LEGACY MOBILE APP
FIELD USERS GUIDE
V3

Contents

About the Legacy App

The Service Autopilot Legacy app, originally called the Mobile App, works on Apple and Android devices. You must have a Full or Mobile-Only user subscription with your Service Autopilot account.

"There's an app for that®"

--Apple

The Legacy App Workflow

Start the Day

To clock in from the field:

1. Log in to the Legacy app, go to the **My Schedule** screen, then tap your photo to clock in.
2. To see your jobs for the day, tap either the **Calendar** or **My Schedule**.
3. Tap a job to open it. Each job shows the client name, address, and scheduled time.
4. If you need to contact the client to notify them that you are coming, tap the button on the right of their name, and choose an option to call, text, or email them.
5. Tap **Map** to bring up the map application on your phone.
6. Tap the truck icon when you are ready to drive to the work site.
7. When you arrive, you can tap on the map to bring up the client's name and see a description of the job or services needed. (Older versions of the Legacy app don't require you to tap the map.)
8. Tap **Start Job**. Time will start tracking.
9. To take a break, tap your photo and click **Start Break**.
10. To end your break, tap your photo and click **Stop Break**.
11. When the job is complete, tap **Stop Job** and **Yes** at the confirmation message.
12. If you have the rights to access invoices, a prompt asks if you want to view the invoice for the job.

If you tap **Yes**, the invoice appears, and you can show this to the client.
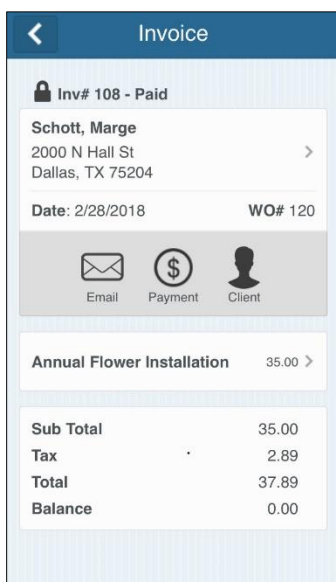
If you have the rights, there are more options with the invoice:

To email the invoice to the client, tap the **Email** icon, then tap **Send**.

To receive the payment in person, tap the **Payment** option, then tap **Enter Payment**.

The **Payment Amount** shown is the balance owed. Edit this amount if needed, then select a **Payment Type** and enter the supporting information about the payment.
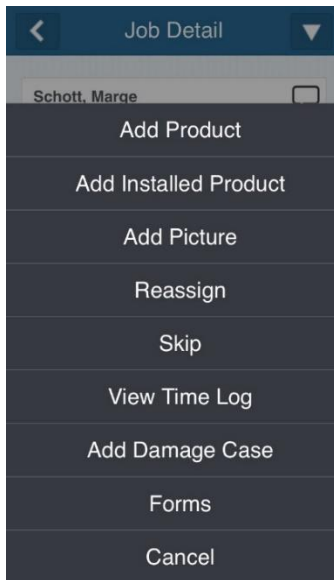
The **Memo** field is optional.

Tap **Charge** to save the payment information.

Add a Product

On the **Job Detail** screen, you can add a product for the current job.

1. Go to the job and tap it to see the **Job Detail** screen.

2. Tap **Options > Add Product** or **Add Installed Product**.

   Note: A *product* is any physical item you provide on a job, such as mulch. An *installed product* is a more costly or long-lasting item for which you need to keep warranty or purchase data.

3. To search for installed products, start typing in the search box, then click **Search**. If you type in a regular product, you'll see a list of your inventory and non-inventory products.

4. Tap to select from the list of products.

5. Type the **Quantity**, **Rate**, and **Cost**.

6. Tap **Yes** to add another product or **No** if you are finished.

Add Comments About a Job or Client

1. Tap **Job Comments** and type your note in the field.

2. Tap **Save**.
   Your comments appear on the Service Autopilot Dispatch Board and are automatically saved with the job record.

Get a Client's Signature on a Work Order

1. Go to the job and tap it to see the **Job Detail** screen.

2. Tap **View Work Order**.

3. Tap **Sign**. A signature box appears where the client can sign on your phone screen.

4. Tap **Save**.

5. To email the signed work order to the client, click the Email icon.

6. If the email address needs to change, fill in the field.

7. If the email address is correct, tap **OK**. The invoice will be emailed to the client.

8. On the **My Schedule** screen, tap your photo, then tap **Clock Out**.

Crew Leader Activities on the Legacy App

On the **My Schedule** screen, you can do any of the following:
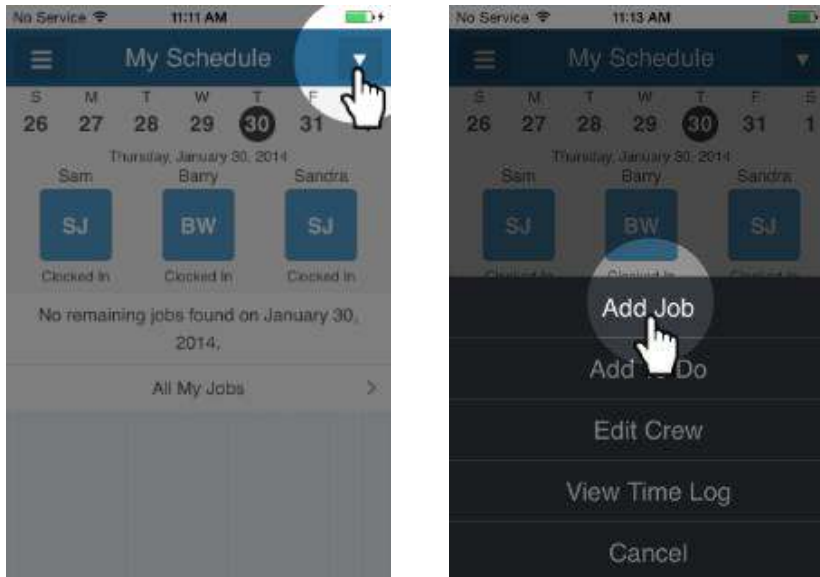
- **Clock in** - Tap a team member's photo to clock them in.

- **Start Driving** – Tap the truck icon--Start Drive--to show you are now going on the road.

- **Make a Call** - the Phone icon contains phone, text, and email options if needed. Tap the **Call** option to make a phone call through your cell phone.

- **Contact Client** - use this information to contact the client, for example, if you are running late.

1. Select the service type for the new job:
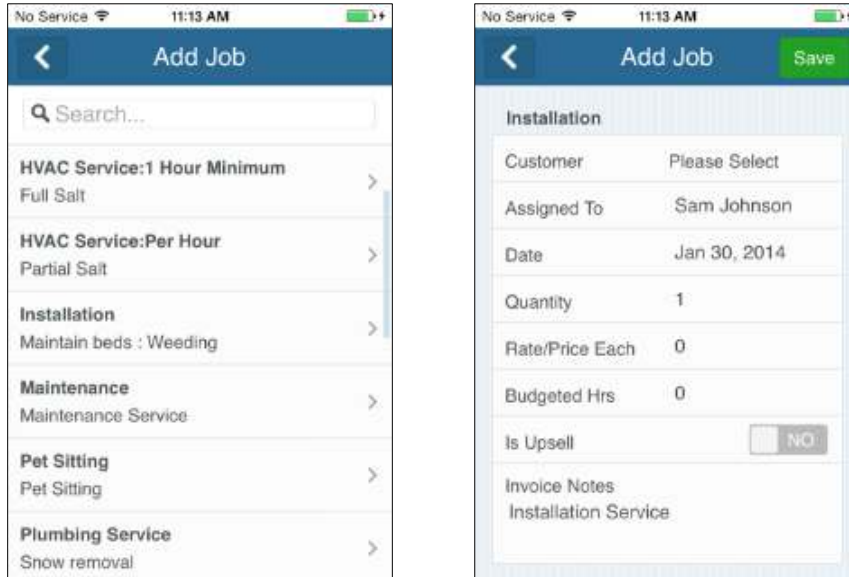
2. From here, you can update information, including the quantity, rate, price, and budgeted hours.

   Note: The Rate/Price Each field is shown or hidden based on the user's role. Also, you need invoice editing rights in order to edit the invoice description.
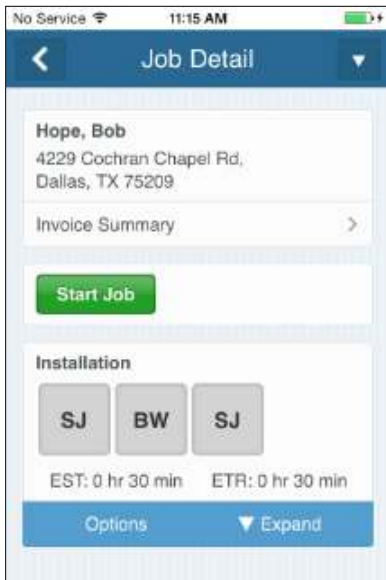
3. Tap **Client**, then select a client from the list:
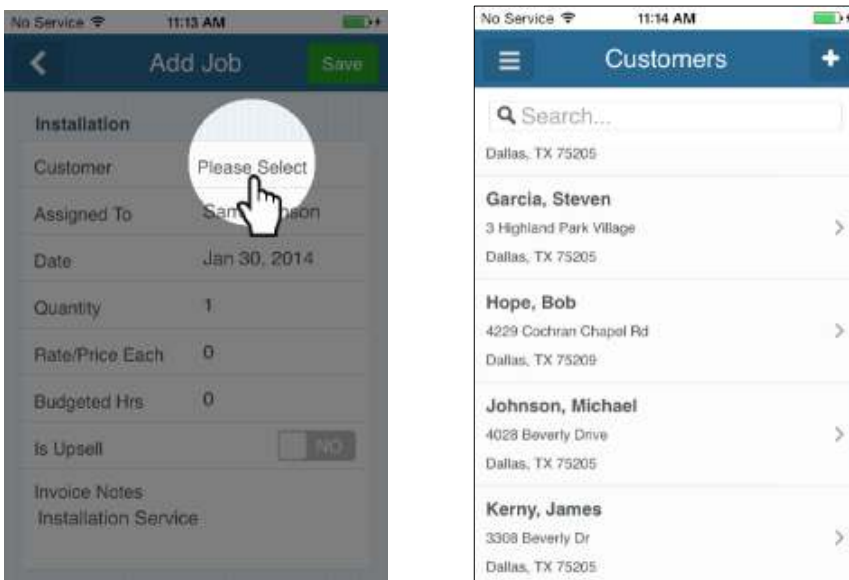
4. Change any of the other values, then tap **Save** to create the new job:
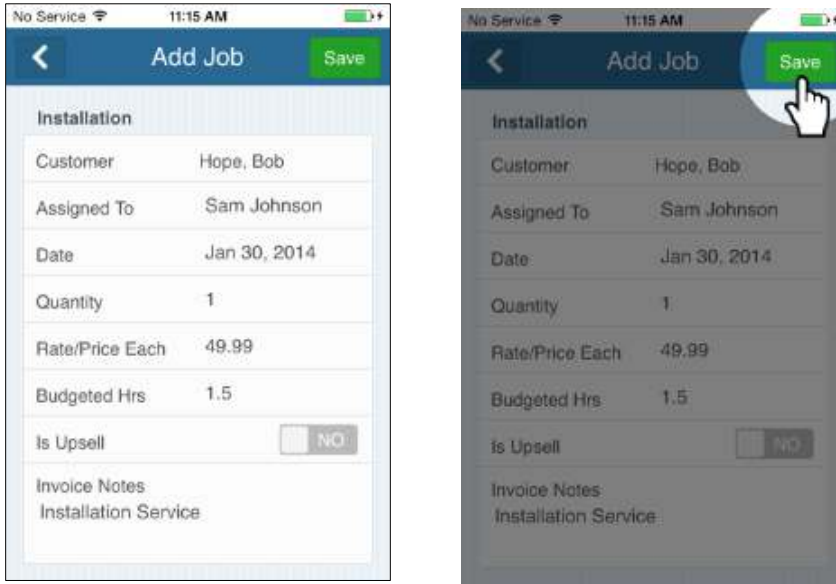
5. After saving the job, you'll see the **Job Detail** screen, where you can clock into the job, add products, etc. You can swipe back to return to the schedule.

Bulk Clock-In for Multiple Jobs or Team Members

You can use the *bulk clock-in* feature to combine the clock-in process for multiple workers or multiple visits:

- Clock in a team to a single visit

- Clock in an individual worker to multiple visits

- Clock in a team to multiple visits

For example, you might want to do a bulk clock-in for a single team servicing several properties that are near each other.

How hours are calculated

The bulk clock-in feature calculates visit times depending on how the visit was scheduled:

- If the job contains budgeted hours, the system divides the total work time among the multiple visits or properties you serviced, based on the percentage of total budgeted hours for each visit.

- If the job did not use budgeted hours, the time is divided evenly among the visits.

Note: We don't recommended clocking into all your visits for the whole day. This may cause problems with job costing in the future, because there will not be an accurate record of times for individual visits.

Bulk Clock-in on the Legacy App

To do a bulk clock-in, follow these steps:

1. On the **My Schedule** screen, tap the photo or avatar for each team member to clock them in.

2. In the list of visits, tap each visit you want to include in the bulk clock-in.

3. Tap **Start**.
   The hammer icon on the right of the clients' names shows the visits are started.

4. When all visits are complete, on the **My Schedule** screen, tap **Stop**.

5. At the confirmation message, tap **Yes**.

Job Comments on the Legacy App

When you enter Job Comments on the Legacy app, they appear on the Service Autopilot Dispatch Board and Dispatch Calendar.

Create a Job Comment

When you are looking at a job, you can read existing comments and add new ones.

1. Go to **Job Detail > Comments**

2. Enter your comments

3. Tap **Save**

The information for this job immediately appears in Service Autopilot on the Dispatch Board or Dispatch Calendar. The office staff can reply to your Job Comments, you can respond back, and so on. The thread is saved with the job.

Charge Credit Cards with the Legacy App

To take payments from client credit cards:

- Your Service Autopilot account must be integrated with a credit card processor
- The Legacy app user must have permissions for charging

To store a client's credit card information

If you want to store a client's credit card information, enter it directly into Service Autopilot. Credit card information entered from the Legacy app can be used for a one-time charge, but the information is not saved on the client's account.

Set Up Permissions for Charging Credit Cards with the Legacy App

Legacy app users can charge a credit card only if they have the **View Invoices** and **Collect Payment** permissions enabled. Here's how to set them up.

1. Go to **Settings > User Roles & Rights > Team Leader > Mobile**

2. Select the check boxes for **View Invoices** and **Collect Payment**

3. Click **Save**

Charge a Credit Card

If you have permissions to take payments, you can charge a credit card in several ways.

Take a Payment with No Credit Card on File

To use the Legacy app to charge a one-time payment on a credit card, follow these steps.

1. On the Legacy app, go to the client invoice by doing one of these:
   a. Within a job that is set to "Daily," tap **Stop Job**.
   b. Tap **Yes** to confirm the job is complete.
   c. At the "View Invoice" prompt, tap **Yes**.

   OR

   a. Tap the client name, tap **View Client**, then tap **View Invoices** to see the list of invoices for that client.
   b. Tap the invoice you need.

   The **Invoice** screen appears.
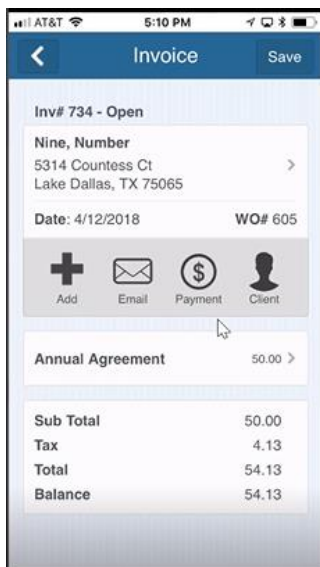
3. Tap the **Payment** icon.

4. On the **Payment** screen, tap one of the payment types: **Charge**, **Swipe Card**, or **Enter Card**:
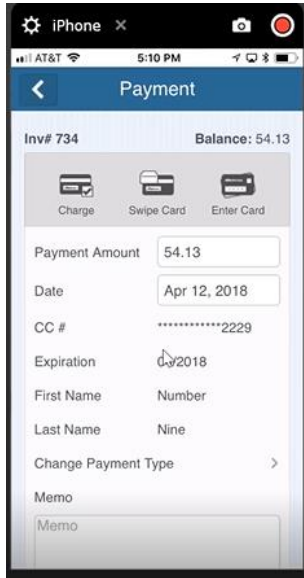
Charge - if you have the client's credit card on file, click **Charge** and then **OK** to confirm.

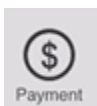**Swipe Card** - For Open Edge only, if you have an external card reader, tap **Swipe Card**, then swipe the credit card or enter the credit card number in the field.

Enter Card - if the credit card is not on file, tap **Enter Card** and fill in the information.

5. Tap **Make Payment**.
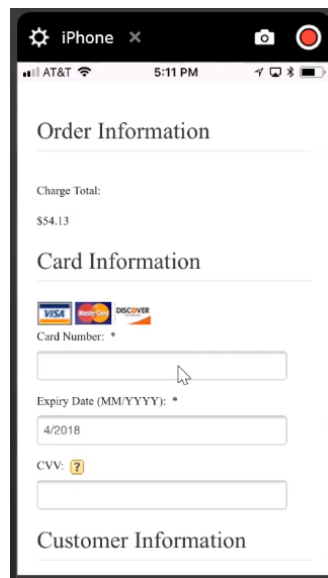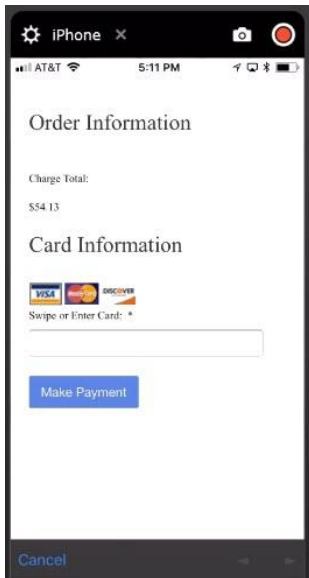
The invoice and payment appear in Service Autopilot in the client record.

Create an Estimate on the Legacy App

After you have set up estimates in SA, you can create and send them from the Legacy app, or bring them up on the app to show clients and leads you are with.

To turn on User Rights for needed for estimates, go to: **Settings > Company >User Roles and Rights > (Role) > "**Mobile" tab, then check the "Enable Estimates" and "View/Edit Client" check box.

Follow these steps:

1. On the Legacy app menu, go to the Lead/Client list.

2. Tap the Lead or Client you will be creating an Estimate for.

3. Tap **View Estimates** to see or modify existing estimates.
    OR
    Create a new estimate by tapping the **Add** (**+**) button.

4. Select **Estimates > Create Estimate** OR **Create from Template** if you have an Estimate Template already created. (This can have a document template associated with it.)

5. Tap **Add** to add line items. Items will show in a "Draft" status (D). Tap the "D" to change the status. This must be done before you can email the Estimate.

6. To add a Product, swipe left on any line item, then tap the green "**+**". Use the red "X" to delete any line items.

7. Modify the statuses of line items if needed, and verify that your pricing and descriptions are correct

8. Tap **Save**.

9. Make sure a document is selected, then email the estimate from the Legacy app.
    OR
    If you're with the client or lead, you can show them the estimate, and they can accept and sign it directly on your mobile device.

After the Estimate is saved, it can be edited any time from the Account on the Legacy app.

Update (Sync) the Legacy App

Updates from the SA Legacy app to the full site can take some time to appear depending on settings and data availability. Changes made on the Legacy app override the Dispatch Board.

One way to avoid make sure field employees have the most accurate information is to Resync. There are a few ways to force the app to sync: "Pull to Refresh," "Sync Everything," or "Clean and Sync."

You need an internet connection, either cellular or wifi, to sync your device to Service Autopilot. If you have no connection, SA saves the updates until you have internet service again.

Sync Everything

1. Tap the Menu icon on any screen that shows it, and scroll down to tap **Sync Everything**.

   This closes the menu and opens a confirmation dialog.

2. Tap **Yes**. This opens the sync screen. You will see a status bar and items scrolling as they process.

 Once syncing is complete, you'll automatically be taken back to the previous screen.

Pull to Refresh

This is the quickest, easiest option but only refreshes the information on that current screen. Unless you know exactly what single update you need, this is not the most reliable option.

1, From the **Schedule** screen (and most other screens), you can pull to refresh by tapping somewhere on the screen, then pulling down until the screen text tells you to "Release to refresh" at the top.

2. Let go and the screen will refresh.

You can see the progress of the sync by looking at the small gray bar below the header.

When the sync is complete, the screen will return to normal.

Clean and Sync

If you have this advanced mobile access, you do a more substantial sync from the **Settings** screen.

Note: Before doing a Clean and Sync, we advise doing a Sync Everything. Doing a Clean and Sync will wipe the Legacy app's data and re-sync the app. If there is information, such as pictures or timesheet records, that has not synced from the app to the main site, you will lose the information when you Clean and Sync.

1. On the Legacy app, from the Menu, choose Settings.

2. Tap **Clean and Sync**.

3. Tap through the confirmation dialogs to proceed. Alternately, you can tap three times in the header on any screen to access the Debug screen.

4. Tap **Clean** to proceed with the Clean and Sync.

The Mileage Report

The Mileage Report on the Legacy app shows the mileage driven while a user is logged in to Service Autopilot. The Mileage Report appears only on the field employee's mobile device, if GPS/Location Tracking is enabled. It does not appear in Service Autopilot or the Report Center.

On the user's mobile device, go to **Common Places > Mileage Report**.
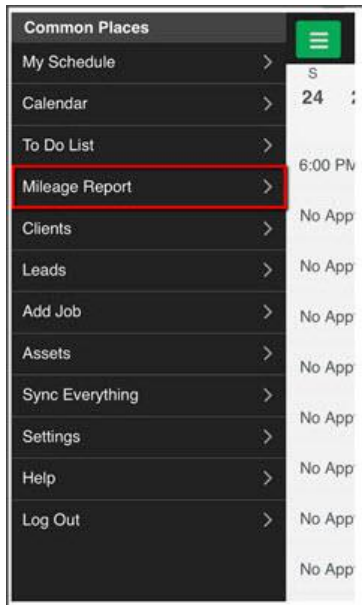
You can see mileage data for up to one week.
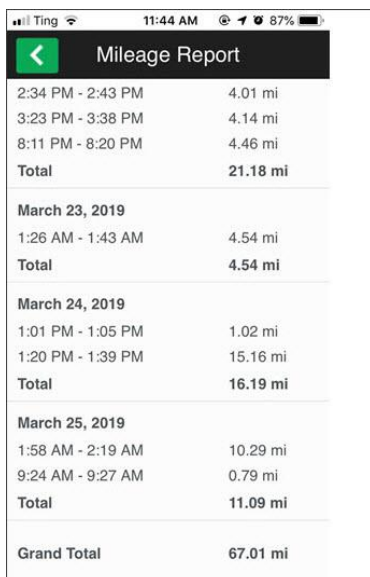
Note: Mileage data is based on GPS movement while the Legacy app is running, *not* Drive Time logged by the field employee.