



Service **Autopilot**™

# SMART MAPS

USER GUIDE

V1.01



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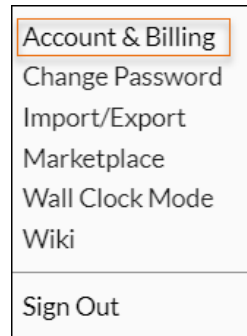
## Advanced Mapping in Service Autopilot

Service Autopilot offers basic map routing to all Members, but the Smart Maps upgrade does much more than mapping. Smart Maps lets you do Marketing, Measuring, and Route Optimization from your office. Use Smart Maps as a Marketing tool to easily identify existing clients for upsells, and import new leads into SA, expanding your sales strategy options.

Smart Maps is an add-on subscription. You can add this service by clicking your avatar at the top right of the Service Autopilot screen and selecting “Account & Billing” from the dropdown menu.

The Smart Maps feature lets you measure a property using Google® satellite images. You can quickly measure any outdoor surface of a property, including square footage of turf, beds, and parking lots as well as any linear measurement. You have the option to store this information in a **Custom Field** in SA.

All measurements for the property are also stored for later retrieval.

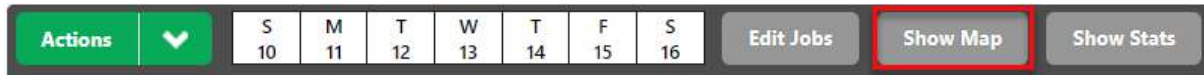


*“If you don't know where you are going, you might wind up someplace else.”*

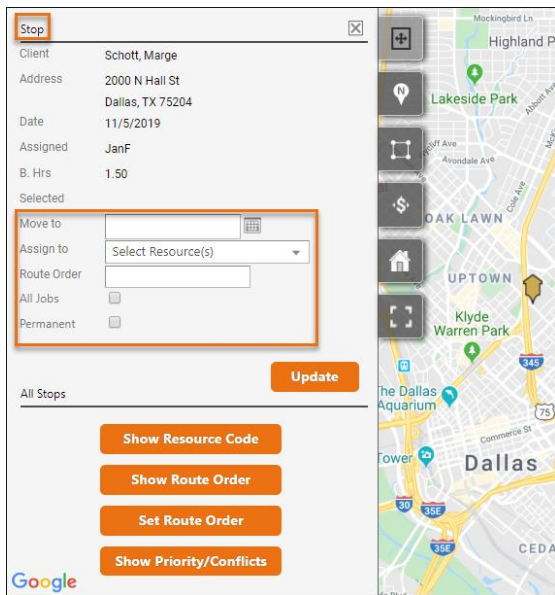
*--Yogi Berra*

# Show the Map Console

The map console is available from several locations in SA: Dispatch Board, client accounts, client and lead lists, and the Dispatch Calendar. The functions available are different depending on where you bring up the map.



From the Dispatch Board, select one or more jobs, then click **Show Map** above the grid.









The map opens in the top half of your screen with the grid items still displayed below.

Any jobs you select in the grid appear on the map as pins or markers.

Click a marker to see contact information about an individual client.

Buttons appear on the left side of the map:

-  Stop - Displays job information for the selected marker
-  Navigation - Driving Directions and GPS Tracking
-  Group Selection - Select jobs by drawing a geographical region
-  Yield Map - See how many jobs you have scheduled at various rates of pay
-  Go to Company Location - Center the map on your location
-  Fullscreen Mode - Enlarge the map to the height and width of the browser window

**Forgot** a button's function? Just hover over the button for a reminder.

## Stop Button

**Stop** displays the selected map marker's job information and lets you update or dispatch services.

There are five fields you can update for the selected services:

- **Move to** updates the scheduled date for the service(s) if set from the Dispatch Board. *This is a required field while on the Waiting List.*
- The **Assign to** dropdown list lets you select Resource(s) -- crews, employees, and vendors -- to add to the selected service(s).
- **Route Order** is an optional field that changes the route order for the selected service(s).
- The **All Jobs** check box will include all the services that are checked in the grid for the selected client.
- The **Permanent** check box makes your changes apply to future instances of the "Assign To" option. Other changes will apply to this occurrence only. For instance, if you change the schedule for a recurring job, the change applies only to the current job.

The button on the bottom of the panel displays **Update** on the Dispatch Board and in Close-Out Day mode. The changes selected will update the services with only the values you changed for **Move to**, **Assign to**, and **Route Order**.

**Note:** On the Waiting List, a button displays **Dispatch**. The system will make the changes to the selected services and dispatch the jobs when you update it.

## All Stops

The bottom of the Stop panel has four buttons for making changes to the map markers.

Show Resource Code

**Show Resource Code** displays the resource code on all the map markers, if services are assigned to a resource with a Resource Code.

Show Route Order

**Show Route Order** displays the route order of all the services.

Set Route Order

**Set Route Order** temporarily sets all service route orders to zero. You can then click to update the route order:

Show Priority/Conflicts

- Left-click a map marker to decrease the route order.
- Right-click a map marker to increase the route order.

**Show Priority/Conflicts.** If you have any jobs with priority or conflicts based on days, they'll have a different icon when you click this button. The job with the red "up" arrow at right is a priority job.

- To undo changes, click the **Cancel** button below the map.
- To save changes, click one of three buttons that appear when you set a route order.

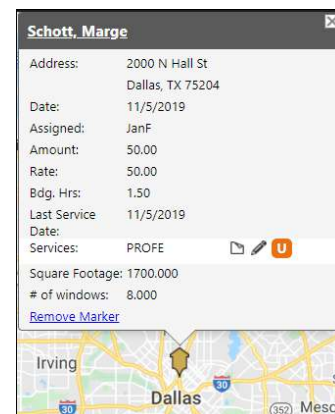


**Update Every Week** and **Update Every Other Week** are for Recurring and Custom Recurring services; they do not work with Waiting List, One-Time, and Package services.

## Stop Map Marker

Select Map Markers when you're on the Stop panel to see a popup box. The popup shows client information and the services displayed in the grid. Markers indicate the color of the resource assigned to them on Dispatch; on the Waiting List the marker will be black or a Crew's color.

- The client name is a hyperlink to their **Clients** screen.
- The Services list has two icons and a button on the right.
- The note icon opens the job dialog and displays the notes for the Service.
- The pencil icon will display the job dialog for the Service.
- The **U** button stands for update and will be displayed only when on the Dispatch Board or Close-Out Day Screen. This button will be displayed as **D** when on the Waiting List screen



and stands for dispatch. The Update/Dispatch button performs the same as using the Stop update/dispatch button in the left panel.

- The **Remove Marker** link on the bottom left of the popup removes the marker from the map but will not remove the service(s) from the grid.
- The **Update Services** button updates all services with the values set in the Stop panel (on Dispatch). It appears as **Dispatch Services** on the Waiting List.

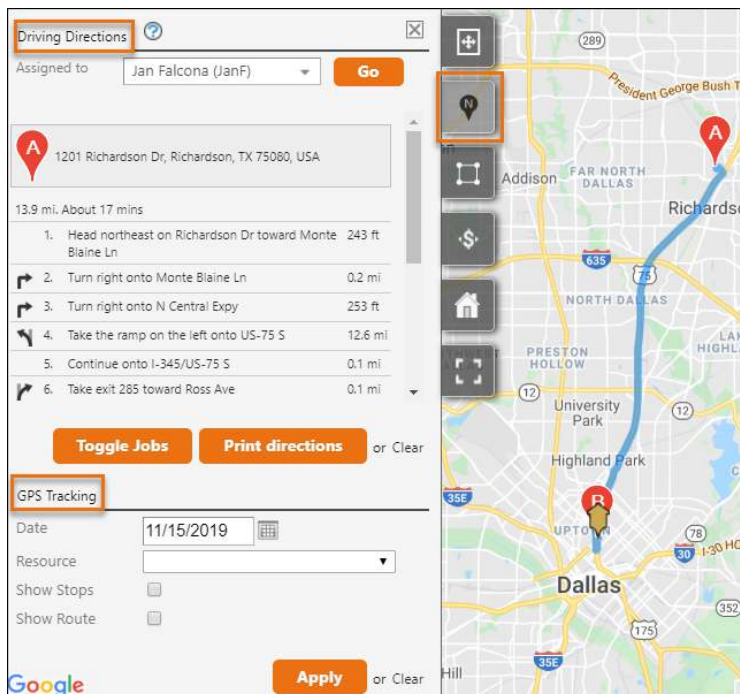
Additional fields can be displayed on the Map Marker dialog for custom fields if they are displayed on the grid. They can be added to the grid by going to the **Columns** popup on the top right of the Services grid.

## Navigation

The Navigation panel contains two sections: **Driving Directions** and **GPS Tracking**.

### Driving Directions

You can get driving directions for any services within the grid. Select a resource and click **Go**.



Directions are generated for the route order if every service for the selected resource is set in the service grid.

If the services have no route order, SA will try to optimize the route before it shows the driving directions.

**Note:** You can generate directions for a maximum of 24 unique devices per request.



Click any of these options below the directions.

- **Toggle Jobs** hides the map markers from the console temporarily to help with viewing the direction markers.
- **Print Directions** opens the Print Preview dialog, where you can print the directions.
- **Clear** hides the driving directions, direction markers, and route drawn on the map.

## GPS Tracking

Use this section to display GPS points on the map for a selected resource on a specific date. If you have either the SA Team app or Mobile App, you must enable GPS Tracking for the employee or vendor who will be using the app.

The **Date** input field is used to select the date to view for GPS data.

The **Resource** dropdown list contains employees and vendors, but not crews, as crews cannot log in as a group. The Resource who logs the crew in, however, can be tracked.

The **Show Stops** check box displays the services on the map for the resource.

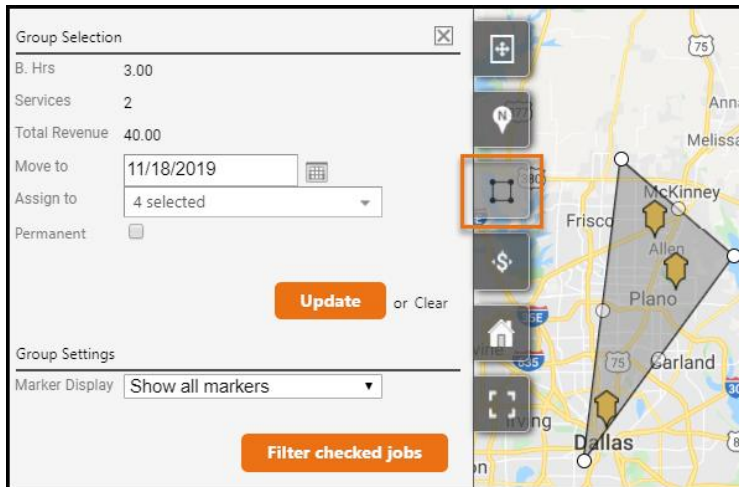
The **Show Route** check box displays the GPS points on the map after you click **Apply**.

## Enable GPS Tracking

1. Go to **Team > Employees** or **Team > Vendors**.
2. In the Employee or Vendor list, select the Resource who will be using the Mobile App or Team app, then go to that person's screen.
3. Click **Edit** next to the Resource's name to bring up an overlay to edit the settings.
4. Click the "Mobile Settings" tab.
5. At the bottom, select an option for GPS Tracking: choose anything other than "Off" to enable the Resource's device to record GPS data after logging in.

## Group Selection

When you click the **Group Selection** button, you can select jobs by drawing around a geographic region.



To do this, click the mouse (don't drag) on each point around an area you want to capture.

With an area drawn on the map, you can either **Update** or **Dispatch** the selected jobs in a similar way to the **Stop** panel.

The top half of the panel displays the budgeted hours, number of services, and total revenue for all services in the selected area.

If needed, you can move and assign the services.

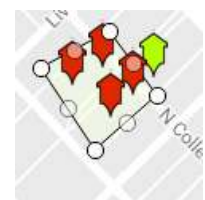
- The **Update** button appears on the Dispatch Board and Close Out mode. The **Dispatch** button is available only on the Waiting List.
- The **Group Settings** section contains a dropdown list for Marker Display, which contains two options:

The **Show only selected** option removes any markers/deselect Services that aren't within the drawn area and display markers/select Services within the area.

The **Show all markers** option does not remove any markers from the Map; it will select only the services on the grid that are within the area.

The **Filter Checked Jobs** button below the Marker Display list removes all jobs not falling within the drawn area from the map and the grid.

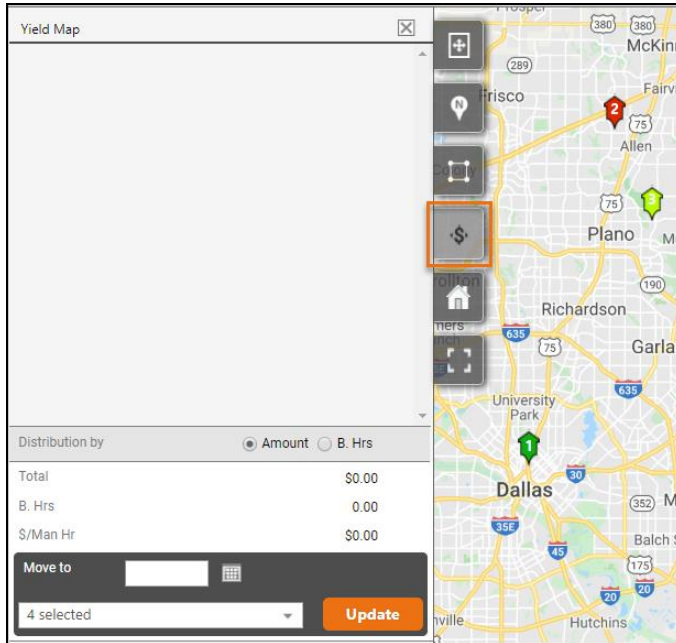
**Note:** To undo your changes, refresh the grid by reloading the browser or clicking the **Refresh** button. It will add back any services that you removed from the map.



Day

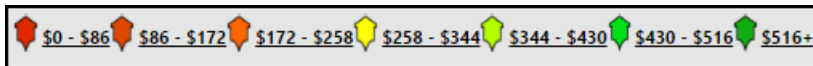
## Yield Map

Clicking **Yield Map** shows your pinned jobs in different colors based on budgeted hours. You can see how many jobs you have scheduled at various rates of pay, letting you see where your money is in any neighborhood on any day.

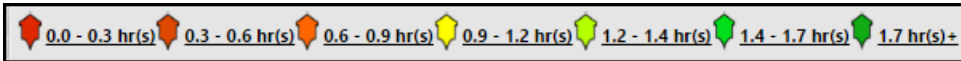


The map marker colors are set from the bottom of the left panel and vary based on either:

- the **dollar amount** for the job:



- or the budgeted hours:



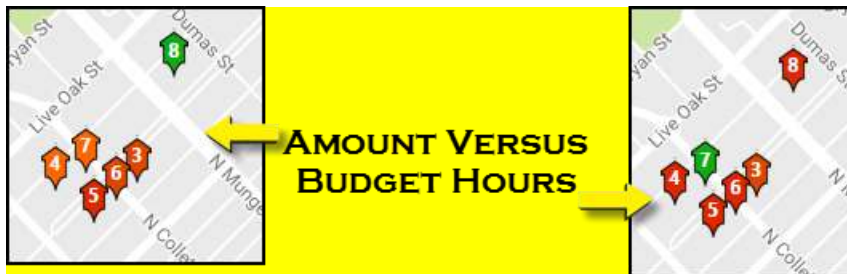
Select a marker to add the job to the left panel in the console. This lets you build the route with the most revenue, again targeting the most profitable or least profitable neighborhoods or even streets.

Yield Map		
<b>Fiddler, Vern</b> <span style="float: right;">8</span>		
4949 Swiss Avenue		
THIS	0.00hr	\$65.00
DESIG	0.00hr	\$450.00
<b>Roussel, Antoine</b> <span style="float: right;">4</span>		
5002 Swiss Avenue		
THIS	0.50hr	\$175.00
<b>Eaves, Patrick</b> <span style="float: right;">7</span>		
4946 Swiss Avenue		
THIS	0.00hr	\$265.00
Distribution by <input checked="" type="radio"/> Amount <input type="radio"/> B. Hrs		
Total		\$955.00
B. Hrs		0.50
\$/Man Hr		\$1910.00

As you add jobs to the left panel, the bottom totals will update with Total Dollars, Budgeted Hours, and Dollars per Man Hour.

Below the selected jobs in the left panel, you can choose to view the distribution by Amount or by Budgeted Hours. This helps you build routes based on budgeted hours and revenue.

In the map below, Stop 8 on the left is the job with the highest price tag, and Stops 4 and 7, in orange, appear to be more profitable than the remaining red jobs.



View those jobs by budgeted hours, however, and you see that the job with the highest budgeted hours is Stop 7, and all other jobs are in the lowest budgeted hours bracket.

So, Stop 8 is your most profitable job, paying the most and for a short budgeted time.

## Center the Map on Your Company



The **Company Location** button centers the map on your address listed on the **Company Settings** page. The location used for the map console is the physical address. Be sure that your addresses are compliant with Postal Service standards and that you are not using a P.O. box.

## Go to Full Screen Mode

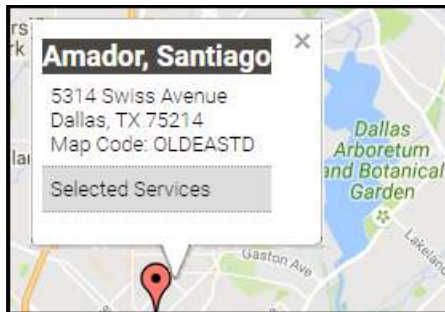


Click this button to enlarge the map to the height and width of the browser window. To exit Full Screen mode, click the **Full Screen** button again.

## Measure Property with Smart Maps

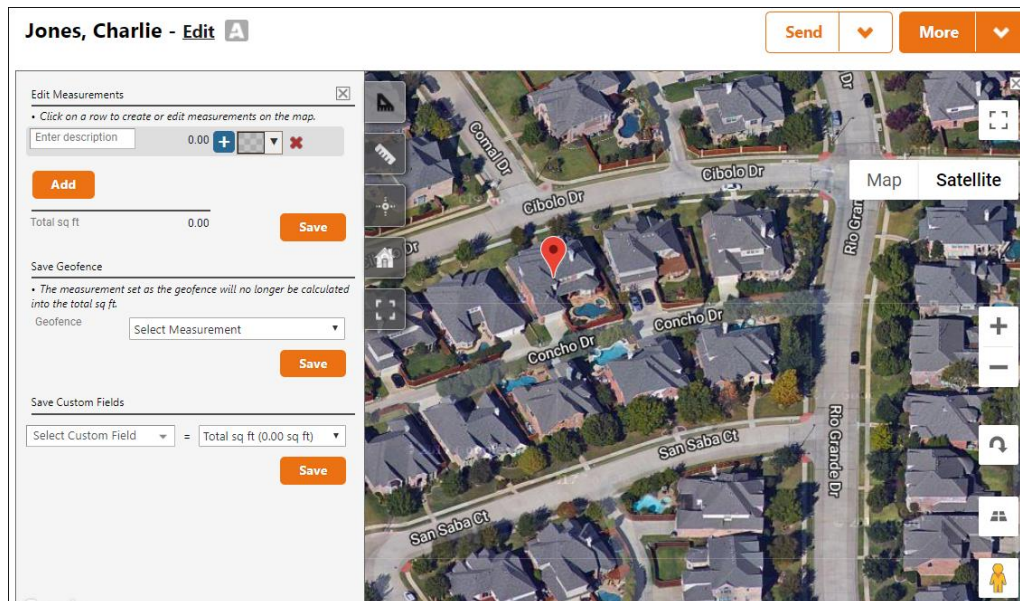
To measure an individual client's or lead's property on the map:

1. Search for a client or lead from the search menu, then click a client/lead.
2. On the individual client screen, click **Show Map**.
3. On the **More** dropdown list, click the "Property Measurements" option.



4. On the **Edit Measurements** overlay, you can do various mapping calculations for the property.

**Note:** 3D view isn't always available, and measurements are approximate.




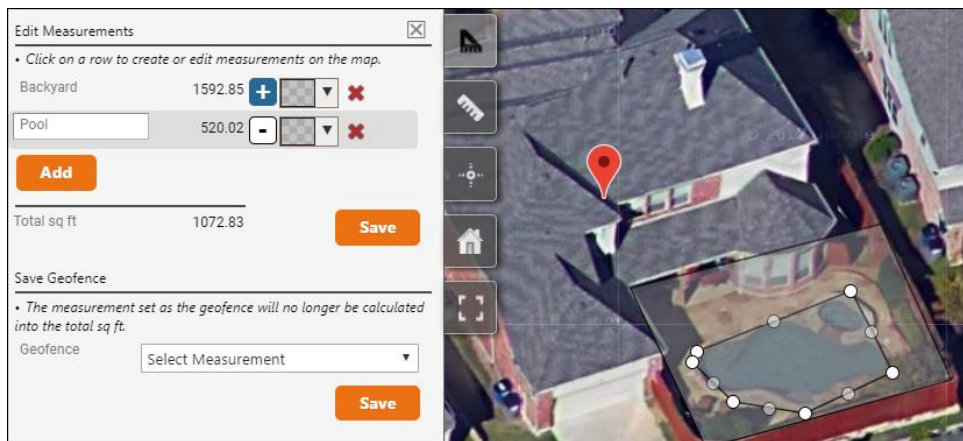
5. To draw areas in the map console for the client's property, use **Edit Measurements** and **Save Custom Fields**. You can save the drawn areas to the client record and assign them as a Geofence or to any custom field.

**Note:** **Save Geofence** is future functionality.

## Edit Measurements with Smart Maps

**Edit Measurements** lets you create, save, and remove drawn measurements on the client account.

1. Click the **Measure Property** icon. The measuring function is activated. 
2. In the “Enter Description” field on that row, type in a name for the measurement such as Yard or House.
3. Click points of the map to outline the area you want to measure.




4. Click the **Measure Property** icon again when you are finished. The **Edit Measurements** panel shows the square footage for the item you just measured.

Click **X (Remove)** to discard a measurement row and area drawn on the map.

Above, we’ve measured the pool and backyard at a property, then removed the pool measurement to determine the area of the patio and turf.

5. Optionally, choose a color by clicking the gray square. Changing the color of the selection lets you more easily distinguish between areas.

6. Click the plus (+) or minus (-) buttons to add or remove an area from the Total Square Footage. 

Click again to exclude the measurement, which changes the icon to a circle.



7. Click **Add** to measure another item and repeat the steps above.

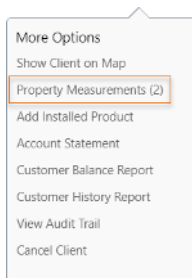
Area	Value	Controls
House	4335.92	[-] [Map] [X]
Backyard	1592.85	[+] [Map] [X]
Pool	520.02	[-] [Map] [X]
	0.00	[+] [Map] [X]

Total sq ft: -2743.07

Buttons: Add, Save

8. Click **Save** when you are finished. This saves the measurements to the client record.

**Note:** Any change you make will be saved to the client record only if you click the **Save** button.




You can save the square footage of the drawn area to a custom field. See “**Error! Reference source not found.**” below.

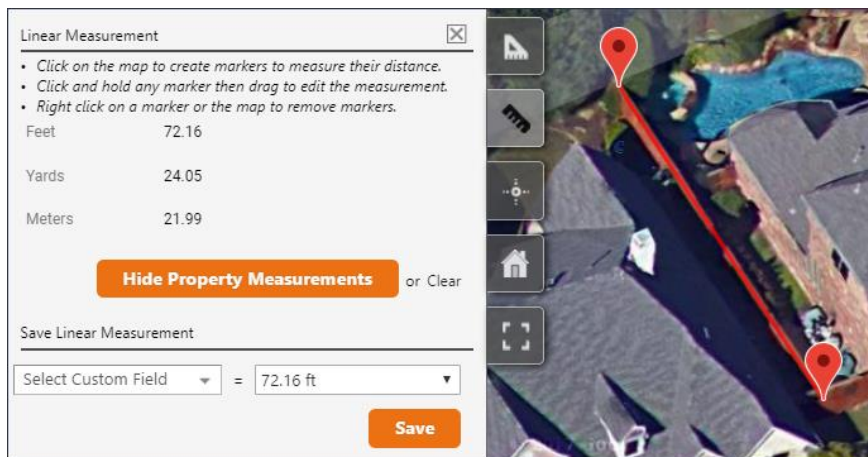
Any time you’ve added property measurements to a client or lead record, you can go back and view them on the client or lead screen, then click **More**. The number of measurements saved for this account appears in parentheses in the dropdown menu.



## Linear Measurement

**Linear Measurement** lets you draw a multi-point line on the map and view and save the measurement data to the client's custom field. Note that you must have a custom field set up in advance, in order to save this measurement.

1. Click the **Linear Measurement** icon to enable the  tool.
2. Click two or more points on the map.



The left panel displays the line length in feet, yards, and meters.

- **Hide Property Measurements** hides measurements created in the Measure Property section.
  - **Clear** removes the drawn line on the map.
3. To save the measurement to a custom field, under **Save Linear Measurement**, select a custom field from the dropdown list.
  4. Click **Save**.

## Adjust a Property Location Marker

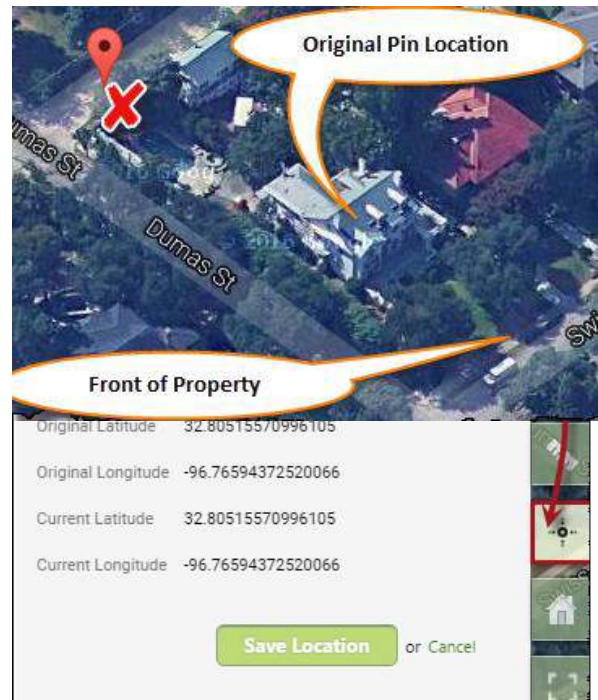
For ease of routing, you might want to move your property marker from the building to the street or nearest road. The marker location is based on the address. So in some cases, you might want to move it elsewhere on the property.

For example, on a large property, placing the marker at the entrance for your team will help with routing.

1. Select the property map marker. The open hand changes to a finger pointer.
2. Drag and drop the marker on the new location.

The panel displays the original and current latitude and longitude data, updated real-time, as the map marker is moved around the map.

3. Click **Save Location**.

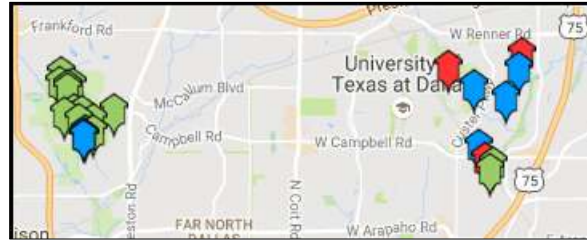


## Find Clients and Leads on the Map

To see map markers for the client or lead list, follow these steps.

1. Search on the Client or Lead.
2. Click **Show Map** at the top right.

Depending on what tab you have open, the map console displays map markers for those accounts.



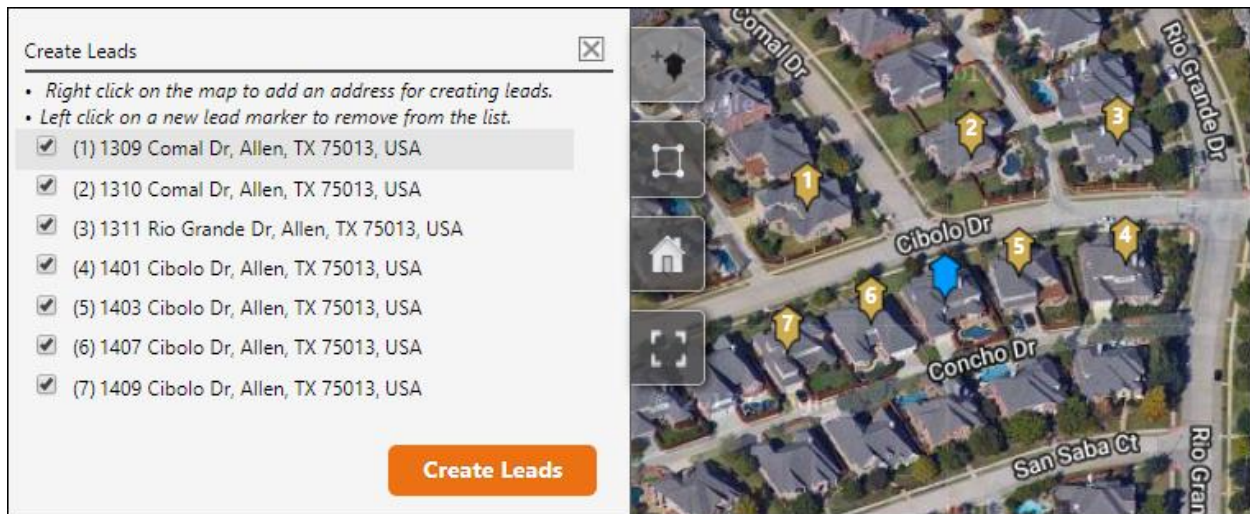
The map marker colors indicate the different types of client or lead:

- **Blue** - current clients
- **Green** - current leads
- **Red** - former clients and closed leads

## Create New Leads with Smart Maps

Smart Maps includes a feature that lets you find leads around current clients or leads. This helps build density, which in turn reduces unproductive time like drive time.

Client homes have a blue house icon and lead homes have a gold house icon.



1. Go to **CRM > Clients** or **CRM > Leads** and click the **Show Map** button.
2. Click **Satellite** to see that view and zoom in near one of your clients or leads by either clicking the **+** button or control-scroll.
3. Right-click houses around the account. The addresses appear on the left panel.
4. Click the **Create Leads** button.
5. In the **Create Leads** dialog box, type a location identifier in the **Property Name** box.

The image shows a 'Create Leads' dialog box with a close button (X) in the top right corner. Below the title, there is a note: 'Check the addresses that will be saved as leads.' There are two input fields: 'Property Name' and 'Tags'. The 'Property Name' field contains the text 'Comal-Rio Grande Block of Cibolo'. The 'Tags' field is empty. At the bottom of the dialog, there is an orange 'Save' button followed by the text 'or Cancel'.

6. Optionally, apply a **Tag** to the new leads.

In the **Tags** box, you can tag the new leads with the street address and date (for example, “EastD10-11-16”) for easy reference in the future.

7. Click **Save**. The leads now appear in your Leads list at **CRM > Leads**.

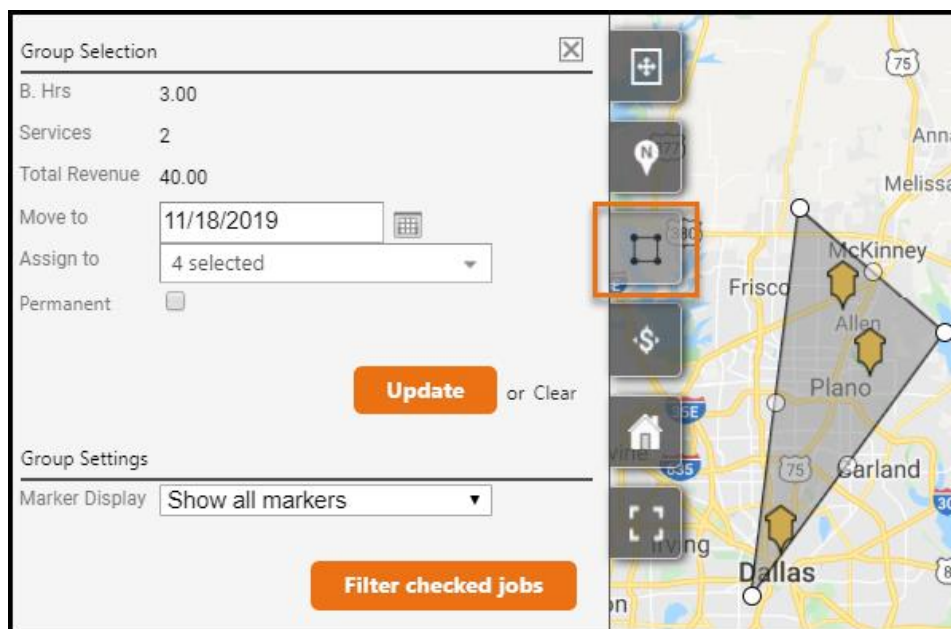
Now that you’ve created a list of leads, you can use public information to find the name of each resident and update the lead in the system for future marketing campaigns.

## Create a Group Selection on the Map



You can filter all the clients or leads on a map by drawing an area with the **Group Filter** tool.

1. On the Clients or Leads list, click **Show Map**.
2. Click the **Group Filter** button.
3. Click each point around the clients/leads to create a grouping.



4. The grid below the map automatically filters down to those selected clients or leads. To remove the drawn area from the map, click **Clear**.
5. You can do a bulk action on the selected list, such as adding a tag, bulk scheduling a job, or editing account information such as Map Code.