ServiceAutopilot™

CHEMICAL TRACKING

USER GUIDE

V1.4

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What's New in Chemical Tracking

If you have not yet set up Chemical Tracking in SA, the **Chemical Tracking Setup Wizard** will take you through simple steps for setting up your chemical products.

We also streamlined some items in Chemical Tracking, including:

- The **Chemical Wizard** now **calculates the ratio** of chemical to solution**.**
- **Mixes** can have multiple application methods.
- **Products and Services** can now be copied.
- **Chemical Tracking Settings** are consolidated to simplify setting up this feature**.**
- **Chemical Tracking Emails** are grouped to allow easier management.
- **Chemical Tracking** and **Planned Chemical Usage** reports reflect the changes above.

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.
- 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 29 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.

Learning Resources

Click this link to see the Chemical Tracking webinar, or click **Help** and search for Chemical Tracking.

Need Help with Forms?

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

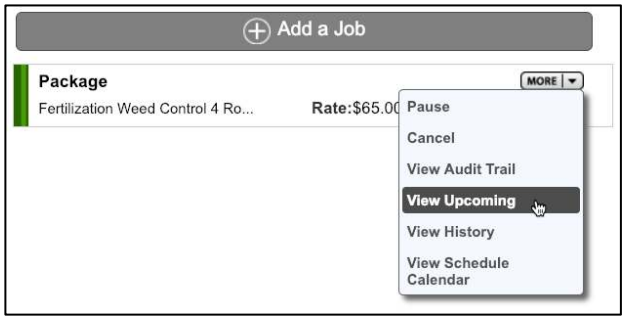
- Online In-House Training on Forms
- Forms User Guide
- Knowledge Base articles on Forms

"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

1. You can set up Chemical tracking using the Chemical Tracking Setup Wizard OR manually.
2. Add a job, then add a Chemical Tracking service to the job.

   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 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, your field technicians can see them on printed Chemical Route Sheets and/or the **Chemical Usage** screen of 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 with the Wizard

The Chemical Tracking Setup Wizard takes you through simple steps for setting up your chemical products.

On the My Day page, click the link for the setup wizard at the top right of your screen.

When the Chemical Tracking Setup Wizard launches, you'll see five tabs across the top of the screen.

Click each of the tabs and fill in the information:

1. Company Info

Under **Company Info**, fill in the type of work. You can select one or more standard options or fill in a custom option.

The options are:

- Fertilization/Weed Control
- Interior Pest Control
- Exterior Pest Control
- Pool Cleaning
- Other

2. License Numbers

Under **License Numbers**, fill in the license numbers of your technicians.

3. Fields

Fill in the **Application Methods**, **Locations**, and **Units**.

- Select from a list of standard data or add your own.
- You can modify the standard data or delete it

4. Chemicals

The wizard supplies a list of chemical products based on the information you set up in the **Company Info** step.

- Click any chemical products in the column on the right to select them.

  When you select them, optional fields appear on the same line: **Scientific Name**, **EPA #**, and **Cost**.
- Fill in the fields if you wish.
- Click the trashcan icon to delete the line.

5. Services

- Click any chemical services in the column on the right to select them.

  When you select a chemical service, optional fields appear on the same line: **Product**, **Start**, and **End**.
- Fill in the fields if you wish.
- Click the trashcan icon to delete the line.

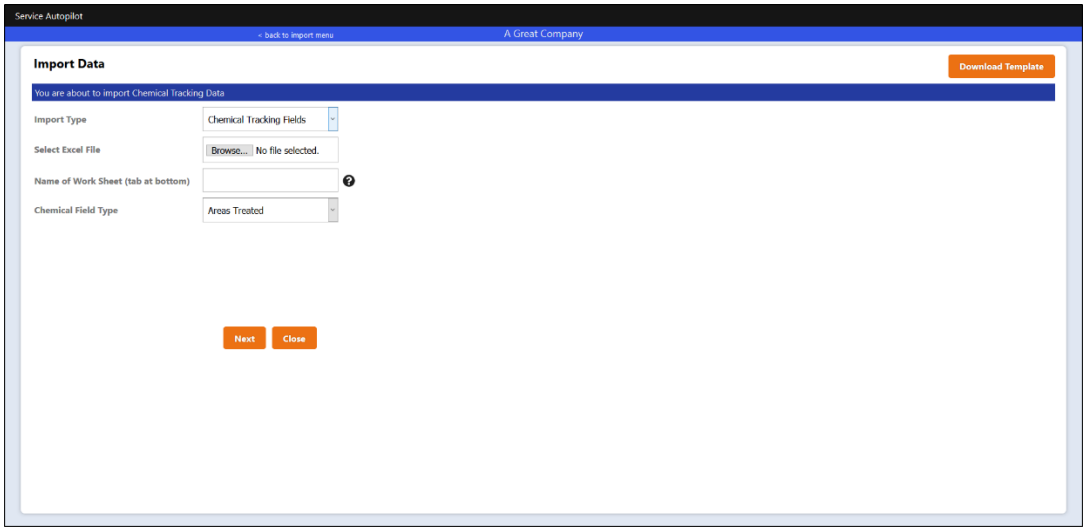
Set Up Chemical Tracking Manually

Chemical Tracking is one area of SA that requires intensive setup if you intend to use the feature to its fullest. Follow the instructions in this section to import your initial data, then in Step 2, manually enter any additional chemical data you need.

Step 1: Import Chemical Data

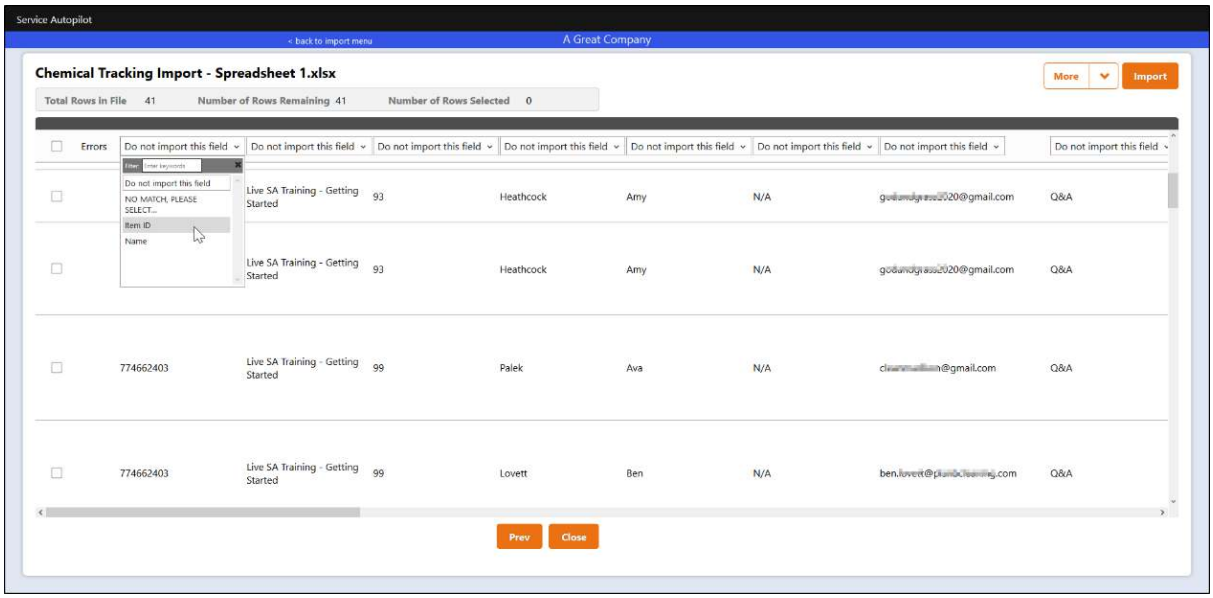
You can import some Chemical Tracking data if you already have it in an Excel file (such as from another software solution). Follow these steps.

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 displays the number of rows that will be imported. Use the dropdown lists at the top of the table to designate where in SA each column will map to.



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

11. When you're satisfied with the column mapping, click **Import**. A progress bar displays during the import. If there are any errors, you'll see a message.

If the import is successful, you won't see a confirmation message; the status bar will simply disappear.

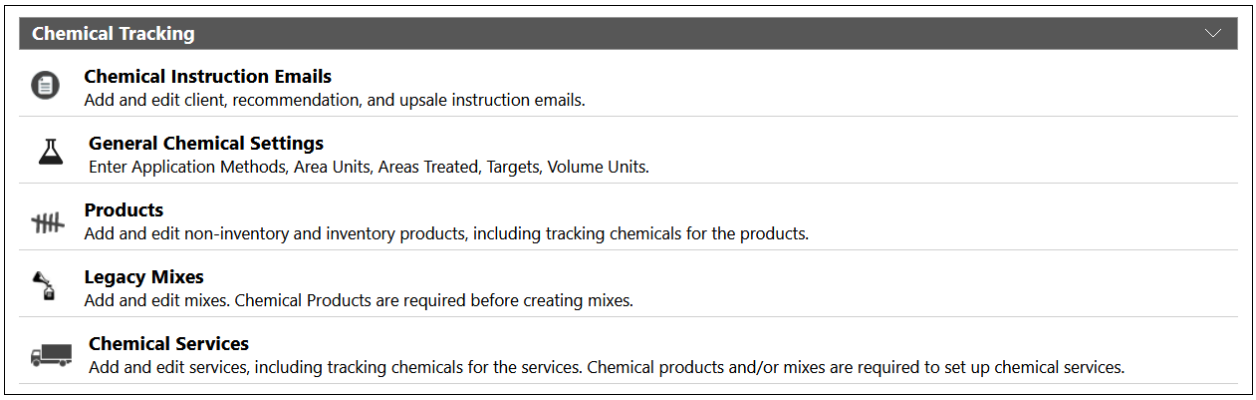
Step 2: Enter Additional Chemical Data

After importing your chemical data, you can enter additional data manually, if needed. Under **Settings > Chemical Tracking**, click each section and supply the data as shown in this section.

Define General Chemical Settings

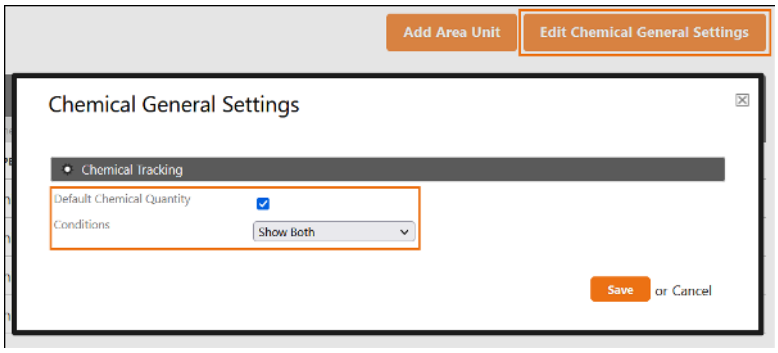
General Chemical Settings include Application Methods, Area Units, Areas Treated, Targets, and Volume Units of Measure. These settings can also affect what appears in the Chemical Tracking Wizard on **Scheduling** screens.

1. Go to **Settings > Chemical Tracking > General Chemical Settings**.



2. 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, Service Autopilot will automatically calculate the quantity of each product to apply at the property based on the applicable custom field value on the account.

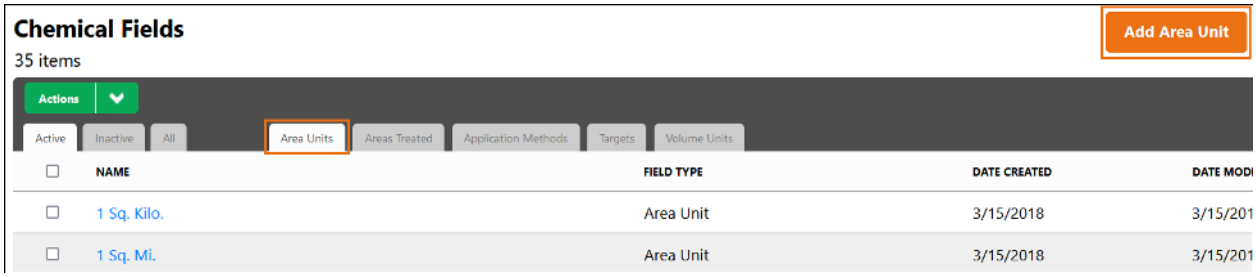
3. In the **Conditions** dropdown list, select one of these options: **Show Weather Conditions**, **Show pH Level**, **Show Neither**, or **Show Both**.



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. You can make any existing entries active or inactive on the **Actions** dropdown menu.

1. Go to **Settings > Chemical Tracking > General Chemical Settings**.
2. On the "Area Units" tab, click the **Add Area Unit** button to add a new area unit.



3. Enter a name in the **Name** field.
4. Click the **Save & New** button to add additional area units quickly.

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. You can make any existing entries active or inactive on the **Actions** dropdown menu.

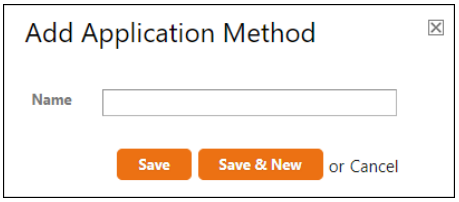
1. Click the "Areas Treated" tab.
2. Click the **Add Area Treated** button to add a new area.
3. Click the **Save & New** button to add additional areas quickly.

Application Methods

The application method tells the system how chemicals will be applied, such as spray, spread, or broadcast. You can also 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, if they have permissions to do so.

1. Click the "Application Methods" tab.
2. Click the **Add Application Method** button to add a new method.
3. Fill in the dialog box, then click the **Save & New** button to add additional methods quickly. Click **Save** after the final entry.



Targets

Targets allow you to specify what your chemical treats, such as types of insects or weeds. You can make any existing entries active or inactive on the **Actions** dropdown menu.

1. Click the "Targets" tab.
2 Click the **Add Target** button to add a new target.
3. Fill in the dialog box, then click the **Save & New** button to add additional targets quickly. Click **Save** after the final entry.

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 or gallons. You can make any existing entries active or inactive on the **Actions** dropdown menu.

1. Click the "Volume Units" tab.
2. Click the **Add Volume Unit** button to add a new UoM.
3. Fill in the dialog box, then click the **Save & New** button to add additional UoM;s quickly. Click **Save** after the final entry.

Set Up Email Templates for Chemical Tracking

There are a few different ways of communicating information about chemical products and services to your clients through SA. These include:

- **Client Instruction Emails** notify clients what chemicals have been applied to their property and any necessary follow-up care.
- **Recommendation Instruction Emails** are general recommendation emails about a client's property that were noticed while you were on site and not necessarily an upsell opportunity.
- **Upsale Email Instructions** let clients know about other services and products they have not yet purchased but would supplement current service.

If you want your technician to send any of these emails, they can do so from the Legacy Mobile app. If not, your technician can simply add a job comment to the job to notify office personnel that an email needs to be sent and why.

Go to **Settings > Chemical Tracking > Chemical Instruction Emails** to set up email templates for communicating instructions, recommendations, and upsells.

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.

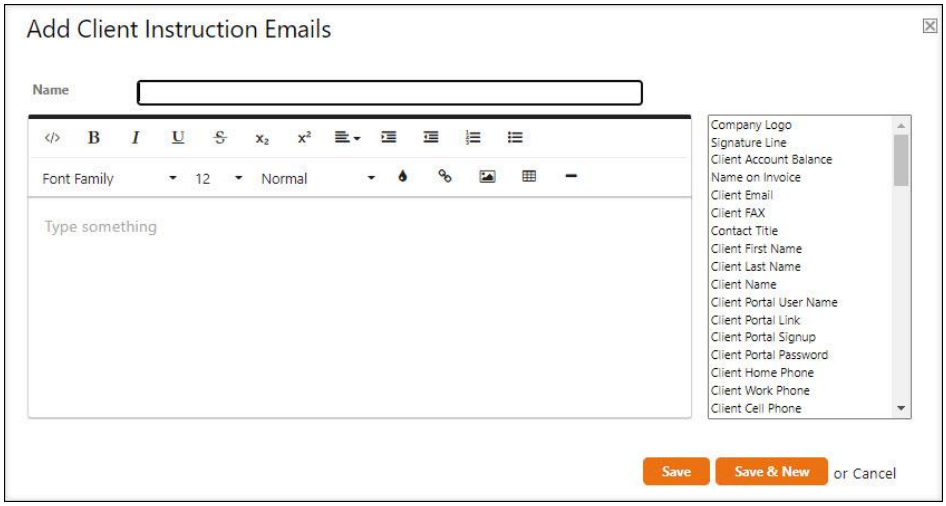
Set Up Client Instruction Emails

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.

1. Go to **Settings > Chemical Tracking > Chemical Instruction Emails**.
2. Click the "Client Instruction Emails" tab, then click the **Add Client Instruction Emails** button to add a new email.

3. Fill out the **Add Client Instruction Emails** overlay. The list to the right is a list of personalization fields. Click any to add it to the email.



4. Click the **Save & New** button to add additional emails quickly. Click **Save** after the final email.

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 > Chemical Instruction Emails**.
2. Click the "Recommendation Instruction Emails" tab, then click the **Add Recommendation Instruction Emails** button.
3. Fill out the **Add Email** overlay.
4. Click the **Save & New** button to add additional emails quickly. Click **Save** after the final email.

Create Upsale 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 > Chemical Instruction Emails**.
2. Click the "Upsale Instruction Emails" tab, then click the **Add Upsale Instruction Emails** button.
3. Fill out the email overlay.
4. Click **Save** or **Save & New** to add additional emails quickly. Click **Save** after the final email.

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.

Set Up Chemical Products

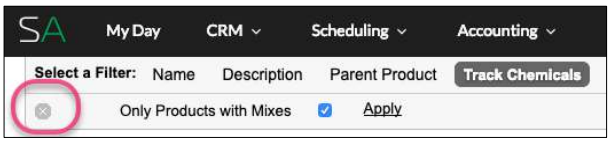
When setting up Chemical products, you tell the system that products can be scheduled individually with a service, and also added to a Mix with other products (see “Create a New Chemical Mix” on page 15).

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 entry under "Chemical Tracking" the list will be filtered to show only Chemical products by automatically applying the "Track Chemicals" filter to the Products list.

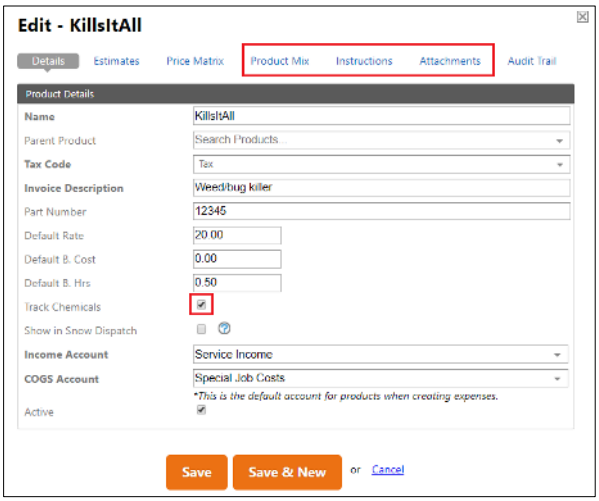
   To see products you already have in the system, click to cancel the filter icon at the top left. The filter shows only products that are already designated as Chemical products.



2. Add a new product or click an existing 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.

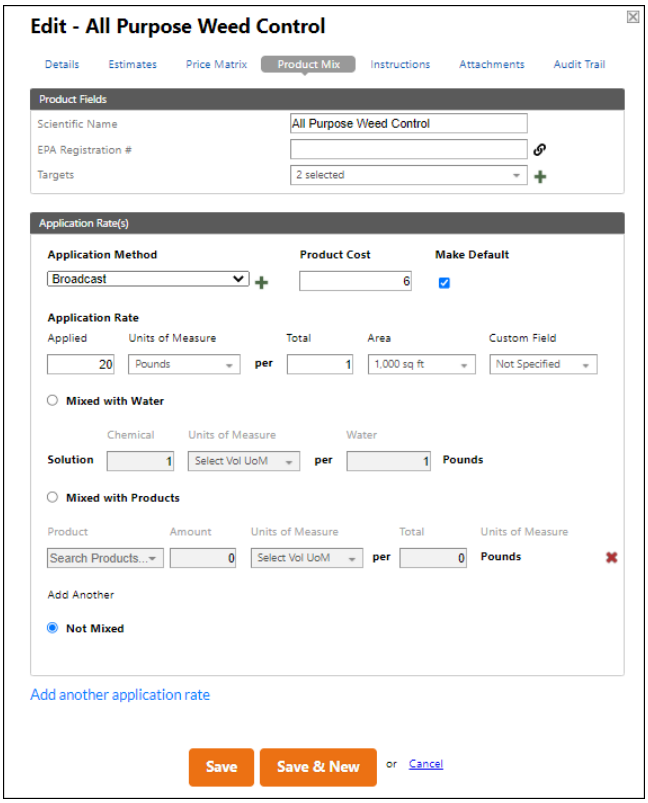
Set Up Chemical Mixes

Mixes are treated just like products.

- You can include chemical mixes in other areas of SA, like Estimates and Invoices.
- You now can create Multiple Application Methods for a chemical product. This saves you time and makes Chemical Tracking reports more accurate.
- The system always refers to chemicals as the original item; after it’s combined with something else, it’s a mix.
- The **Legacy Mixes List** contains all mixes you previously created, and you can still use them as before. You can find this list under **Settings > Chemical Tracking > Legacy Mixes**.

Create a New Chemical Mix

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:



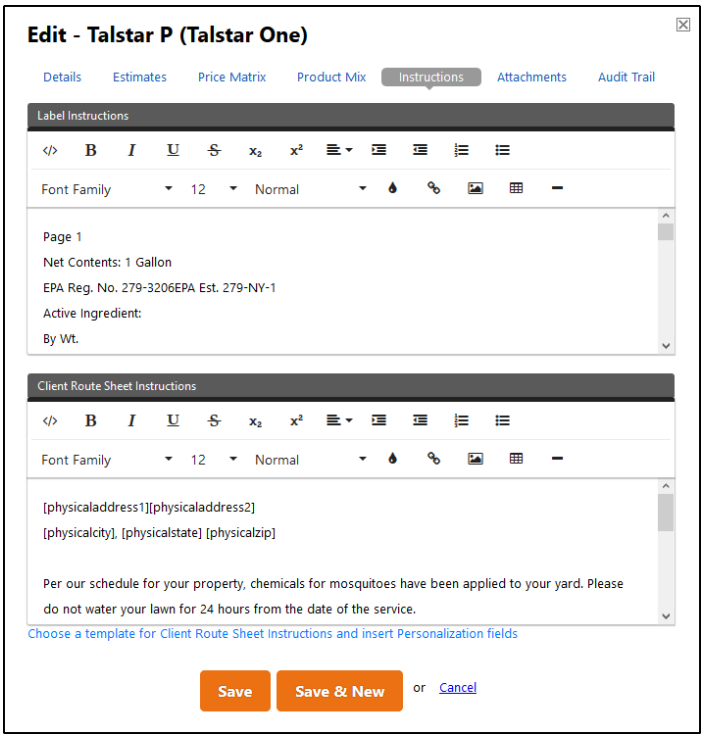
1. Go to **Settings > Products**, then create a new chemical as a Product.
2. On the "Product Mix" tab, fill in the **Scientific Name** - Some states require this,
3. Fill in the **EPA Registration #** field. Optionally, you can add the URL for the EPA website. You'll later see that link when you use the Chemical Tracking wizard.
4. **Targets** - Specify what this chemical treats, such as insects or specific types of weeds, algae, etc.
5. Choose an **Application Method** from the dropdown list. This tells how the chemical will be applied to the area.
6. **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.
7. Check the **Make Default** check box when you have an application method and rate that you use more often. It will be the first option that appears when you use the Chemical wizard.
8. Select the radio button for either **Mixed with Water** or **Mixed with Products**, then select the products and quantities to mix.
   OR
   Select the radio button for **Not Mixed**.
9. 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.
10. Create additional application methods by clicking the link **Add another application rate**.
    Note: You can create multiple application rates, but only one application method per product.
11. Click **Save** to exit, or click **Save & New** to save and create another chemical product.

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

Add Instructions

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

The “Instructions” 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.

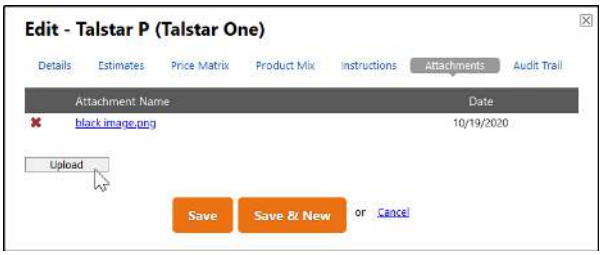
Client Route Sheet Instructions - These are instructions that can be torn off of the Route Sheet and provided to the client at time of service.

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.

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

Add Attachments

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



Click **Upload > Attach A File** to browse for your attachment.

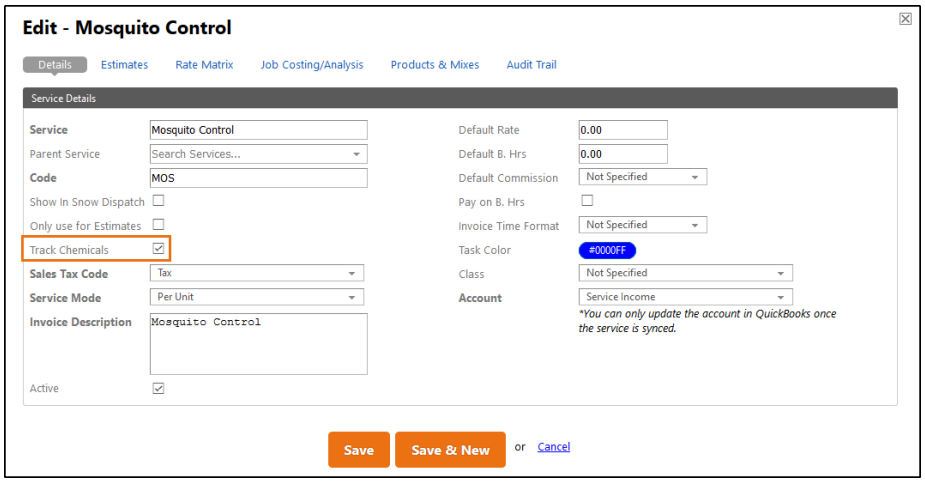
Note: These attachments are not viewable or selectable on the Legacy app.

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.

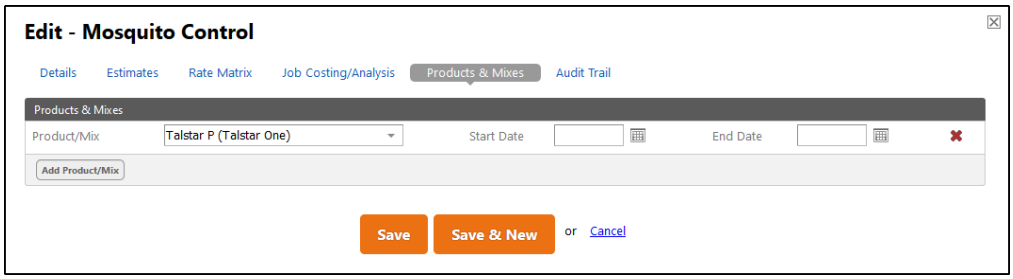
1. Under **Settings > Chemical Services,** click a service to open its **Edit** screen.

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



You must check this box for a Service to appear 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 13 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

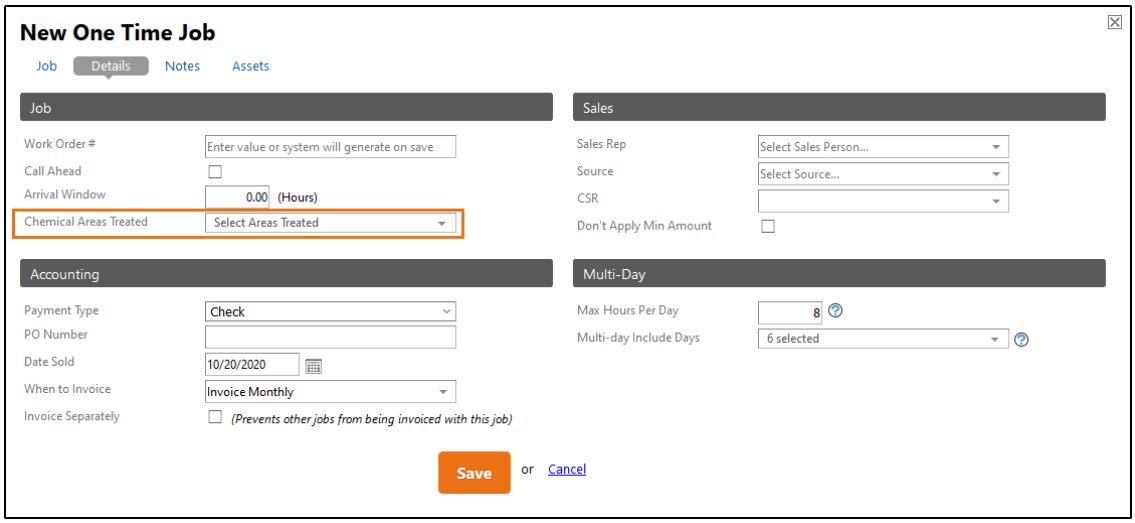
Setting up a new Chemical Job is the same as you would set up any other job:

1. Add 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.

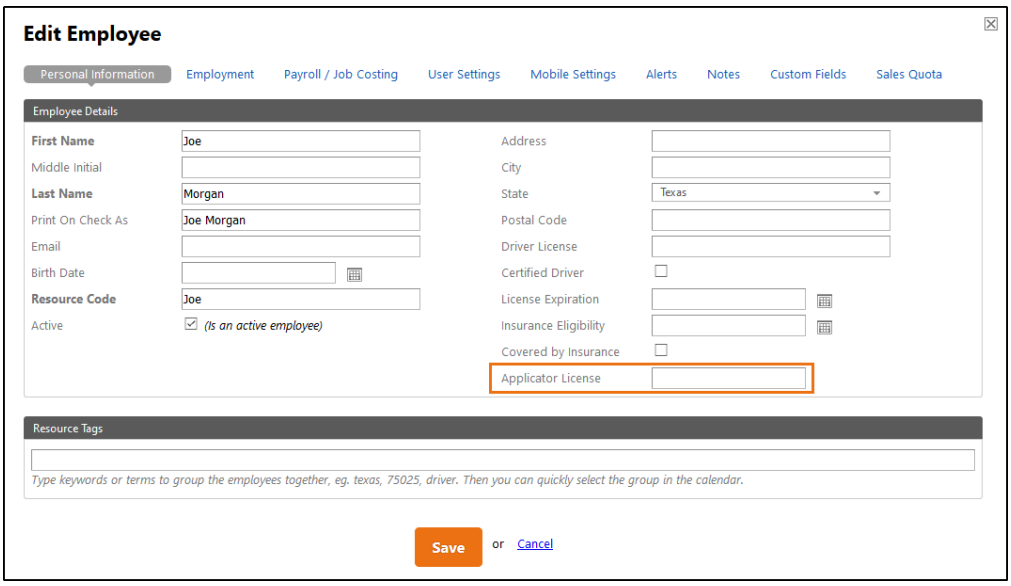


Add a Chemical Applicator License Number

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

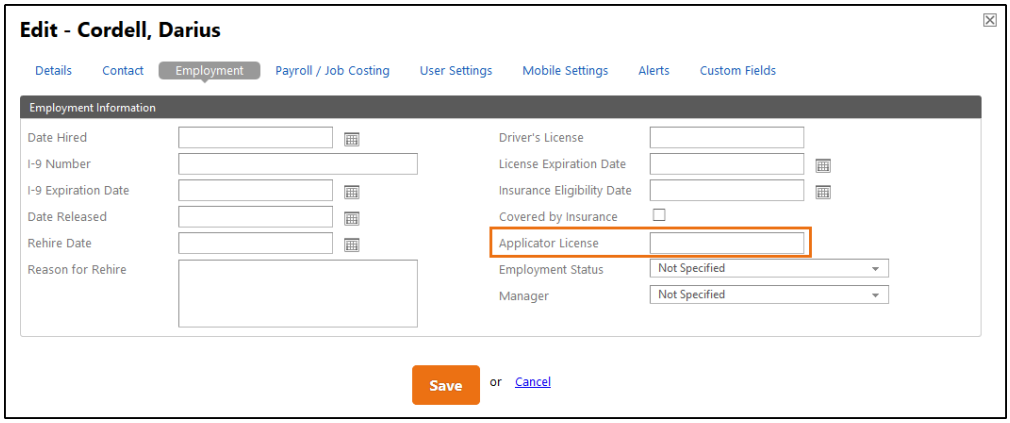
1. Go to **Team > Employees > (Employee Name)**.
2. Click **Edit.**
3. The **Applicator License** field is on the "Personal Information" tab:



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**.

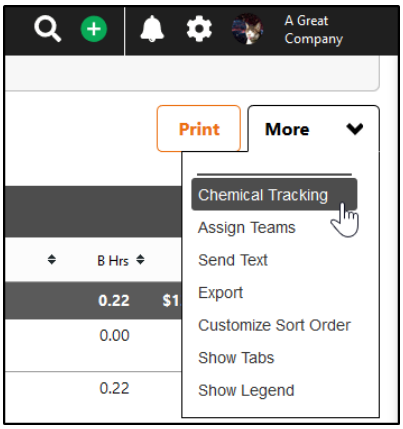
Manage Chemical Tracking Services with the Wizard

The Chemical Tracking Wizard is a tool on the Dispatch Board that lets you manage chemical tracking services. You can use it to:

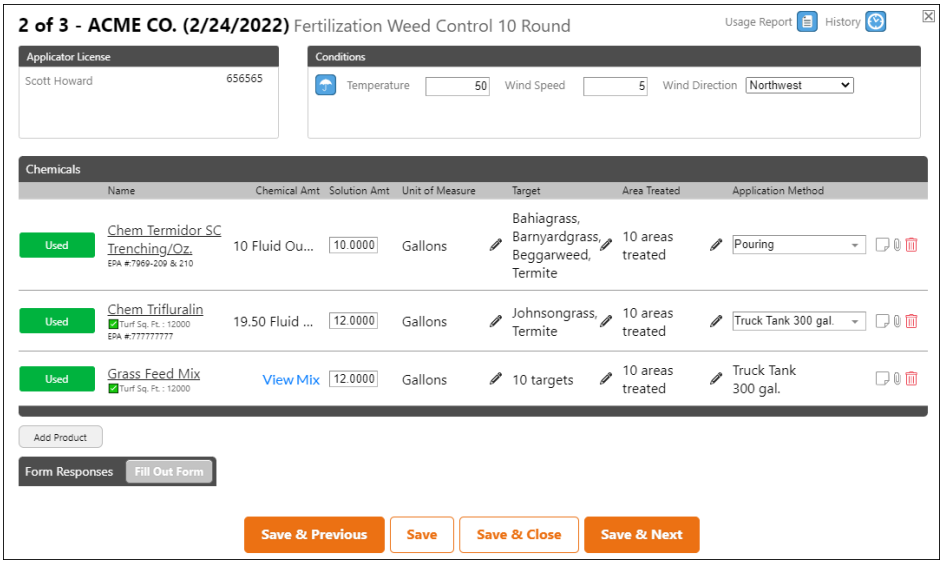
- **Adjust quantities** of chemicals that were used on a job
- **Add new chemicals** that were used
- **View reports** related to future and past chemical applications
- **Display weather conditions** and pH settings, if these General Settings are enabled

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

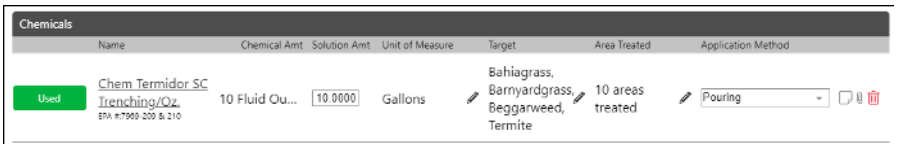
- To confirm the Product used, click the **Used** button.
- Click the name of any item to edit it, including the application rate and mix ratio.
- Use the pencil icons to change the **Areas Treated** or **Application Method**.
- Use the buttons at the top right to access the **Planned Chemical Usage** report and the **Chemical History** for the property currently in the view.

Conditions

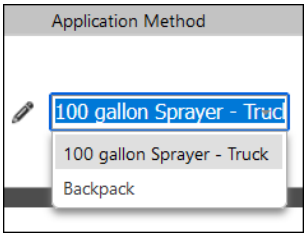
This section is where you can manage Products, Mixes, and Form responses.

- The **Conditions** section applies to all Jobs when a value is entered.
- If you include Temperature, Wind Speed, and Wind Direction on the Wizard, you can click **Save & Next** and these fields will auto-populate the next screen.
- 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.
- Weather conditions you include on the wizard will appear on the **Chemical Tracking Report.**

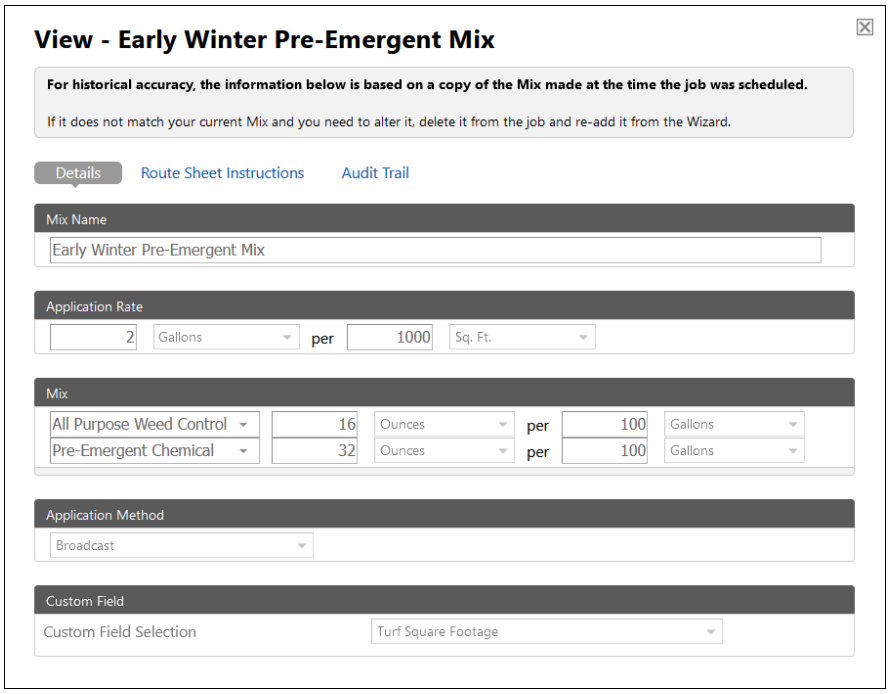
Chemicals



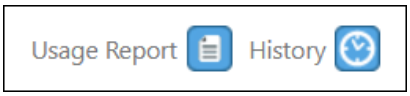
- To confirm the product used, click the **Used/Not Used** button.
- Click the name of any item to edit it, including the application rate and mix ratio.
- Use the pencil icons to change the **Target**, **Areas Treated**, or **Application Method**.
- The **Chemical Amount** automatically calculates the ratio of chemical to solution.
- If you have set up **multiple application methods** for a product, you can choose a method from the dropdown list. The wizard automatically recalculates your solutions based on the application method.



- If this is a mix, a link will appear. You can click the **View Mix** link to see the breakdown of each chemical.



- Use the buttons at the top right to access the **Planned Chemical Usage report** and the **Chemical History** for the property currently in view.



EPA Link

- When you set up a chemical product, if you add the URL for the chemical on the EPA website, you'll see that link on the wizard.

- On the wizard, click the blue link to go directly to the chemical on the EPA website.

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. From the Dispatch Board, go to **More > 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 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.

Chemical Tracking on the Legacy App

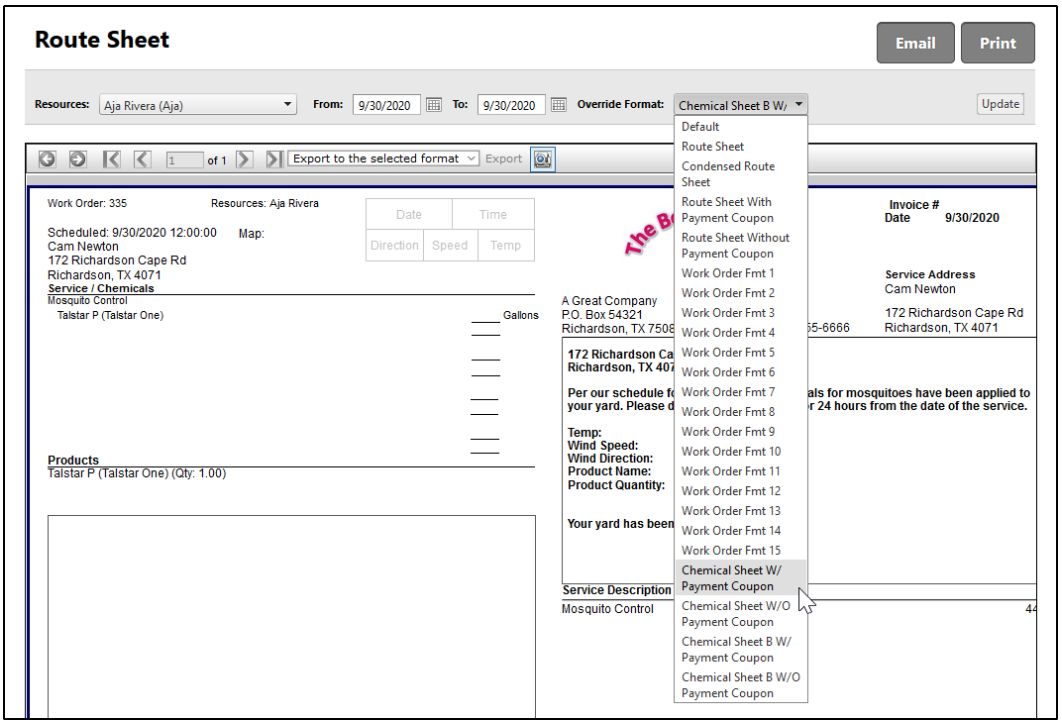
If they have the correct User Rights, mobile users will be able to modify all fields on the Chemical Tracking Wizard from the Legacy app.

On the Legacy app, your technician will be able to enter a different quantity if they end up applying a different amount.

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”)



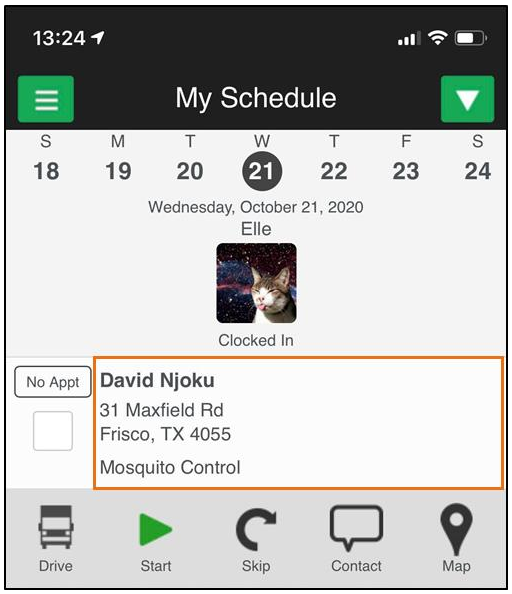
5. Click **Print** again to open the pages in a new tab and view the print dialog

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

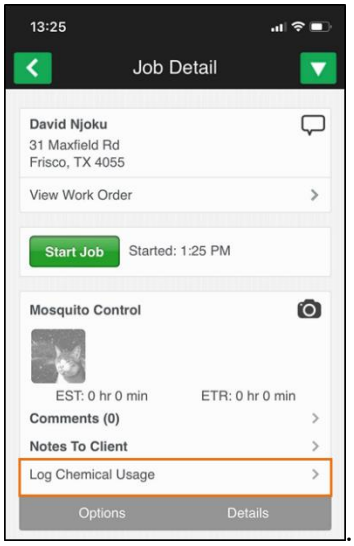
Chemical Tracking features are available on the Legacy mobile app for chemical jobs. Technicians can follow these steps to update Chemical Tracking jobs in the field.

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

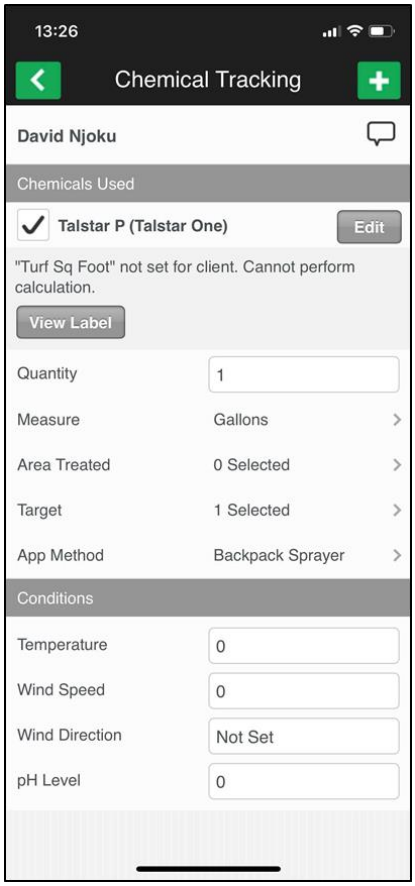


2. Tap a Chemical Job, then tap the **Start Job** button.

3. Tap **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.

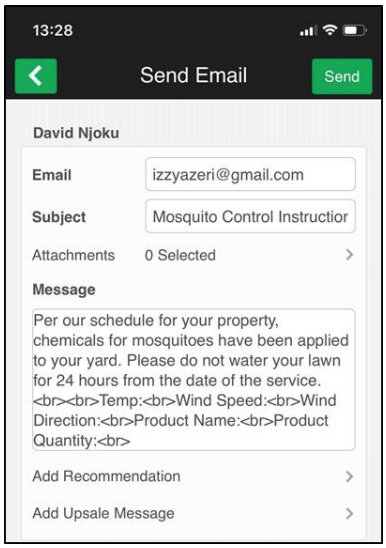
   Note: Label instructions must first be added to the product in the product list.

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

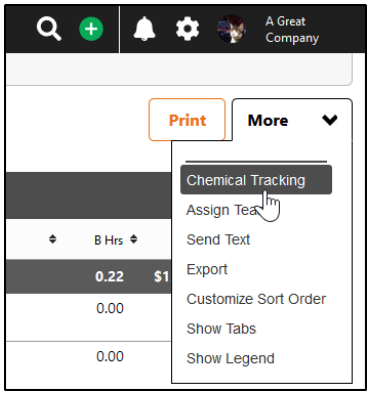
Two pre-built reports in the Report Center will help with Chemical Tracking:

- Planned Chemical Usage report
- Chemical Tracking report

Planned Chemical Usage Report

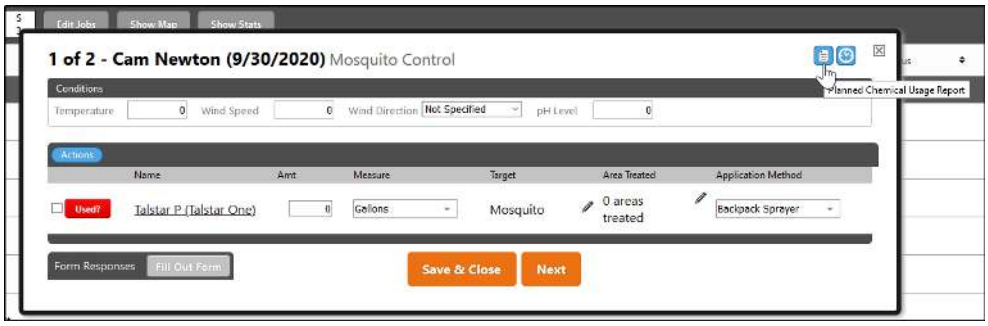
Before a Chemical Tracking job, you can print the **Planned Chemical Usage** report for the technician to know what chemicals and how much of each to take into the field. The **Planned Chemical Usage** Report will tell the technician the overall quantities of product to load on the truck and the individual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

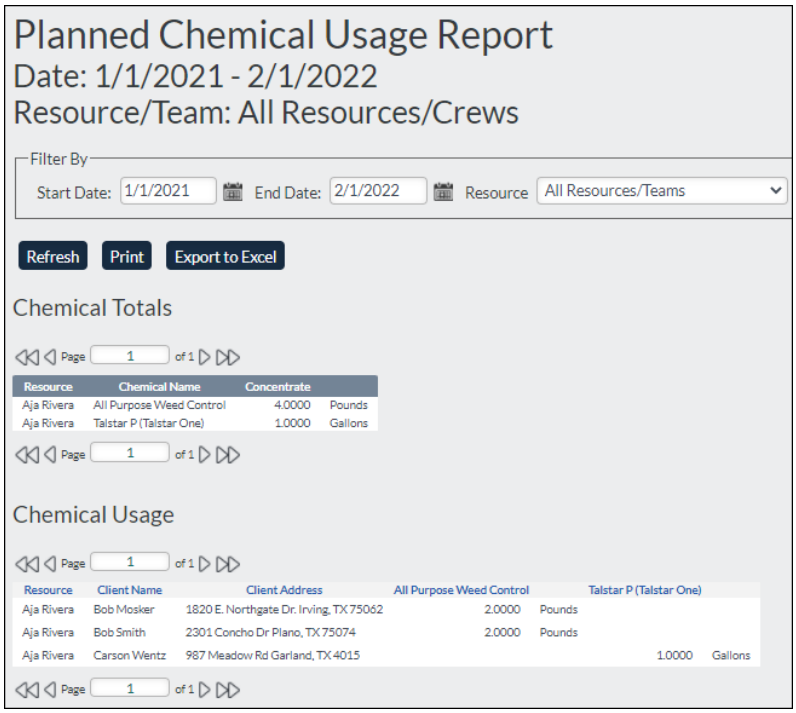


   The "Chemical Tracking" option will appear only if you have chemical jobs scheduled for the date range you are currently viewing on the Dispatch Board.

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 shows the overall quantity for each chemical to be used for the day.

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

Note: Concentrate and water amounts display separately to help your technicians load their tanks properly. Concentrate amounts are truncated to four decimal places.

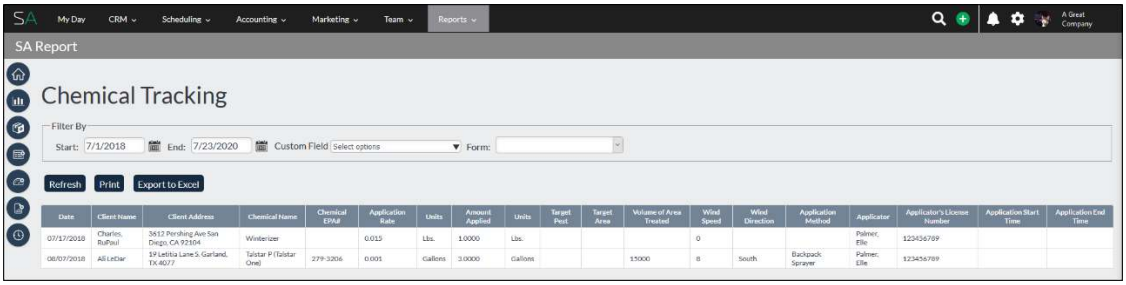
Chemical Tracking Report

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

The report is based on the information entered on Chemical Jobs using Chemical Services and Products.

Go to **Reports > Report Center >**  **SA Reports > Service Reports > Chemical Tracking**.

The Chemical Tracking report can be filtered by date range, custom field, and resource team:



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
Budgeted Concentrate Amount	The total amount of chemical product to be used
Actual Concentrate Amount	the total amount of chemical product actually used
Targets	the Target the chemical product is designed to kill
Areas Treated	the areas where the chemical product is to be applied

Amount of Area Treated	the value in the custom field designated on the "Product Mix" tab of the chemical product
Temp	the temperature entered at the time of application
Wind Speed	the wind speed entered at time of application
Wind Direction	the wind direction entered at time of application
pH Level	pH level of the chemical product entered at the time of application.
Application Method	how the chemical product was applied to the property
Applicator	the Resource who applied the chemical product. This field requires the **Applicator License #** field be filled in.
Applicator License #	the license number of the Resource who applied the chemical product
Application Start Time	the time the Job was started. This field requires the **Applicator License #** field be filled in.
Application End Time	the time the Job was completed. This field requires the **Applicator License #** field be filled in.

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 **Chemical 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.