ServiceAutopilot™

CHEMICAL TRACKING

USER GUIDE

V1.3

Contents

What's New in this Guide

We've added information on the requirement for using Chem Tracking, and we changed references to the "Mobile App" because it's now called the "Legacy App." We also updated the paths to finding additional articles and videos in the newly updated Help Center.

Why Use Chemical Tracking?

The Chemical Tracking feature is available with the Service Autopilot Pro and Pro Plus membership. Benefits include:

- Helps ensure your compliance with state regulations.
- Service Autopilot (SA) automatically calculates the quantities of chemicals to apply at each property.
- Reports help you before and after Chemical jobs. See "Reports to Use with Chemical Tracking on page 24 for more information.
- If the Chemical Tracking report doesn't have all the data you need for your state requirements, you can create a form to enhance the report.

Before You Start

This is an advanced feature that requires viewing the webinar before functionality is enabled.

If Chemical Tracking is not currently enabled on your account, click the following link to see the Chemical Tracking webinar, or click **Help** and search for Chemical Tracking. Then contact Member Support and mention that you have watched this webinar to have Chemical Tracking enabled.

Need Help with Forms?

To find training videos and written documentation on Forms, click the **Help** button and search for:

- Online In-House Training on Forms
- Forms User Guide
- Knowledge Base articles on Forms

"Chemistry can be a good and bad thing. Chemistry is good when you make love with it. Chemistry is bad when you make crack with it."

--Adam Sandler

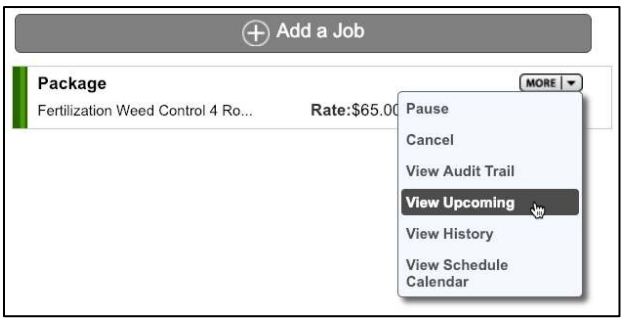
Chemical Tracking Overview

Here is a quick view of the process for setting up and using Chemical Tracking. There are two parts: setup and operations.

1. Set up Chemical tracking under **Settin**
2. Add a Job, then add the service to the job that is designated as a Chemical Tracking service.

   You can add a chemical service to any of the four job types: one time, recurring, package, and waiting list.

3. Finish setting up the job as you would for any other scheduled service.
4. After you add a Chemical Job to a client's account, you can see the job on the Client screen.
5. The master job appears under the **Add a Job** section of the client's account, and the job details appear under **More > View Upcoming**.



6. The Waiting List and/or Dispatch Board shows the job for scheduling.
7. After the jobs have been dispatched, you can see them on both a printed Chemical Route Sheet and/or the Chemical Usage screen on the Legacy app.
8. After the technician logs the chemicals and the completes the job, the chemicals will appear on the Chemical Tracking report.

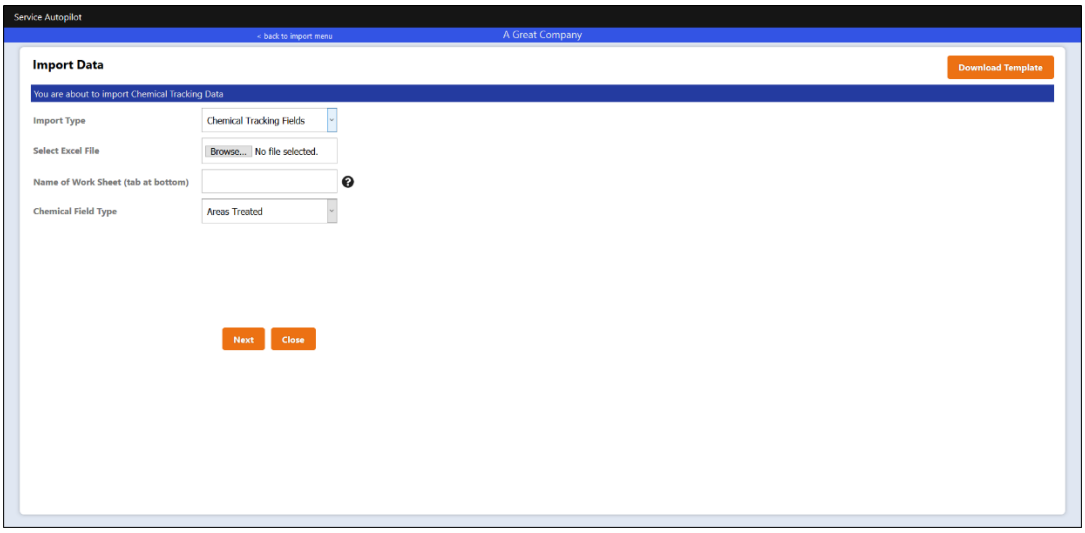
Set Up Chemical Tracking

Follow the instructions in Step 1 to import your initial data, then in Step 2, manually enter your chemical data.

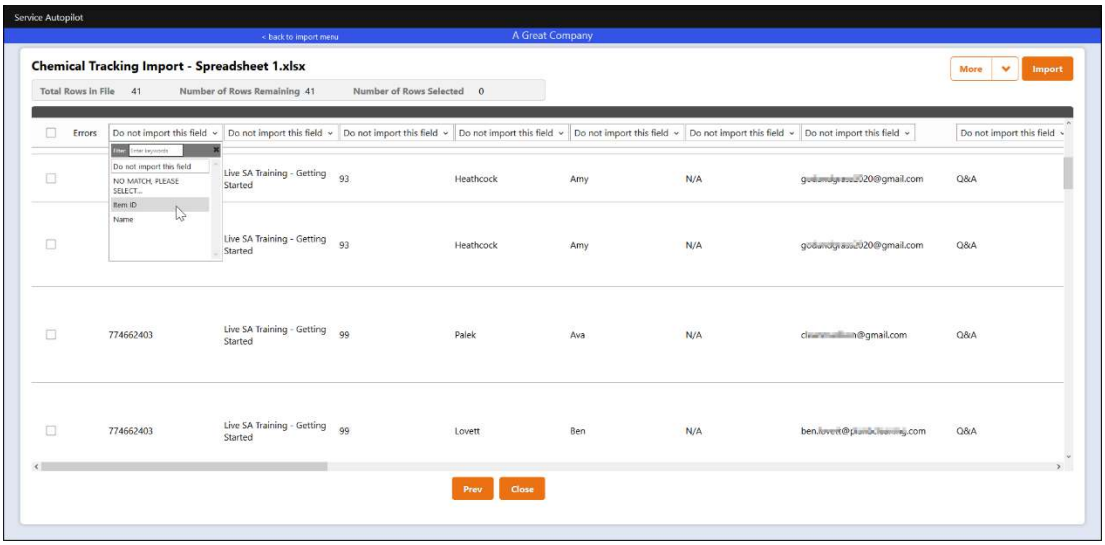
Step 1: Import Chemical Data

To import data into your Chemical Tracking Settings, follow these steps.

1. Hover over the small user avatar in the upper right corner and click **Import/Export**.
2. On the Import/Export Data screen, click Import Data.
3. Select "Chemical Tracking Fields" from the **Import Type** dropdown list.



4. To ensure your spreadsheet is formatted correctly, click Download Template to see example formatting.
5. Select the Excel file that you want to import from your computer.
6. Enter the name of the tab on the spreadsheet you are importing first. This must match your spreadsheet tab name exactly.
7. Select the Chemical Field Type that corresponds to the tab name entered in the previous field.
8. Click **Next**.
9. The next screen will display the number of rows that will be imported. Use the dropdown lists at the top of the table to designate where each column will map to in SA.



10. If there are any rows you do not need to import, check the box at the far left and then delete them from the More dropdown list in the upper right corner of the screen.

11. When you are satisfied with the column mapping, click Import.

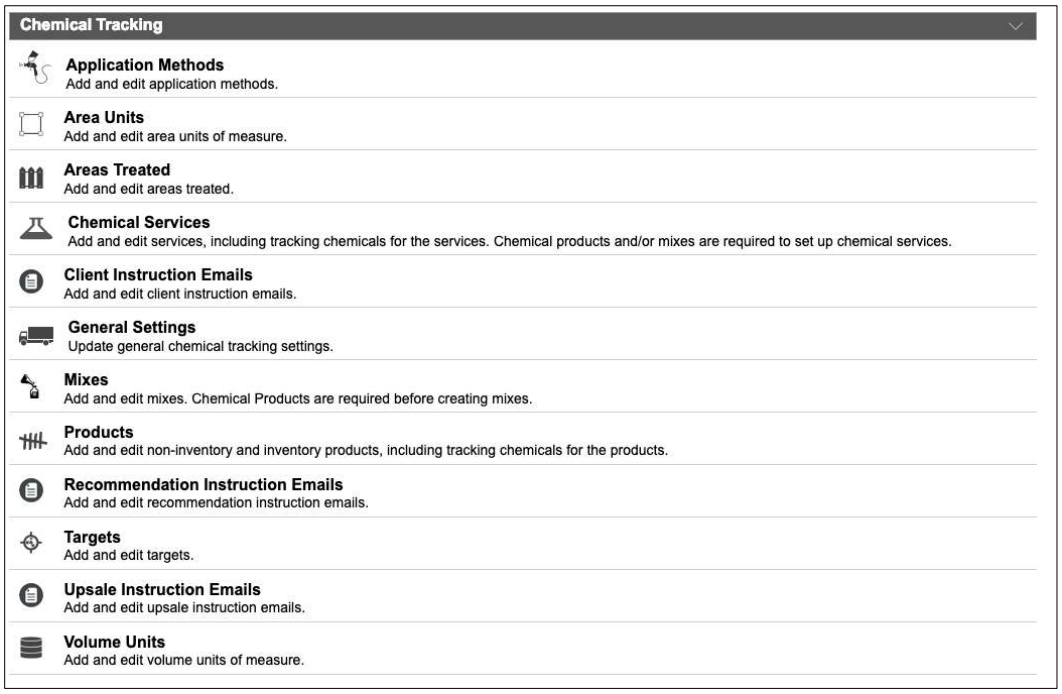
A progress bar will display for the duration of the import. If there are any errors, they will display. If the import is successful, no confirmation will appear, the status bar will just disappear.

Step 2: Manually Enter Additional Chemical Data

After importing, you can input any additional data manually, if needed.

Tip: When adding data manually, and you see the **Save & New** button, you have the option to press **Enter** rather than clicking **Save & New**. This lets you keep your hands on the keyboard to quickly enter your next item.

1. Click the **Settings** icon.
2. Scroll to the **Chemical Tracking** section, then click each of the following sections below.



Add Application Methods

The application method tells the system how chemicals will be applied, such as spray, spread, or broadcast. You also can add specific pieces of equipment to this list.

Note: The Chemical Technician in the field can make changes to the application method on the Legacy app.

1. Click the **Add Application Method** button to add a new method.
2. Click the **Save & New** button to add additional methods quickly.

Designate Area Units

This tells the system the different ways you want to designate the size of the area to which chemicals are applied, such as yards or square feet.

1. Click the **Add Area Unit** button to add a new area unit.
2. Click the **Save & New** button to add additional area units quickly.

Add Areas Treated

This tells the system all the possible area locations at a property that need chemical treatment. Some examples: total turf, front lawn, side lawn, back lawn.

1. Click the **Add Area Treated** button to add a new area.
2. Click the **Save & New** button to add additional areas quickly.

Specify Targets

Targets allow you to specify what your chemical treats, such as insects or specific types of weeds, algae, etc.

1. Click the **Add Target** button to add a new target.
2. Click the **Save & New** button to add additional targets quickly.

Define Volume Units of Measure

Volume Units of Measure (UoMs) allow you to specify how your chemicals are measured when applying or mixing, such as ounces, cups, pints, gallons, etc.

1. Click the **Add Volume Unit** button to add a new UoM.
2. Click the **Save & New** button to add additional UoM quickly.

Define General Settings

General settings affect what appears in the Chemical Tracking Wizard on Scheduling screens.

1. Check or clear the “Default Chemical Quantity” check box.

   If you check this, and you also set up the rest of the Chemical system properly, SA will automatically calculate the quantity of products to apply at each property.

2. Select one of the options: “Show Weather Conditions,” “Show pH Level,” or “Show Both.”

Set Up Email Templates for Chemical Tracking

Set up email templates for communicating information such as instructions, recommendations, and upsells.

Set Up Client Instruction Emails

Set up emails with specific instructions for Clients regarding chemicals that have been applied to their property. You have the option to send these emails from the Dispatch Board or Legacy app.

You can create a different instruction email for chemicals which require specific instructions. If you're not required to give specific instructions, you can create a generic instruction email.

Tip: Always make the subject line indicate the content of the email. This allows the technician to quickly find the correct email on the Legacy app. This subject line will appear in the subject line to the client, so use common language that they will understand.

1. Go to **Settings > Chemical Tracking > Client Instruction Emails**
2. Click the **Add Instruction Email** button to add a new email
3. Click the **Save & New** button to add additional emails quickly

Create Upsell Instruction Emails

You can send these emails to the client suggesting additional services you offer. They may or may not relate to the chemicals you applied to the property.

1. Go to **Settings > Chemical Tracking > Upsell Instruction Emails**
2. Click **the Add Upsale Email** button to add a new email
3. Click the **Save & New** button to add additional emails quickly

If you want your technician to send these, they can do so from the Legacy app. If not, your technician can simply add a job comment to the job from the Legacy app that goes to the Dispatch Board. Then the office staff will see the comment and can send an upsell email from the Dispatch Board.

Create Recommendation Instruction Emails

These emails are general recommendations for the client regarding their property, typically based on observations your technician or team has made at their property. These might include recommendations such as future treatments, watering instructions, damage, or something you want to notify the client about.

1. Go to Settings > Chemical Tracking > Recommendation Instruction Emails
2. Click the **Add Recommendation Email** button to add a new email
3. Click the **Save & New** button to add additional emails quickly

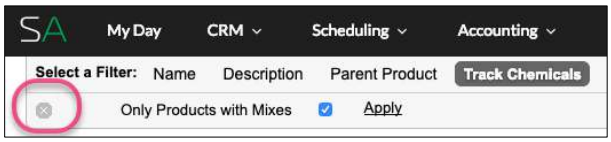
Set Up Chemical Products

When setting up Chemical Products, you tell the system that products can be scheduled individually with a service, and also added to a Mix with other products (see “Set Up Mixes” on page 12).

Here, you can designate inventory or non-inventory products for Chemical Tracking. Use this process for existing products or new ones you add. Most dropdown lists have a **Create New** button that lets you quickly add new items.

1. Go to **Settings > Products**. There are two entries (under "Scheduling" and "Chemical Tracking") and chemical Products can be entered in either. If you click the one under "Chemical Tracking" the list will be filtered to only show chemical Products by automatically applying the "Track Chemicals" filter to the Products list.

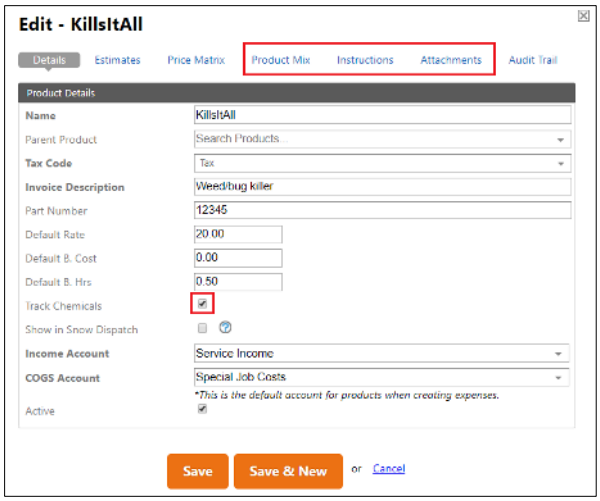
   To see products you already have in the system, click to cancel the filter icon at the top left. The filter shows only products that are already designated as Chemical products.



2. Click a product to open its **Edit** screen.

3. Check the **Track Chemicals** check box. This step is required for Chemical tracking. At the top of the **Product Edit** screen, three new tabs appear.

- The “Product Mix” tab shows the individual product mix and application rates specific to this product. It is viewable on the Legacy app.
- The “Instructions” tab includes “Label Instructions” and “Client Instructions” for the product. Only Label Instructions are viewable on the Legacy app. Client Instructions are viewable on printed Chemical Route sheets.
- The “Attachments” tab lets you attach things like documents, pictures of product labels, SDS instructions, etc. Attachments are not viewable or selectable on the Legacy app.



4. Fill out the rest of the "Details" tab as you would with any other Product.

5. Click **Save**.

Add a Chemical Product

If you need to add new products for Chemical Tracking, follow these steps.

1. Choose either the “Inventory” or “Non-Inventory” tab for the Chemical Products you want to add.

2. Click the **Add Product** button.
   As with non-chemical products, you can add and edit chemical products for both non-inventory and inventory.

3. Name the Product.

4. Add the **Tax Code**.

5. Add the Purchase Description and Sales Description.

   Note: Chemical products don’t need to be invoiced, because the service rate typically covers the product cost.

6. Check the **Track Chemicals** box to designate it as a Chemical Product.

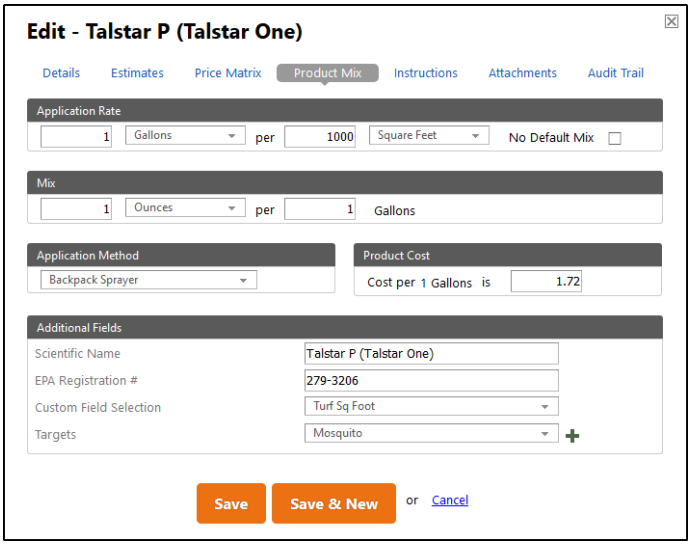
7. Add an Income Account.

8. Add a COGS Account.

9. Click the “Product Mix” tab.

The Product Mix Tab

The "Product Mix" tab shows the individual product mix and application rates specific to this product. This information is viewable on the Legacy app.



Application Rate: Check the **No Default Mix** box if the product does not have to be mixed with water. Chemical products can be liquid or solid (granular).

No Default Mix: Check this box if the product is a solid or dry product. Leave it unchecked if it is a liquid product.

Mix: If the product is mixed with water before application, this is the ratio of product to water. You cannot adjust the unit of measure here, because this field needs to match the Application Rate "volume unit of measure."

Application Method: Select how the product is applied to the treatment area from the dropdown list.

Product Cost: This is a per-unit cost as it relates to the Application Rate. This cost will appear on the Job Costing Report after the chemical job has been completed in the system. The report shows your costing information for each of the jobs where this product is used.

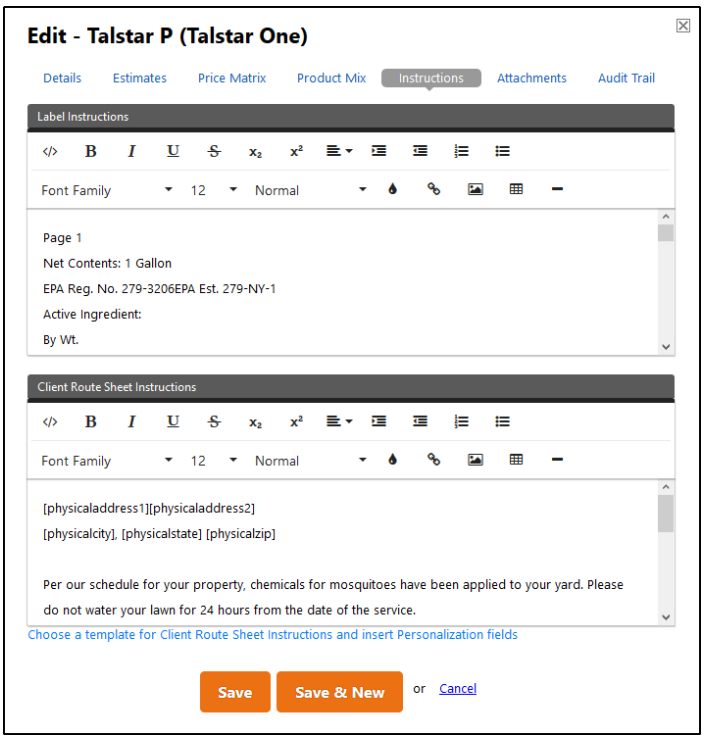
Additional Fields

You can get the information you need from the product label, except for the Custom Field.

- **Scientific Name** - Some states require this for technical reasons.
- **EPA Registration #** - The number for this product as required by the EPA.
- **Custom Field Selection** – Selecting this field allows Service Autopilot to calculate how much of this product is needed for a property as you dispatch the job. It also lets SA give you bulk product amounts per a given day of chemical applications on the Planned Usage report, which is helpful for loading the products before going out to the properties where the chemical will be applied. The Planned Usage report is located on the Chemical Tracking Wizard.
- **Targets** - Specify what this chemical treats, such as insects or specific types of weeds, algae, etc.

Instructions Tab

This tab includes product "Label Instructions" and is viewable on the Legacy app. It also has the "Client Route Sheet Instructions," which appear on the Chemical Tracking Route Sheet options so they can be torn off the Route Sheet and left with the client.



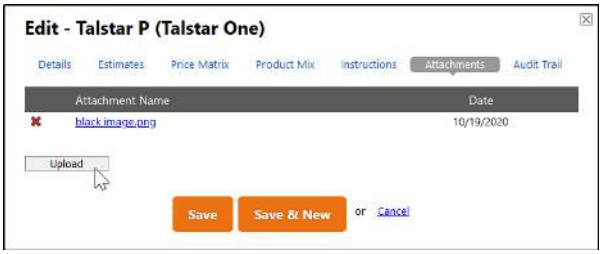
Label Instructions - Add the product label instructions so the technician can see them on the Legacy app. The technician will be able to click the **Label** button to see these.

Client Route Sheet Instructions - These are instructions that can be torn off of the Route Sheet and provided to the client at time of service.

Click the link below the text field to import text from an existing Client Instruction Email (**Settings > Client Instruction Emails**). You may have to condense the content because the space is limited on the Route Sheet.

Attachments

Attachments might be documents, photos of product labels, or SDS instructions.

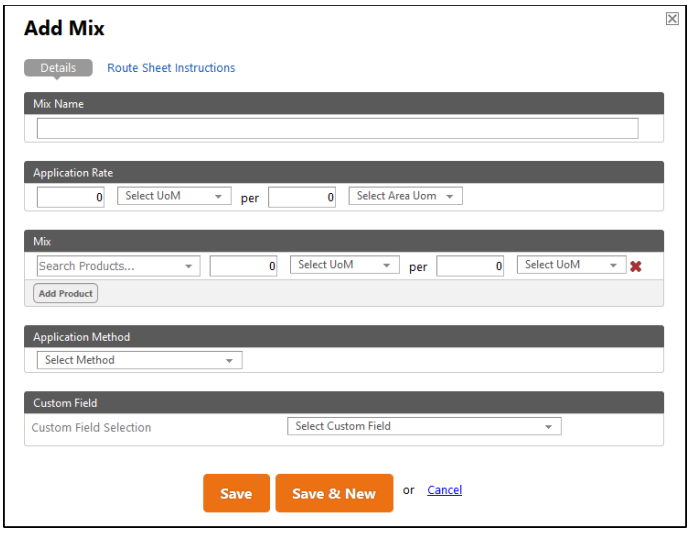


Click **Upload > Attach A File** to browse for your attachment. These attachments are not viewable or selectable on the Legacy app.

Set Up Mixes

Mixes let you specify the ratio of two or more liquid products and water, which are then added to a container such as a large tank or backpack sprayer. You won't be able to set up Mixes until you have added all the component Chemical Products you need to your account. To set up a new Mix, follow these steps:

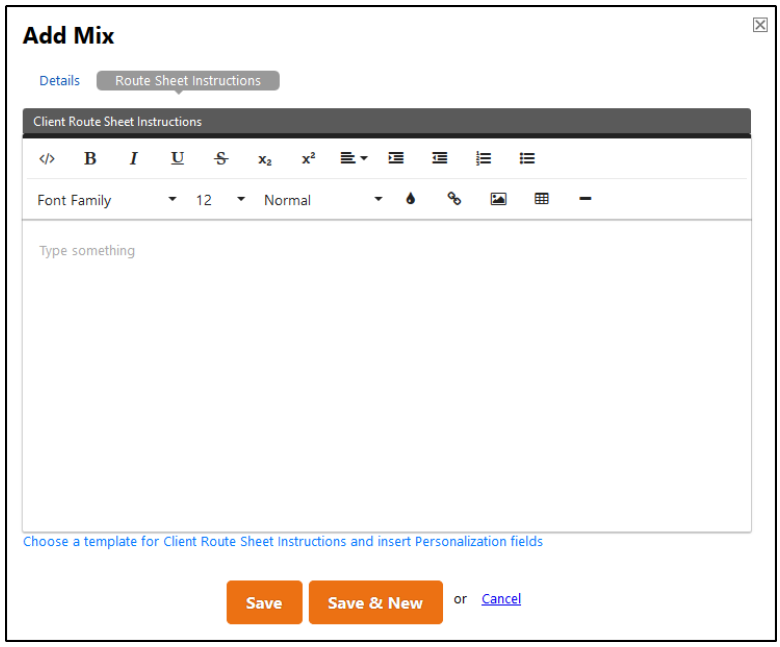
1. Go to **Settings > Mixes**.
2. Click **Add Mix**.
3. Enter a Mix Name.



4. Enter an **Application Rate**. This is to specify how much of the mixed product is applied per a given area unit of measurement. An example might be 1 gallon per 1000 sq. ft.
5. Under **Mix**, add the chemical products that are applicable to this mix per an amount of water. Click Add Product to add multiple products.
   Note: default mix rations will automatically load as you select appropriate products from the list.
6. Select the **Application Method** from the dropdown list. This tells how the chemical will be applied to the area that is to be treated with the Mix.
7. Select the **Custom Field** appropriate for calculating the correct quantity of the product to be applied at the property.

   The first option in the list, "Create New" is to create an entirely new Custom Field. Remember that quantities will not calculate if the Custom Field does not have a value at the Account level.

8. If needed, add instructions on the “Route Sheet Instructions” tab. These can be torn off the Route Sheet and left at the property.



9. Click **Save** or **Save & New** to quickly add a new Mix.

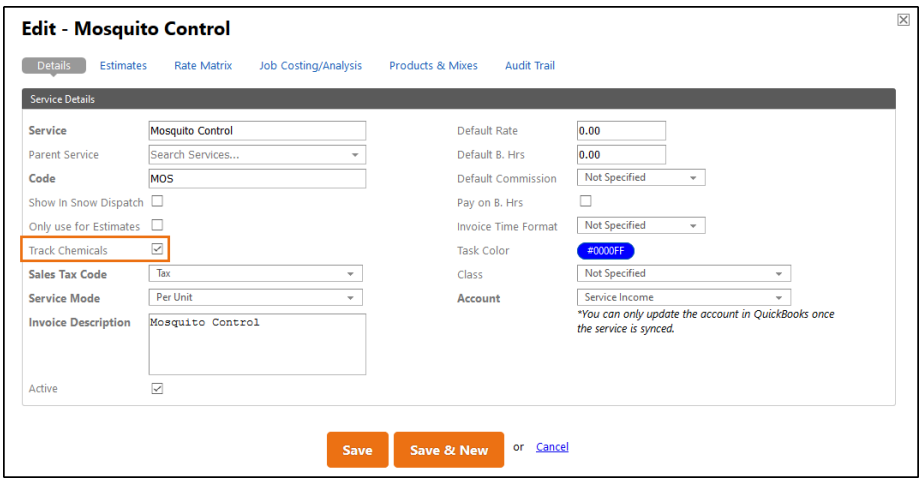
After creating a Mix, it will be available to link to a chemical service.

Set Up Chemical Services

Chemical Services are set up much in the same way as any other Services, with one key exception: checking the **Track Chemicals** check box

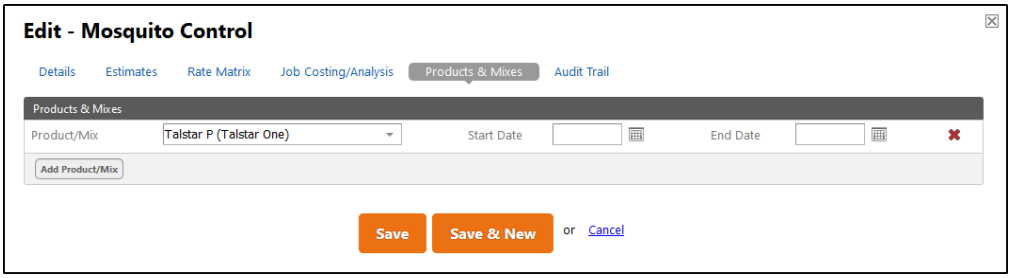
1. Under **Settings > Chemical Services,** click a service to open its **Edit** screen.

2. Check the **Track Chemicals** check box.



You must check this box for a Service to appearing in Chemical Tracking reports and the Chemical Tracking Wizard on the Dispatch Board.

3. The "**Products & Mixes**" tab is added to the overlay, where you can include chemical products for that service.



4. Click **Add Product/Mix** to add a new item to the tab. The selection list will show you all active Chemical Products and any Mixes you have set up.

5. Optionally, you can add a start and end date for each Product or Mix. This is in case you use the same Service year-round but the products used vary by season.

6. Click **Save** or **Save & New**.

See "Add a Chemical Product" on page 8 and "Set Up Mixes" on page 12 for more information.

Set Up Chemical Jobs

After completing the Chemical Tracking setup, you're ready to set up Chemical Jobs.

- *Existing jobs* that include Chemical Services will now be designated as Chemical Jobs, so they will be tracked. You do not have to set up those jobs again.
- *New jobs* can be set up as Chemical Jobs by adding a Chemical Service to any Job Type: One Time, Waiting List, Package, or Recurring.

Set up a New Chemical Tracking Job

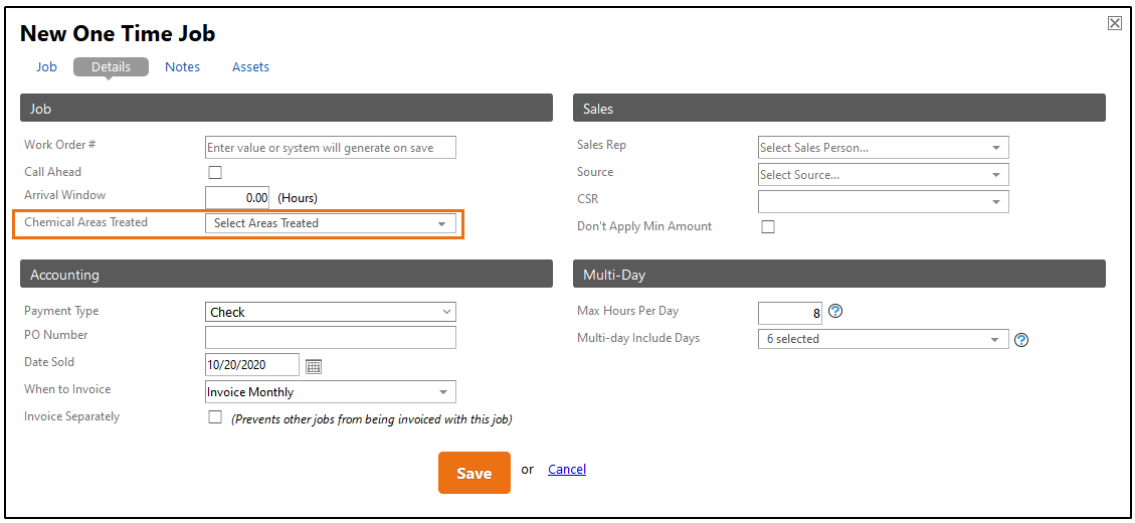
Setting up a new Chemical Job is the same as you would set up any other job:

1. Choose a Chemical Service or Package composed of Chemical Services to the Job.
2. Once Services are added, add Chemical Products to the Job in the same way as you would add any product, unless the Chemical Products have been applied to the Service at the Service level.

   Note: For chemical jobs, you should **not** add chemical products within the job, because you have already linked the chemical product with the chemical service during setup.

Identify a Chemical Job

- On the "Job" tab of the **Job** overlay, any services designated as Chemical make this a Chemical Job.
- On the "Details" tab of the **Job** overlay, the **Chemical Areas Treated** field tells the technician what areas to treat for this job. This can be customized at the Job level, because Areas Treated may vary from the default for a property.

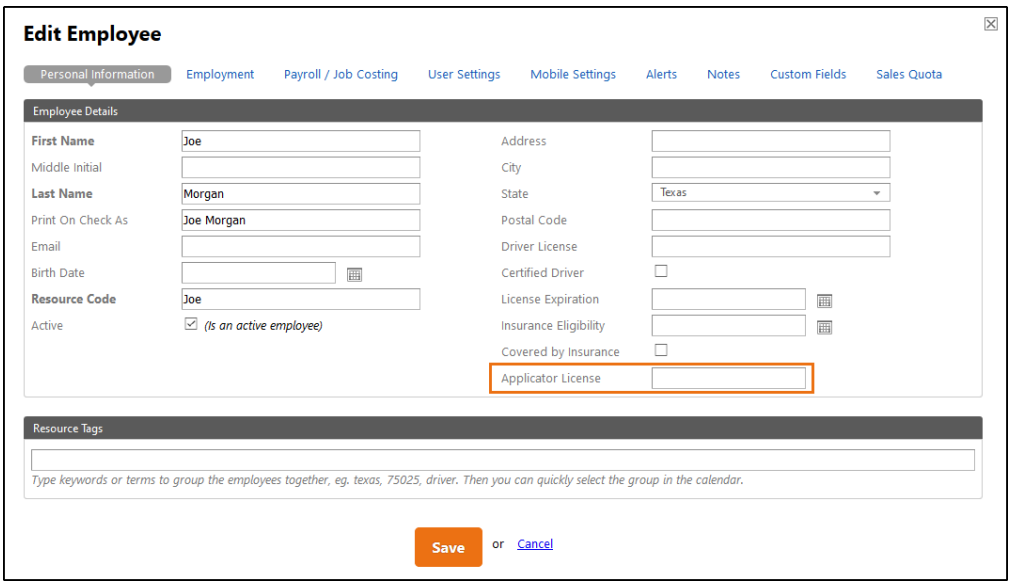


Add a Chemical Applicator License Number

If your business is required to document the Applicator License number for your technicians, you can do this for an Employee or Vendor. This number will appear on the Chemical Tracking Report for Services completed by each Resource:

For an Employee

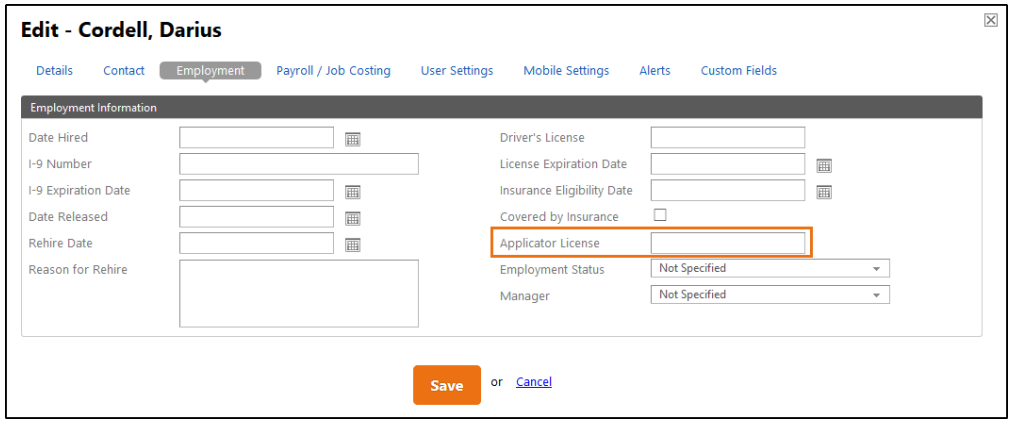
1. Go to **Team > Employees > (Employee Name).**
2. Click **Edit.**
3. The **Applicator License** field is on the "Personal Information" tab:



4. Type in the license number. This number will appear on the **Chemical Tracking** report.
5. Click **Save**.

For a Vendor

1. Go to **Team > Vendors >** (Vendor Name).
2. Click **Edit.**
3. The **Applicator License** field is on the "Employment" tab:



4. Type in the license number. This number will appear on the Chemical Tracking report.
5. Click **Save**.

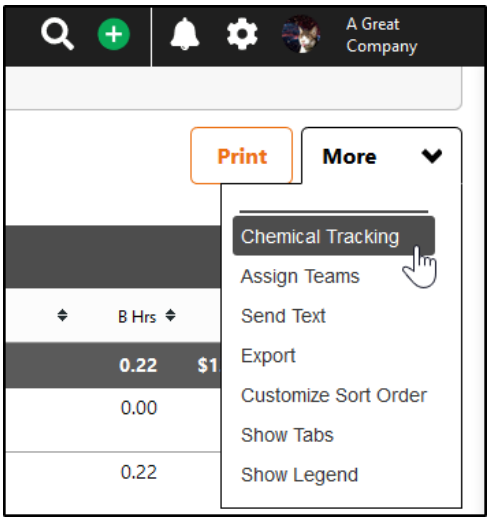
Manage Chemical Tracking Services with the Wizard

The Chemical Tracking Wizard is a tool on the Dispatch Board that lets you manage chemical tracking services. This includes:

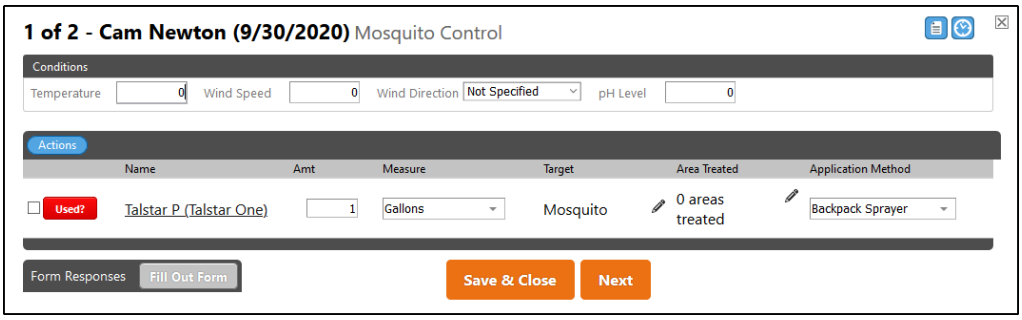
- **Adjusting quantities** of chemicals that were used on a job
- **Adding new chemicals** that were used
- **Viewing reports** related to future and past chemical applications
- **Displaying weather conditions** and pH settings, if these General Settings are enabled

Access the Chemical Tracking Wizard

From the Dispatch Board, click **More > Chemical Tracking** to open the wizard:



The Chemical Tracking Wizard is divided by Job, with the number of Chemical Jobs listed at the top of the overlay:



Using the Wizard

- To confirm the Product used, click the **Used** button.
- Click the name of any item to edit it, including the application rate and mix ratio.
- Use the pencil icons to change the **Areas Treated** or **Application Method**.
- 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.

Conditions

- The **Conditions** section applies to all Jobs when a value is entered. This is where you can manage Products, Mixes, and Form responses.
- Add the values for these fields relevant for the date when chemicals are to be applied. If you don't know this information when scheduling a job, then the Technician on the job can enter the information on the Legacy app.

Actions

- These fields appear in the grid area. Each field in the columns can be edited except for **Measure** if it is an actual Mix.
- Verify the **Amt** column is correct before your technician or crew goes into the field. This way, they will know what amount or quantities of chemicals should be used for a property. You can click the product name and each of the columns to edit them as needed.

Chemical Tracking on the Legacy App

If they have the correct User Rights, mobile users will be able to modify all fields on the Chemical Tracking Wizard from the Legacy app.

On the Legacy app, your technician will be able to enter a different quantity if a different amount ends up being applied.

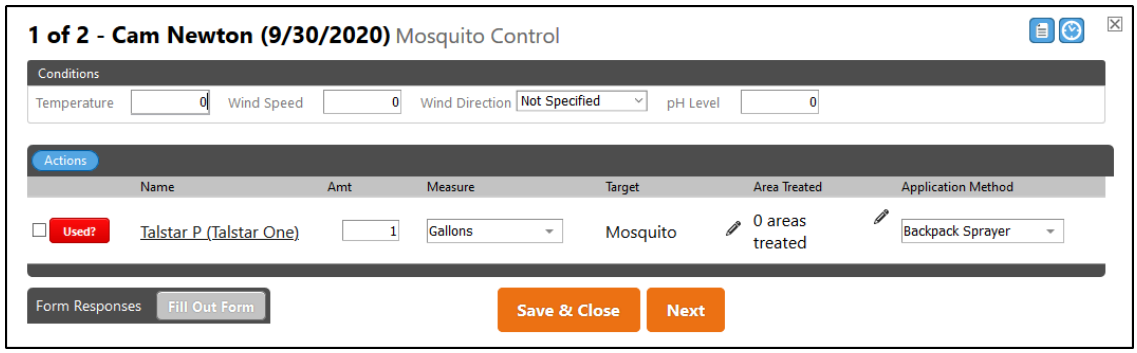
Close Out Day for Chemical Tracking

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 it, follow these steps:

1. Hover over **More** and select "Chemical Tracking."

   The Chemical Tracking Wizard opens:



2. After the Jobs are completed using the Legacy app, you can see updates to Products and Jobs on this wizard.

3. If needed, update anything entered on the Legacy app can 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.

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

   Click the **Next** button at the bottom to move easily from Job to Job to review Products and quantities.

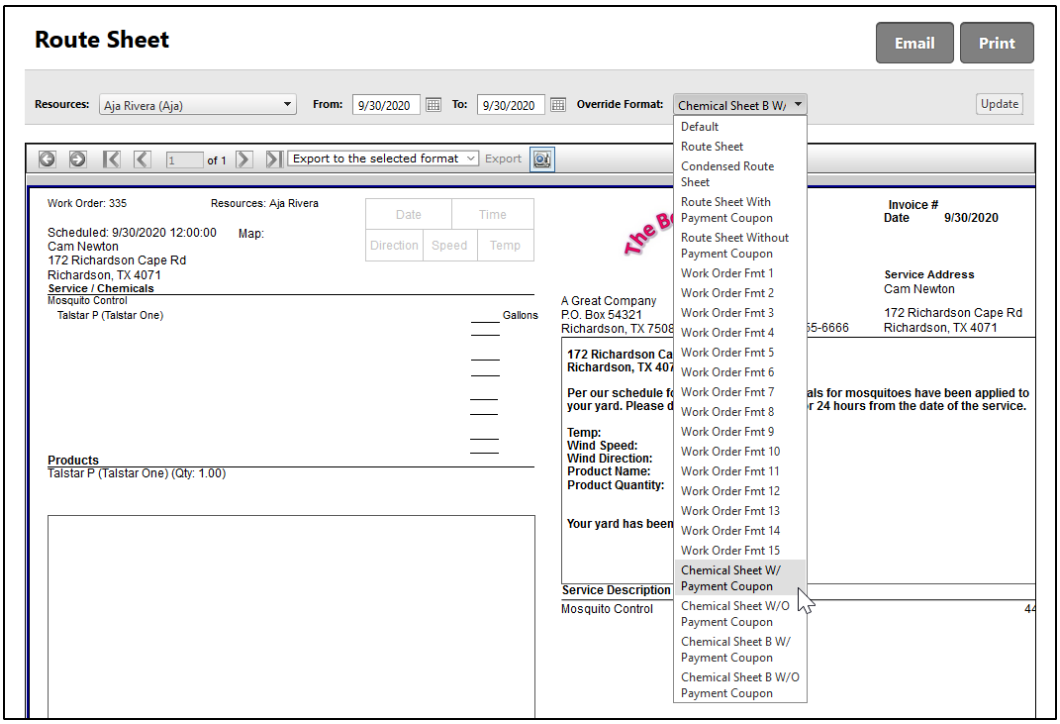
4. If you send Client Instruction Emails from the Legacy app or from SA, enable the “Instruction Emails Sent” column on your Close Out Day view on the Dispatch Board:

   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.

Print Chemical Tracking Route Sheets

Your technicians can see Chemical Tracking job information on the Legacy app, or you can print Route Sheets from the Dispatch Board by following these steps.

1. Go to **Scheduling > Dispatch Jobs**
2. Check the check box for all jobs to dispatch, then click **Actions > Dispatch**
3. Open the route sheet and click the **Print** button in the upper right corner
4. Select your options:
   - Resource(s)
   - Date
   - Override Format (either “Chemical Sheet W/Payment Coupon” or “Chemical Sheet W/O Payment Coupon”)



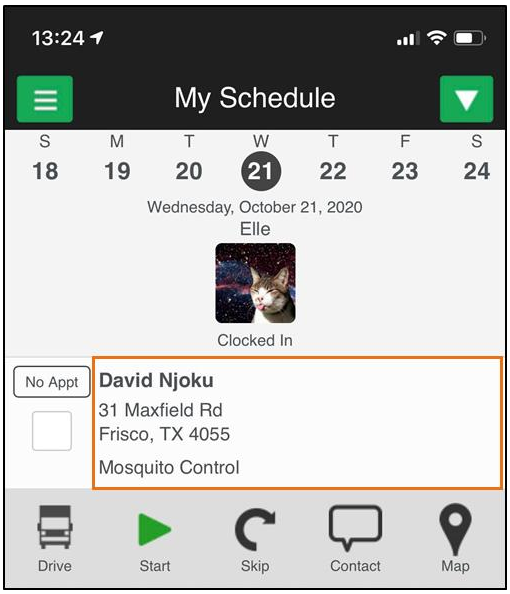
5. Click **Print** again to open the pages in a new tab and view the print dialog

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.

Chemical Tracking on the Legacy App

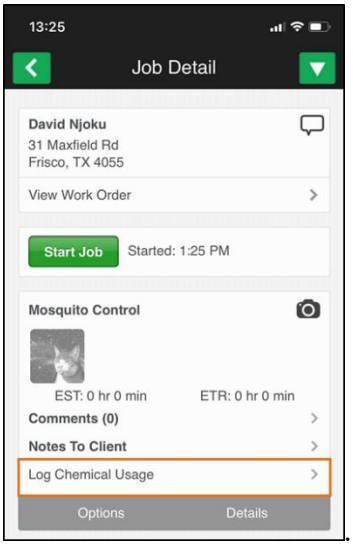
Chemical Tracking features are available on the Legacy mobile app for chemical jobs. Technicians can follow these steps to update Chemical Tracking jobs in the field.

1. On the Legacy app, log in and clock in.

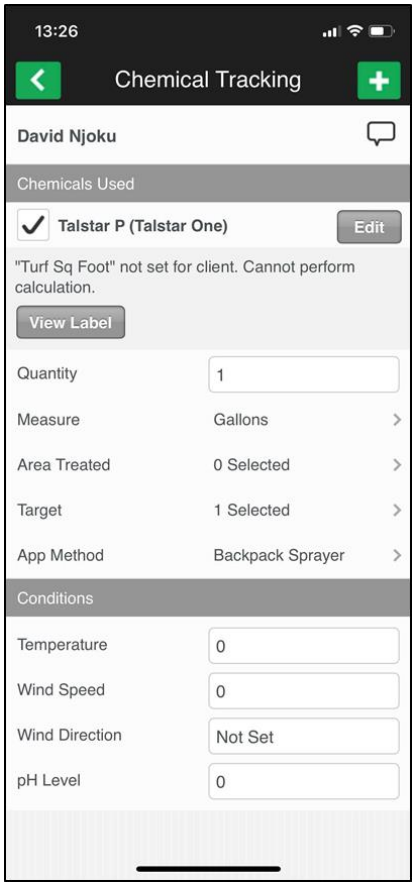


2. Tap a Chemical Job, then tap the **Start Job** button.

3. Tap the “Log Chemical Usage” to view chemical details



4. Tap the check box for all products you used at a property. If needed, you can edit the weather conditions at the bottom of this screen.



5. To add additional Chemical Products from this screen, tap the "**+**" in the upper right corner.

6. To see label instruction for the product, tap the **View Label** button.

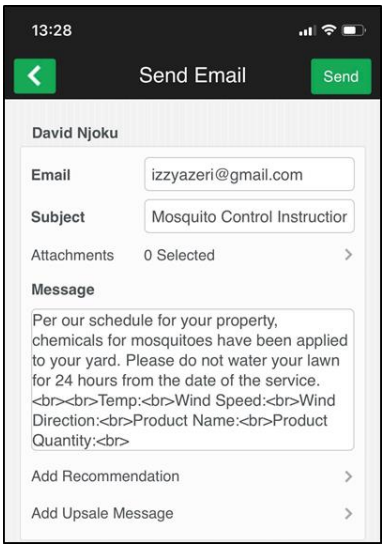
   Note: Label instructions must first be added to the product in the product list.

7. To email the client with client instructions, tap the cartoon bubble in the top right corner, below the "**+**".

   You can either choose the appropriate chemical instructions and send them in the pre-written email, or edit the email if needed.

8. Select an email template **or** manually type an email.

9. Edit the email as needed. Any code you see in the body of an email template will not be visible once the email has been sent.



10. Tap **Send** in upper right corner to send the email.

11. Tap the back-arrow button **<** to get back to the job screen.

Reports to Use with Chemical Tracking

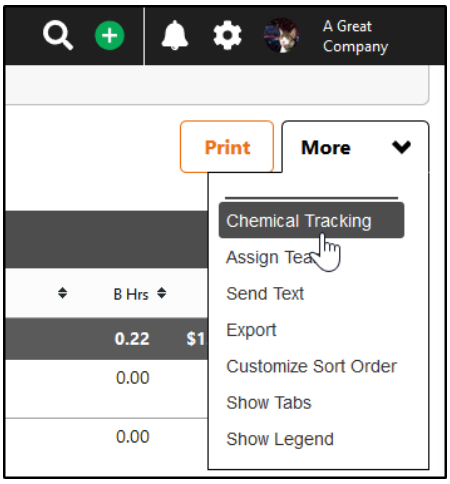
Two pre-built reports in the Report Center will help with Chemical Tracking:

- **Planned Chemical Usage** report
- **Chemical Tracking** report

Planned Chemical Usage Report

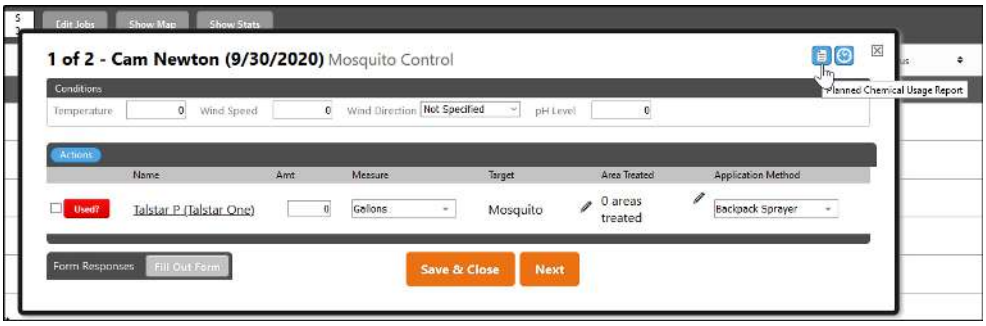
Before a Chemical Tracking job, you can print the **Planned Chemical Usage** report for the technician to know what chemicals and how much of each to take into the field. The **Planned Chemical Usage** Report will tell the technician the overall quantities of product to load on the truck and the individual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

1. From the Dispatch Board (**Scheduling > Dispatch Jobs**), select **More > Chemical Tracking**:

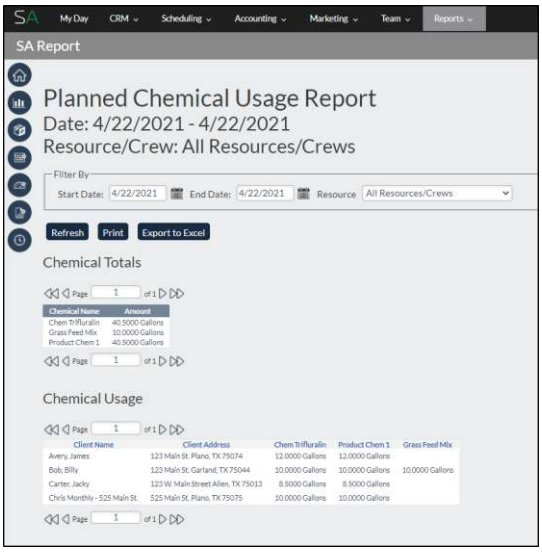


The "Chemical Tracking" option will appear only if you have chemical jobs scheduled for the date range you are currently viewing on the Dispatch Board.

2. To access the report: from the Chemical Tracking Wizard, click the **Planned Chemical Usage Report** button in the upper right corner of the overlay:



3. The report opens in the Report Center in a new tab and will look something like this:



Description

Chemical Totals refers to the overall quantity for each chemical to be used for the day.

The **Chemical Usage** portion shows the Client Name, Client Address, and the quantity of chemical to be used at the property.

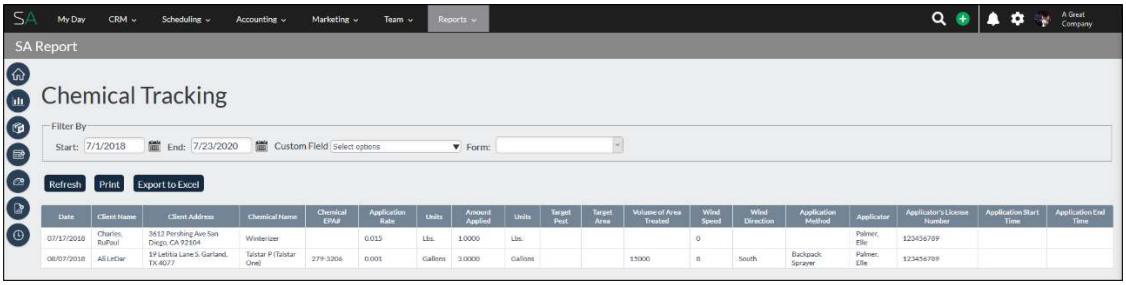
You can also find information about this report in the Knowledge Base or *Report Center User Guide*.

Chemical Tracking Report

This report is a list of applied chemicals including their details, such as EPA#, amount, and weather conditions. You must have Chemical Tracking enabled and set up for this report to be available.

This information is valid for the information entered on Chemical Jobs using Chemical Services and Products.

This report can be filtered by date range, Custom Field, and Form:



Description

Date	the date of the service
Client Name	the name of the client who was serviced
Client Address	the address of the property that was serviced
Chemical Name	the name of the chemical product used on the Job
Chemical EPA#	this corresponds to the EPA Registration # field on the "Product Mix" tab of the chemical Product
Application Rate	the application rate for the product based on the information entered in the "Application Rate" section of the "Product Mix" tab of the chemical Product.
Units	the units of Product applied according to the application rate
Amount Applied	the total amount of chemical Product
Units	the units of chemical Product applied at the Job site
Target Pest	the Target the chemical Product is designed to kill
Target Area	the area where the chemical Product is to be applied
Volume of Area Treated	the Custom Field value on the Account for the Custom Field designated on the "Product Mix" tab of the chemical Product

Wind Speed	the wind speed entered at time of application
Wind Direction	the wind direction entered at time of application
Application Method	how the chemical Product was applied to the property
Applicator	the Resource who applied the chemical Product. Resource Applicator License number required to populate this field.
Applicator License Number	the license number of the Resource who applied the chemical Product
Application Start Time	the time the Job was started. Resource Applicator License number required to populate this field.
Application End Time	the time the Job was completed. Resource Applicator License number required to populate this field.

If your state requires more information than this report provides by default, you can create Forms in which the field technician can log additional information. When creating a Form, make sure the Form is associated with the Service so that it's available on the Legacy app for the technician. This information is automatically added to the Chemical Tracking report. Each field on the form will become a column on the Chemical Tracking report.

You can also find information about this report in the Knowledge Base or *Report Center User Guide*.

