ServiceAutopilot™

DISPATCH BOARD

USER GUIDE

V2.5

Contents

About the Dispatch Board

The Dispatch Board at **Scheduling > Dispatch Board** is the scheduling hub of Service Autopilot. Much of the information that you enter into other areas of the software ends up here at some point. From the Dispatch Board, you can:

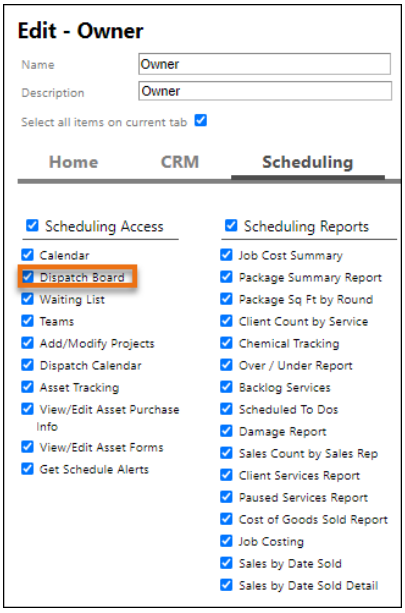
- Send out your teams
- See what jobs you have scheduled
- Change service dates
- Make and view notes
- Set and change route order
- Print route sheets.

You might also enter hours, change product information, cancel, skip, complete, and otherwise manipulate the jobs you have scheduled—and that's not everything. Understanding how to navigate through Dispatch is critical to getting the most out of Service Autopilot.

Set Up User Rights for the Dispatch Board

Your company roles need to be configured to allow access to the Dispatch Board. Rights are permissions assigned to each user. To configure the Roles for the company, go to **Settings > User Roles & Rights** and choose the Role you want to modify.

Dispatch Board Permissions



The **Scheduling Access** list has several settings available. You **must** have the Dispatch Board permission checked to see the Dispatch Board under **Scheduling**.

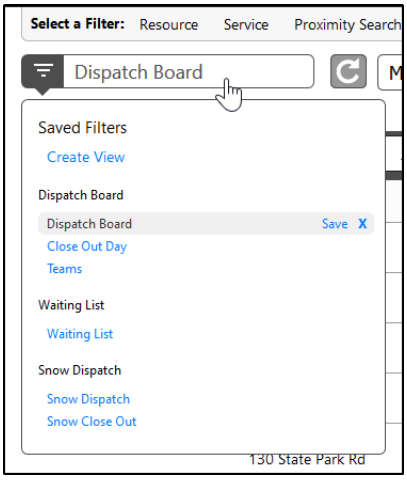
Note: Snow Dispatch is not enabled under these permissions. For information on Snow and the Snow Dispatch Board, see the *Snow User Guide*.

Overview of the Dispatch Board

This is an overview of the functionality available on the Dispatch Board. You can access the Dispatch Board by going to **Scheduling > Dispatch Jobs**.

At the very top of the page under the Navigation Bar you will see the filter selection:

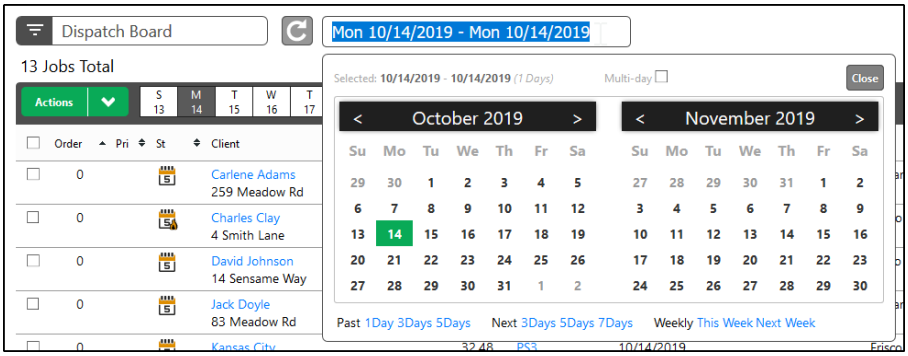
Click any filter to display the filter criteria and apply the filter. Under the filters, you have the view selection:



Here, you can access different views you've already created or create new views.

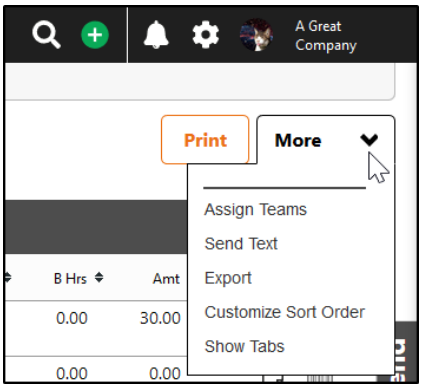
To the immediate right of the view selection is a **Refresh** button.

To the right of the **Refresh** button is the date selection. Click the date selection field to open a date picker:



After you select your dates, click **Close** to apply the dates and close the dialog.

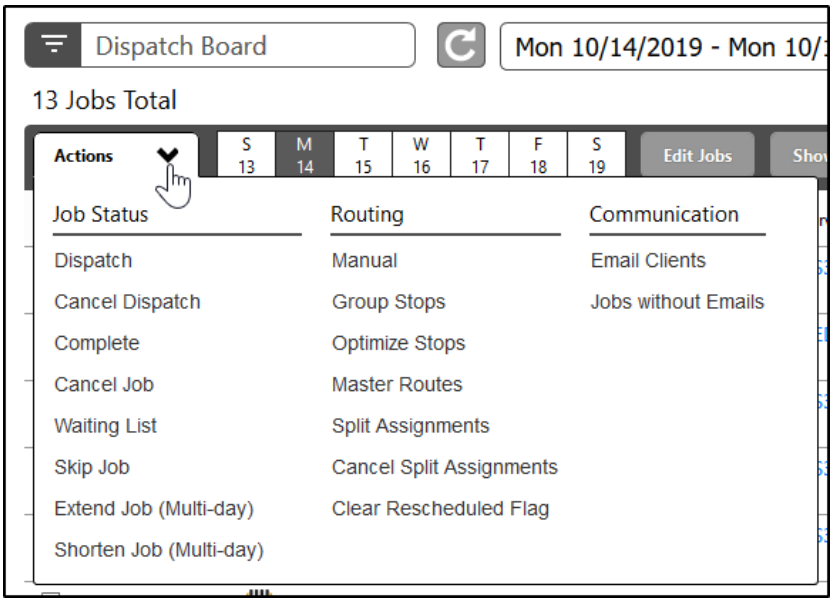
The **Print** button and **More** dropdown list are on the far right:



Use the **Print** button to print Route Sheets for dispatched jobs.

The **More** dropdown list options are: Assign Teams, Send Text Messages, Export the Dispatch Board, Customize Sort Order, or Show Tabs.

Under the view selection and job total is the **Actions** menu:



Here, you can do different from changing the job status to routing to communication with Clients.

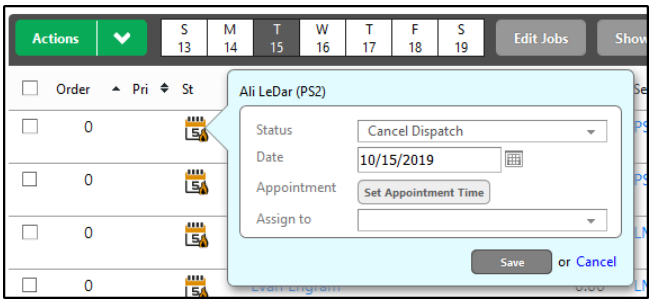
To the right of the **Actions** dropdown list is a quick date selector. Choose a different date to automatically refresh the page.

The **Edit Jobs** button lets you reassign or reschedule one or more jobs:

The **Show Map** button display the Map so you can see jobs in physical relation to one another.

Show Stats displays the **B. Hrs**, job count, and total amount by resource. At the far right is the column selection for the Dispatch Board.

There are additional functions on the grid of the Dispatch Board itself. You can click any status icon to display a dialog to make quick changes:



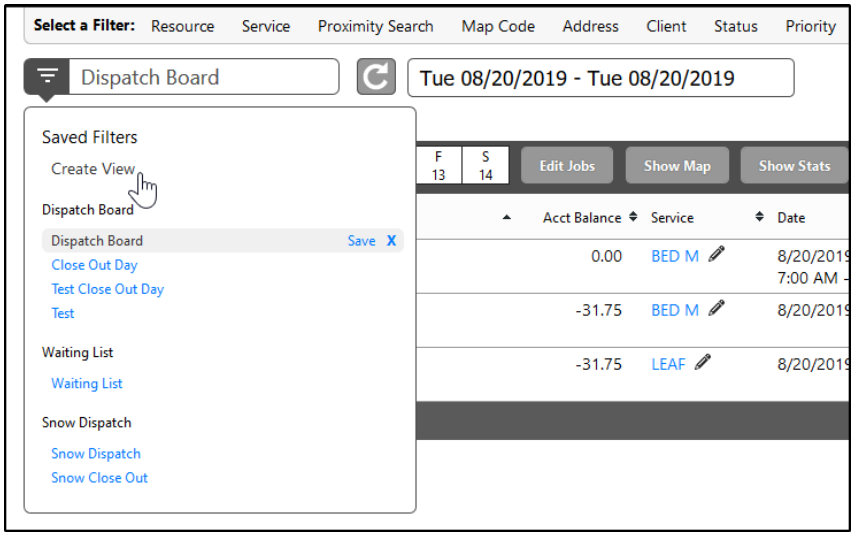
- Click a Client name to open the Client Account in a new tab.
- Click a service to open the **Job Details** overlay.
- At the far right, click the icons to update Notes or add Products.

Create Screen Views on the Dispatch Board

You can save a number of different views on several screens within Service Autopilot. These views load any selected filters to save you time when pulling up filtered lists. You can apply custom views to the following screens: Clients, Leads, Estimates, Calendar, Dispatch Board, Snow Dispatch, and Dispatch Calendar.

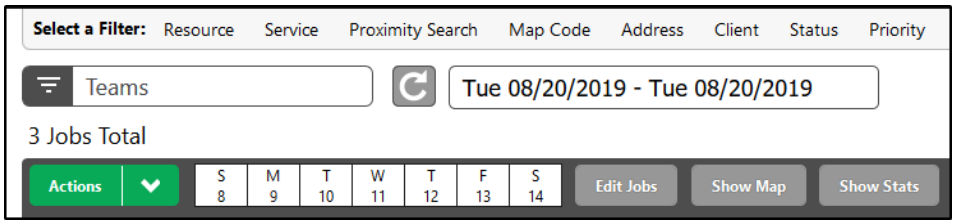
To create a custom view on the Dispatch Board, follow these steps:

1. Go to **Scheduling > Dispatch Jobs**.
2. Select the dropdown list next to the Dispatch Board heading and select "Create View."



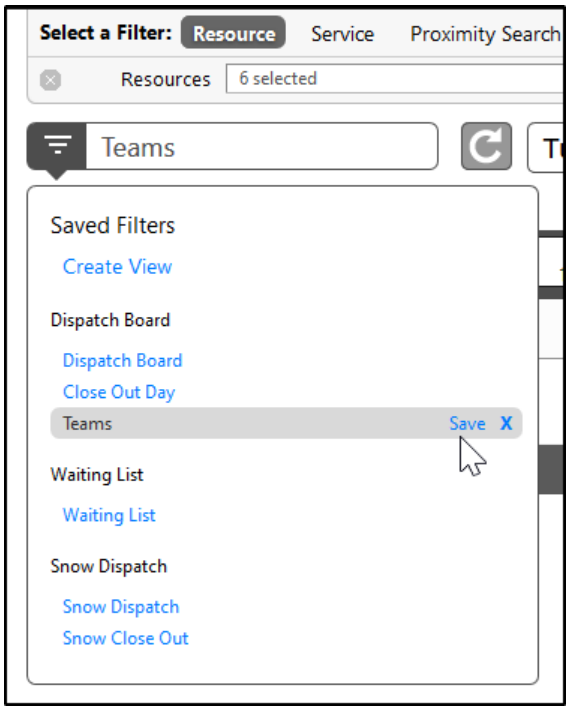
3. A dialog appears to enter the new Screen View name. Enter a name and click **Save**.

4. After saving, you will be looking at your new view.



5. Add and apply any filters you'd like to load when you select that View.

6. Go back into the **View** dropdown list and click the **Save** link next to your new View.



Now, whenever you load that View, the page will load with the filters you selected. You can edit Screen Views at any time by saving again.

To delete a view, select the "**X**" instead of **Save**.

Columns for Multi-Day Jobs

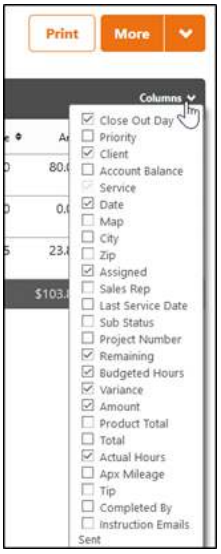
There are a number of columns you can enable on your Dispatch Board that have particular relevance to Multi-Day Jobs. You may want to create a view specifically for Multi-Day Jobs that includes, at a minimum, the following columns:

- **Remaining** – Shows how many hours are left on the Job based on B. Hrs and actual time worked.
- **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:

Status Icons on the Dispatch Board

This article will show you what different icons on your Dispatch Board mean. You can always view this information in the Dispatch Board Legend (More > Show Legend).

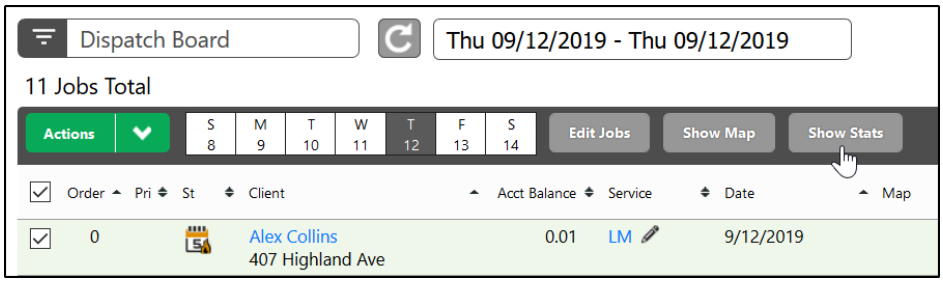
Scheduled	Job is scheduled
Scheduled-New	Job is new for this Client
Dispatched	Job is dispatched and can be seen on mobile apps
Completed	A Resource has completed the Job
Canceled	The job has been canceled
Skipped	The job has been skipped
Invoiced	Job has been completed and an Invoice generated
Locked Invoice	Job has been completed, an Invoice generated, and the Invoice is locked.
Removed from Invoice	The Invoice Line Item this Job produced has been deleted from the Invoice
On-site	A Resource is at the Service location.
Driving to Site	A Resource has started drive time to the Service location.
Multi-day Job - Scheduled	A Multi-day Job has been scheduled
Multi-day Job - Dispatched	A Multi-day Job has been dispatched and can be seen on mobile apps
Split Assignments	Job is assigned to more than one Resource but can be routed separately
Edit Time Records	Edit time punches on Job

Has Mobile Photos	Photos have been added to the Job
Confirm Appt.	Client must confirm before Service
Appt. Confirmed	Client has confirmed Service
Low Priority	A Low Priority Job
High Priority	A High Priority Job
Job Notes (Edit)	View/Edit Job Notes, Job Comments, Notes to Client, or Invoice Description
Job Notes Exist	Job has Job Notes
Products (Edit)	View/Edit Products on the Job
Has Products	Job has products added
Edit Job/To Do	View/Edit Job details

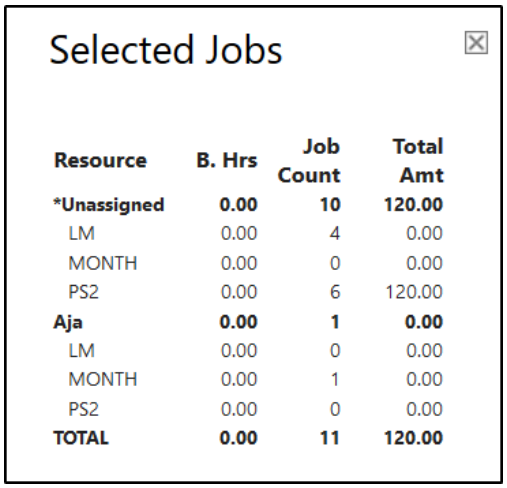
Show Job Statistics

From the Dispatch Board, you can pull up job statistics. This feature reports the total of Budgeted Hours, Job Count, and Total Amount per Resource.

1. Go to **Scheduling > Dispatch Jobs**.
2. Select the check box next to the Jobs you want to see statistics for. If you want to see statistics for all the jobs, select the top check box to check all.
3. Click **Show Stats**.



An overlay shows statistics for the selected Jobs.

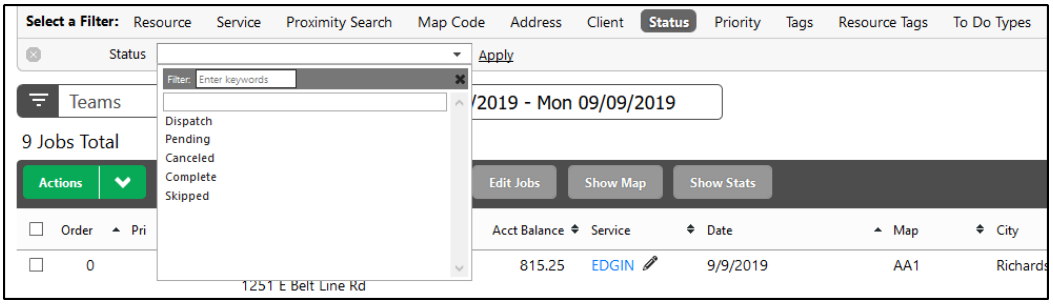


Selected Jobs

Resource	B. Hrs	Job Count	Total Amt
***Unassigned**	**0.00**	**10**	**120.00**
LM	0.00	4	0.00
MONTH	0.00	0	0.00
PS2	0.00	6	120.00
Aja	**0.00**	**1**	**0.00**
LM	0.00	0	0.00
MONTH	0.00	1	0.00
PS2	0.00	0	0.00
TOTAL	**0.00**	**11**	**120.00**

Filter the Dispatch Board by Status

If you have a lot of Jobs on your Dispatch Board, you may need to filter to dispatch or reschedule skipped Jobs. The Job Status filter can also help you find cancelled Jobs. Once you cancel a Job in Service Autopilot, the job will be removed from your view on the Dispatch Board and you will have to apply the Job Status filter to view it.



The Status filter can be used for the following statuses:

- Dispatch
- Pending
- Canceled
- Complete
- Skipped

You can only apply one status filter at a time. On the Dispatch Board, click the **Status** button, select a status, and click **Apply**. This will automatically reload the Dispatch Board and only the Jobs in the selected Status and date range will appear.

Work Orders on the Dispatch Board

A Work Order is a setting on a job which groups two or more services together on the Dispatch Board. Instead of multiple rows with each service, you'll see one row for the entire job. Any One Time, Recurring, or Waiting List jobs with more than one service can be a Work Order.

Before you can create Work Orders, you will need to enable the function in your Company Settings. You will also need to create a Work Order before it can be seen on the Dispatch Board.

On the Dispatch Board or Waiting List, a Work Order will display as one line item:

The Service will be the first item on the Work Order and the B. Hrs and Amount columns will be cumulative for the entire Work Order. On the far right, there is a small black arrow where the Products icon would be. Click this arrow to display all line items on the Work Order:

Even though the first service line item of the Work Order is blue, it is not clickable. To edit any of the jobs within the Work Order, you will need to expand the Work Order, then click the service you need to modify. Also note that all line items within the Work Order are highlighted in blue so you can spot them easily on the Dispatch Board.

If you change the status of the first Work Order item, it will change the status for all services within the Work Order. However, if you expand the Work Order, you can click individual status icons to dispatch services separately.

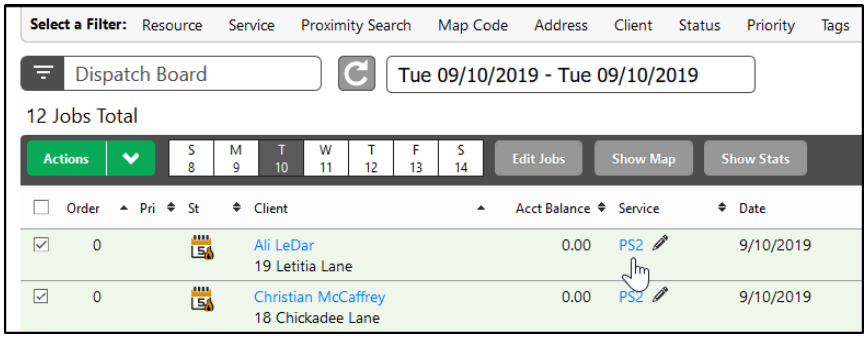
Change Job Statuses

Reassign Jobs from the Dispatch Board

There are a few different ways you can reassign work on the Dispatch Board. This is useful if a Resource calls out sick because you can easily reassign multiple Jobs at once.

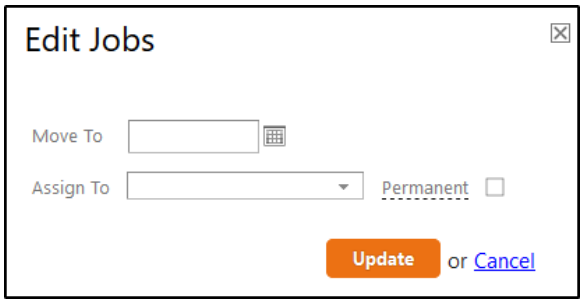
Edit Assignments in Bulk

1. Go to **Scheduling > Dispatch Jobs**.
2. Select the Jobs you want to reassign.
3. Click **Edit Jobs**.



4. Update the Assignment. This will affect all selected Jobs.

   The **Permanent** option refers to only the Assignment and is effective for all dates moving forward. Checking this box will update the assignment on the Master Job.

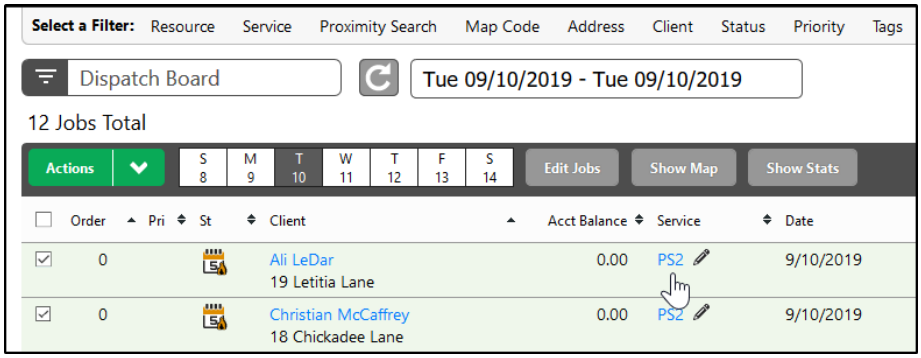


5. Click **Apply**.

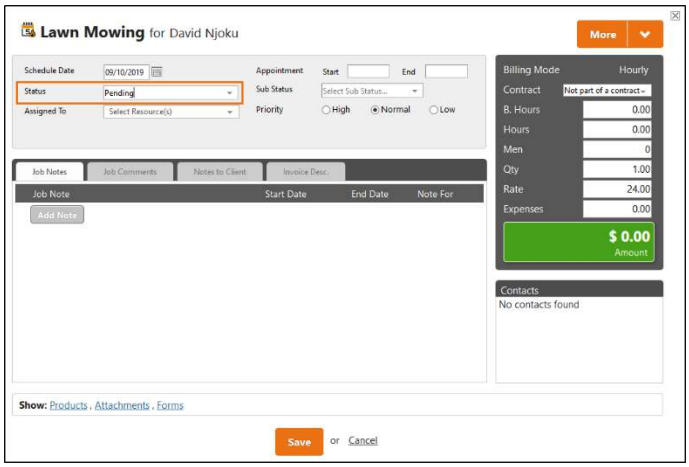
Edit Assignment for One Job

Option 1

1. Go to **Scheduling > Dispatch Jobs**.
2. In the "Service" column, click the Service on the Job you need to reassign.



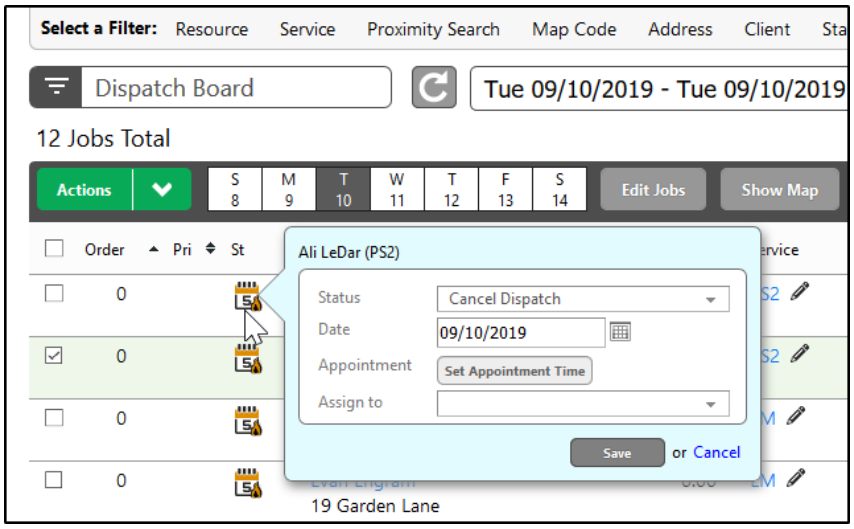
3. In the Job Edit overlay, change the job assignment in the Assigned To field by selecting a different Resource.



4. Click **Save**.

Option 2

1. Go to **Scheduling > Dispatch Jobs**.
2. Click the **Job Status** icon for a job.



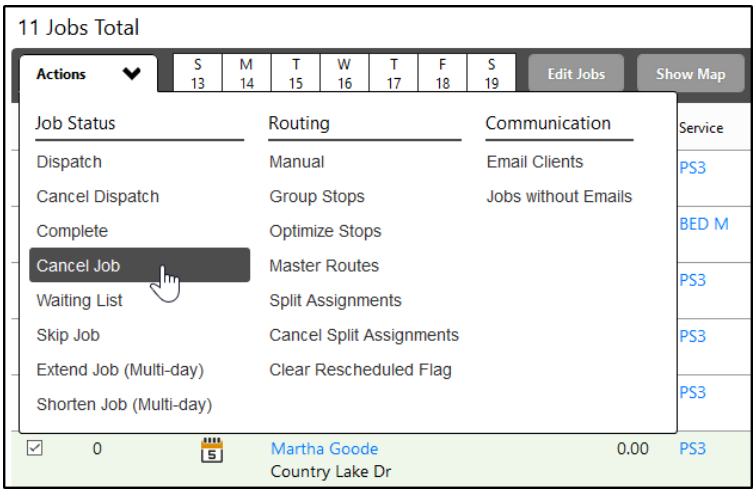
3. Use the overlay to change the assignment.
4. Click **Save**.

Cancel Jobs

You can cancel job instances directly from the Dispatch Board. This will not cancel the master job. This means that if you cancel a weekly job from the Dispatch Board, the job will still appear the following week.

To cancel a master job, go to the client account, hover over the master job, and select **More > Cancel**.

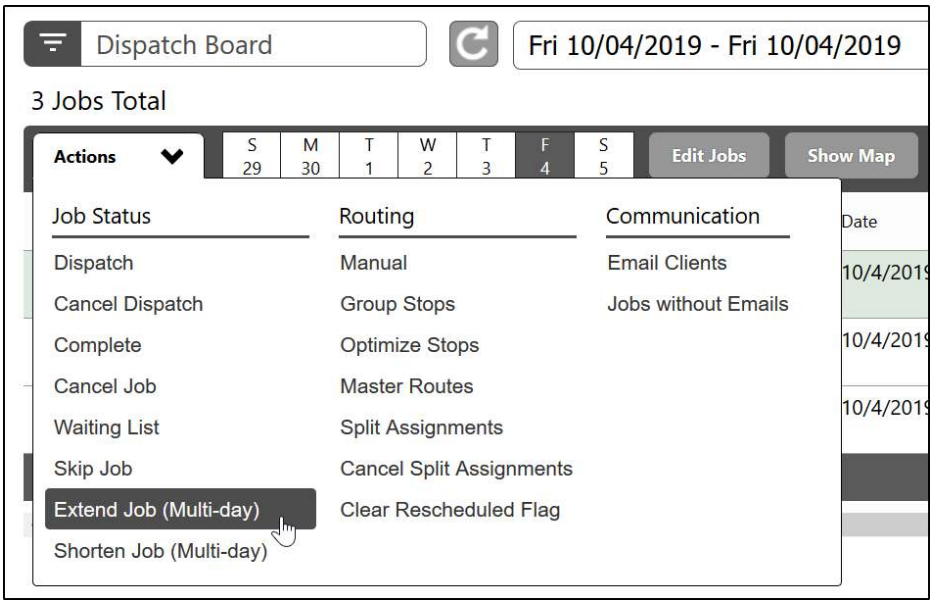
To cancel a job on the Dispatch Board, simply check the box next to the job you want to cancel, hover over **Actions** and select "Cancel Job."



Note: You can view cancelled jobs on the Dispatch Board by applying the "Canceled" **Status** filter.

Extend or 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.

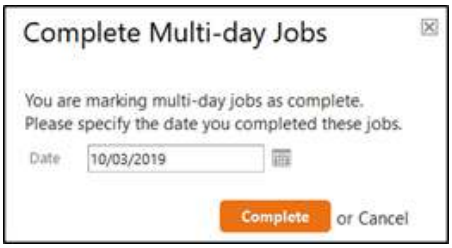


For example, if you logged hours on the last day of the job but the work wasn't finished, you could extend the job by as many days as you need. This would create additional job instances tacked onto the last day of the job. Any remaining Budgeted Hours (B. Hrs) will be allocated when the job is extended.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

Complete a Multi-Day Job

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:



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.

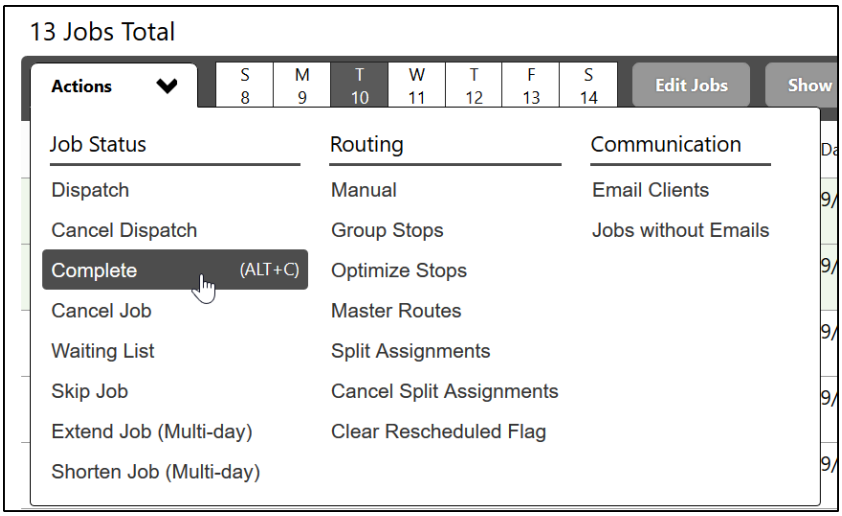
When the Invoice for a Multi-Day Job is generated, there will be one line item for each completed Service regardless of how many days it took to complete the Job. If your Multi-Day Job only had one Service that means it was not a Work Order. The Invoice would only show a single line item for that single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

Complete a Job

If your field staff uses the Service Autopilot Mobile App, you will not need to mark jobs as complete because they will do that as they finish Jobs. If your field staff are not using the SA Mobile App, you will need to manually mark jobs as complete. There are a few ways to do this depending on how many jobs need to be completed.

Complete One or More Jobs

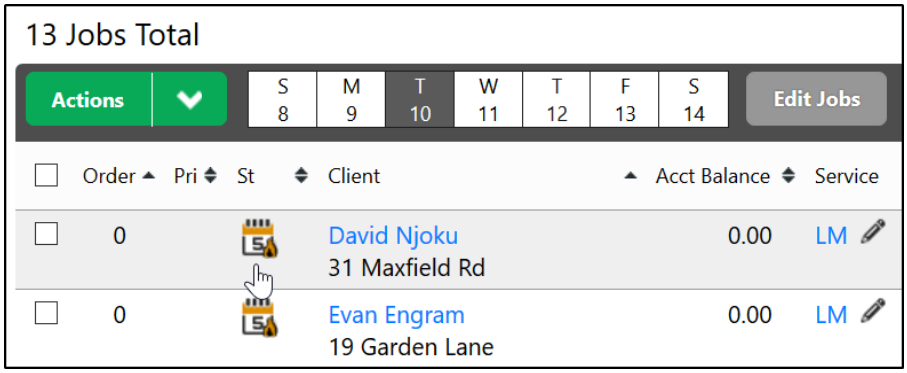
1. Go to **Scheduling > Dispatch Jobs**.
2. On the Dispatch Board, locate the Job(s) to be marked as complete.
3. Click the check boxes next to each Job.
4. Hover over **Actions**.
5. Select "Complete."



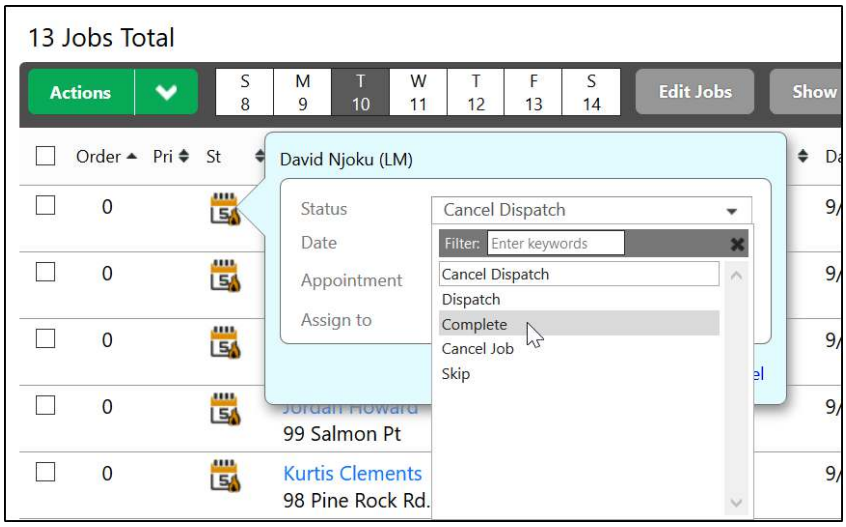
Complete one job

Option A

1. Go to **Scheduling > Dispatch Jobs**.
2. Click the **Job Status** Icon for the Job you want to complete.



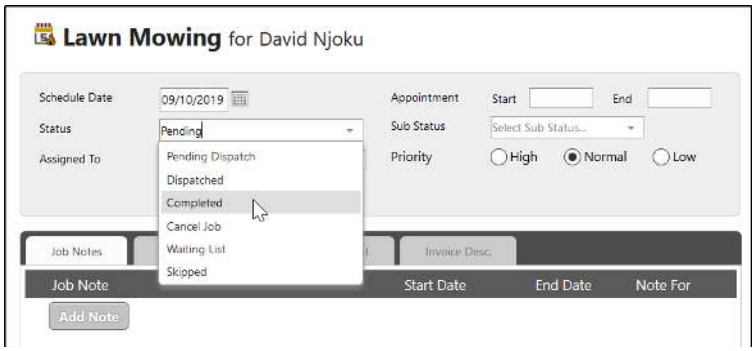
3. Click the **Status +** dropdown list.
4. Select "Complete" from the **Status** dropdown list.



5. Click **Save**.

Option B

1. Go to **Scheduling > Dispatch Jobs**.
2. Click the Service for the Job you want to complete. This will open the **Job Edit** overlay.



3. Click the **Status** dropdown list.
4. Select "Complete."
5. Click **Save**.

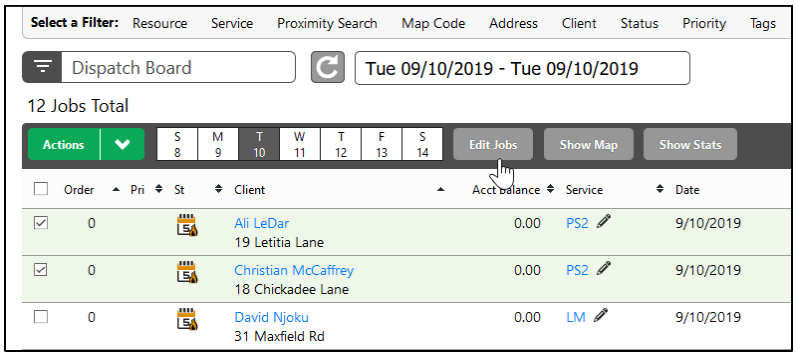
Reschedule Jobs from the Dispatch Board

Rescheduling jobs because of weather or other reasons, can be stressful and time-consuming. Fortunately, there are a few simple ways to reschedule Jobs in Service Autopilot. You can also easily reassign jobs to different Resources at the same time. The steps below will explain how to do it.

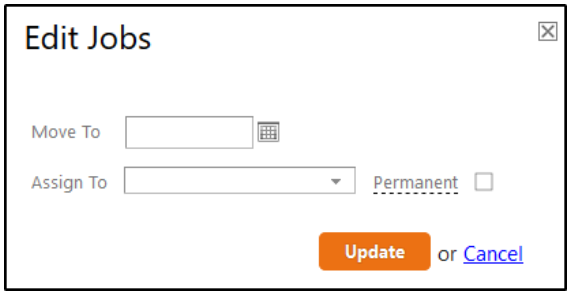
Remember that recurring schedules (such as Weekly - Monday) will auto-adjust whenever a job instance is skipped or rescheduled. That means that even if one Job is rescheduled, the others will remain on the selected schedule. If you need to update all future rounds, you will need to update the Master Schedule on the Master Job record.

Reschedule and Edit Assignments in Bulk

1. Go to **Scheduling > Dispatch Jobs**.
2. Select the Jobs you want to move.
3. Click **Edit Jobs**.



4. Type a date in the **Move To** field or click the "Calendar" icon to choose a date.



5. Update the Assignment. This is optional and will affect all selected Jobs. The **Permanent** option refers to only the Assignment and is effective for all dates moving forward. Checking this box will update the assignment on the Master Job.

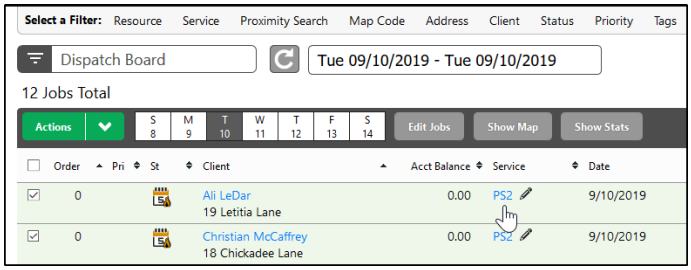
6. Click **Apply**.

Reschedule and Edit Assignment for One Job

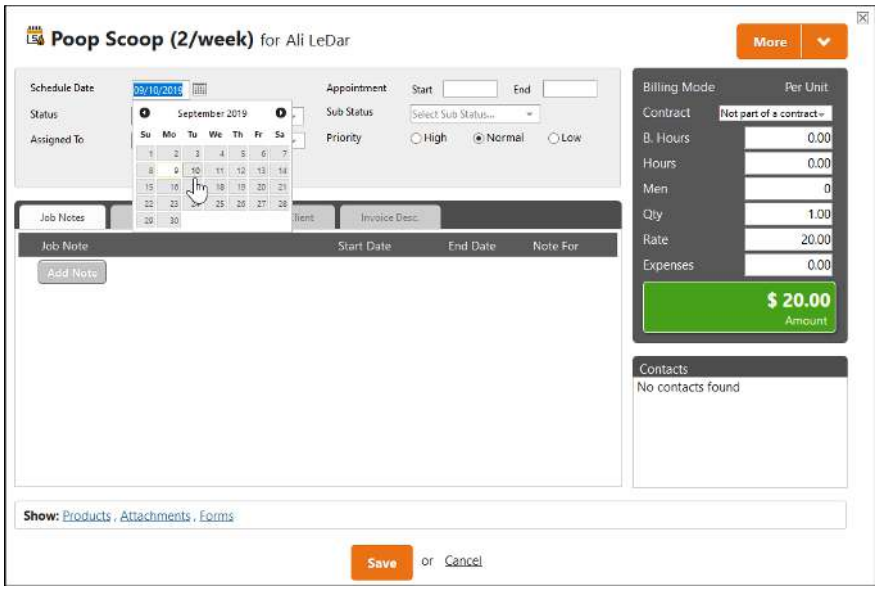
Option 1

1. Go to **Scheduling > Dispatch Jobs**.

2. In the "Service" column, click the Service on the Job you need to move.



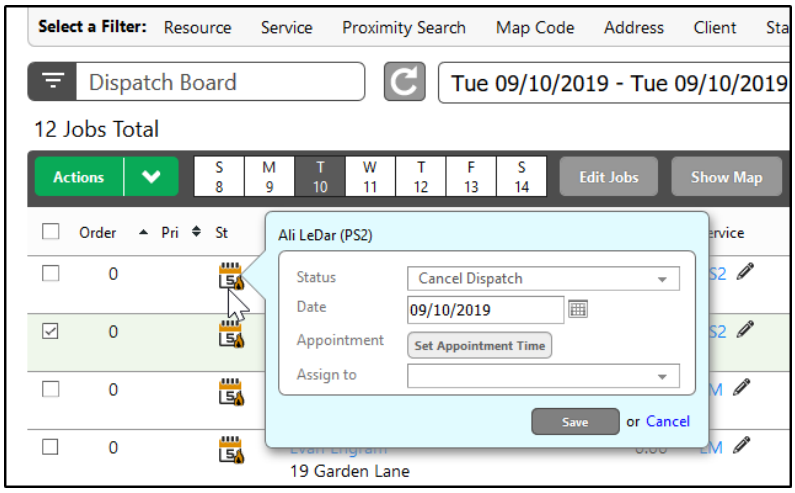
3. In the **Job Edit** overlay, find the Schedule Date, then change the date manually, or click the calendar to select a new date.



4. Change the job assignment in the **Assigned To** field by selecting a different Resource.
5. Click **Save**.

Option 2

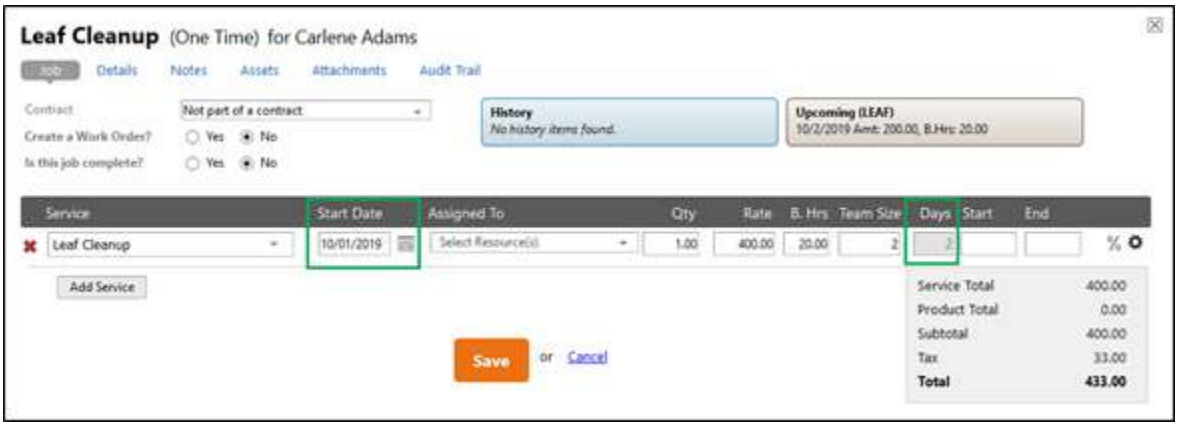
1. Go to **Scheduling > Dispatch Jobs**.
2. Click the **Job Status** icon for a job.



3. Use the overlay to change the Status, Date, Appointment Time, or Assignment.
4. Click **Save**.

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:



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.

Team Size does not update when you assign the job from the Dispatch Board or Waiting List. If you want the number of days for the job to update based on the Team Size, you will need to update the assignment from the Master Job level.

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.

Modify a Job Rate from the Dispatch Board

Completed Jobs become line items on Invoices (unless the jobs are under Contract). This means that you can modify the service rate from the Dispatch Board and your changes will be on the Invoice. This can be done from the Job Details Overlay or from the Dispatch Board itself. To change the Rate on a Job from the Dispatch Board, follow these steps:

1. Go to **Scheduling > Dispatch Jobs**.
2. Find the job you want to modify and click the value in the "Amount" column.
3. Change the amount.
4. Click **Save**.

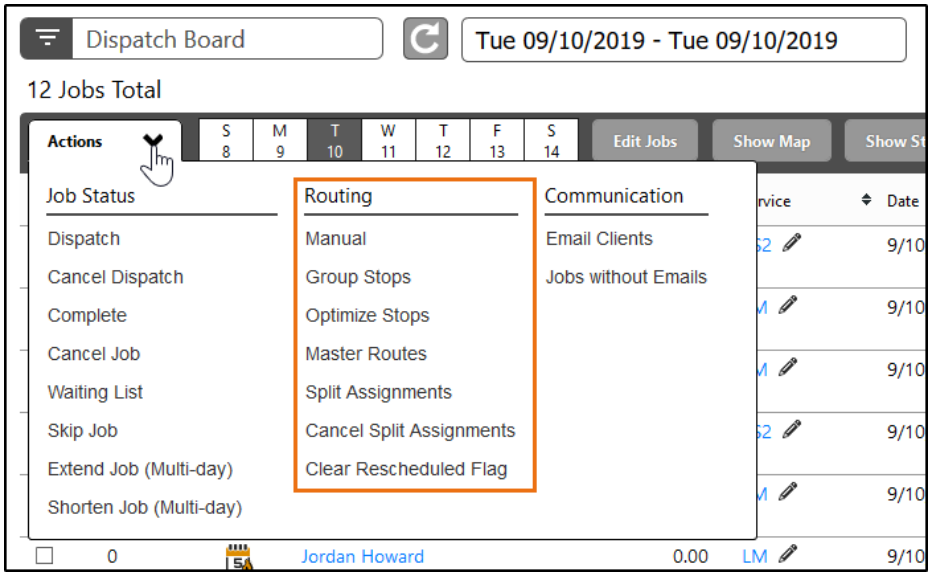
Note: If the Service Mode of the service is Hourly, the Amount will change based on the total time worked on the job, for example: Number of Staff x Hours x Rate = Amount.

Routing

Routing Overview

Routing lets you place jobs in order by Team or resource. It's a great tool that helps make drive time more efficient.

1. Go to **Scheduling > Dispatch Jobs**.
2. Hover over **Actions** and locate the "Routing" column.



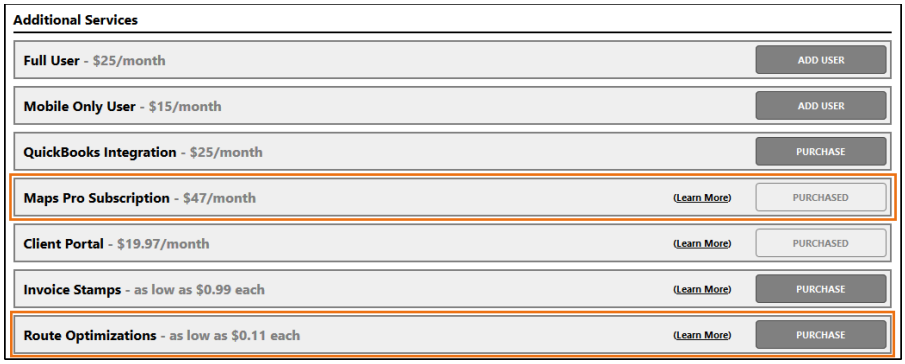
You have four options to choose from.

- **Manual** - This option allows you to drag and drop jobs into the order in which you would like to perform them.
- **Group Stops** – "As the crow flies" routing. This option will order jobs by distance, traveling in a straight line. It does not take into consideration things like lakes and mountains, housing complexes, or road systems.
- **Optimize Stops** - Very similar to how Group Stops works, this option will place jobs in order by distance but will take into consideration roads, natural barriers and the best route from A to B. There are two ways you can optimize your route, Track Road and Google.

  Google- Comes with the Smart Maps subscription. You can route as many times as you want but are limited to 23 stops per resource. For example, a crew with 30 jobs per day couldn't be routed through Google, but a crew with 20 stops could.

  Track Road- You purchase routing credits. Each credit is good for one Team's route, and you can route up to 100 stops per resource.

  To purchase either of these, hover over your avatar and select "Account & Billing." On the new screen, you will see the two Optimization options.



- Master Route - This option allows you to place all of your accounts on a route template. This is typically only used for On Demand (Snow) jobs.

After you've selected your routing option, a yellow bar appears prompting you to save the route's order. It gives you three options based on your preferences.

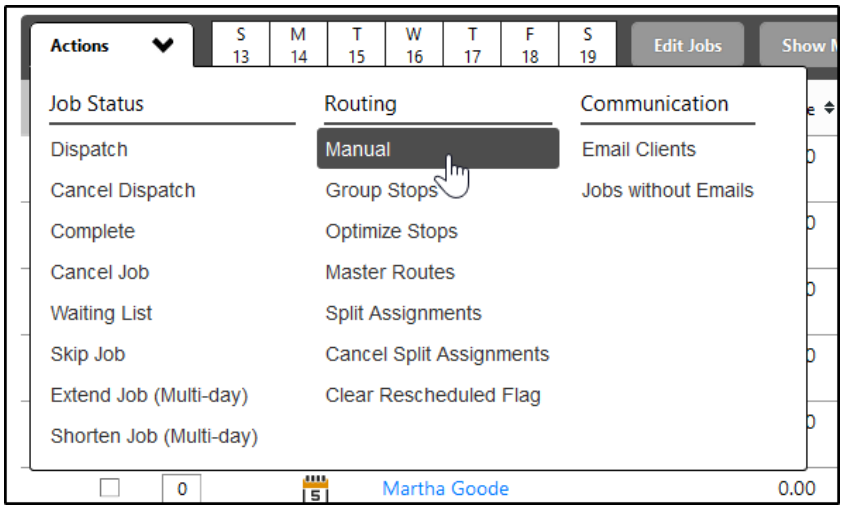
- **Update Today's Route Only** - Updates the route only for the current day being routed.
- **Update Every Week** - Updates those jobs every single week if they are Recurring Jobs, useful for weekly schedules.
- **Update Every Other Week** - Updates the jobs every other week, useful for bi-weekly schedules.

In addition to these routing options, you can also route from the Dispatch Board map. For more information, see “Reassign or Reschedule Jobs from the Dispatch Board Map” on page 72.

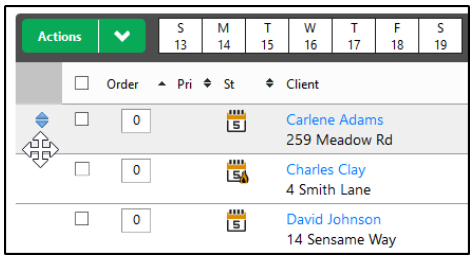
Change Route Order

Regardless of which method you use to initially route the day's work, you may find situations where you need to move a few jobs for whatever reason. In such a situation, it's best to manually re-order the jobs.

1. Make sure you are viewing the correct date on the Board, then hover over **Actions** and select "Manual."



2. Hover over the far left side of the grid to see blue, double-sided arrows:



3. Use the arrows to drag and drop the jobs to a different position.

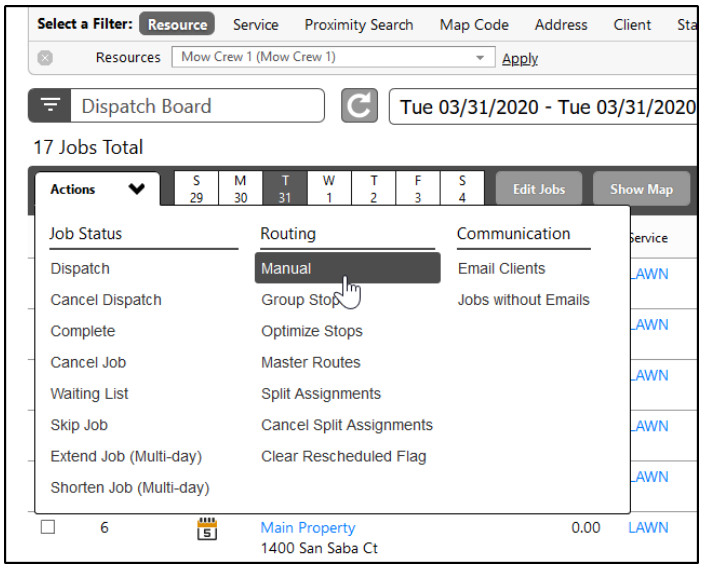
   You can also type in the **Order** field to re-route.

4. When you are finished with your adjustments, use the yellow bar at the top of the grid to save your changes:

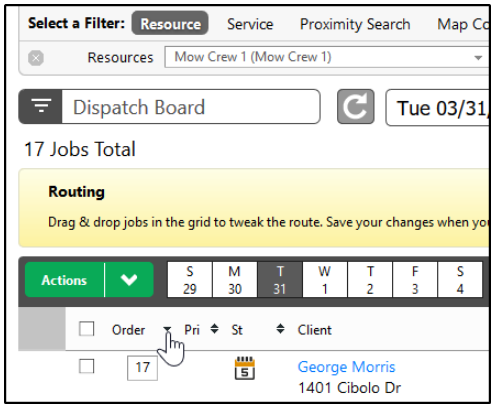
Reverse Route Order

If you use one of the routing options available on the Dispatch Board, Jobs will be routed from the physical address location of your company outwards. You can reverse the route order so your last stop would be back at the shop location. To do this, you first need to have your Jobs routed. Then, from the Dispatch Board, follow these steps:

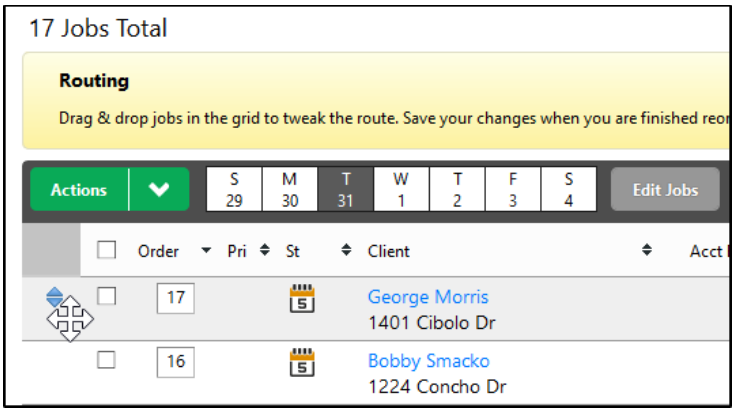
1. Hover over **Actions** and select **Routing > Manual**



2. In the “Order” column, click the arrow at the right to sort the column in reverse numerical order.



3. Hover to the left of the first Job to see the double-sided blue arrow.



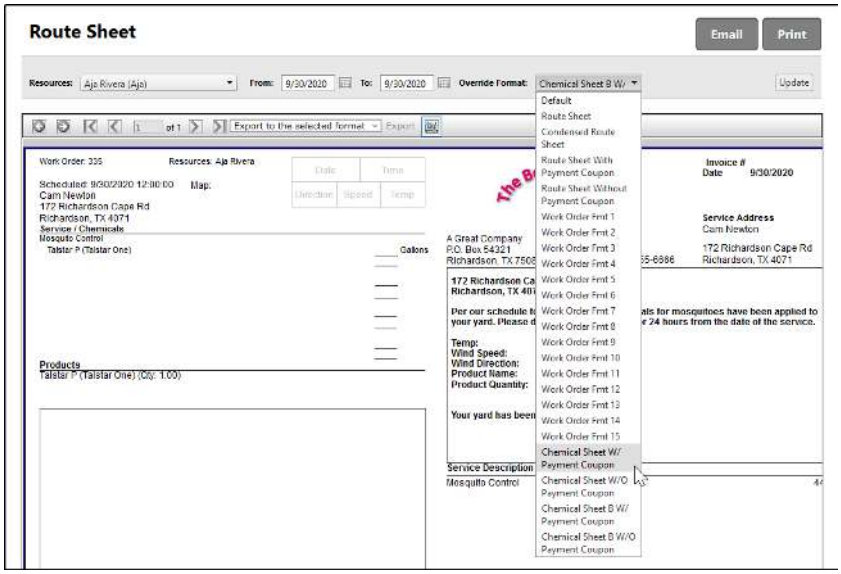
4. Click and drag the first Job down to the second spot then back to the first. This will re-number the list in the reverse order.

Print Chemical Tracking Route Sheets

For technicians who are not using the Legacy Mobile App, you have the option of printing Route Sheets. There are two different formats without payment coupons, and with payment coupons, which list the chemical product information so it can be torn off and left on site when work is completed.

To print chemical Route Sheets, follow these steps:

1. Go to **Scheduling > Dispatch Jobs**.
2. Check next to every job that needs to be dispatched, then go to **Actions > Dispatch**.
3. Click **Print** at the top right corner of the Dispatch Board.
4. Select the Resource, Date, and override format at the top of the page. The options for Chemical Route Sheets are at the bottom of the list.



5. Click **Print** again to open the pages in a new tab and view the print dialog.

Chemical route sheets print in landscape format. If you use perforated paper, the Technician can tear the paper in half, leave one half at the property with custom instructions for the client, and fill out the other half to return to the office for your records.

Troubleshoot Print Issues in Chrome

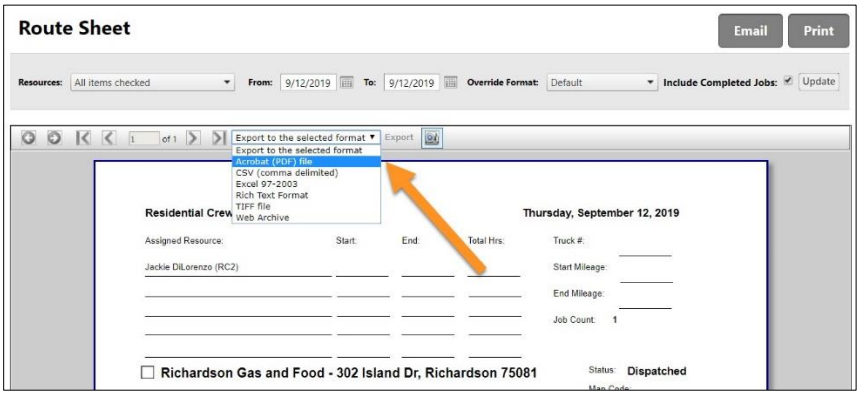
Google Chrome recently did an update which removes the ability to print documents from a tab in your browser. You may have noticed that nothing happens when you try to print Route Sheets and Invoices while in Chrome. There are two workarounds:

- Switch to the Firefox browser which lets you print these from the browser.
- Print the Route Sheets or Invoices by first downloading them as a PDF, and then printing from the PDF.

To print Route Sheets

1. Instead of clicking **Print** on the **Route Sheet** screen, select the option to Export to the selected format.
2. From the dropdown list, select “Acrobat (PDF) file.”
3. Click **Export**.

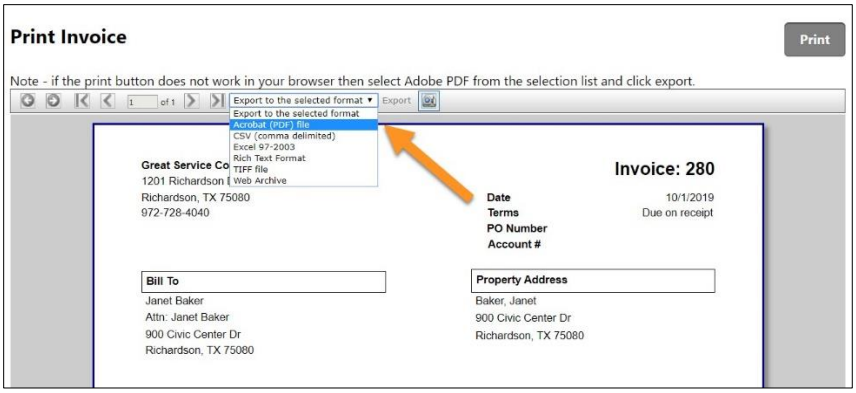
The Route Sheets will download as a PDF file.



To print Invoices

1. Instead of clicking **Print** on the **Print Invoice** screen, select the option “Export to the selected format.”
2. From the dropdown list, select “Acrobat (PDF) file.”
3. Click **Export.**

The Invoice will download as a PDF file.



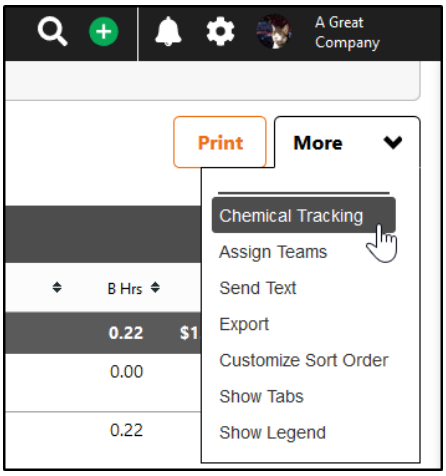
The More Dropdown List

Chemical Tracking Wizard

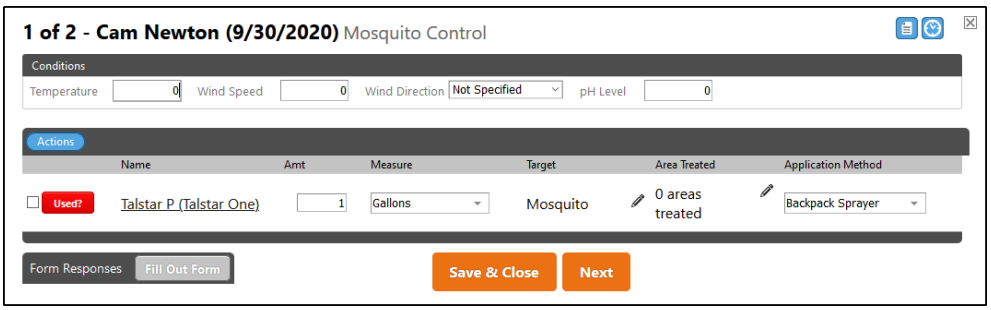
The **Chemical Tracking Wizard** is a tool on the Dispatch Board that lets you manage all chemical tracking services within a single overlay. This can include:

- Adjusting quantities of chemicals that were used on a job
- Adding new chemicals that were used
- Viewing reports related to future and past chemical applications
- Displaying weather conditions and pH settings, if these General Settings are enabled

You can access the wizard from the Dispatch Board by hovering over the **More** dropdown list and selecting "Chemical Tracking."



This opens the **Chemical Tracking Wizard**:



It is divided by Job with the number of Chemical Jobs listed at the top of the overlay. Use the buttons at the top-right to access the **Planned Chemical Usage** Report and the **Chemical History** for the property currently in the view.

The "Conditions" section applies to all Jobs when a value is entered. This is where you can manage Products, Mixes, and Form responses. To confirm the Product used, click the **Used** button. Clicking

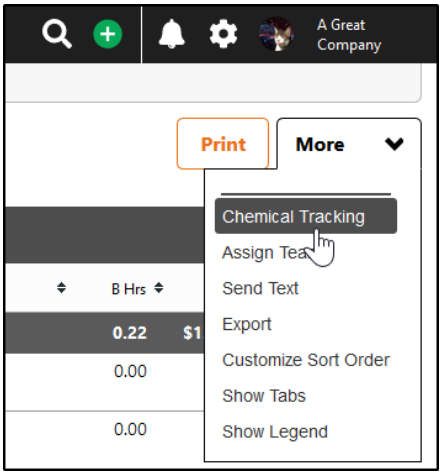
the name of any item will allow you to edit it including the application rate and mix ratio. Use the pencil icons to modify the **Areas Treated** or **Application Method**.

With the applicable User Rights, a mobile user will be able to modify all fields on the Chemical Tracking Wizard from the Legacy Mobile App.

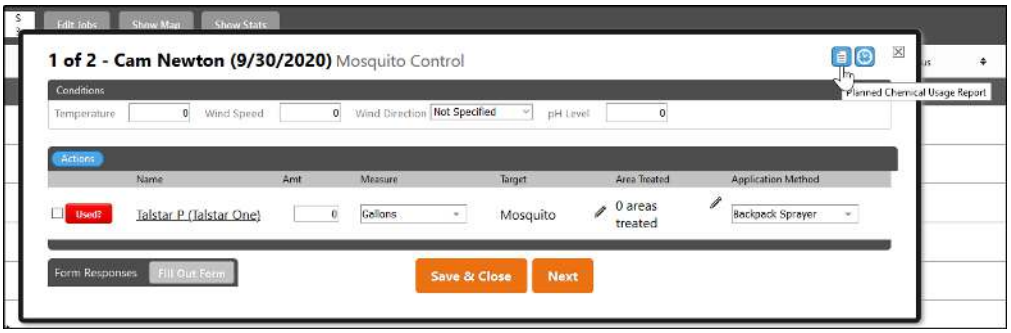
Planned Chemical Usage Report

Before a Chemical Tracking job, you can print the Planned Chemical Usage Report for the technician to know what chemicals and how much of each to take into the field. The Planned Usage Report will tell the technician the overall quantities of product to load on the truck and the individual quantities for each client they will be servicing on the date or date range you choose for the report.

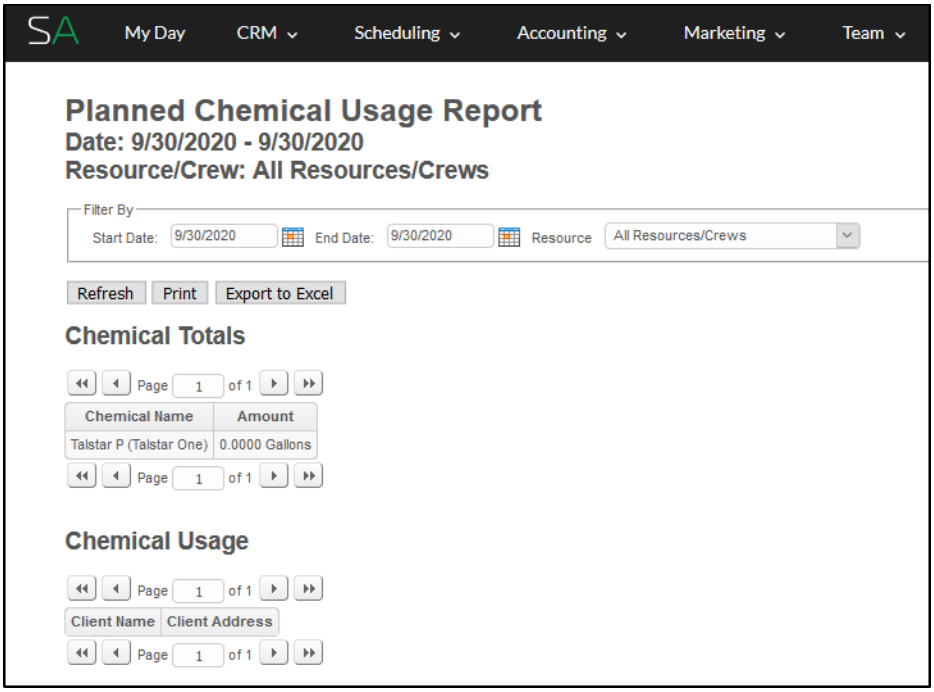
Access the report from the Dispatch Board (**Scheduling > Dispatch Jobs**) by selecting **Chemical Tracking** on the **More** dropdown list:



The **Chemical Tracking** option will only appear if you have chemical jobs scheduled for the date range you are currently viewing on the Dispatch Board. From the Chemical Tracking Wizard, click the **Planned Chemical Usage Report** button in the upper right corner of the overlay to access the report:



The report will open in a new tab and will look something like this:



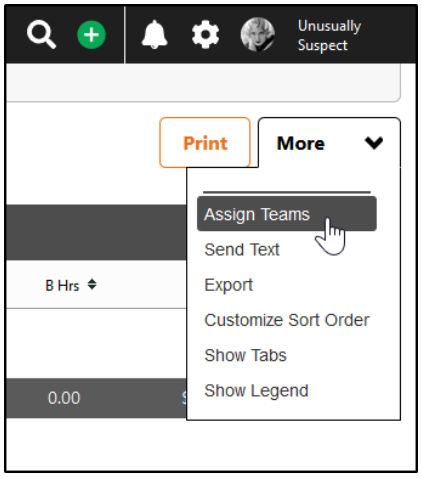
Chemical Totals refers to the overall quantity for each chemical that is to be used for the day. The **Chemical Usage** portion will display the Client Name, Client Address, and the quantity of chemical that is to be used at the property.

Assign Teams

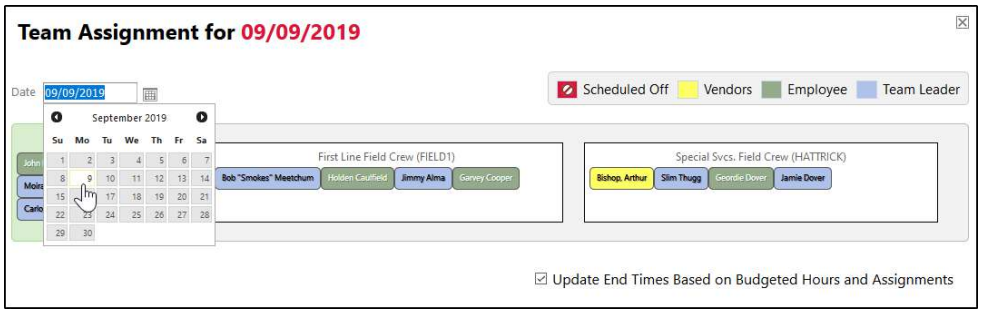
When creating or scheduling Jobs, you may not know who will be doing the actual work. You can assign Resources to different Teams directly from your Dispatch Board to make sure you have the most accurate personnel for the day's Jobs.

To assign Teams, follow these steps:

1. Go to **Scheduling > Dispatch Jobs**.
2. Hover over **More**.
3. Select "Assign Teams."



4. Select a date, if needed. The date defaults to the date in the current Dispatch Board view.



5. Click and drag Employee and Vendor name(s) from the "Unassigned" list to Teams on the right. You can also click and drag Resources between Teams.
6. Click the "**X**" to exit the **Assign Teams** overlay. Changes are saved automatically.

Note: An employee cannot be listed on more than one crew at a time.

Auto-Adjust Job End Times with Team Changes

If you have Budgeted Hours (B. Hours) and Appointment Times set for a Job, you can choose to automatically update the end time of that Job based on the number of Resources assigned to it from Team Assignments.

For Example, let's say a job has an appointment time of 1:00 p,m, - 2:00 p.m., the B. Hours are set to one hour, and there is one resource assigned to the Team. If you update the Team by adding two additional resources (now three total), the appointment time will change to 1:00 p.m. - 1:20 p.m.

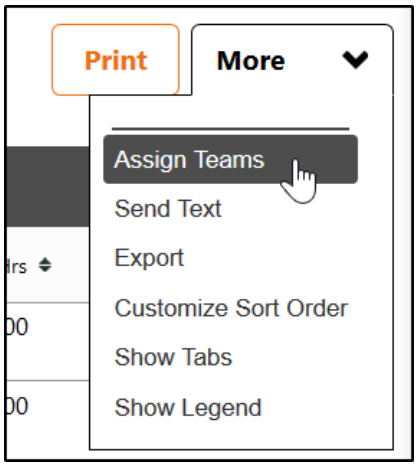
Enable the Feature

There are two ways to enable this option: from your Calendar Settings and from the Dispatch Board. If you update the check box in one place, it will update the other.

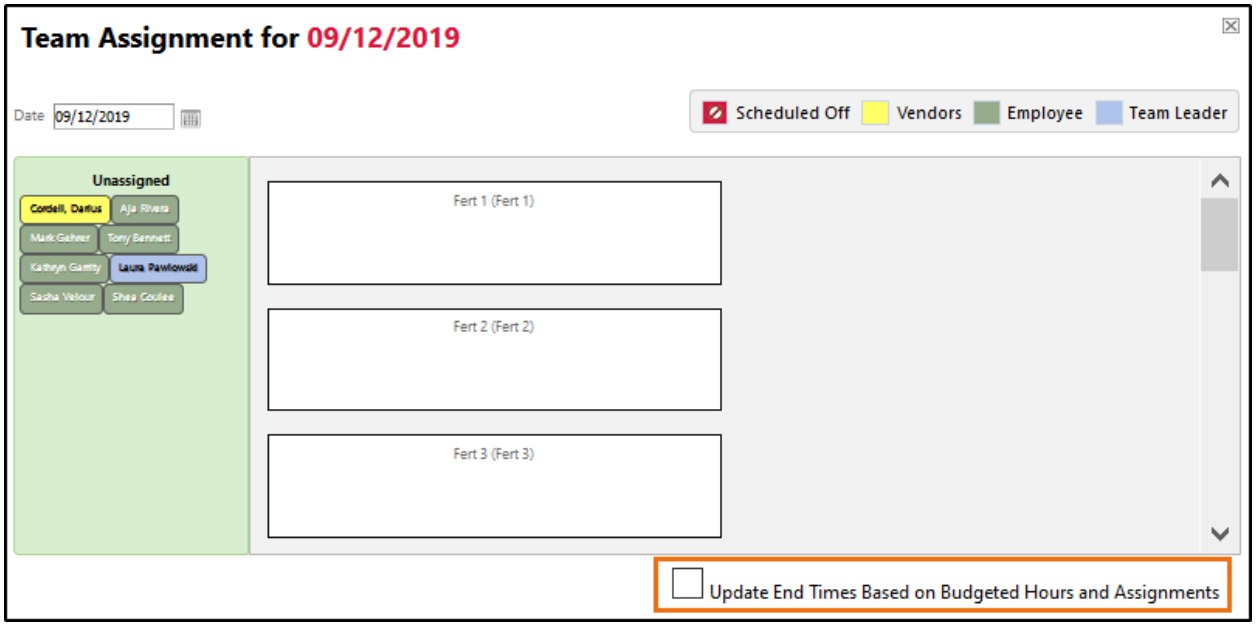
For Instructions on how to enable this setting on the Calendar, go to **Scheduling > Calendar > Calendar Settings- Auto-Adjust Job End Times with Team Changes** in the Help Center.

On the Dispatch Board

1. Go to **Scheduling > Dispatch Jobs**.
2. Hover over the **More** dropdown list.
3. Select "Assign Teams."



4. Check the box that says **Update End Times Based on Budgeted Hours and Assignments**.



5. Click the "**X**" to close the overlay. Changes are saved automatically.

How the Feature Works

For this feature to work, Jobs must have the following criteria:

- Appointment Times
- Budgeted Hours
- Team Assignments

From either the Calendar or Dispatch Board, if you add or remove Resources from a Team, the end times for the Team's jobs will adjust based on the total number of Resources.

Example

For example, you have a job with two Budgeted Hours assigned to a Team of two Resources, and the appointment time is 4:00 p.m. - 5:00 p.m.

Let's say you add another Resource to the Team for a total of three Resources. The Job's appointment time will reduce by a third (20 minutes). So the new appointment time will be 4:00 p.m. – 4:40 p.m.

Alternatively, if you remove a Resource from the Team so the Team now has one Resource, the appointment time will double to two hours. So the new appointment time will be 4:00 p.m. - 6:00 p.m.

The time always adjusts based on the Budgeted Hours. You can think about the calculation in this way: **New Time = Budgeted Hours / Number of Resources.**

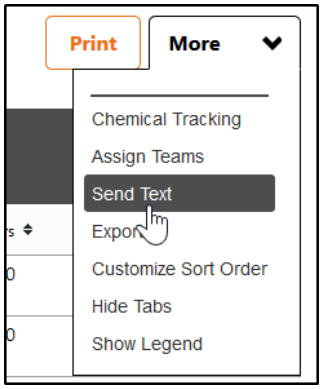
Note: Any Jobs that are dispatched will not adjust automatically, even if you have the Auto-Adjust option selected. You must change the Job Status to Pending and then make your Team changes.

Send a Text Message to a Resource

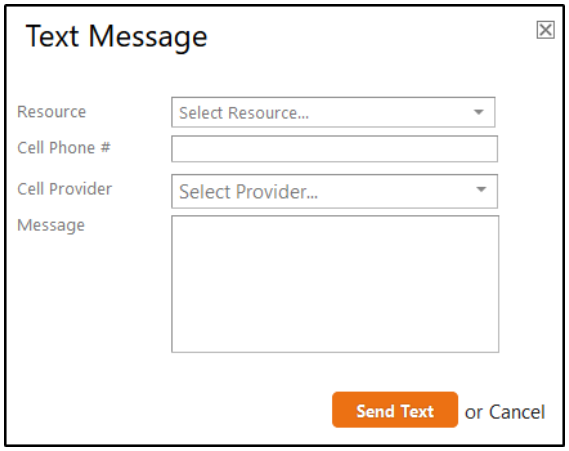
From the Dispatch Board, you can send text messages to your resources or clients. You do not need to have a Pro Plus or Two-Way Texting subscription to do this, just the cell phone number and provider of the person you want to message.

To text a Resource, follow these steps:

1. On the Dispatch Board, hover over the **More** dropdown list.
2. Click **Send Text**.



3. On the **Text Message** dialog, select the Resource you want to contact.



The Cell Phone Number and Cell Provider will be filled in when you select a Resource if that information is already on the Employee or Vendor record. If not enter the Resource information in the dialog.

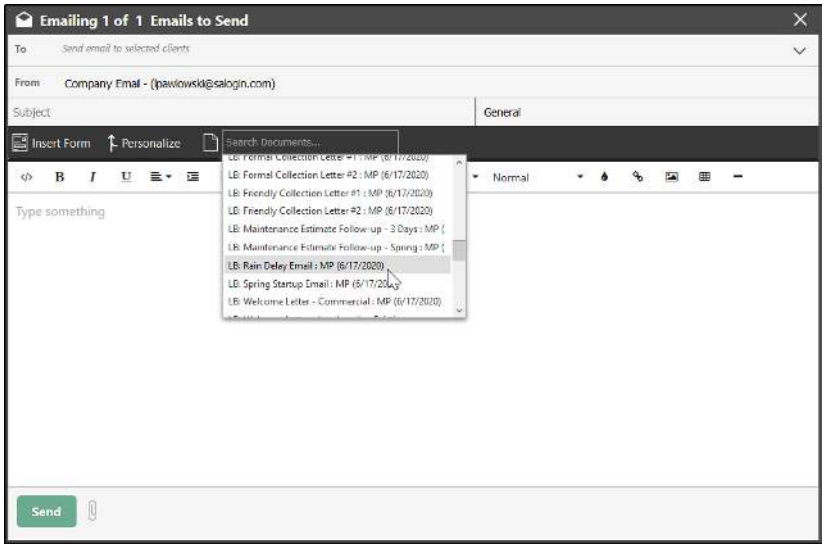
4. Type in your message.
5. Click **Send Text**.

Send Emails from the Actions List

You can send emails to your clients directly from the Dispatch Board. This might be helpful if you like to let your clients know you'll be performing work at their property before the day begins. There are two ways to send emails from the Dispatch Board - from the Job Detail and from the Actions List.

Emailing from the **Actions** List gives you the opportunity to email in bulk or to a single client. To do so, follow these steps:

1. From the Dispatch Board (**Scheduling > Dispatch Jobs**), check the boxes next to the Jobs you want to email. Check the box at the top left of the table to select all.
2. Go to **Actions > Email Clients**. An email overlay appears.
3. To save time, select an Email Document you've already downloaded or made.



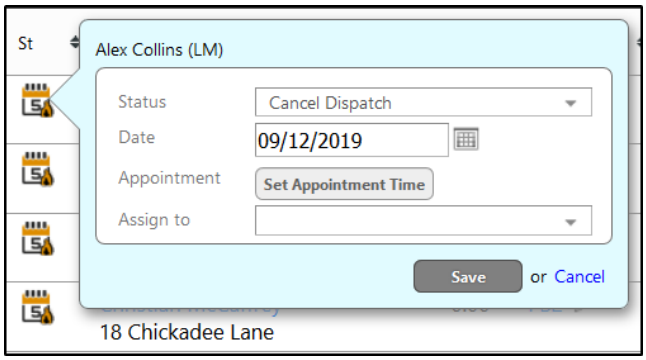
4. Customize the email as needed. Remember that you will not see merge tags populate information in this overlay if you are sending to more than one client.
5. Click **Send**.

Set Appointment Times on the Dispatch Board

If you didn't add an Appointment Time for a Job when the Job was originally created, it can be done from the Dispatch Board itself or from the Job Details overlay. To add an Appointment time from the Dispatch Board, follow these steps:

Using the Status icon

1. Go to **Scheduling > Dispatch Jobs**.
2. Click the Job Status icon for the job you want to change.
3. In the dialog, click **Set Appointment Time**.



4. Enter times.
5. Click **Save**.

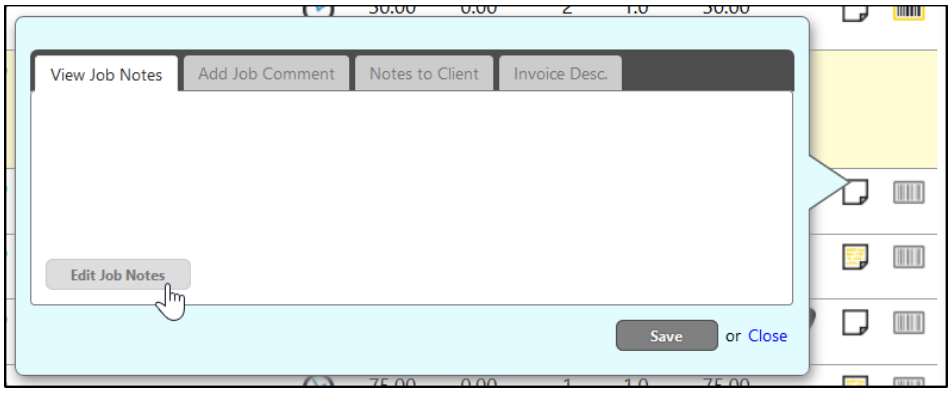
Add a Job Note from the Dispatch Board

Service Autopilot lets you add notes to Jobs in order to provide your Teams with specific information related to those Jobs. For example, maybe a Client wants her gate closed after your staff leaves the property. You can have a note appear for the Teams on the Route Sheets or Service Autopilot Legacy mobile app that says something like, "Close the gate!"

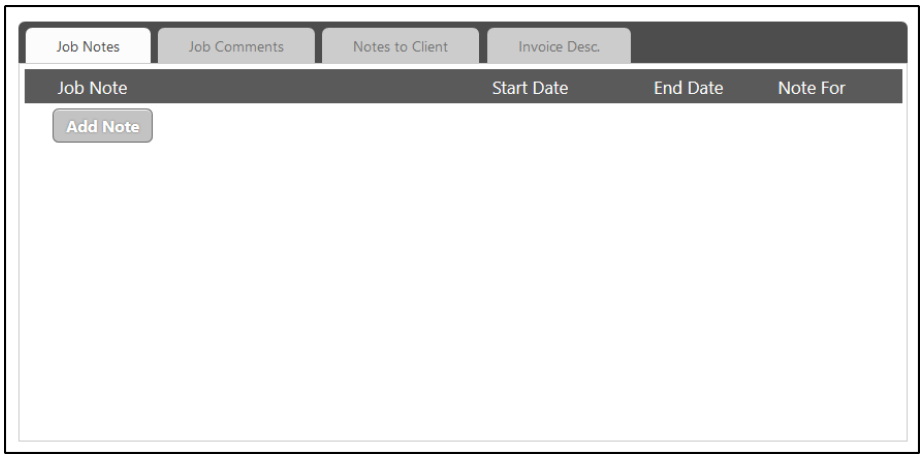
While you can add a Job Note to a Job when you first create it or to a Master Job at any time, you can also view and add Job Notes from the Dispatch Board.

To add a Job Note from the Dispatch Board, follow these steps:

1. Go to **Scheduling > Dispatch Jobs**.
2. Locate the Job and click the Note icon at the far right side of the Dispatch Board. This opens a small popup with your various note options.
3. Click the **Edit Job Notes** button.



4. The **Job** overlay will open with the **Job Notes** section blinking.
5. Click the **Add Note** button.



6. Enter your note. The dropdown list at the right of the Note indicates whether this Note will apply to the Master Job, this Job instance only, or the Service.
7. Click **Save**.

By default, adding a Note through these steps will update the Master Job. If it is a Recurring Job, the new Note will appear on all occurrences going forward. If you enter a Start Date and End Date this will put a specific date range for the note on the Master Job.

On the Dispatch Board, the Note icon will turn yellow to reflect that there is a Job Note. Click the icon to open a small popup which now displays the Job Note.

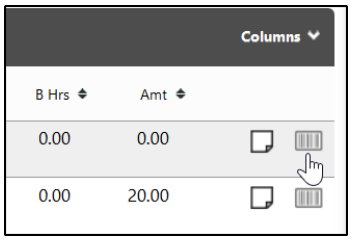
You can still add or edit by clicking **Edit Job Note**.

Add or Confirm Products on the Dispatch Board

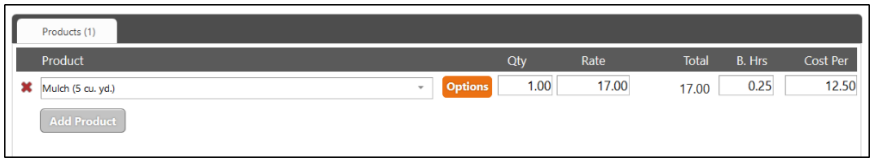
Service Autopilot allows you to add and confirm Products from the Dispatch Board. When you are creating a Job and adding a Product to it, you can check the Confirm? box on the Product. Doing this will highlight the Job in red on the Dispatch Board so that you know that the Product quantity needs to be confirmed. This is useful for Chemical Tracking when you need accurate records of where Chemical Products are used or for any Products the Client will be paying for on their Invoice.

To Add or Confirm Products on the Dispatch Board, follow these steps:

1. Go to **Scheduling > Dispatch Jobs**.
2. On the Job where you want to add or confirm a Product, and click the **Edit Products** icon (Barcode) or the Service name. Both options bring up the **Job Overlay**.



3. In the **Product** section, adjust the Product information.

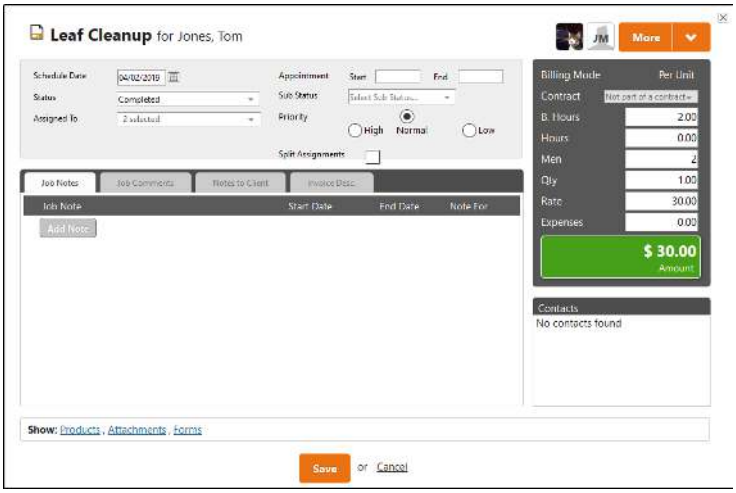


4. You can change the Product, add a new one, or adjust any of the fields: **Qty**, **Cost Per**, and/or **Rate**.
5. If the Job is complete and you previously marked to confirm the product, click the **Confirm?** button.
6. Click one of the items in the dropdown list:
   - **Add to Invoice**
   - **Used, do not Invoice**
   - **Not Used, Cancel**

7. Click **Save**.

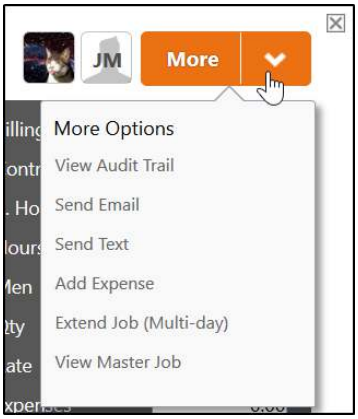
Overview of Job Details Overlay

On the Dispatch Board in Service Autopilot (**Scheduling > Dispatch Jobs**), clicking the Service in any row displays a Job Overlay screen with all the information attached to that Job.

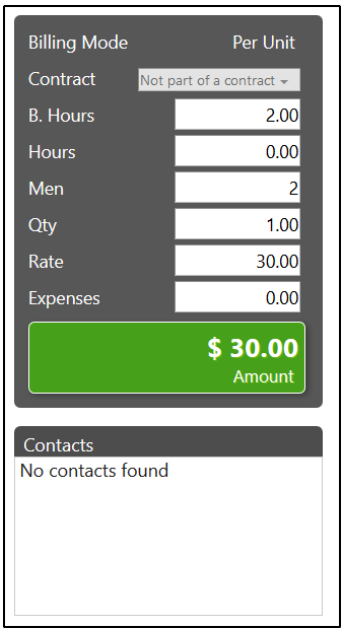


The top portion of the overlay shows your scheduling and accounting information and Notes. The status of the Job is on the left of the service name, matching the dispatch icons. The information in the light gray box shows scheduling information at a glance. If the Job is Invoiced and the Invoice is locked, this information cannot be changed without first unlocking the Invoice from the **More** dropdown list

Resources assigned to the Job appear as icons on the right. The **More** dropdown list lets you view the Audit Trail, send Emails or Texts, or select additional options.

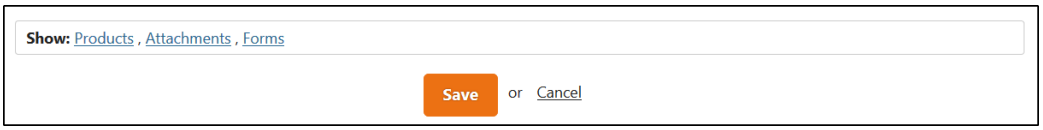


Accounting information is shown in the dark gray box. After the Invoice is generated, it is best to update any of this information at the Invoice level rather than the Job level. Contacts for the Client will show beneath the Accounting information.



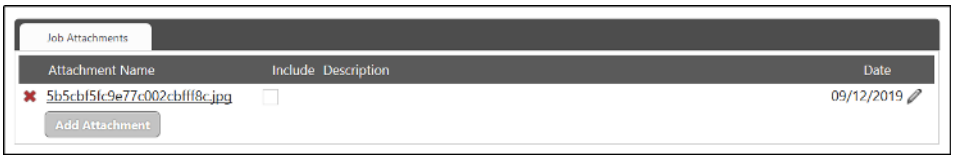
The Notes section allows you to view, edit, and add Notes under four different tabs: Job Notes, Job Comments, Notes to Client, and Invoice Description.

The Show links at the bottom above the **Save** button let you see Products, Attachments, and Forms. Each will expand when you click the link.



You can view, edit, add, or delete Products to the Job. The button at the right reveals more options regarding the Product. The **Note** icon will display the Invoice Notes for the Product.

In the **Attachments** section, you can view, edit, or delete Attachments that were added to the Job on the Mobile Apps or add new Attachments. If you add an Attachment from this overlay, you need to click **Save** at the bottom of the overlay before you can see the edit and delete icons.



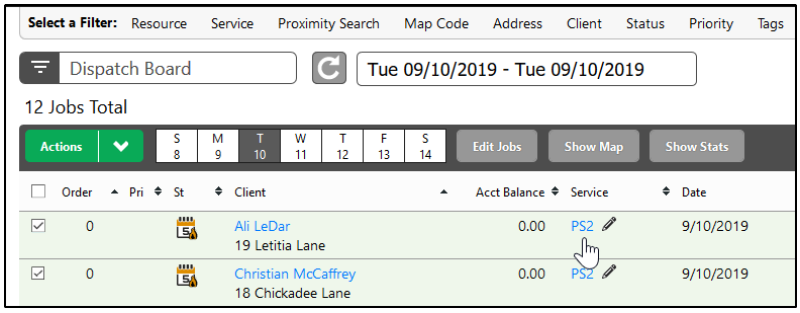
The **Forms** link will display any Form Responses that have been filled out for that Service. You can also add a Form Response by clicking **Fill Out Form**. The dropdown list will display all Forms that are associated to the Service on the Job.

Reassign Jobs from the Job Details Overlay

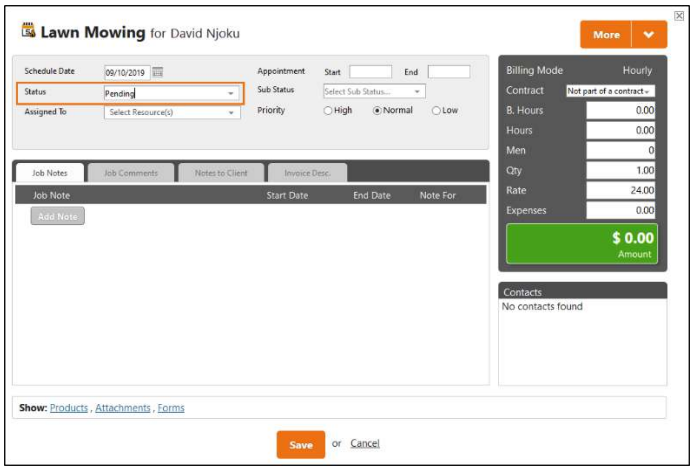
There are a few different ways you can reassign work on the Dispatch Board. This is useful if a Resource calls out sick because you can easily reassign multiple Jobs at once.

To reassign a Job from the **Job Details** Overlay, follow these steps:

1. Go to **Scheduling > Dispatch Jobs**.
2. In the "Service" column, click the Service on the Job you need to reassign.



3. In the **Job Edit** overlay, change the job assignment in the **Assigned To** field by selecting a different Resource.



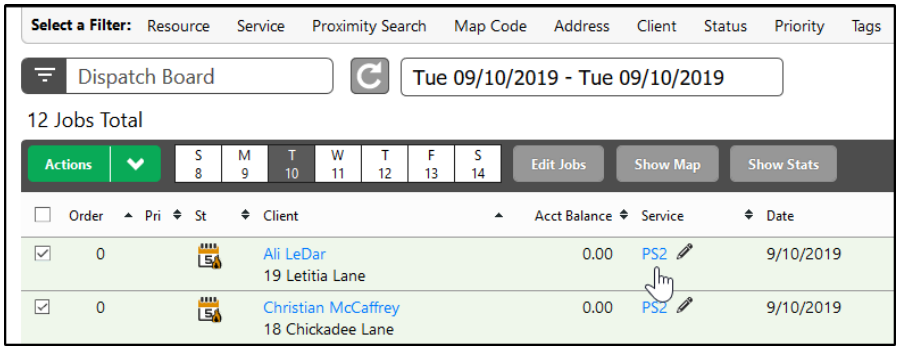
4. Click Save.

Reschedule Jobs from the Job Details Overlay

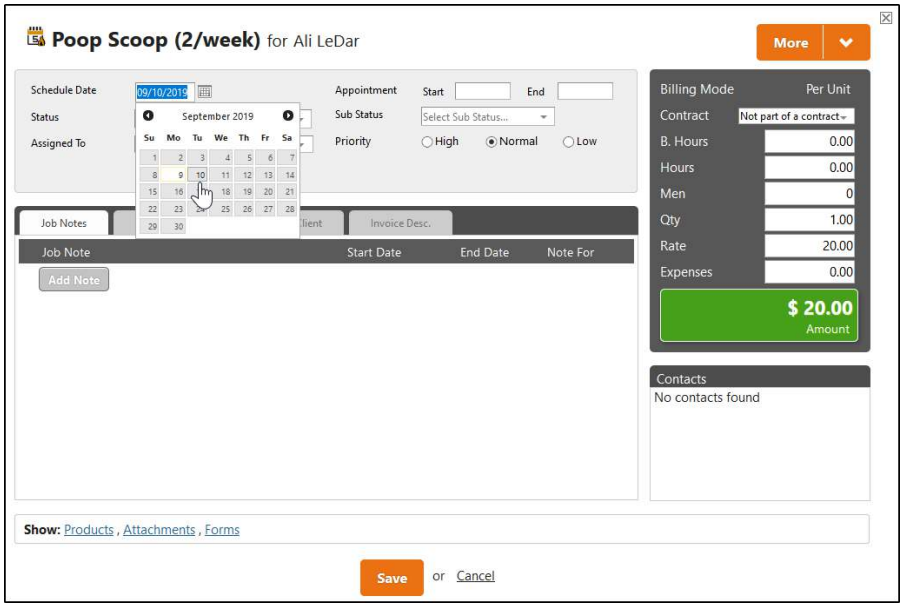
Rescheduling jobs because of weather or other reasons, can be stressful and time-consuming. Fortunately, there are a few simple ways to reschedule Jobs in Service Autopilot. You can also easily reassign jobs to different Resources at the same time. The steps below will explain how to do this from the Job Details overlay. For a full explanation, see “Reschedule Jobs from the Dispatch Board” on page 22.

Remember that recurring schedules (such as Weekly - Monday) will auto-adjust whenever a job instance is skipped or rescheduled. That means that even if one Job is rescheduled, the others will remain on the selected schedule. If you need to update all future rounds, you will need to update the Master Schedule on the Master Job record.

1. Go to **Scheduling > Dispatch Jobs**.
2. In the “Service” column, click the Service on the Job you need to move.



3. In the **Job Edit** overlay, find the Schedule Date and change the date manually or click the calendar to select a new date.

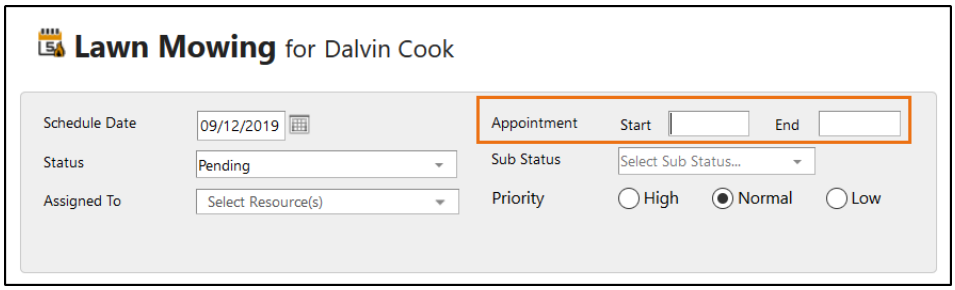


4. Change the job assignment in the **Assigned To** field by selecting a different Resource.
5. Click **Save**.

Set Appointment Times from the Job Details Overlay

If you didn't add an Appointment Time for a Job when the Job was originally created, it can be done from the Dispatch Board itself or from the Job Details overlay. To add an Appointment time from the Job Details Overlay, follow these steps:

1. Go to **Scheduling > Dispatch Jobs**.
2. Click the Service of the Job you want to change. This opens the **Job Details** overlay.
3. Click the **Appointment Start** and **End** fields and enter your times.



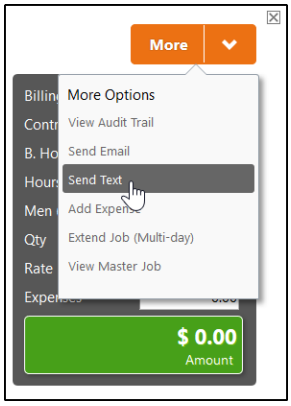
4. Click **Save**.

Send a Text Message to a Client

From the Dispatch Board, you can send text messages to your resources or clients. You do not need to have a Pro Plus or Two-Way Texting subscription to do this, just the cell phone number and provider of the person you want to message.

Texting a client can only be done from the Job Detail. To do this, follow these steps:

1. On the Dispatch Board, click the Service for the client you wish to text.
2. On the Job Detail, hover over the **More** dropdown list.
3. Click **Send Text**.



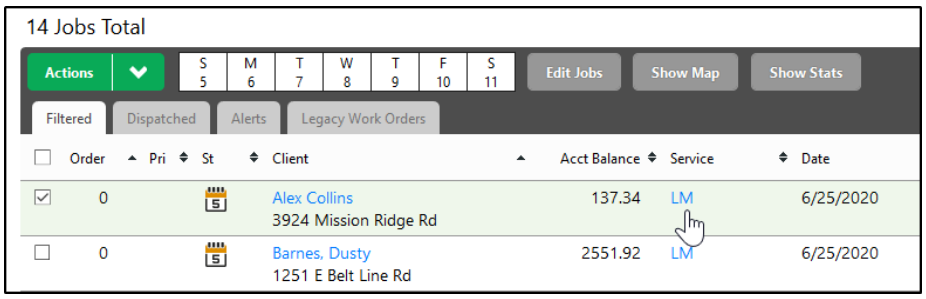
4. On the **Text Message** dialog, enter your message. If the Cell Phone Number and Cell Provider are on the Account already it will fill in automatically. If not, you need to enter this information on the dialog before sending your message.

5. Click **Send Text**.

Send Emails from the Job Details Overlay

If there is only one client you need to email, you can also do this from the Job Detail overlay. Follow these steps:

1. From the Dispatch Board (**Scheduling > Dispatch Jobs**), click the Service for the client you want to email.



2. On the **Job Detail** overlay, click **More** and select "Send Email."

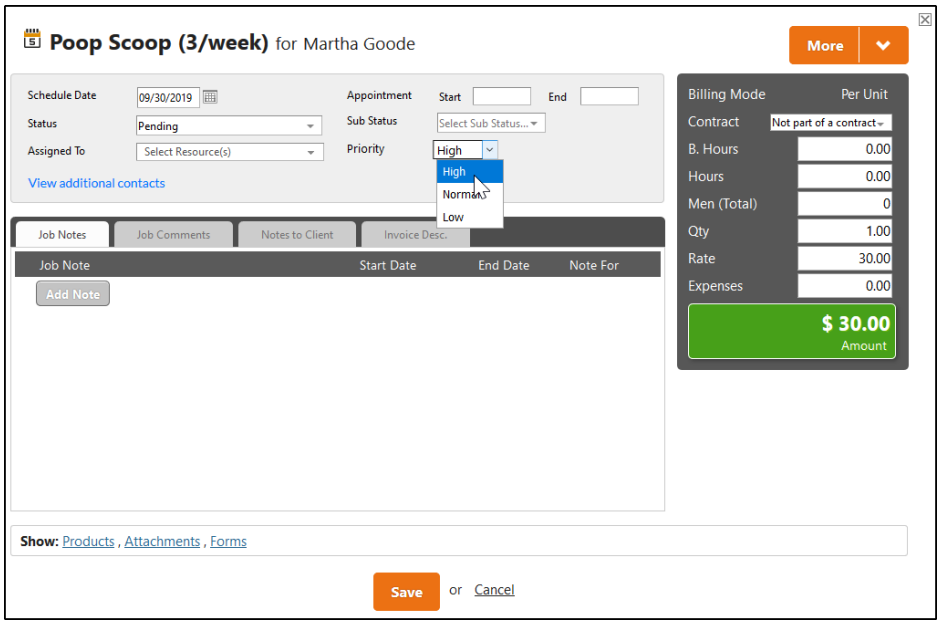
3. To save time, select an Email Document you've already downloaded or made.
4. Customize the email as needed.
5. Click **Send**.

If you need to send emails to multiple clients, see this article about emailing from the Actions List.

Change a Job's Priority

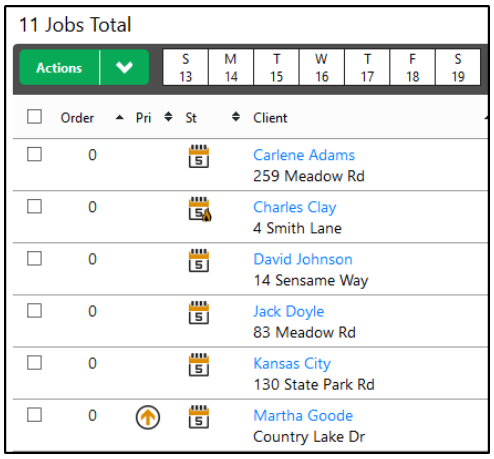
If you have jobs that need to be done sooner for whatever reason, you can change the Priority of the job on the Dispatch Board. This adds and icon to help aid you in routing and scheduling. To change the Priority from the Dispatch Board, follow these steps:

1. Go to **Scheduling > Dispatch Jobs**.
2. Click the Status of a job to open the **Job Details** overlay.
3. In the **Priority** dropdown list, select "High."

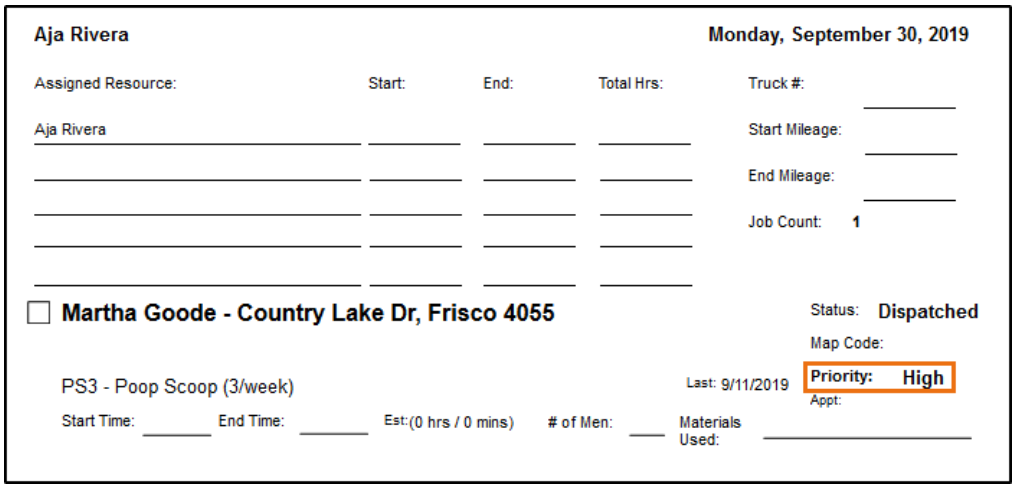


4. Click **Save**.

   After saving, you'll see an icon added to the "Priority" column:



The Priority also appears on the Route Sheets:



View Job Notes Outside Current Date Range

Occasionally, you may have set certain Notes on a Recurring Service that you only want to show during a specific date range of that scheduled Service's life cycle. Outside of the specified date ranges, those Job Notes will not appear.

There is a tab available in the Job Overlay to view these "invisible" notes from the Dispatch Board.

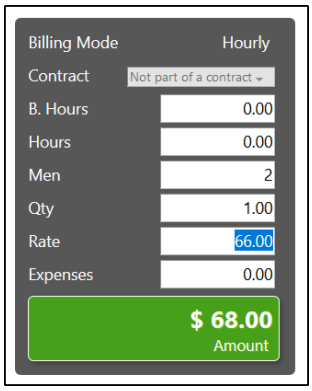
To view notes for a job outside the current date range, follow these steps:

1. Go to **Scheduling > Dispatch Jobs**.
2. Click the Service on the Job you want to see. The Job overlay appears.
3. Click the "All Job Notes" tab to see all the Job Notes for that job.

Modify Job Rate and Amount to Invoice from the Job Details Overlay

Completed Jobs become line items on Invoices (unless the jobs are under Contract). This means that you can modify the service rate from the Dispatch Board and your changes will be on the Invoice. This can be done from the Job Details Overlay or from the Dispatch Board itself. To change the Rate from the Job Details Overlay, follow these steps:

1. Go to **Scheduling > Dispatch Jobs.**
2. Click the Service for the Job you want to modify. This will open the Job overlay.
3. Change the number in the **Rate** field on the right side of the overlay.



4. Click **Save**.

   Note: If the Service Mode of the service is Hourly, the Amount will change based on the total time worked on the job, i.e., **Number of Staff x Hours x Rate = Amount**.

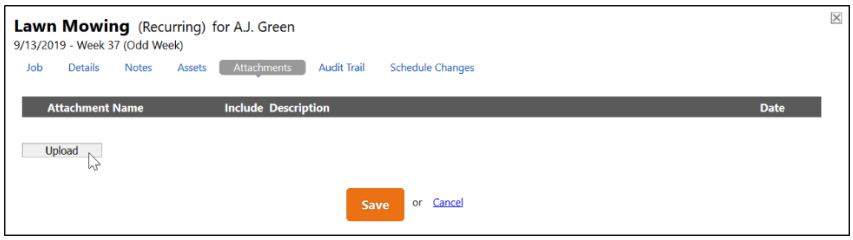
Add Attachments to Job from Office Notes

You can attach files to Jobs from the office to be viewed on the SA Legacy app. Attached files can be images (.jpg, .png), PDFs, or Word files (.doc, .docx). Mobile technicians will be able to see the images or previews of other files.

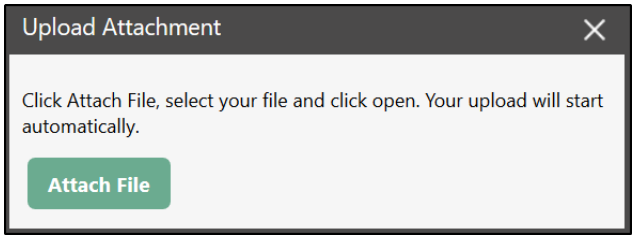
If Attachments are added to the Master Job, they can be viewed on all Job instances. You can also add Attachments to a single Job instance. If it's a Recurring Job, Mobile Users will see the Attachments only on the date added.

Add Attachments to a Master Job

1. Navigate to a Master Job record.
2. Go to the "Attachments" tab.
3. Click **Upload** then select the image to attach.



4. Once the image is selected, click the **X** to close the Attachment dialog.

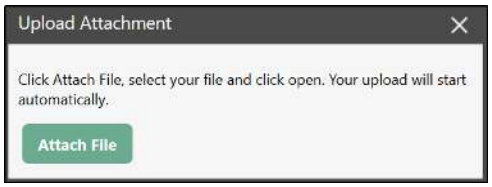


5. Click **Save**.

Add Attachments to a Job Instance

1. Go to **Scheduling > Dispatch Jobs**.
2. Click the Service of the Job you would like to add Attachments to.
3. On the **Edit Job** overlay, click the **Attachments** link.
4. Click **Add Attachment**.

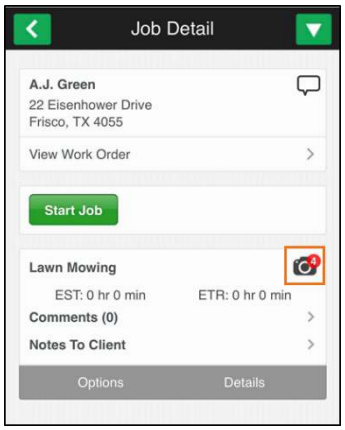
5. Use the **Upload Attachment** dialog to upload all needed files from your computer. Click "**X**" to close the dialog.



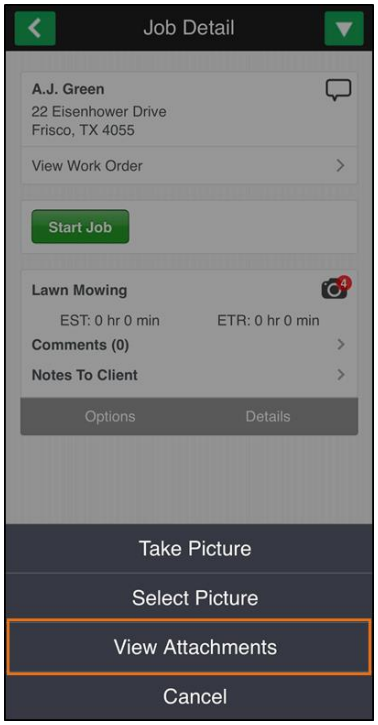
6. Click **Save**.

View Attachments on the SA Legacy App

Mobile users can see job attachments in the SA Legacy app by tapping a Job and then the Camera icon.



1. Tap **View Attachments**.



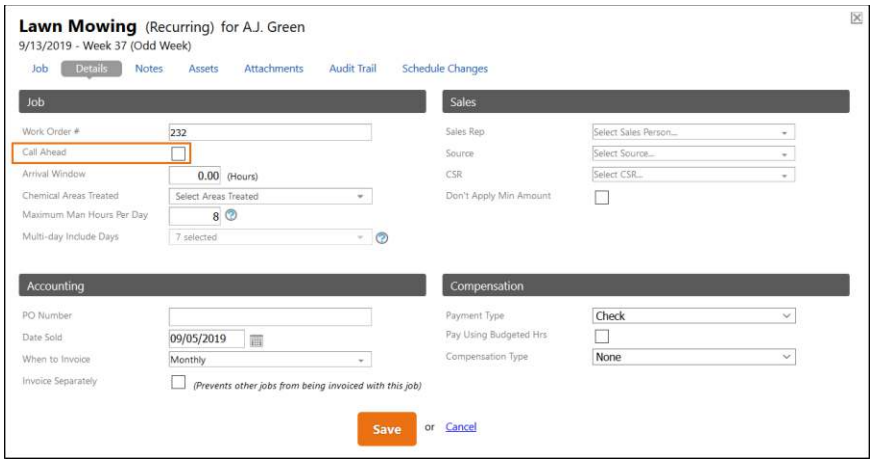
2. Tap the attachment to see it.

Set a Call Ahead Reminder for a Master Job

There may be some Clients who require a phone call before their scheduled service to confirm that the Job will be completed as planned. You can set up Call Ahead Reminders in SA that you can see from the Dispatch Board and Legacy app to ensure the Client gets the needed phone call.

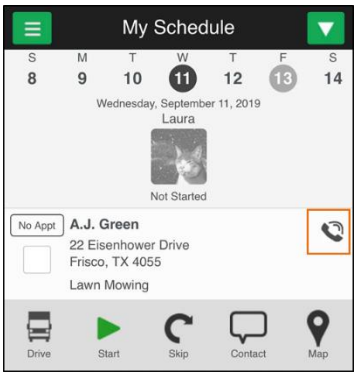
To set Call Ahead Reminders, follow these steps:

1. Navigate to a Master Job record. (From the Dispatch Board, go to the **Job Details** overlay and click the **More** dropdown list.)
2. On the Master Job record, go to the “Details” tab.
3. Check the box next to **Call Ahead**.



4. Click **Save**.

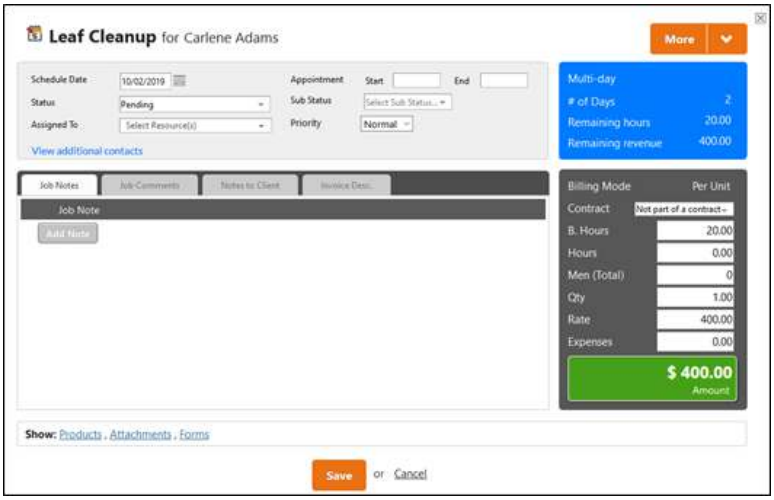
   A phone icon now appears next to the job on the Dispatch Board.



You can also see the phone icon on the Legacy app (if the "Contact Client" User Right is enabled).

Job Details Overlay for Multi-Day Jobs

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



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.

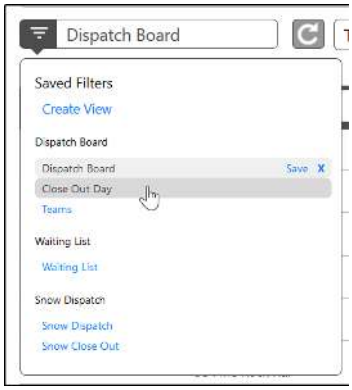
Close Out Day: Update Job Times

If you are using the Service Autopilot Legacy mobile app, job times will automatically appear in **Close Out Day** view. If you're not using the Legacy app, you need to add those times manually. You may also need to edit the times recorded by Resources on the mobile apps from the **Close Out Day** view.

Access the Close Out Day View

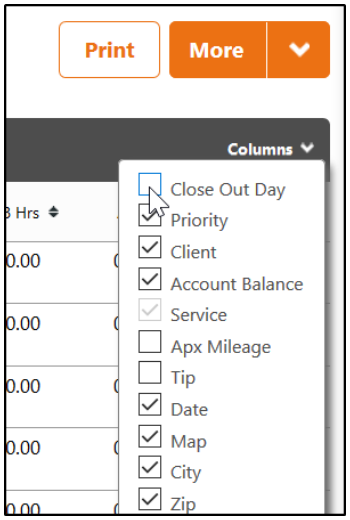
You can access the **Close Out Day** view in one of two ways from the Dispatch Board (**Scheduling > Dispatch Jobs**):

1. Go to the primary dropdown list and select **Close Out Day**.



OR

Hover over "Columns" on the far right of the Dispatch Grid header and check the **Close Out Day** check box.



The **Close Out Day** view and column shows the following columns:

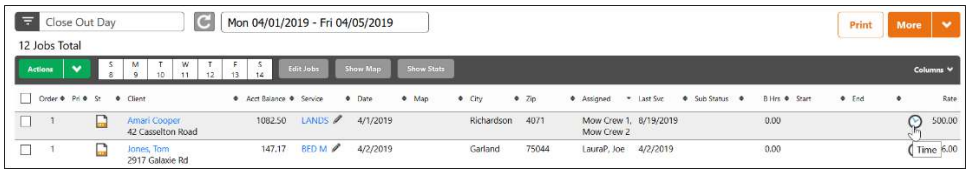
- Start Time
- End Time
- Rate
- Hours
- Men
- Quantity

Enter the Time Worked

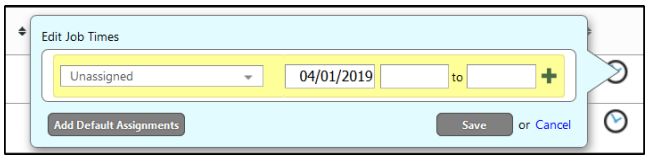
If the default Team assignment worked the exact same times on the job, simply enter the time in the **Start Time** and **End Time** columns.

To enter different job times for each resource, follow these steps:

1. Click the **clock icon** to open a dialog with spaces to enter job times.



2. In the dropdown list, select the resources who worked.
3. Click **Add Default Assignments** if you want the Team assignments to appear automatically.



4. Enter the date and time for each resource.
5. Click **Save**.

Close Out Day for Chemical Tracking

Chemical Jobs need to be closed out at the end of the day like any other Job. The Chemical Tracking Wizard can help you move easily from Job to Job to make sure details are accurate for billing. To access, hover over **More** and select **Chemical Tracking**. This will open the Chemical Tracking Wizard:

After the Jobs are completed via the Legacy app, updates to Products and Jobs can be seen on this wizard. Anything entered on the Legacy app can of course be updated on the Chemical Tracking Wizard or the Dispatch Board. The Conditions fields are global updates unless values have already been entered for a particular Job.

The buttons on the left toggle between (red) **Used?** and (green) **Used**. During Close Out Day for chemical jobs, verify that the appropriate chemical products have the green **Used** button next to them, indicating the product was used in the quantity seen.

Use the **Next** button at the bottom to move easily from Job to Job to review products and quantities.

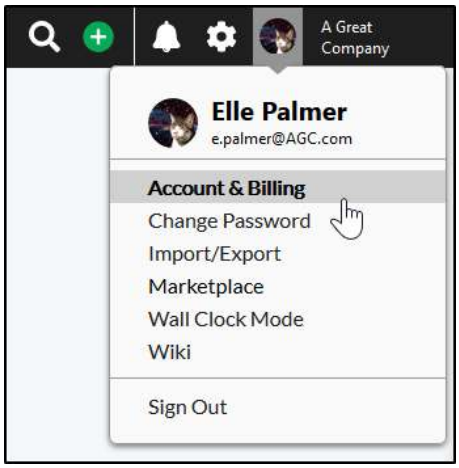
If you send Client Instruction Emails from the Legacy app or from the full site, enable the “Instruction Emails Sent” column on your Close Out Day view on the Dispatch Board. To do this, hover over the column selection at the top right of the table and select the column. The column will populate at the right side of the grid as an icon, to the left of **Products** and **Job Notes**. The icon will change when an Instruction Email has been sent.

Smart Maps Overview

Service Autopilot offers basic map routing to all Members. The Smart Maps subscription (with an additional monthly fee) does much more than mapping. Smart Maps allows you to measure properties and optimize your routes 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 for Pro and Pro Plus accounts. You can add this subscription by following these steps.

1. Hover over your avatar at the top right of the Service Autopilot screen and select **Account & Billing** from the dropdown list:



2. Scroll down to the **Additional Services** section where you can purchase the subscription.

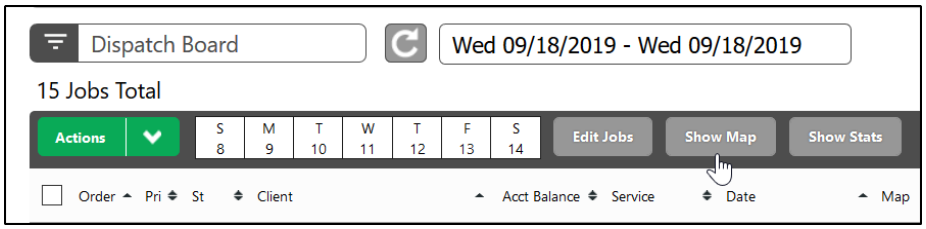
The Smart Maps feature lets you measure a property using Google® satellite images. You can quickly measure any outdoor surface of a property, including square footage of turf, beds, and parking lots as well as any linear measurement. All measurements are stored for future use. You also have the option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

For full instructions on using Smart Maps, see the *Smart Maps User Guide* or Knowledge Base.

View the Map on the Dispatch Board

With a few clicks, you can see any number of Jobs from the Dispatch Board on the Map. To do this, follow these steps:

1. Go to **Scheduling > Dispatch Jobs**.
2. Select the Jobs you want to see on the Map by clicking the check boxes next to them. To see all Jobs, click the top check box.
3. Click **Show Map**.



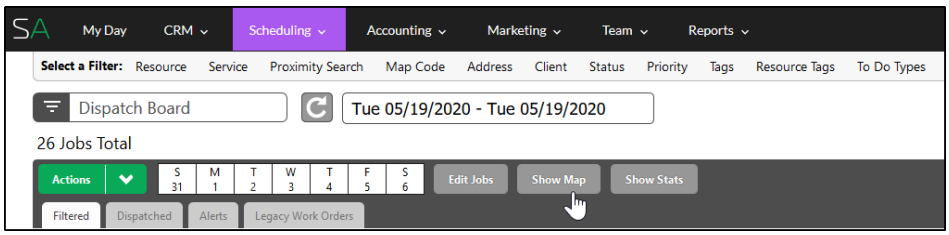
   This opens the Map showing all selected Jobs as pins.

4. To discontinue viewing the Map, click **Hide Map** in the header where the **Show Map** button was previously.

Dispatch Board Map Console - Stop Tab

The Smart Maps 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.

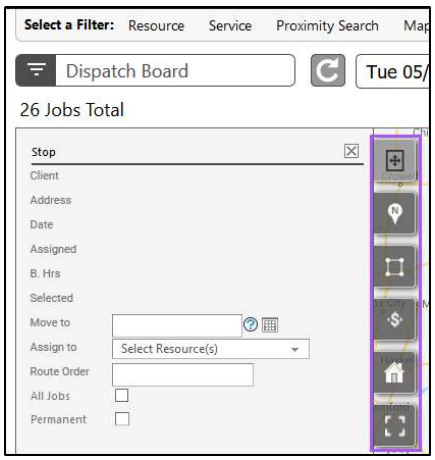
1. From the Dispatch Board, select one or more jobs, then click **Show Map** from the top of the table:



   The map opens in the top half of your screen with the table items still displayed below. Any jobs you select in the table appear on the map as pins or markers.

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

   The map console has multiple tabs on this screen:



- **Stop** - Displays job information for the selected marker
- **Navigation** - Driving directions and GPS tracking
- **Group Selection** - Select jobs for routing or assignment by drawing a geographical region
- **Yield Map** - Shows jobs displayed by pay rates so you can know where you are making money
- **Go to Company Location** - Center the map on your company address
- **Fullscreen Mode** - Enlarge the map to fill the screen

If you forget what the tabs are, just hover over one to see its name.

Stop Tab

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 on the Waiting List.
- The **Assign to** dropdown list lets you select Resource(s) -- teams, 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 includes all the services that are checked in the table 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 Close-Out Day screen. The changes selected will update the services with only the values you changed for **Move to**, **Assign to**, and **Route Order**. 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.

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

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

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

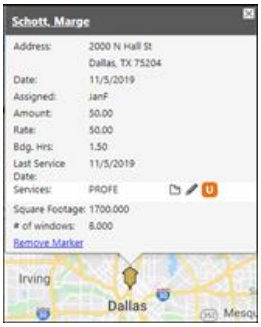
  Right-click a map marker to increase the route order.
- **Show Priority/Conflicts**. If you have any jobs with priority or conflicts based on days, they'll have a different icon when you click this button. The job with the red "up" arrow is a priority job.
- **To undo changes**, click the **Cancel** 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 Markers

Select Map Markers when you're on the Stop panel to see a popup box:



The color of the marker indicates the assigned resource. If you are viewing more than one day on the Dispatch Board, the marker color will be by day and a legend will display on the top right of the map. The popup shows client information and the services displayed in the table:

- The **client name** is a hyperlink to the client account.
- 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.

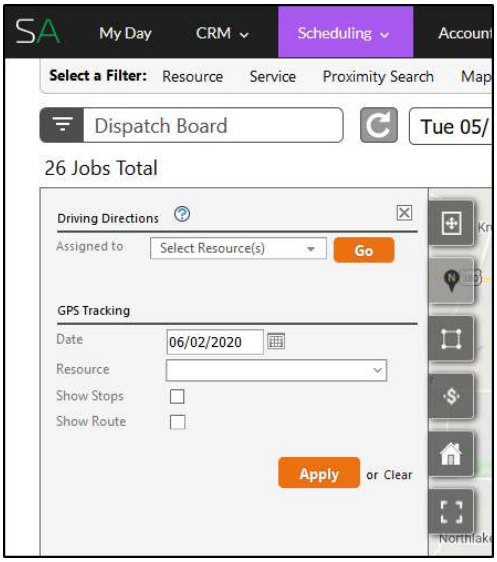
  The **pencil icon** will display the job dialog for the Service.

  The **U button** stands for update and will be displayed only when on the Dispatch Board or Close-Out Day Screen. This button displays 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.

Dispatch Board Map Console - Navigation Tab

The Navigation tab in the Mapping Console contains two sections: Driving Directions and GPS Tracking:



Driving Directions

You can get driving directions for any services within the table. Select a resource and click Go. Directions are generated for the route order if every service for the selected resource is selected in the table. If the services have no route order, SA will try to optimize the route before it shows the driving directions. 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 GPS Tracking 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 resource 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

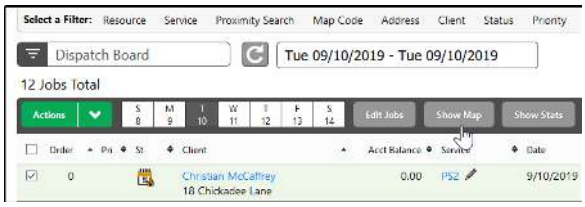
1. Go to **Team > Employees** or **Team > Vendors**.
2. In the Employee or Vendor list, click the name of the Resource you would like to modify.
3. Click **Edit** next to the Resource's name.
4. Click the "Mobile Settings" tab.
5. At the bottom, select an option for GPS Tracking. Choose anything other than **Off** to enable the Resource's device to record GPS data after logging in.

Dispatch Board Map Console - Driving Directions

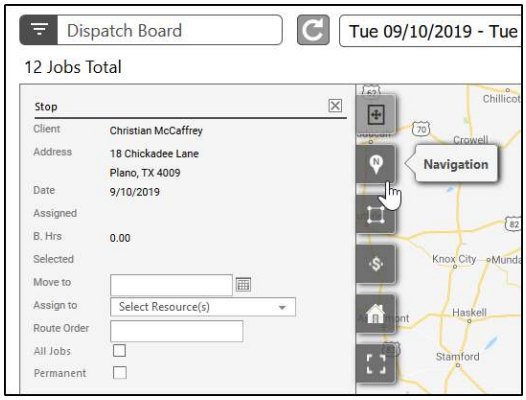
If you are not yet using the Service Autopilot Mobile App or need to use paper Route Sheets, you can also generate and print driving directions from the Dispatch Board. Please note the **Show Map** button appears only if you have the Smart Maps subscription.

To do this, follow these steps:

1. Go to **Scheduling > Dispatch Jobs**.
2. Select the jobs on your Dispatch Board that you want to get directions for.
3. Click **Show Map**.



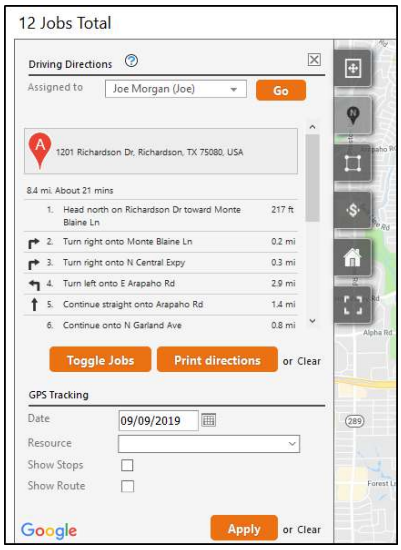
4. Click the "Navigation" tab on the map menu.



5. Select the Resource the jobs are assigned to.

6. Click **Go**.

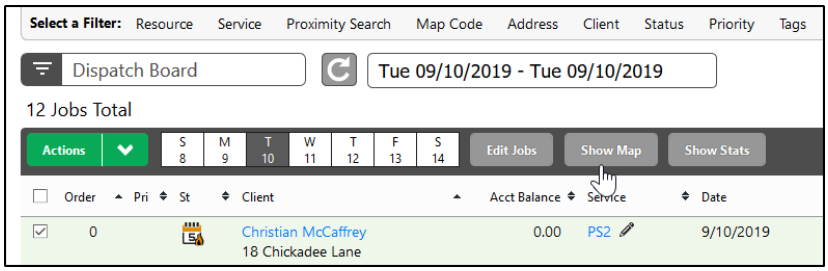
   The directions will load and you have the option to **Toggle Jobs** (change the direction) or **Print directions**.



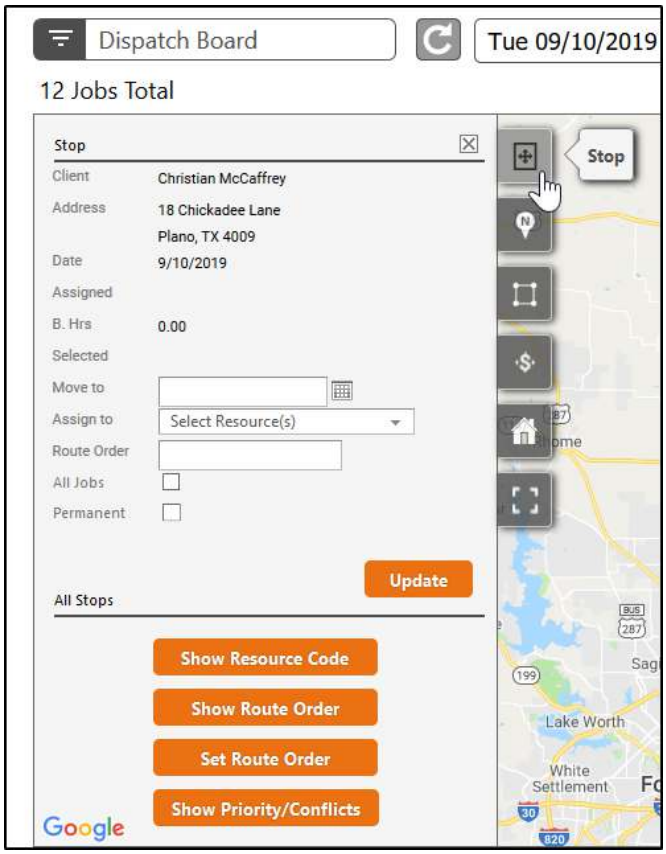
Reassign or Reschedule Jobs from the Dispatch Board Map

You can change details of any Job from the Map on the Dispatch Board.

1. To display the Map, click **Show Map**.



2. Make sure the "Stop" tab is selected:



3. Make sure the correct job is selected. You can either select the check box next to the job or select the corresponding pin on the map.
4. To change the assignment, use the **Assign to** dropdown list and select a Resource.
5. Click **Update** to save your reassignment.

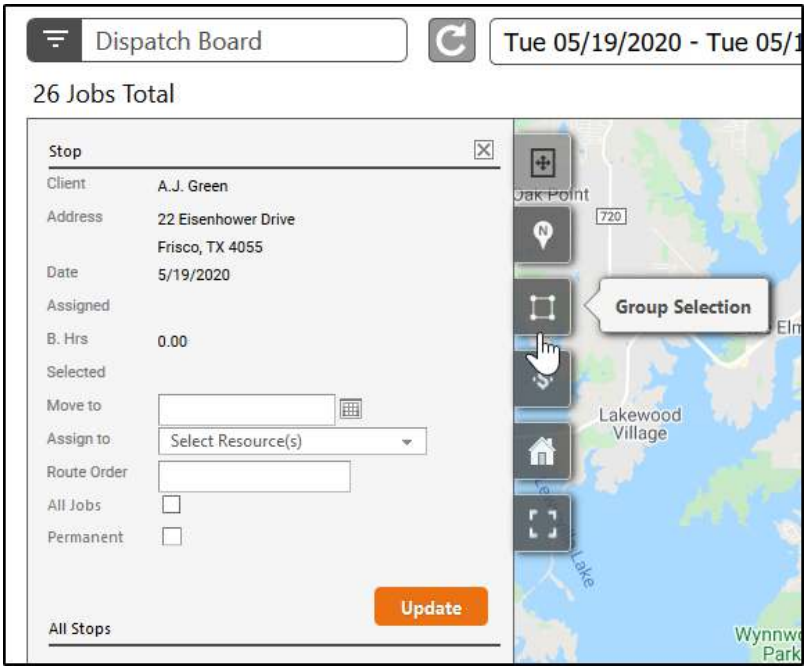
You can reschedule the Job from the same panel:

1, Simply type a date into the **Move to** field or select a date from the calendar icon.

2. Click **Update** to save your changes.

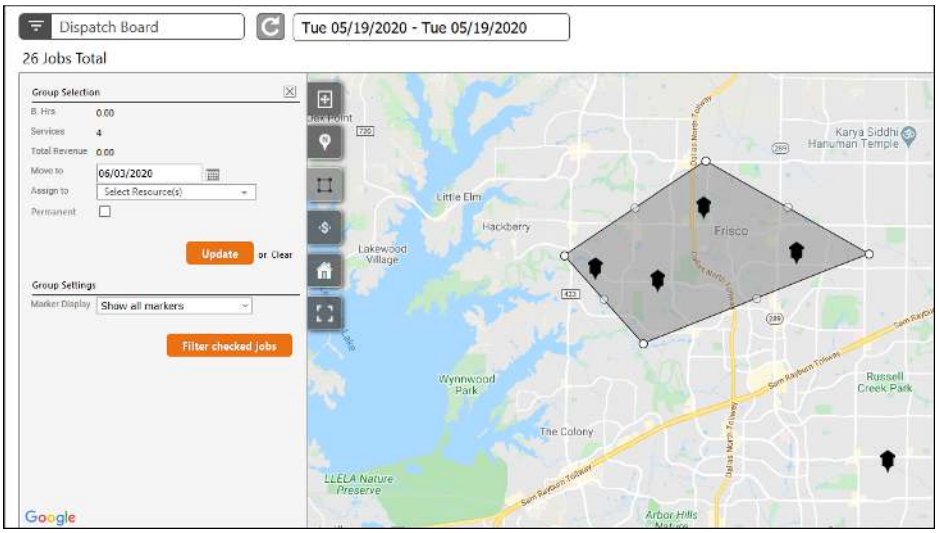
Dispatch Board Map Console - Group Selection Tab

The Group Selection tool on the mapping console allows you to select jobs by drawing a shape around a geographic location:



1. Use your mouse to right-click to form the points of the shape on the map.

2. Click the first point to close the shape.



Once an area is drawn, the top half of the panel at the left will display the budgeted hours, number of services, and total revenue for all services in the selected area.

- The **Update** button appears on the Dispatch Board and Close Out Day 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.

Undo changes

To undo your changes to the map display with the Group Selection tool, refresh the page or click the **Refresh** button on the Dispatch Board. This will add back any services that you removed from the map.

Dispatch Board Map Console - Yield Map

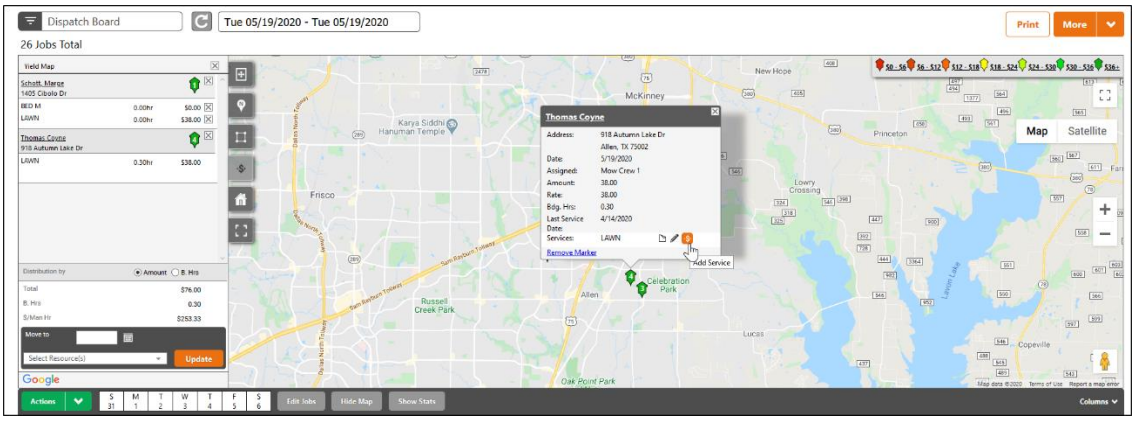
The “Yield Map” tab on the Maps Console shows your pinned jobs in different colors based on budgeted hours. You can see how many jobs you have scheduled at various rates of pay, letting you see where your money is in any neighborhood on any day.

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:

- **To change the designation** between Amount and Dollars, use the radio button selection next to **Distribution by** in the left panel.
- **To see the details for that job**, click a marker on the map.
- **To add a job to the yield calculator**, click **Add Service**:



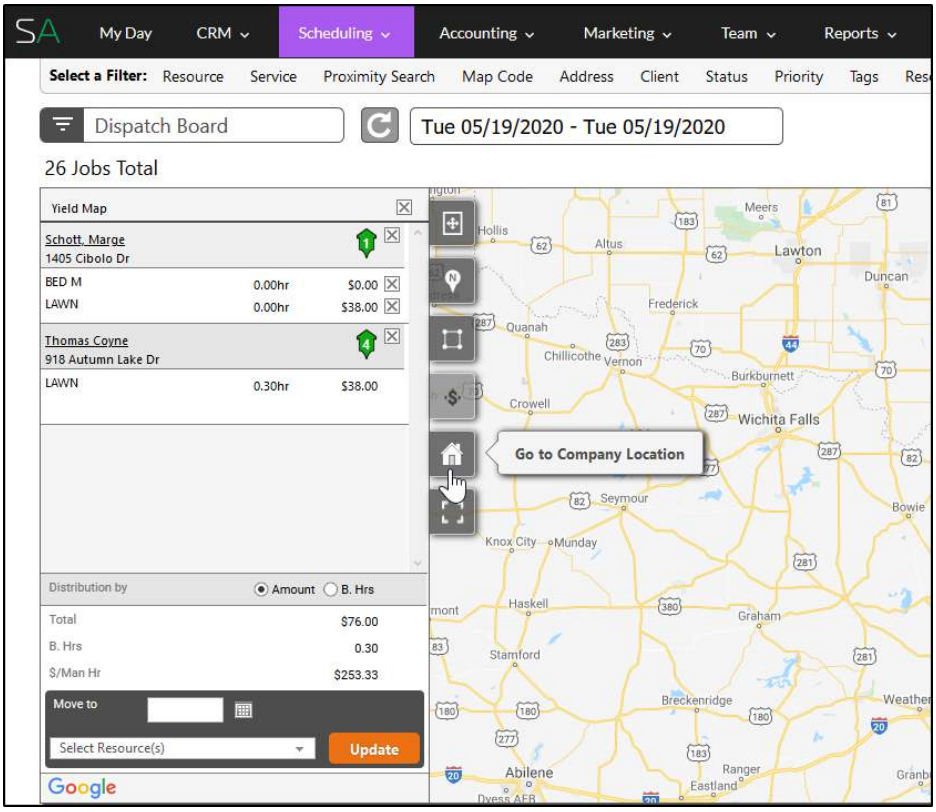
This lets you build the route with the most revenue, again targeting the most profitable or least profitable neighborhoods or even streets. As you add jobs to the left panel, the bottom totals will update with **Total Dollars**, **Budgeted Hours**, and **Dollars per Man Hour**.

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.

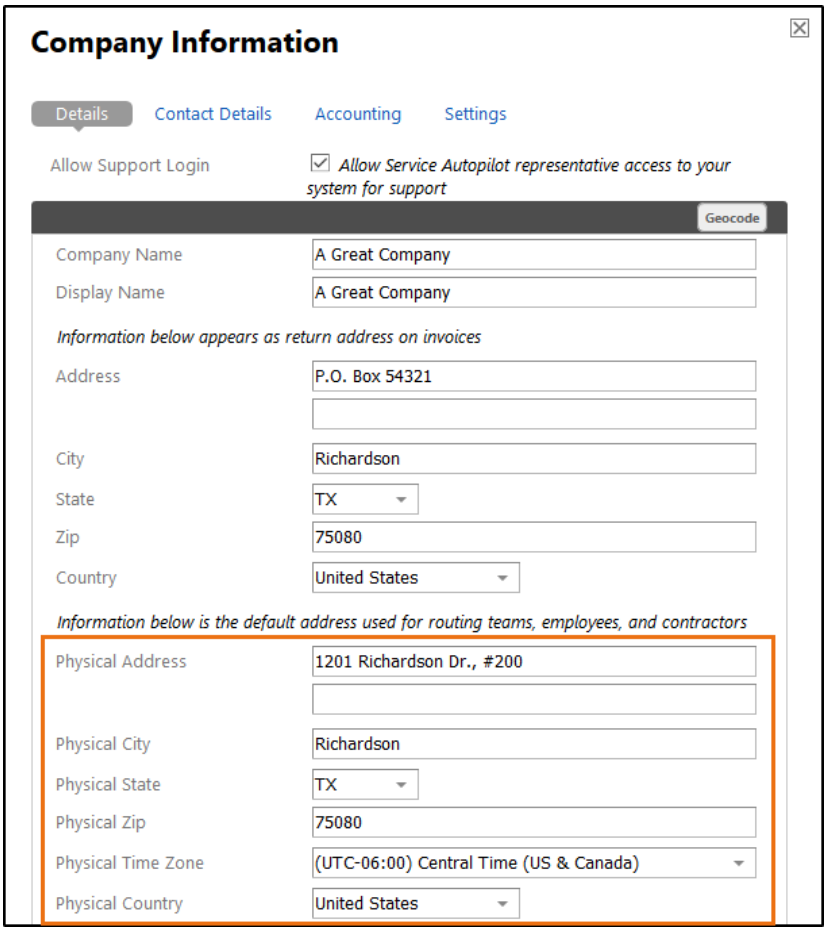
Dispatch Board Map Console - Go to Company Location

If you click the “Go to Company Location” tab in the map console, it will re-center the map to your company location without interrupting any other work you may have been doing:



To check or update your company location, go to **Settings > Company Information**.

On the "Details" tab, check the Physical Address information:



Be sure that your addresses are compliant with US Postal Service standards and that you are not using a PO box. The map will not display a location if the address listed is a PO Box.

