Service Autopilot™

LEGACY APP
SETUP GUIDE
V3

Contents

About the Legacy App

The Service Autopilot Legacy App, originally called the Mobile App, works on Apple and Android phones. You must have a Full or Mobile-Only user subscription with your Service Autopilot account. The Legacy app is free for your employees to download with your Service Autopilot account.

This guide shows SA owners and administrators how to set up your resources to use the Legacy app, and how you can use it to monitor your resources.

System Requirements

Please note the operating system requirements for the Legacy app.

- **Apple**: 9.0 or higher

- **Android**: 6.0 or higher

Updating (Syncing) the Legacy App

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

Click **Sync Everything** to update the Legacy App.

"We are what we repeatedly do.

Excellence, then, is not an act but a habit."

--Aristotle

Set Up the Legacy App for Your Team

For your employees to use the Legacy app, they must be set up by a Service Autopilot Member with administrative access. Before you start, be sure that you have these:

- *An email address* for each user. Each employee's email address will be their login.

- *A user license* for Team Leaders. To purchase more licenses, click your profile picture and select **Account and Billing**.

Choose settings for each employee

1. For an employee already in the SA system, go to **Team > Employees**, click an employee in the list, then click **Edit**.
   OR
   To add a new employee to SA, go to **Team > Employees** and click **Add Employee**, then create their profile.
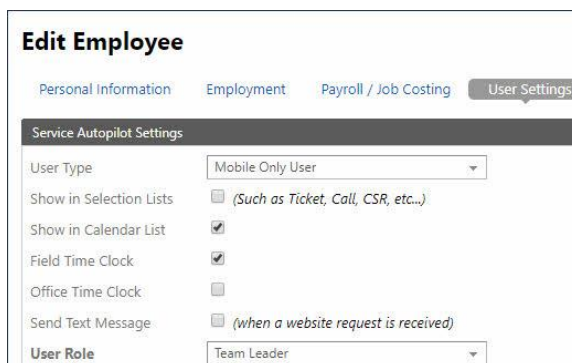
2. On the "Personal Information" tab, enter the employee's email address in the **Email** field.

3. On the "User Settings" tab, select an option from the **User Type** dropdown list**.**

   Full user – This gives access to Service Autopilot plus the Legacy app. This is typically used for office staff. Each additional Full user requires a license from SA.

   Mobile Only User - This gives access to only the Legacy app.
   Typically, a Team Leader gets this access so they can clock in and out for the rest of the team. Each Legacy app user requires a license from SA.

4. Finish setting up the employee. These are typical settings for a Team Leader:

   Show in Calendar List - Allows you to add the employee to jobs if they are not part of a team. It will also cause them to appear on the calendar.

   Field Time Clock - Allows the Team Leader to clock in and out.

5. Click the **User Role** dropdown list and select **Team Leader** or another role you have set up for Mobile Users**.**

6. Enter a password in the **Password** field. The password must be eight characters long and have at least one number and one capital letter. Be sure to note the password, as it is never displayed, for security reasons.

7. Click the "Mobile Settings" tab and check **Is Team leader**.

8. Assign the rights you want to give the Team Leader.
   Note: You can alter many of these settings at **Settings > User Roles and Rights**; so it's not always necessary to change them here.

Suggested settings

Only Show assigned work – Uncheck to let the Team Leader see other people's work on the **Company Schedule** if that work has been dispatched. This setting overrides the User Right **Show Everyone's Work**. If checked, they won't be able to see the **Company Schedule**.

Allow Reassign Work - Check to let the Team Leader reassign their own work to another resource. The User Right for **Make Work Assignments** does the same thing.

Allow Edit Invoice Description – Check to let the Team Leader edit invoice descriptions for services and products. There is also a **User Right** for **Edit Invoice Description**, which does the same thing (**Settings > User Roles & Rights > [Role] > "Mobile"** tab).

Disable Drive Time - Leave this unchecked to allow the Team Leader to use this function. There is also a **User Right** to **Enable Drive Time**.

9. In the **GPS Tracking** dropdown list, select how often to do GPS tracking:

- **Off**
- **Every 25 meters**
- **Every 100 meters**

- **Every 1000 meters** - About half a mile
- **Power Saving** -Tracks the location based on pings off every third cell tower

10. Click the **Culture** dropdown list and select **English** or **Spanish**.
    Note: Not all SA information will appear in Spanish.

11. Check **Only Sync Attachments Over Wifi** to sync signed documents or pictures you upload only over wifi and not when using the cellular data.

12. Leave **Wipe Mobile App Data** unchecked.
    This is a security feature that lets you remove all data from the device if needed, for instance, if the device is lost, or if that employee stops working for you.
    If you check this option, a confirmation box asks you to type **Yes**, then click **OK**.

13. Click **Save**.

User Roles and Rights for Legacy App Users

To set up additional User Rights, go to **Settings > User Roles & Rights**, click a role, then click the **Mobile** tab. Some of the most useful rights for users are listed below.

General Legacy App Rights

For a complete list, see the *User Roles and Rights Guide*.

View/Edit Client - When checked, this allows the employee to view or edit client information. If you want the employee to have access to your client list, you have the option to choose "Always" or "When Assigned Job."

- "**Always**" means that at any time, day or night, they can log into the Legacy app, and have access to the client list.

- "**When Assigned Job** – allows the user to see the client only when they are assigned a job.

Auto Download Clients - When checked, will cause the Legacy app to search for updates to client information when in use. We recommend unchecking this for best performance of the Legacy app.

Contact Client - When checked, allows the employee to contact the client. When in the Legacy app, it will bring up a variety of options for the employee to contact the client, whether it be a phone number to call or text, or an email address.

Enable Drive Time - Allows the Legacy app user to track drive time.

Edit GPS Settings- When unchecked, employees will not be able to change GPS settings within the device, but they will be visible.

Access App Settings – Allows employees to access Legacy app settings within the device.

Edit Job Quantity - Allows the user to edit the quantity for jobs.

Edit Product Quantity - Allows the user to edit the quantity for products.

Add Product - Allows the Team and Legacy app user to add products to existing jobs and installed products to clients.

Edit Schedule Date - Allows the employee to move the date of a job to another date.

Enable Bulk Clock In - Allows the employee to clock into multiple properties at one time, as well as multiple jobs at one time. For a job that has multiple services, this enables the Team Leader to clock into all services at once, rather than one at a time.

Require View Job Notes - Forces team to acknowledge that they see the job notes before beginning the job.

Require "Before" Pictures - Prompts the Team or Legacy app user to take a photo before starting a job.

Require "After" Pictures - Prompts the Team or Legacy app user to take a photo after completing a job.

Edit Team - Allows the Team or Legacy app user to add/remove resources from the job team.

View/Submit Forms - Allows the user to view and edit V2 Forms.

Legacy App Rights for Charging Credit Cards

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

1. Go to **Settings > User Roles & Rights > Team Leader** and click the "Mobile" tab

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

3. Click **Save**

Team Tracking on the Legacy App

Team Tracking is a Legacy app feature that lets you see the locations of your resources and jobs on the map.

To access Team Tracking, go to **Team > Team Tracking**.

Set Up Team Tracking

To enable a resource to be tracked in the field while using the Legacy app, you need to set them up as follows:

1. Go to **Team > Employee**, select an employee, then click **Edit**.

2. On the **Edit Employee** screen, click the "Mobile Settings" tab, then select the GPS Tracking settings for this user. You can change the tracking distance to **Every 25 Meters**, **Every 100 Meters**, **Every 1000 Meters**, or **Power Saving**.

3. Click the "User Settings" tab and make sure that "Field Time Clock" is checked.

4. Click **Save**, and repeat these steps for all field employees who use the Legacy app.

Use Team Tracking

- Make sure that you have the services on schedule and assigned to an employee or team.

- Have employees use the Legacy app to clock in to work for the day and utilize the other time tracking features.

- When the employee first signs into the Legacy app, depending on the device, it will ask them permission for the Legacy app to use their phone's location, and they must allow it. Typically, you can adjust this in the phone settings as well.
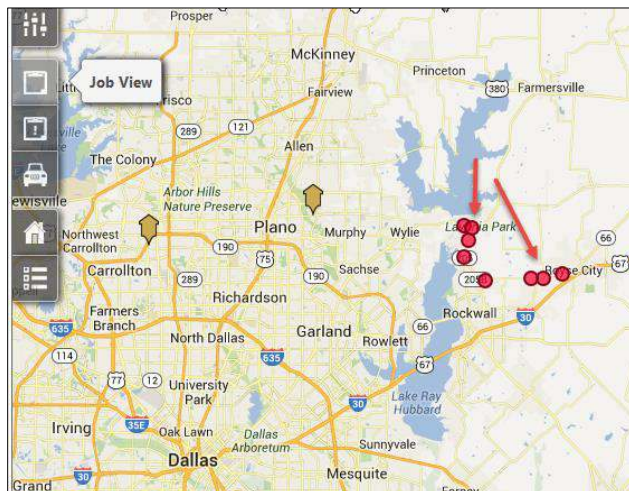
Filter

This section lets you specify the date, resources, branches, and tags to filter the search for client stops and resources on the map.
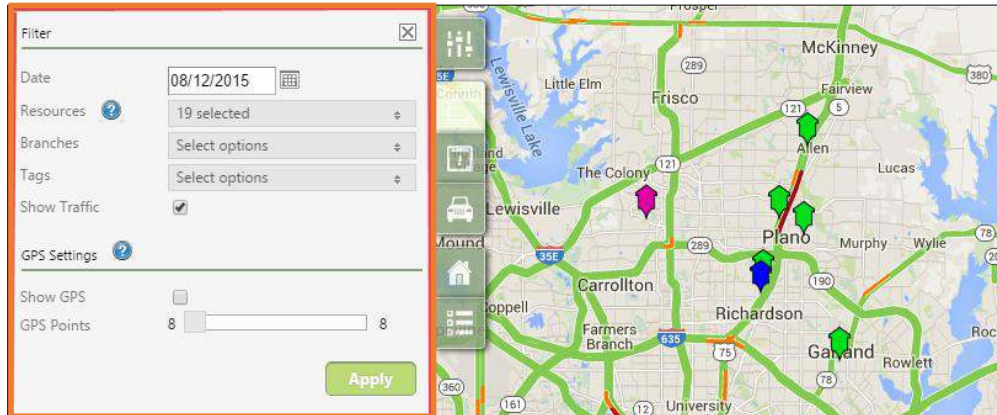

Job View

This displays visits for the day and resources selected by GPS points in which the resources have traveled. Also, if you select the **Show GPS** check box, it will display the GPS points gathered for the resources who are using the Legacy app.

Trucks + Remaining Jobs View

This displays all the services that are dispatched and fit the criteria selected in the filter section.
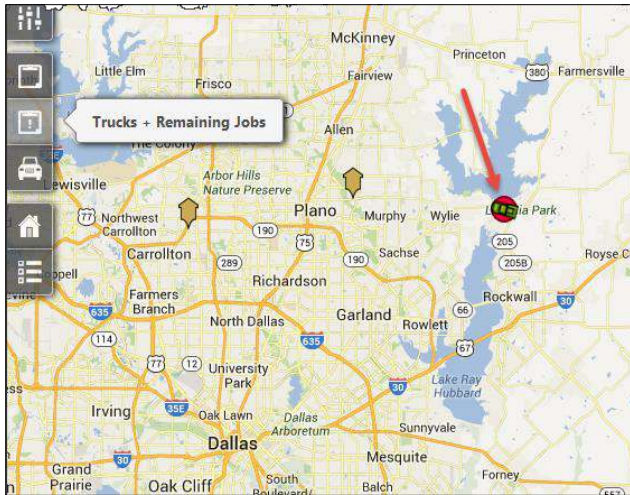
Trucks

This shows you the last GPS point for the resource you select. The location will appear as a "truck" on the map.

Legend Section

This shows the client stops and resources on the map based on the filter section. You can select the client location icon and pan the map to the client's location.
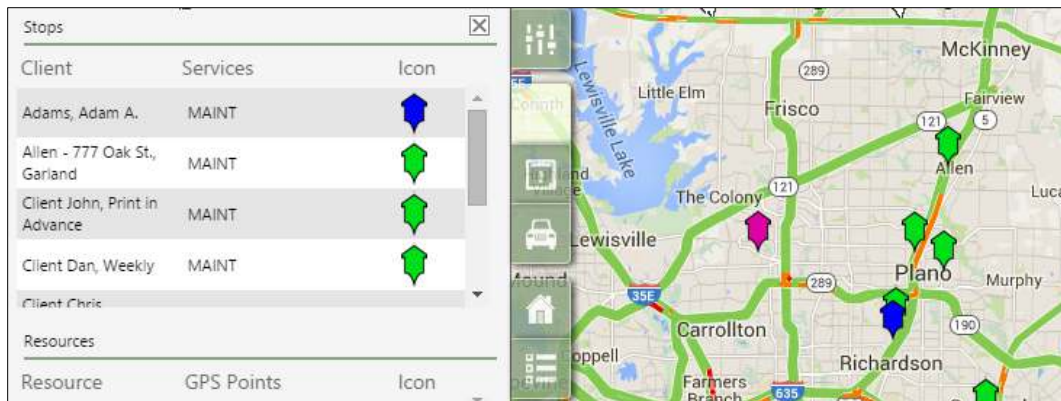
Client Stop Info Popup

- If you click the stop icon for a client, you'll see the popup below, listing the client information.

- The client name is a hyperlink that opens a new tab to the client's page.

- The proximity button displays the Resource Proximity Section.

- The view job button displays a dialog to view and edit the dispatched service.