Advanced In-House Training Class Notes

Use this outline as a reminder of the concepts covered in the training class, and we’ve left space for you to take notes, if you wish.

### Video Links

Click these to go straight to some of our instructional videos:

* [V2 Forms](https://support.serviceautopilot.com/hc/en-us/articles/360045481591--Forms-Video)
* [V3 Forms](https://support.serviceautopilot.com/hc/en-us/articles/360045475691--V3-Creating-Forms-Video)
* [Smart Maps](https://support.serviceautopilot.com/hc/en-us/articles/360054702652--Smart-Maps-on-the-Dispatch-Board-Video)
* [Estimates](https://support.serviceautopilot.com/hc/en-us/articles/360045478751--Advanced-Estimates-May-7-2020)
* [Dispatch Calendar](https://support.serviceautopilot.com/hc/en-us/articles/360054760592--Dispatch-Calendar-Webinar-Video)
* [Timesheets & Payroll Report](https://support.serviceautopilot.com/hc/en-us/articles/360054833931--Timesheets-and-Payroll-Report-Video)
* [Set Up Job Costing](https://support.serviceautopilot.com/hc/en-us/articles/360055275091--Job-Costing-Video)
* [Job Costing & Report Center](https://support.serviceautopilot.com/hc/en-us/articles/360045477671--Job-Costing-and-Reports-April-7-2020)
* [Automations](https://support.serviceautopilot.com/hc/en-us/articles/360045479491--Getting-Started-with-Automations-May-14-2020)

### Documentation Links

* [V2 Forms User Guide](https://support.serviceautopilot.com/hc/en-us/articles/360058751571--User-Guide-V2-Forms-)
* [V3 Forms User Guide](https://support.serviceautopilot.com/hc/en-us/articles/360045037492--User-Guide-V3-Forms)
* [Smart Maps User Guide](https://support.serviceautopilot.com/hc/en-us/articles/360045481831--User-Guide-Smart-Maps)
* [Estimates User Guide](https://support.serviceautopilot.com/hc/en-us/articles/360045476251--User-Guide-Estimates)
* [Dispatch Calendar User Guide](https://support.serviceautopilot.com/hc/en-us/articles/360045475891--User-Guide-Dispatch-Calendar)
* [Payroll Report & Timesheets User Guide](https://support.serviceautopilot.com/hc/en-us/articles/360045036932--User-Guide-Payroll-Report-Timesheets)
* [Job Costing User Guide](https://support.serviceautopilot.com/hc/en-us/articles/1260806934349--User-Guide-Job-Costing)
* [Report Center User Guide](https://support.serviceautopilot.com/hc/en-us/articles/360045476271--User-Guide-Report-Center)
* [Automations User Guide](https://support.serviceautopilot.com/hc/en-us/articles/360045475611--User-Guide-Automations)

## Graphical user interface, text, application Description automatically generatedFor More Information

Go to the SA **Help Center** to find more articles, videos,   
  
and user guides on the topics from this workshop.

To see the full Help Center, click the avatar icon at the  
  
top right corner of your screen, then click **Help Center**.

Or

Click the **Help** button at the top right of any   
  
SA screen, then type a term into the Search field.

Day 1: Forms, Smart Maps, and Estimates

# Forms

You can email forms or embed them on your website to help you collect and interpret information efficiently. You can associate a form with jobs, actions, events, or services.

#### Internal form examples

* **Checklist** –this can appear when the field employee clocks into a job, or the daily checklist before they head out for job, or when they clock in for the day.
* **Sample Employee Checklist**—Load a Prebuilt form like the **Inspection Checklist** that you can customize.

#### External form examples

* Estimates form, Contact Us form
* **Surveys** to email to clients like net promoter score, reviews
* New Employee form
* **Client contact info**—data fields map to the client’s account in SA and update automatically

# Smart Maps

Smart Maps is a subscription feature for Pro and Pro Plus accounts using Google® satellite images. Measurements are stored for future use, and you can store this information in a Custom Field in SA.

Use Smart Maps to:

* Measure any outdoor surface of a property, including square footage of turf, beds, and parking lots
* Do linear measurements
* Optimize routes from your office
* Identify existing clients for upsells
* Import new leads into SA

# Estimates

The estimating process can be easy and efficient using some advanced estimating tools, including estimate templates, rate matrixes, and estimate stages.

### Estimate Setup

#### Settings

**Settings > CRM > Estimate Settings**

Check these boxes:

* Allow Signature Capture
* Confirmation Email

*The* ***Estimates User Guide* appendix** has a full explanation of settings for Estimates.

### Custom Fields

Use for data that won’t change, such as **Turf Square Footage**.

**Settings > CRM > Custom Fields**

1. Click **Add Custom Field** button and fill in overlay.   
Custom fields appear in the client account on the “Custom Fields” tab

**2. Print on Work Order** check box—check this so the field employee can see the custom field on the work order or mobile app

#### Associate custom field to service

**Settings > Scheduling > Services**

* You’ll usually use **flat rate service** for pricing matrix
* If using a custom field in the rate matrix, don’t use the “Calc” portion of the formula
* Use: Qty x rate x visits

### Add a video

1. On You Tube, click **SHARE > Embed Video**

2. Copy code

3. Go to **Code View** in the Estimate (click <**/**>

4. Paste code

### Call script

This offers reminders when you’re on the phone.

## Estimate Components

#### Estimate Grid

#### Estimate Client Email

#### Estimate Confirmation Email

#### Estimate Document

## Estimates Workshop

Use this time to implement what you learned. Trainers will be available for questions.

# Day 2: Dispatch Calendar, Payroll, Timesheets, Job Costing, and Reports

## Dispatch Calendar

The Dispatch Calendar is useful for companies whose work is based on timeslots and ad-hoc teams.

* Set up timeslots and time intervals at **Settings > Resource timeslots**
* Click and drag a job card to any timeslot
* Appointments are automatically assigned
* Filter waiting list jobs for different aspects, including proximity
* Use the Dispatch Board to do routing, rather than the Dispatch Calendar

# Payroll and Timesheets

### Payroll

Set up company payroll options: **Settings > Accounting > Payroll**

Set up employee payroll settings: **Team > Employees > Edit > Payroll/Job Costing tab**

* Here, you can override the company payroll settings above for individual employees.
* **Resource PIN** – set this for **Wall Clock** mode.

#### Labor Burden

**Labor Burden** is sometimes called **Loaded Labor Rate** and other variations. It means   
*Gross Hourly rate* + *Additional labor costs* as shown in the table below.

The following example shows how to calculate your labor burden. Adjust all the factors to apply to your company: use what applies to help you determine how much a resource is costing you.

#### Sample Company’s Total Financial Contribution for Employee with Annual Totals

|  |  |
| --- | --- |
| Gross Pay | $28,000 (Gross weekly alone $13.46 hr.) |
| Workman’s Comp | $500 |
| Unemployment Insurance | $240 |
| Any other Insurances | $1,000 |
| Taxes | $550 |
| Bonus | $850 |
| Annual Total | $31,140.00 |
| Monthly based on 12 mo. | $2,595.00 |
| Weekly based on 52 wks. | $598.85 |
| **Hourly based on 40 hrs.** | **$14.97 This is your employee’s Labor Burden** |

### Timesheets

**Accounting > Timesheets**

* Click an employee to manage their work times
* See their time punches on the “Work Time” tab.
* Adjust timesheet entries on “Clock Time” tab
* **Actions > Export Timesheet** **Report**

### Services

Specify job costing settings for services at **Settings > Services**

#### Labor Burden

* Put in default budgeted hours that will appear on recurring or one-time jobs
* Adjust the budgeted hours for individual jobs or packages

#### Products

* Default budgeted cost for product appears on the **Job Costing** report
* When you add a new job with a product, type in a quantity and the product cost is calculated
* If needed, override the product cost on the **New One Time Job** screen

#### Check Data

* Go to **Dispatch Board > Team Assignment** screen to adjust crew if needed after a job is complete
* Go to **Dispatch Board > Close Out Day** to adjust other data on a completed job (Rates, Amounts, Variance, Hours)
* Revenue
* Products
* Drive Time (on Timesheet)

### Dispatch Board

### Payroll Report

This report calculates regular and overtime pay for employees and vendors.

**Accounting > Payroll Report**

1. Select time period

2. Check all hours in summary and time records

3. To approve time, select check boxes on left and:

**Actions > Mark as Approve**

**Actions > Export** if needed

4. You can email the spreadsheet to ADP/Paychex or third-party payroll company

# Job Costing and Pre-Built SA Reports

Go to **Reports > SA Reports** for all prebuilt reports.

## Job Costing Report

Shows who worked, budgeted and actual rates and hours, revenue costs and totals.

* Defaults to Today’s date
* **Actual Rev Cost** = Job time labor cost, drive time labor cost, and product cost
* **Actual Time Variance** shows time efficiency (a Key Performance Indicator)
* See [**Job Costing Report**](https://support.serviceautopilot.com/hc/en-us/articles/360048731431-Job-Costing-Report) in the Help Center to see descriptions of each column.

## Job Cost Summary Report

This report shows less detailed information than the **Job Costing** report, but it provides a quick way to see information about budgeted versus actual costs.

#### Job Cost Summary Report Columns

**Actual Rev Total** - invoiced rate for both the Service and any Products attached to the Service.

**Bgt/Man Hr** - rate entered on the job level divided by the budgeted hours.

**Actual Rev/Man Hr** - invoiced rate for the service divided by the actual time spent on the job. This column also has red and green arrows that indicate whether the Service was profitable.

**Actual Time Variance** - difference between budgeted and actual hours.

**Target Over (Under)** - difference between the actual dollars per staff hour earned and the target dollars per staff hour desired (entered on the Service level).

**Products Actual Cost** - actual cost of the Products used on the Service (versus costs initially assigned to the job).

**Labor Cost** - average cost per Resource times the number of Resources on the job.

**Drive Effect Cost** - labor costs accrued during drive time.

## Other Helpful Reports

### A/R Aging Report

Who owes you money, and for how long.

If a client owes, run the **Unapplied Payments** report to make sure they have not already paid, but you didn’t apply the payment to the invoice.

### Cancellation Count Report

Shows cancellations by Reason, Source, Sales Rep, CSR, and Postal Code.

### Client Balance Report

Shows who owes you the most money.

### Email Reports

Various reports under the **Audits** section give data on marketing emails.

### Estimates by Stage Report

Helps you estimate **projected revenue.**

* Look by different criteria like Sales Rep, Stage

### Profit/Loss – Cash Basis

Useful if you track profits and losses.

### Sales Tax Report

Helpful at tax time if you charge sales tax.

* Shows total taxable sales by date range
* Click each line to drill in for details

### Visits Report

Budgeted versus actual time and dollar amounts, and the status of jobs.

# Custom Reports & Dashboard

See [Formulas Explained](https://support.serviceautopilot.com/hc/en-us/articles/360045478491-Formulas-Explained) in the Help Center for information on building your analysis.

### Build an Analysis

1. Go to **Reports > Report Center > Create Analysis**

2. Click “Job - Client” from **Select Data** dropdown list.

3. Select revenue, time, labor costs.

4. Click “Job Cost Detail” from **Select Data** dropdown list.

5. Select client name and service address.

6. Click “Client – Custom Fields” from **Select Data** dropdown list.

7. Click **OK** to generate the analysis. The table contains a column for each check box selected.

Rearrange columns as you wish by holding down the tree dots in the column heading and dragging. For example, you might move the date, client name, and service to the left side.

#### Filter the Analysis by Date

1. Click “Date” column heading, then select “Filter” from THE dropdown list.

2. Select date or date range and click **Add**.

**Sliding date** is a relative filter that will update as you open the report in the future. If you have already set a date filter, click **Replace**. If there is no date filter set, click **Add**.

#### Filter Out Unneeded Data

This lets you remove jobs that have no budgeted or actual hours.

* **Filter Column** – select **Actual Hours**
* **Comparison** – select **>**
* **Value** – select **0**

#### Group by Service Name

* Click the “Service Name” column heading and select **Group** from the dropdown list.
* When a column is grouped, it automatically moves to the far-left side of the table.
* See an Average of hours per service – Select the “Actual Hours” column heading, then select **Aggregate > Average** from the dropdown list
* Hide columns if needed. The data will still be used in formulas and calculations.
* Click the gear icon to see **Hide and show columns** overlay. Check or uncheck any box as needed.

### Create a Custom Formula

1. Name the formula, then choose a column to insert from the **Insert a Column** dropdown list

2. Select an operator from the **Operator** dropdown list

3. Select an option from the **Formula** dropdown list (click the **Formula Help** button for information about each formula)

4. Select the **Data Type** and **Display Format**

5. Click **Add**

The column is added to the far-right end of the analysis.

### Add a Crosstab

Select specific items from the larger table for a comparison of those items.

### Add a Chart

This graphical output can be added to your dashboard.

## Build a Dashboard

**Reports > Create Dashboard**

* Select items from the Visual Gallery. Choose from numerous prebuilt items and your own custom analyses and charts.
* Drag the panels around as you wish.
* Add a tab and rename it to create another grouping of items.
* Click **Add Global Filters** to filter all the items on the Dashboard.

### Add Items from Visual Gallery

Select from your previously created analyses, crosstabs, and charts.

### Schedule Reports

(Pro Plus Members) Set up a schedule to receive an email with a report. There is a limit of five scheduled reports at a time.

1. Go to **Reports > Report Center** and select the report you want to schedule.

2. Click the clock icon and fill in the Schedule overlay.

# Report Center Workshop

Use this time to implement what you learned. Trainers will be available for questions.

# Day 3: Automations

Learn how to customize and implement pre-built Automations into your SA account.

### Automation List

### Sequences and Sequence Rules

### Automation Events

### Testing Your Automation

### Tracking Your Automation

# Automations Implementation Workshop

Use this time to implement what you learned. Trainers will be available for questions.