SA user.
Mobile App	Service Autopilot has two mobile applications. The Service Autopilot Mobile App has many of the tools available in SA including estimates and invoices. The SA Team app is a streamlined version for completing jobs in the field.
Mobile Only User	An employee or vendor who has access only to the Mobile Apps or Team app, not the full Service Autopilot site.
My Day Page	The first screen you see when logging into Service Autopilot. It contains announcements from SA, Calendar events, Calls, To Do's, Notifications, the Office Time Clock, and training materials for getting started in SA.
My Account Page	A page under the Account Access Icon that you can visit to view current subscriptions, update your credit card, and add subscriptions.

N

Navigation Bar	The header across the top of Service Autopilot gives access to the main areas of SA: My Day , CRM , Scheduling , Accounting , Marketing , Team , and Reports .
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Non-Billable Items	Different statuses that you can select on the mobile apps to appear on timesheets and summarized under “Non-Billable Time.” An example might be “Fuel Stop” or “Coffee Break.” You can customize these at Settings > Non-Billable Items .
Notes to Client	Notes that can be added to jobs from the Dispatch Board. These appear on the SA mobile apps and Route Sheets.


O

On Demand Job	A type of job used with the Snow system for jobs that occur during a given event rather than on a specific calendar date. On Demand jobs must be created at the client level.
One Time Job	A job performed once on a specific date. An example would be a repair job or installation.
Overlay	Overlays appear when you click on some aspect of a screen. They let you do a larger task related to an item, without going to a new page. Overlays generally contain complex information, such as setting up a job or making a payment.

P

Package	A series of jobs, frequently Waiting List jobs, performed for a client over an extended period, scheduled as rounds. Packages are created on a company level and then assigned to clients. There are two types of packages: Master and Custom.
Package job	A series of Waiting List jobs that are bundled together, can be assigned to multiple clients, and are renewed annually. Examples would be fertilization or mosquito control services.
Payment	Funds received from a client, usually associated with an Invoice. Payments affect a client's account balance.
Payroll Report	Found at Accounting > Payroll Report , this screen takes information from Timesheets and calculates hours that would be used for payroll purposes. You can export this information for use in other payroll software.
Pipeline	In Automations, this is the timeline or progression chart, showing which clients are at which point in different sequences of an Automation.
Product	Any materials used on a job, such as chemicals, mulch, or cleaning products, for which there is no sale or warranty information that you need to keep for reference. For products with sale or warranty information, see Installed Product .
Projects	An interface through which you can build and work a large, complicated job that may require multiple services, down-payments, phases of completion, and flexible dates. Projects are typically much more complicated than Multi-Day jobs or Work Orders. It is an advanced feature that requires successfully completing the webinar at Help > On Demand Classes before functionality is enabled.
Purchase Order	A document associated with and given to vendors to purchase products or services.

Q

Quick Add		The button at the top right of the header where you can quickly add a client, lead, estimate, To Do, call, job, or package.
QuickBooks Online		A cloud-based version of QuickBooks accounting software that syncs with new Service Autopilot accounts.
QuickBooks Sync		A full two-way transfer of data between SA and QuickBooks Online or QuickBooks Desktop for Windows.

QuickBooks Sync Connector

The program through which the QuickBooks Sync is run for Members who sync with QuickBooks Desktop (for Windows). The QB Sync Connector can be installed on only one computer and a shortcut icon will be installed on the desktop of that computer.

**R****Rate Matrix**

An automatic pricing calculator tool that you can use to create and customize rates for each service.

ReCAPTCHA

A user authentication tool by Google available on forms and email throughout SA. The reCAPTCHA badge will appear on any page where a Form is embedded. The reCAPTCHA may ask users to verify that they are not bots, but it generally validates users without interrupting their experience.

Recurring Job

A job performed on a pattern of specific dates, such as every Tuesday or every other Friday. Examples include weekly lawn maintenance or biweekly cleaning.

Report Center

A centralized area for all Reports and analytics about your company. Here, you can access pre-built SA Reports and the SA Dashboard, as well as create custom Analyses, Reports, and Dashboards that can be set to a schedule to be emailed.

Resource

Anyone who can be assigned work—an employee, vendor (including contractors), or a team.

Resource Note Types

Specific types of compliments or complaints that can be entered onto a resource's account. You can customize these at **Settings > Scheduling > Resource Note Types**.

Resource Timeslot

On the Dispatch Calendar, a period during which you can schedule work for a resource.

Round

An instance of a waiting list job from a package.

Route Sheets

Printable pages with details of a resource's daily work, as well as the order of their jobs. You can print Route Sheets from the Dispatch Board by clicking **Print** after dispatching jobs.

Route Sheet & Work Order Formats

Different pre-built formats for Route Sheets and Work Orders. You can select any format at **Settings > Route Sheet & Work Order Formats** will apply to any and all Route Sheets that are printed from the Dispatch Board.

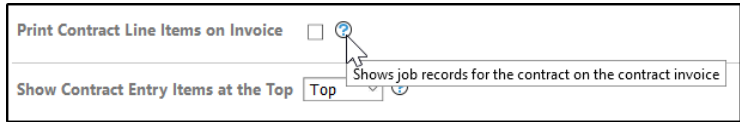
Rules

In Automations, Rules are a collection of triggers and conditions that begin and end a sequence.

S

Sales Campaigns	A letter that can be used as marketing material to upsell to clients, recommend new services, or fill in the gaps on existing recurring services or packages. Because Sales Campaigns are an advanced feature, you're required to successfully complete the webinar at Help > On Demand Classes before this functionality is enabled.
Sales Rep	A resource responsible for selling services or products to clients. Once they are designated, a Sales Rep can be assigned to a client, job, or estimate for reporting purposes. You can find a list of all Sales Reps at Settings > Scheduling > Sales Rep .
Sequence	In Automations, a series of events that occur based on rules that you create.
Service	Billable work that a company performs. Once scheduled, a service becomes a job.
Service Mode	There are three types of Service Modes: <i>Flat Rate</i> - a set fee regardless of time spent on the job <i>Hourly</i> - the rate for a service is multiplied by the staff hours spent on a job <i>Per Unit</i> - a fee that multiplies the quantity by the rate
Smart Maps	A more advanced Maps function that allows you to create property measurements, optimize routes, target leads, and maximize yield on dispatched jobs. Smart Maps requires an additional subscription to the Pro or Pro Plus membership.
Snow Dispatch Board	A job board, like the Dispatch Board, used to manage On Demand (Snow) jobs.
Snow Invoicing	Under Accounting > Snow Invoicing , this is where you manually generate Snow Invoices after a completed Snow event.
Subscriptions	A set amount that is billed to a client every month but is not associated with a job. This also is a selection on the "Accounting" tab of the Navigation Bar that displays all active subscriptions.
Sub Status	An additional status designation that can be added to a job. You might use a Sub Status on a Waiting List job that is awaiting parts or a subcontractor's availability. You can view a job's sub status on the Waiting List or Dispatch Board. Customize Sub Statuses at Settings > Scheduling > Sub Status .

T

- Tags** A customizable marker that can be added to a client or lead account. Tags are a powerful tool that you can use in filtering for clients, leads, or jobs. They can also be used as triggers in Automations.
- Team** A *team* is considered a resource in SA, for ease of scheduling. It's a container for any number of employees or vendors. In most cases, if multiple people are going out on a job, they will be assigned to a team.
- Team App** A streamlined version of the Mobile App designed to help field employees view and complete work.
- Team Directory** A list of all active employees and vendors that displays a thumbnail image, resource type, SA User type, and contact information. You can find the team Directory at **Team > Team Directory**.
- Team Tracking** A map that displays GPS tracking information for Mobile Users. To access team tracking, go to **Team > Team Tracking**.
- Template** Saved versions of jobs, estimates, emails, letters, or other documents that you can save for repeated use in the future.
- Timeline** A history of calls, To Do's, touchpoints, emails, notes, forms, and Automations associated with a client or lead. You can see the Timeline on client and lead account screens.
- Timesheets** A record of time logs for all resources. Time can be input on the Mobile App, Team app, Wall Clock, Dispatch Board, or the Timesheet itself. You can find Timesheets at **Accounting > Timesheets**.
- To Do** A non-billable task assigned to one or more resources. To Do's display in several places in SA including the Calendar, Dispatch Board, and My Day screens.
- Tool Tip** A "?" icon in SA that gives information about the part of the screen you're using. Hover over a Tool Tip to see the information.
- 
- Touchpoint** Points of contact with clients or leads. You can add and edit Touchpoint Status Items at **Settings > CRM > Touchpoint Status**.
- Trigger** In Automations, an event that has a specific condition associated with it. Meeting the trigger condition causes another action to take place.


U

- Unit** For the *Per Unit service Mode*, the Unit refers to the “Qty” field on a job or Invoice.
- User** Any person with access to SA.
- User Roles & Rights** Permissions for SA Users. You can customize these at **Settings > User Roles & Rights**.

V

- Validation** Rules for what fields are required when creating a client, lead, or job. You can set Validation Rules at **Settings > Company > Validation**.
- Vendor** A resource who is not a w-2 employee such as a sub-contractor. Vendors can also be entities such as retail or wholesale suppliers, or Sales Tax agencies.
- Vendor Types** Categories for vendors such as a contractor or sales tax agency. You can customize these at **Settings > Scheduling > Vendor Types**.

W

- Waiting List** A different view of the Dispatch Board that contains jobs with a date range instead of a specific scheduled date. Once scheduled, a Waiting List job will move to the Dispatch Board.
- Waiting List Job** A job that’s performed one time but within a date range rather than on a specific date. An example would be an installation that needs to be done by a certain point but the schedule date is flexible.
- Wall Clock** This feature lets you set up a spare laptop or tablet for clocking in at the office. When each resource uses a PIN and clicks **Clock In, Start/End Break, or Clock Out**, the Wall Clock creates a record for the day, as well as an audit record.
The time record will appear on the resource’s Timesheet.
- 
- Websites** A Legacy feature where you can maintain public websites that are integrated with SA.
- Work Order** A job containing two or more services that are grouped together on the Dispatch Board. Work Orders are highlighted in blue on the Dispatch Board.