Service Autopilot™

TEAM

USER GUIDE

V3.02

Contents

About the Team App

Service Autopilot's **Team app** is a streamlined version of the Legacy Mobile App. Team is designed to help your field employees with a simple interface for logging in and getting job assignments. The Team app includes these features:

- Easy photo function, with the option to prompt users for before-and-after pictures
- Instantly updated Job Comments
- Colors indicate the status of every job
- Notifications appear on your phone any time, including when the Team app is not running
- Works with the map apps on your phone
- Offers Spanish language

This guide takes you through the basics of setting up and using the Team app.

"The team with the best players wins."

--Jack Welch

Settings and User Rights for the Team App

You have the option to enable these settings for employees who will use the features below.

Team Leader Permissions

Go to **Settings > Company > User Roles & Rights**, select the role for your team leader, then click the **Mobile** tab. Check the following rights:

- **Enable Push Notifications** - allows updates to appear on the Team Leader's phone
- **Edit Timesheets** - allows the Team Leader to allocate time spent on jobs
- **Edit Crew**–add or remove crew members, and clock them in for the day
- **Require "Before" Pictures** and **Require "After" Pictures** - Team app users will be prompted to add before-and-after photos, similar to the Legacy Mobile App.

Touch ID or Fingerprint ID Setup

Users have the option to log in with a touch ID/fingerprint instead of a username and password.

On each user's device, go to:

Settings > Touch ID (for Apple devices)

OR

Settings > Fingerprint (for other operating systems)

Spanish Language

If you set the device's language to Spanish, the Team app will display text in Spanish.

Daily Operations

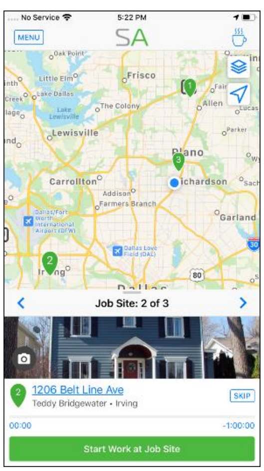
Follow these steps to use the Team app.

Log In to the Team app

1. Log in with your SA email and password.

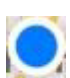
Your assigned jobs for the day appear.

2. Pinch or expand two fingers to zoom in and out to see all the day's visits on the map.



Tap the arrow to zoom to your current location.

Tap the stack of maps to see the satellite view.

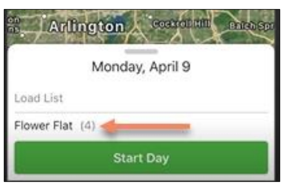


The blue dot shows your current location.

Tap the blue dot to re-center the map.

3. The **Load List** shows the products you may need to load for today's visits.

4. Tap **Start Day** when you are ready to go to the first job site.



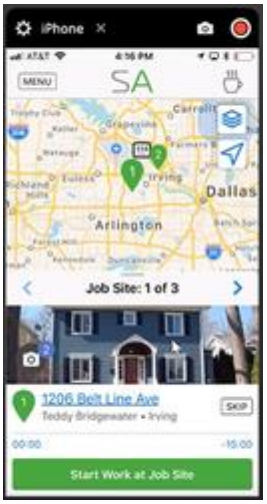
5. If you are a crew leader, clock in your team.

You can tap **Edit Team** to change team members as needed.

6. At the bottom, tap **I'm Ready to Get Started**.

See details about today's visits

After you clock in for the day, today's visits are listed below the map.



Drag the title area up to see more details about a visit, such as products needed.

Swipe left to see future visits.

Swipe right to see past visits.

You can add comments by swiping up to see the **Comment** field.

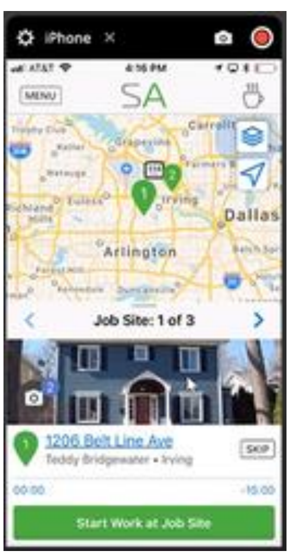
Get directions

The Team app supports Apple Maps, Google Maps, and Waze; and for iOS, it also supports Mapbox.

1. Tap the address, and the navigational apps on your phone will appear.

2. Tap the navigational app you want to use.

3. When you reach the job site, tap **Start Work at Job Site**.



The bar and job icon turn blue.

4. Tap **Complete Work** when the job is finished.

Get turn-by-turn directions (iOS only)

For Apple devices, the Team app can also show turn-by-turn directions when you tap an address at the job site.

To set it up, go to **Settings > Mapping App**, then select "Mapbox."

Job Timer

A countdown timer starts based on how much time is budgeted for the visit, and how many team members are working. A progress bar shows how much time remains budgeted for the visit.

If no hours are budgeted, the timer tracks only the elapsed time.

Pause your work

For accurate time tracking, you may need to pause a visit once it's started. You remain on the clock, but your time record for the visit is closed.

1. Tap **More > Pause Work**

This lets you stop the work temporarily in order to do other tasks, such as leave a job site to pick up supplies.

You remain on the clock, but your time record for the visit is closed.

2. Tap the reason.

   Skip Work might be needed, if for example, the weather prevents you from doing the job.

   The color turns yellow to indicate the job is paused.

3. When you're ready to return to work, tap **Resume**.

4. The app creates a clock-in record

This function can be used in conjunction with taking a break. See “Take a break” on page 11.

Add a Product or Service

You can **add products and services** on the same day to visits that are already scheduled.

Add a Service to a Visit

1. Tap **Add Service** and choose it.
2. Add a comment if needed.
3. Change the quantity with **+** and **−** buttons.

Add a Product to a Service

1. On a Service, tap **Edit**.
2. Tap **Products** and choose the product.
3. Add a comment if needed.
4. Change the quantity with **+** and **−** buttons.

Manage photos and attachments

At the job site, you can see any photos and attachments for a job by tapping the camera icon. The number badge shows the number of attachments for this job.

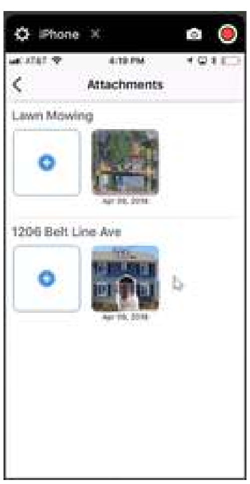
Add a photo

The **Attachments** screen shows photos or diagrams for the service and client.

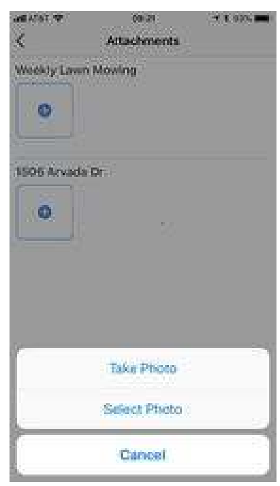
You might receive a prompt to take *Before-and-After* photos, depending on your company's requirements.

To add a new photo:

1. Tap **+** on a blank square.



2. Tap **Take Photo**, then use your phone to take a photo as usual.



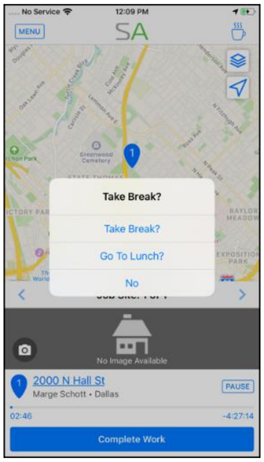
Save a photo as a profile picture

Tap the photo and select "Save As Profile Picture." It will now display on the main screen.

Take a break 

You can use the Team app to track breaks or lunch times.

1. Tap the coffee cup icon, then tap one of the options:



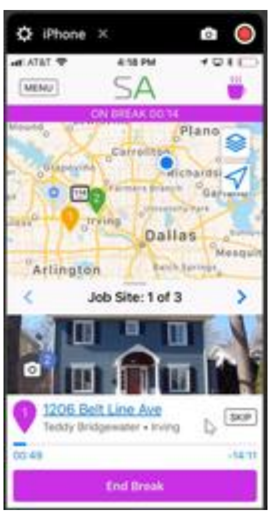
Take Break

OR

Go to Lunch

This closes the existing clock-in record for the visit, and the system creates a break or lunch timesheet record for payroll.

The color bar turns purple to indicate you're on a break.



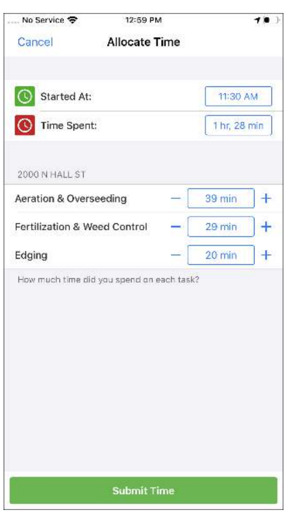
2. Tap **End Break** or **End Lunch**.

This closes the existing Break timesheet record and clocks you in again.

Complete a visit

1. Tap **Complete Work** when the visit is finished.

The **Allocate Time** screen appears after you complete a visit if you have the "Edit Timesheets" right enabled.



If there are budgeted hours on all tasks, the app automatically divides the time based on the budgeted hours.

If there are no budgeted hours, the app automatically assigns equal time to all the services in the job.

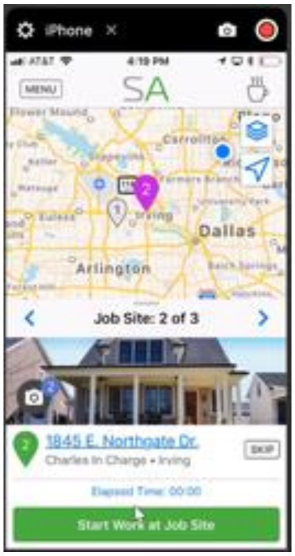
2. Adjust the actual times worked on each service, if needed.

   For overall time on the visit: type a different **Started at** or **Time Spent**.

For each service on the visit: tap the **+** or **-** to increase or decrease the time used by five-minute increments.

Alternatively, you can tap the time box for an individual service to enter time by the minute.

3. After making your changes, tap **Submit Time**. Your next job appears.



Clock out for the day

1. After the last assignment for the day, tap **Finish Day** for time tracking.
2. Log out at **Menu > Log Out**.

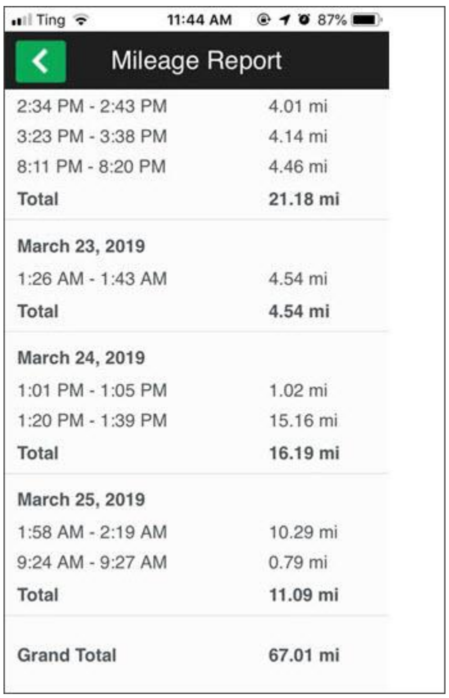
The time spent on all your jobs appears on the Dispatch Board in Service Autopilot, and the system add a "Clock Out" record to the timesheet for payroll purposes.

The Mileage Report

The Mileage Report on the Team app shows the mileage driven while a user is logged in to Service Autopilot. The Mileage Report appears only on the mobile device of the field employee, 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 **Menu > Mileage Report**.

You can see mileage data for up to one week.



Note: Mileage data is based on GPS movement while the Team app is running, *not* Drive Time logged by the field employee.

