

Multi-Day Job Functionality

Overview

In the 10/4/2019 release, we made some changes to Multi-Day Job functionality. If you're unfamiliar with this feature, this is a great opportunity to learn. This document will take you through everything regarding Multi-Day and make notes along the way about the most recent changes.

Updates – At a Glance

- Multi-Day Jobs will automatically be scheduled based on the maximum hours per day, the number of people on the job, and the budgeted hours for the job. To change the number of days, you would need to change one of these variables. You will no longer be able to manipulate the number of days on a job.
- You will be able to see the revenue earned each day based on the time worked on that day. This helps you make sure that you are making enough money daily to complete the project on budget.
- You'll be able to see both your daily time variance and running time variance. This helps you compare daily progress to your original plan.

Settings and Setup

Company Settings

To ensure that Multi-Day Jobs are calculated correctly, you will need to make sure that your work days and hours are set correctly in your Company Settings. The Company Settings are the default for all Multi-Day Jobs. Days and hours can be customized at the Job level, if needed.

To edit your Company Settings, use the following steps:

1. Go to **Settings > Company Information**.
2. Select the “Settings” tab.
3. Near the bottom of the overlay, set the **Maximum Man Hours per Day**.



A screenshot of a form field labeled "Maximum Man Hours Per Day". The field contains the number "8" and has a question mark icon to its right.

4. Select days in the **Multi-day Include Days** dropdown list.



A screenshot of a dropdown menu labeled "Multi-day Include Days". The menu shows "6 selected" and has a question mark icon to its right.

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

The **Maximum Man Hours per Day** is the total maximum hours that a single Resource assigned to a Job can work in one day. With Multi-Day Jobs, you might have a rotation of crews that work around the clock until the job is complete. In this case, the Maximum Man Hours per Day might be 24 because there is always a Resource working every hour of the day. Think of this number as the typical time the first worker clocks in to the typical time the last worker clocks out.

The **Multi-day Include Days** are all days of the week resources will work on a Job. If your Resources never work on Sundays, you would include all days except Sunday on this list.

Create a Multi-Day Job

Any type of job (One-Time, Recurring, Waiting List, or Package) in Service Autopilot can be made into a Multi-Day Job. This should be done when the Job is first created before you ever click **Save** on the Job overlay. Ideally, you'll want to have the Job planned out before you create it in SA. You should know who the Job is for, what Service(s) will be done, the total amount of money you will charge, the total amount of time you'll need to budget to complete the Job, and the number of workers you will need on a daily basis. Think of the Master Job record like a master plan or the most realistic way the Job will be completed.

One important consideration before you create a Multi-Day Job is how definite the start date of the project is. For example, if you're supposed to start an outdoor project during a rainy season, there's a good chance the first day could get rained out. To avoid additional work later, you would want to schedule this as a Waiting List Job. Then, when the forecast is clear you can move that job over to the Dispatch Board.

To create a Multi-Day Job, use the following steps:

1. Click the **Quick Add** button and select "Job".
2. Select **One-Time** or **Waiting List**. This will open the New Job overlay.
3. If you were not previously on a Client Account, select a **Client**.
4. Select a **Service**.
5. Modify the **Start Date**, if needed, for a One-Time Job. Add a **Complete** by date for a Waiting List Job. The Start Date will default to the current date.
6. Select a **Resource** to assign the job. The **Team Size** defaults to 1 even if you do not assign the job. The Team Size will recalculate based on the **Default Team Assignment**.
7. Enter a **Rate**.
8. Enter the **B. Hrs**. This is the total amount of hours that you expect it to take to complete the job.
9. If you don't know the specific assignment, change the team size to reflect the number of workers you would typically have on the job.
10. Under **Details > Multi-Day**, change the **Max Hours Per Day** and **Multi-day Include Days**, if needed.

The screenshot shows the 'New One Time Job' overlay with the following fields:

- Job**
 - Work Order #: Enter value or system will generate on save
 - Call Ahead:
 - Arrival Window: 0.00 (Hours)
 - Chemical Areas Treated: Select Areas Treated
- Sales**
 - Sales Rep: Select Sales Person...
 - Source: Select Source...
 - CSR: Select CSR...
 - Don't Apply Min Amount:
- Accounting**
 - Payment Type: Check
 - PO Number: [Empty]
 - Date Sold: 10/02/2019
 - When to Invoice: Invoice Monthly
 - Invoice Separately: (Prevents other jobs from being invoiced with this job)
- Multi-Day** (highlighted with a green box)
 - Max Hours Per Day: 8
 - Multi-day Include Days: 6 selected

Buttons: Save or Cancel

11. Click **Save**.

If you're using the Team Size default, as soon as the B. Hrs on the Job exceeds the Max Hours Per Day you'll see the **Days** field automatically update. This is the formula for how the Number of Days is calculated:

$$\text{Number of Days} = (\text{Budgeted Hours}) / [(\text{Maximum Man Hours per Day}) \times (\text{Team Size})]$$

Example: 40 B. Hrs, / [(8 Maximum Man Hours per Day) x (Team Size 2)] = 3 Days

Number of Days is always rounded up. That just means that there are no decimals used in the Days calculation. Even if the resulting number in the equation is over by .01 it will result in an additional day.

Dispatch Board Operations

Schedule a Multi-Day Job

If you create a One-Time Job as a Multi-Day Job, the Job will automatically be scheduled on the Dispatch Board based on the Start Date, number of days, and Multi-Day Include Days:

Leaf Cleanup (One Time) for Carlene Adams

Contract: Not part of a contract

Create a Work Order? Yes No

Is this job complete? Yes No

History: No history items found.

Upcoming (LEAF): 10/2/2019 Amt: 200.00, B.Hrs: 20.00

Service	Start Date	Assigned To	Qty	Rate	B. Hrs	Team Size	Days	Start	End
Leaf Cleanup	10/01/2019	Select Resource(s)	1.00	400.00	20.00	2	2		

Add Service

Save or Cancel

Service Total	400.00
Product Total	0.00
Subtotal	400.00
Tax	33.00
Total	433.00

In this example, the first day of the Job would be 10/1 and the second day would be 10/2. Both of those dates are weekdays that would typically be worked. If, for example, you do not schedule work on weekends but a three-day job starts on a Friday, the next two days would be scheduled on Monday and Tuesday.

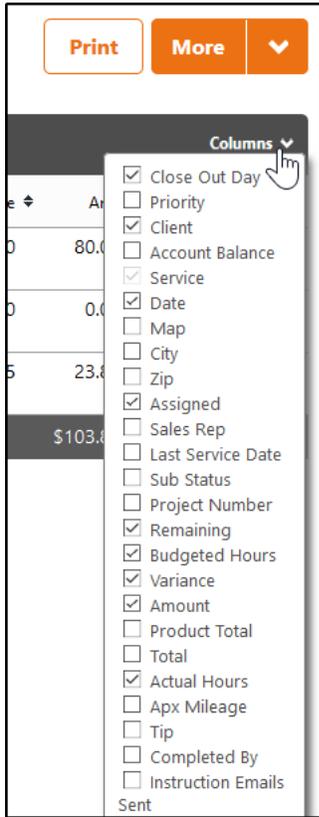
If you create a Waiting List Job as a Multi-Day Job, it will remain on the Waiting List until you move the job to the Dispatch Board. Once you schedule the job, it will follow the same rules as a One-Time job.

Dispatch Board Columns

There are a number of columns you can enable on your Dispatch Board that have particular relevance to Multi-Day Jobs. You may want to create a view specifically for Multi-Day Jobs that includes, at a minimum, the following columns:

- **Remaining** – Shows how many hours are left on the Job based on B. Hrs and actual time worked.
- **B. Hours** – shows the budgeted hours per day based on the number of days, Team Size, Maximum Man Hours per Day, and actual hours worked on the previous day.
- **Actual** – shows the total actual time worked on that day. For example, if three people worked for five hours each, the column would show “15”.
- **Variance** – shows two numbers, the **Daily Variance** and **Running Variance** (in parenthesis)
 - **Daily Variance** – the top number displayed. This is actual hours minus B. Hrs for the day.
 - **Running Variance** – the bottom number in parenthesis. This is how far under or over time you are on the entire project as of that day. Think of this number as a comparison against your original plan.
- **Men** – The number of people assigned to an instance of the job. When time is logged, it shows the actual number of Resources who clocked time regardless of the Assignment. This column is enabled by selecting **Close Out Day** on the Column dropdown list.
- **Amount** – the daily amount earned on the job based on the total job amount and daily B. Hrs OR actual time logged.
 - **Example:** A job for \$1000 will last two days. If there are 15 B. Hrs on day 1 and 5 B. Hrs on day 2, the Amount for day 1 would be \$750 and the Amount on day 2 would be \$250. For the same job, if you logged 10 hours on the first day, the amount on day 1 would be \$500.

With these columns enabled, your Columns dropdown list will look something like this:



With those selections, you would see those columns displayed like this:

Order	Client	Service	Date	Assigned	Start	End	Remaining	B Hrs	Actual	Variance	Hours	Men	Qty	Rate	Amt
0	Carlene Adams 259 Meadow Rd	LEAF	10/2/2019				20.00	4.00	0.00	-4.00 (0.00)	0.00	2	1.0	400.00	80.00
0	Jones, Tom 2917 Galaxie Rd	LM	10/2/2019				0.00	0.00	0.00	0.00	0.00	0	1.0	75.00	0.00
0	Williams, Katrine 2140 E Campbell Rd	PS3	10/2/2019				0.00	0.00	0.00	0.00	0.00	0	3.0	7.95	23.85
							4.00	0.00	0.00						\$103.85

Job Details Overlay

On the Job Details overlay you will notice an additional blue box that other jobs do not have:

Leaf Cleanup for Carlene Adams More ▾

Schedule Date: 10/02/2019 Appointment Start: End:

Status: Pending Sub Status:

Assigned To: Priority: Normal ▾

[View additional contacts](#)

Job Notes | Job Comments | Notes to Client | Invoice Desc.

Job Note

Billing Mode	Per Unit
Contract	Not part of a contract-
B. Hours	20.00
Hours	0.00
Men (Total)	0
Qty	1.00
Rate	400.00
Expenses	0.00
\$ 400.00 Amount	

Show: [Products](#), [Attachments](#), [Forms](#)

or

The **# of Days** field is a fixed number so you can see at a glance how many days the job lasts. **Remaining hours** and **Remaining revenue** update as time is logged on the job.

Completing Jobs

All instances of a Multi-Day Job work together as a single job. As such, certain changes such as status changes affect all instances of the job. This is particularly important when marking Multi-Day Jobs as complete. It's best to not complete any job instances until the last day when all work is complete. If you were to complete the job before the last instance, no job history will be recorded past the point where the job was completed.

When you go to mark an instance as complete from the Dispatch Board, you will receive this prompt:

Complete Multi-day Jobs ✕

You are marking multi-day jobs as complete.
Please specify the date you completed these jobs.

Date:

or

If the date you select on this prompt is before the last job instance, any instances after that date will be removed from the Dispatch Board. Any time logged will be retained but you will not have any of the budgeting or job costing information for those days.

When the Invoice for a Multi-Day Job is generated, there will be one line item for each completed Service regardless of how many days it took to complete the Job. If your Multi-Day Job only had one Service that means it was not a Work Order. The Invoice would only show a single line item for that single Service. If your Multi-Day Job was a Work Order (it had multiple Services), each Service would show as a separate line item on the Invoice.

Extend/Shorten a Multi-Day Job

You do have the option on the Dispatch Board to extend or shorten a Multi-Day Job. This is helpful for scenarios where actual work doesn't quite go to plan. Both options are available from the **Actions** dropdown list.

If, for example, you logged hours on the last day of the job but the work wasn't finished. You could extend the job by as many days as you need. This would create additional job instances tacked onto the last day of the job. Any remaining Budgeted Hours (B. Hrs) will be allocated when the job is extended. If you were out of B. Hrs before extending the job, there will not be any B. Hrs allocated to additional job instances.

Move (Reschedule) a Multi-Day Job

One-Time Multi-Day Jobs

If you need to move a One-Time Multi-Day Job once it's been scheduled, this can be an inconvenience. Regardless of the Job Status, each job instance would need to be rescheduled. For example, let's say you had a job scheduled on Monday/Tuesday/Wednesday but it now needs to start on Wednesday. Each instance needs to be moved because the job costing allocations are different for each day. Monday's instance would be moved to Wednesday, Tuesday's to Thursday, and Wednesday's to Friday. A scenario like this could become very confusing. If you anticipate this happening frequently, consider using Waiting List jobs rather than One-Time jobs.

Waiting List Multi-Day Jobs

The advantage to using Waiting List jobs for Multi-Day jobs is that they can be sent back to the Waiting List from the Dispatch Board. If you need to re-schedule one of these jobs, you can send the job back to the Waiting List then reschedule all occurrences with only a few clicks from the Waiting List. This would avoid the confusing shuffling that you can have with One-Time jobs.

If you have a scenario where you don't know exactly when you're going to start a job, it's best to use a Waiting List Job. These might be scenarios where weather is a factor or you have to wait on equipment or personnel that you normally don't have on hand. This way, you'd have the added advantage to being able to easily reschedule the job without any other loss of functionality.