



Service**Autopilot**<sup>™</sup>

# SNOW

## USER GUIDE

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## Workflow of a Snow Event

If you follow the steps in this guide for setup, all your preparations will pay off when you create Snow jobs. Here's the basic sequence of events.

1. Get the forecast for an upcoming Snow Event.
2. Verify all Master Routes are up to date.
3. Create a Snow Event on the Snow Dispatch Board.
4. Add Snow Jobs to the new Snow Event under **Scheduling > Dispatch Snow Jobs > More > Add to Dispatch**.
5. Add the Jobs you need to the Dispatch Board.
6. On the Snow Dispatch Board, verify that all jobs are:
  - Correct
  - In the appropriate Route Order
  - Assigned to the correct Resources
7. Dispatch all Snow Jobs.
  - Change your Snow Dispatch from "Pending" to "Working"
  - Make sure your field Resources see their Snow Jobs on either the SA Legacy app or printed Route Sheets
8. Get to work (stay warm).
9. Close Out the Day on the Snow Dispatch Board.
10. Invoice the Snow Jobs.
11. Get Paid!

*"Not all storms come to disrupt your life; some come to clear your path."*

## Set Up the Snow System

This section walks you through setting up the Snow System in SA:

1. Turn On the Snow Feature in Service Autopilot - page 3
2. Set up Team Leaders - page 3
3. Assign Snow Teams - page 3
4. Set Up Snow Services - page 4
5. Set Up Snow Products - page 5
6. Set Up Asset Type - page 5
7. Set Up Client Priority for Routing (Optional) - page 6
8. Set Up Snow Contracts - page 7
9. Set Up *On Demand* and *One-Time* Snow Jobs - page 11
10. Set Up Master Routes - page 16



## Turn On the Snow Feature in Service Autopilot

1. Go to  **Settings** > **Company Information**.
2. Click the **Settings** tab and select the “Enable Snow” checkbox.
3. Click **Save Changes**.

## Set up Team Leaders

If needed, set up your Snow Teams so they can use the Legacy app. Only the Team Leader needs login credentials.

**Note:** The Team app does *not* support SA’s Snow system.

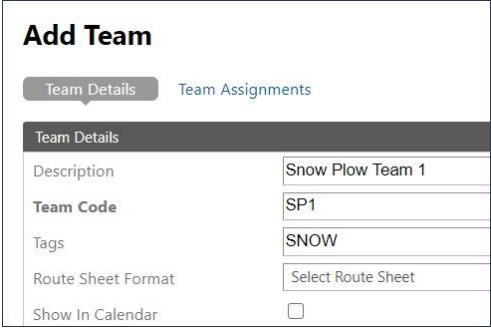
1. Go to **Team** > **Employees**, click an Employee’s name, then click **Edit**. This opens the Edit Employee overlay. For Team Leaders, click the **Mobile Settings** tab and select the “Is Team leader” checkbox. For full instructions, see the *Legacy App Setup Guide*.
2. Go to  **Settings** > **User Roles & Rights**, click a role name, then go to the **Scheduling** and **Mobile** tabs to select the permissions and requirements. On the **Mobile** tab, you can require before-and-after pictures. For more information, see the *User Roles & Rights Guide*.
3. We recommend you **enable Location Services and wi-fi** on each mobile device to improve location tracking.

## Assign Snow Teams

Depending on your operations, create separate Teams for your various Snow assignments.

**Tip:** It’s best practice to designate a team for snow services, even if you typically have just one employee for this work. Why? It will save you time later if you have a personnel change. It’s a simple step to switch employees on the **Team Assignment** screen, which carries over to each snow job. Otherwise, you’ll need to make assignment changes to every job affected.

1. Go to **Team** > **Teams** > **Add Team**.
2. Name the Teams to indicate their Job. For example, Snow Plow Team 1, Snow Plow Team 2  
Snow Shovel Team 1, Snow Shovel Team 2.
3. Give each team a “Team Code,” which is an abbreviation for its name. This code appears on the Snow Dispatch Board. For example, “SP1” stands for Snow Plow Team 1.
4. In the “Tags” field, add a **SNOW** tag so you can filter the Calendar screen for Snow Jobs *only*.
5. If you know who’ll be assigned to the Team, click the **Team Assignments** tab and set up the Resources like you would for any other Team.



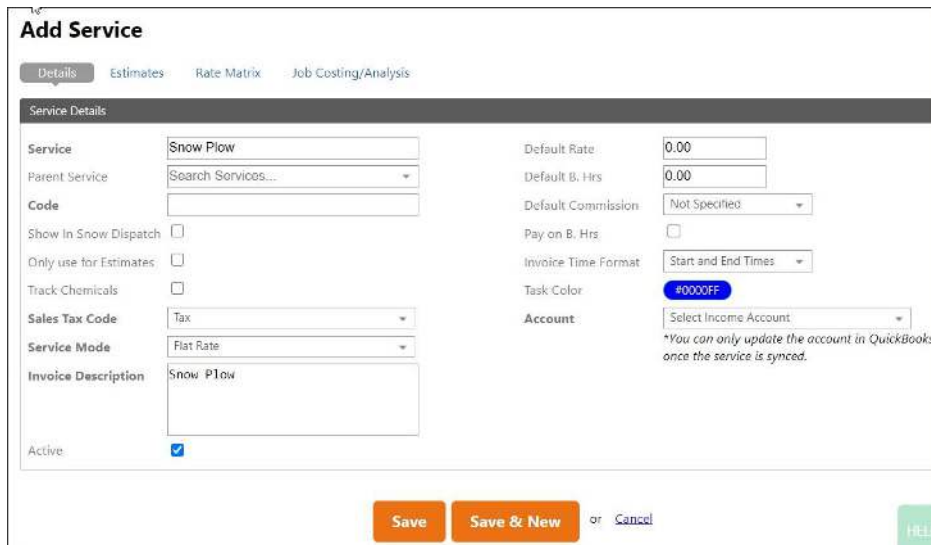
| Add Team           |                          |
|--------------------|--------------------------|
| Team Details       |                          |
| Description        | Snow Plow Team 1         |
| Team Code          | SP1                      |
| Tags               | SNOW                     |
| Route Sheet Format | Select Route Sheet       |
| Show In Calendar   | <input type="checkbox"/> |

6. Click **Save**.

## Set Up Snow Services

Later, you'll set up a *Pricing Matrix* for each On Demand Snow Job, so it's not necessary to set up Snow Services with different depths. You don't need to set up pricing matrixes at the Service level either.

1. Go to  **Settings > Services > Add Service**. Set up the various Snow Services you offer, such as Snow Plowing, Snow Removal, Snow Shoveling, De-icing, Salting, Sanding, and so on.



2. Within each Snow Service, note these settings:
  - **Service** – It's best practice to start the name of each of your Snow Services with the word "Snow..." or suitable abbreviation. This makes it easier to find your Snow Services in various Service dropdown lists, and other areas like reports.
  - **Show In Snow Dispatch** – Select this checkbox; it's a **required field** for the Snow system. If it's not checked, you will *not* be able to see your Snow Services when adding On Demand Snow Jobs to your Clients.
  - **Invoice Time Format** – This is optional. If you need to log any of these options on your Snow Invoices in the **Invoice Description** field, then choose the one that best fits your situation.
3. Fill in the rest of the Service fields like you would with any other Service in SA.
4. Click **Save**.

## Set Up Snow Services for Contract Billing

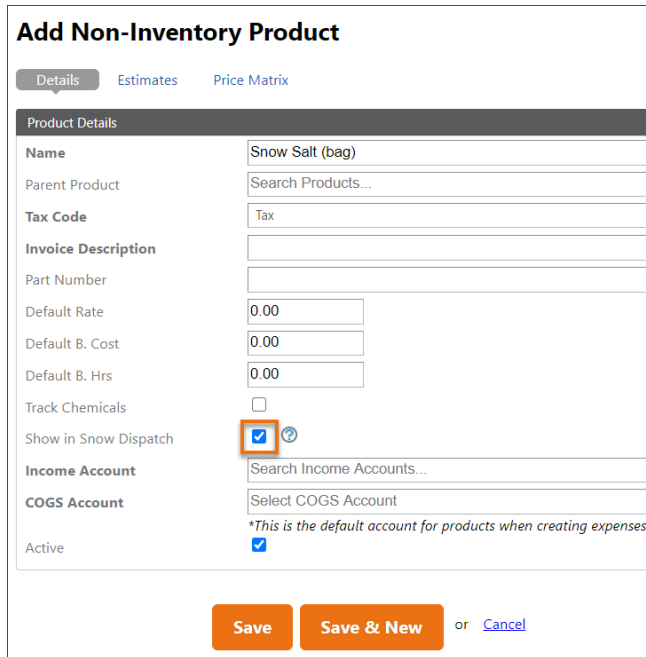
If you plan to use Contract billing, then we recommend you set up a separate Snow Service exclusively for Contract billing. Doing this lets you easily track your Contract revenue on the Profit/Loss report. The Service will *not* be scheduled, but it *will* appear on your Contract Invoices.

Name the Service something like “Snow Contract Agreement.”

## Set Up Snow Products

For each Product you might use for Snow Services, follow these steps:

1. Go to  **Settings > Products > Add Non-Inventory Product**. Products can either be Inventory or Non-Inventory.



**Note:** Inventory products are *not* tracked as inventory in Service Autopilot. If you sync with QuickBooks, then you can use its inventory tracking feature.

2. Add any Products you want to track or Invoice for Snow.

**Tip:** Start the name of each product with “Snow” so you can easily find them later, such as Snow Salt, Snow De-Ice, and Sand.

3. Select the “Show in Snow Dispatch” checkbox.
4. Click **Save & New** to add another Product or click **Save** if you’re done.

## Set Up Asset Types

An advantage of using the Snow System in SA is *Asset Billing*—it lets you bill by the equipment, or *assets*, used for each job.

For example, you might set up a single Snow Plow Service, but you would bill each Client differently depending on the specific equipment used. At Invoice time, just select the piece of equipment that was used on the job, and then the pricing will be calculated automatically.



**Note:** This function is not for asset tracking but for billing.

To set up each type of equipment, follow these steps:

1. Go to  **Settings > Asset Types**.
2. Click **Add Asset Type**.

|                          | Edit | Name       |
|--------------------------|------|------------|
| <input type="checkbox"/> |      | Bertha     |
| <input type="checkbox"/> |      | Skid Steer |

**Asset Types**  
Clear Checked Add Asset Type  
Name: Asset Type Name  
Description: Asset Type Description  
Apply Cancel

3. Fill in the “Name” and “Description” fields, then click **Apply**.

## Set Up Client Priority for Routing (Optional)

You don’t have to set a priority on every Client for Snow Jobs, but if you have Clients who run essential Services or you need to serve sooner for any reason, setting the priority can be helpful. At the time you are routing, you’ll see the higher-priority properties at a glance, making it easier to decide the Route Order.

For each Client who will use Snow Services, follow these steps:

1. Go to **CRM > Clients**, select a Client, then click **Edit**.

2. Click the **Details** tab, then choose the priority for this client from the dropdown. **A** is the highest priority, whereas **E** is the lowest.

**Edit Client - Marge Schott**

Personal Information | **Details** | Sales | Billing | Office Notes | Custom Fields

**Details**

|              |             |           |             |
|--------------|-------------|-----------|-------------|
| Client Since | 10/10/2016  | User name | MASC5619    |
| CSR          |             | Password  | *****       |
| Account Type |             | Latitude  | 32.7979388  |
| Priority     | A - Highest | Longitude | -96.7918122 |

**Priority dropdown options:** A - Highest, B, C, D, E

**Buttons:** Save, Cancel

You can see this priority in two places:

- Master Route
- Snow Dispatch Board

## Set Up Snow Contracts

If you plan to bill a Client a set amount for Snow Services each month, then you need to set up a Snow Contract. You might also want to set up a Contract if you bill a Client for an entire season.

*Contract billing* in SA is also known as *Installment billing*.

1. From an individual Client's Account screen, click **Add a Contract**.

**Invoice #133** 10/31/2019  
Amt: \$232.74 Bal: \$232.74

**Invoice #131** 10/01/2019  
Amt: \$216.50 Bal: \$216.50

**Payment** 06/04/2019  
Amt: (\$216.50) Bal: \$0.00

**Invoice #122** 02/01/2019  
Amt: \$216.50 Bal: \$216.50

**Invoice #120** 01/01/2019

**Contracts** All

**+ Add a Contract**

**Snow removal agreement**

Date: 10/09/2018 - 02/28/2019  
Expires: -552 days  
Value: \$200.00

**HELP**

2. This opens the New Contract overlay where you'll enter the Contract details. This Contract will automatically generate a Contract Invoice based on the parameters you set.

The 'New Contract' overlay form has a title bar and four tabs: 'Contract Details' (active), 'Other Details', 'Jobs Under Contract', and 'Contract Notes'. The form is divided into sections: 'Client' with a dropdown for 'Client' (Schott, Marge : 2000 N Hall St) and a text field for 'Contract Name' (Snow plowing agreement); 'Contract Start & End Date' with date pickers for 'Start Date' (11/01/2020) and 'End Date' (03/31/2021); and 'Invoice Description' with a 'Line Item' field (placeholder: Enter Line Item) and a list of 'Invoice Line Items'.

## Client Section

The “Client” field defaults to the Client for whom you are creating the contract.

It's best practice to include “Snow” in the “Contract Name” field. Otherwise, set up the Contract like you would any other contract.

**Tip:** A simple name, such as “Snow Contract Agreement,” is helpful. This name is internal only. Your Clients will not see it.

## Contract Start & End Date Section

Fill in the “Start Date” and “End Date” fields. These dates are for your reference and define the overage period.

**Note:** You can set up your Jobs with caps based on inches, pushes, or events. The date range on your Snow Contract defines your season. If you use seasonal caps on your Snow Contracts, make sure the Start and End Date include your entire season (if you have a seasonal cap for the On Demand Snow Job).

## Invoice Description Section

Under the Invoice Description section, add at least one Line Item then click the **+** sign next to the “Line Item” field. This description will appear on the Invoice.

You have the option to use personalization fields like [month] [year].

The 'Invoice Description' section shows a 'Line Item' field with a placeholder '[month] [year] Snow Removal Agreement' and a '+' icon. Below it is a list of 'Invoice Line Items' with 'Snow Plowing', 'De-Ice', and 'Snow Shoveling'. To the right of the list are icons for adding, moving, and deleting items. At the bottom, the 'Default Service' is set to 'Snow Plowing'.

Click the plus sign (+) next to the “Line Item” field to add another line to your Invoice Description. You can use the additional lines to add more descriptive information to the Invoice.

To edit items in the “Invoice Line items” field, select a line item and:

- Use the up and down arrows to change the order of the Line Items
- Click the X to delete a Line Item

Use the “Default Service” dropdown to select a Service. If you previously set up a Snow Contract Agreement Service, then select it here.

If you don’t already have Services set up for Contract revenue reporting, go to  **Settings > Services** to create them.

**Note:** This Service does *not* affect scheduling. Instead, it’s the Service used to calculate revenue for this Contract on your Profit/Loss report for tracking Contract revenue.

## Invoice Details Section

Under “Invoice Details,” fill in how much you’ll charge the Client for the months that fall within your Snow season. Months that have zero dollar amounts will not generate Contract Invoices.

| Invoice Details |        |                  |           |                                   |                                     |                                     |
|-----------------|--------|------------------|-----------|-----------------------------------|-------------------------------------|-------------------------------------|
| January         | 200.00 | <b>Auto Fill</b> | July      | 0.00                              | Billing Day of Month ⓘ              | 1                                   |
| February        | 200.00 |                  | August    | 0.00                              | Bill 1 Month in Advance ⓘ           | <input type="checkbox"/>            |
| March           | 0.00   |                  | September | 0.00                              | Payment Type                        | Credit Card ▼                       |
| April           | 0.00   |                  | October   | 0.00                              | PO Number                           |                                     |
| May             | 0.00   |                  | November  | 200.00                            | Auto Generate                       | <input checked="" type="checkbox"/> |
| June            | 0.00   |                  | December  | 200.00                            | Active                              | <input checked="" type="checkbox"/> |
|                 |        |                  |           | Include Sub Properties by Default | <input checked="" type="checkbox"/> |                                     |

**Tip:** To quickly fill in the rest of the fields, type a dollar amount in the “January” field, then click **Auto Fill**. The rest of the fields will automatically populate with the same amount. Simply clear the fields that aren’t included in the date range you need.

*For Clients who pre-pay* for the whole season, fill in the full amount in the month you’ll bill them.

Fill in the “Billing Day of Month” field. This is the date when SA will automatically generate your Contract Invoice for this Client.

You can view the help message for this field by hovering over the ? icon.

Select the “Bill 1 Month in Advance” checkbox if you want the Invoice to be created in advance of the billing month. The Invoice will then be generated for the following month on the date in the “Billing Day of Month” field.

Leave this unchecked if you want the Invoice to be generated in the current month.

Fill in the rest of the Invoice Details section.

Adjust the following fields as needed:

- **Payment Type** - Any selection here will carry over to the Invoice as the default for this Contract. You *will* have the option to override the Payment Method in an individual Job.
- **PO Number** – Add a PO Number if applicable.
- **Auto Generate** – Select this checkbox to have SA automatically generate the Contract Invoice according to the billing day you specified.
- **Active** – Select this checkbox if the Contract is active. Uncheck it to deactivate the Contract.
- **Include Sub Properties by Default** - For Clients (master properties) with sub-properties, check this box to include both the master property and its sub-properties under this Contract.

The day of the month the invoice is automatically created by Service Autopilot. If you enter the 31st Service Autopilot will adjust the day to the last day of the month if there are not 31 days in the month.

**Billing Day of Month** ? 1

Bill 1 Month in Advance ? ☐

**Payment Type** Credit Card

PO Number

Auto Generate ☒

Active ☒

Include Sub Properties by Default ☒

**Note:** Everything above the Services & Packages section applies to billing. Everything below it applies to scheduling. By adding Services and Packages to the Contract, you’re telling SA which Services to bill under Contract.

## Services & Packages Sections

Go to **Actions > Add Contract Item**. Add a Contract item for each Service the Contract will include. This creates a blank line for each Service. Fill in each line with all possible Services under Contract for the Client.

*If this is a master property, and you checked “Include Sub Properties by Default,” then all the sub-properties will have the same Services billed by the Contract. Add any additional Services to this list that you’ll be providing the sub-properties.*

Services & Packages

**Actions** ▼

Add/Remove

**Add Contract Item**

Remove Contract Item

Active/Inactive

Make Active

Make Inactive

The fields on the right side of this section *do not* apply to Snow Contracts: **Qty/Visits, Alert Over Qty/Visits, Contracted Hours, Alerts Over Hours, and Invoice Overage**. These fields are used with On Demand jobs *only*.

**Note:** In the Snow system, you will *not* set up a Rate Matrix for overages within a Contract or Service, but you do have the option to set up a Rate Matrix for caps and overages at the Job level. This is explained in “Add a Rate Matrix” on page 13.

When you’re done, click **Save**.

## Set Up On Demand and One-Time Snow Jobs

Two types of Jobs can be used on the Snow Dispatch Board:

- *On Demand Jobs* are typically used for existing Clients who will be serviced throughout the Snow season or across multiple Snow Events.
- *One-time Jobs* are typically used for requests that are last-minute or outside the norm. These can be useful for Clients who aren’t already in your SA account.

### Add an On Demand Snow Job

For Snow Clients who need recurring Services, you need to set up On Demand Jobs.

**Note:** On the Client’s Account, these Jobs will *not* appear under “Upcoming” when you hover over the Job and select **More > View Upcoming**. This is because SA does not put them on a schedule until you add them to the Snow Dispatch for an individual Snow Event. On Demand Jobs are different from other types of Jobs in SA.

When adding an On Demand Job, you must set up both the initial scheduling parameters and Invoicing parameters in advance.

1. On the Client account screen (**CRM > Clients > [Client Name]**), click **Add a Job**, then select **Add an on demand job**.
2. In the New On Demand Job overlay, select a Service from the “Service” dropdown list.

The only services that appear in this list are those you designated as “Show in Snow Dispatch” when you created the Service.

**New On Demand Job** for Schott, Marge

Job Details Products Notes

**Job Info**

Service: Snow Plowing

Assign To: Snow Crew 2 (SC2)

# Inch-Trigger: 3 Inches

Days Authorized: 7 selected

**Invoice Setup**

Invoice Type: Select Invoice Type...

3. In the “Assign To” dropdown, it’s best practice to select a Team or Resource. This will save you from having to assign them every time a Snow Event occurs. Assigning a Team is the most flexible solution.
4. Optionally, fill in the “# Inch-Trigger” and “Days Authorized” fields. Later, this will allow you to filter using the “Exclusions” fields on the **Add to Dispatch** screen for the Snow Dispatch.

**Job Info**

Service: Snow Plowing

Assign To: Snow Crew 2 (SC2)

# Inch-Trigger: 3 Inches

Days Authorized: 7 selected

Check all Uncheck all

Sunday ☒

Monday ☐

Tuesday ☐

Wednesday ☐

Thursday ☐

Friday ☐

Saturday ☐

Rate Matrix

Asset Type: General

Range from: 0 in

The “# Inch-Trigger” defines how many inches must fall before you Service this Client.

The “Days Authorized” defines any days the Client allows you to Service them. Deselect any checkboxes for days that are not allowed.

5. Under the Invoice Setup section, select the way the Client will be billed using the “Invoice Type” dropdown:

**New On Demand Job** for Schott, Marge

Job Details Products Notes

**Job Info**

Service: Snow Plowing

Assign To: Snow Crew 2 (SC2)

# Inch-Trigger: 3 Inches

Days Authorized: 7 selected

**Invoice Setup**

Invoice Type: Contract

Contract

Cap Type

Per Push, Per Inch

Per Event, Per Inch

Hourly

- **Contract**
  - **Per Push, Per Inch** - Each time a field Resource clocks into and out of a per-push, per-inch Job, a separate Line Item will appear on the Snow Dispatch Board and the Snow Invoice.
  - **Per Event, Per Inch**
  - **Hourly**
6. Under the “Invoice Type” dropdown, select a Contract that you previously set up (see “[Set Up Snow Contracts](#)” for details).

7. Under the “Cap Type” dropdown, choose an option to set up an overage:

- **No Cap**
- **Number Inches**
- **Number Pushes**
- **Event**

If you chose options that have a cap, additional fields appear:

- In the “Cap” field, enter the number for the Cap Type you chose.
- For the “Cap Reset Period,” choose **Monthly** or **Contract Year**.
- For the “Overage Invoice Desc” field, type the description that will appear on the Overage Invoice. This Invoice is automatically generated in addition to the Contract Invoice any time an overage occurs.

If you’re billing by Asset Type, fill in the Rate Matrix section for each Asset, such as a piece of equipment.

## Add a Rate Matrix

A Rate Matrix, when set up properly, creates pricing for any type of On Demand Job. For Snow Jobs, a Rate Matrix can calculate your fees based on a range of snow depths, pushes per inch, the number of inches for a Snow Event, or equipment used.

In any of these cases, the Rate Matrix also helps you prepare for billing above the standard Contract Invoice amount.

**Tip:** It’s a good idea to run a “test” Snow Event to ensure the Rate Matrix is working correctly.

1. At the bottom of the Edit On Demand Job overlay, select an Asset from the “Asset Type” dropdown.

The screenshot shows the 'Rate Matrix' section of a software interface. It features a table with the following columns: 'Range From', 'Range To', 'Rate', 'B. Hrs', and 'Bill As'. The first row has 'Bertha' in the 'Range From' column, '0' in the 'Range To' column, '0.00' in the 'Rate' column, '0.00' in the 'B. Hrs' column, and 'Flat Rate' in the 'Bill As' column. A second row is partially visible with 'Skid Steer' in the 'Range From' column. Below the table are four buttons: 'Add Range', 'Copy Group', 'Delete Group', and 'Add Group'. At the bottom right of the interface are two buttons: 'Save' (in orange) and 'Cancel' (in blue).

2. Fill in the inches, rates, budgeted hours, and billing type for that range. It’s best practice to have a range that starts at 0. Also, there should be no overlap in the “From” and “To” fields. In the example, the ranges are 0 – 4, 4.1 – 6, 6.1 – 8, and so on.
3. Optionally, click the **Note** icon  to add an Invoice Description for this range.
4. Click **Add Range** to add a new line to the Rate Matrix.

**Rate Matrix**

Asset Type: **Skid Steer** +

Range From: 0 Inches To: 4 Inches Rate: 175.00 B. Hrs: 0.00 Bill As: Flat Rate

+ Add Range Copy Group Delete Group Add Group

Save or Cancel

- Continue filling in the ranges. In the sample, we created new lines for every two inches at an additional cost of \$10.00 for each increment.

**Rate Matrix**

Asset Type: **Skid Steer** +

| Range From | To         | Rate                | B. Hrs | Bill As   |
|------------|------------|---------------------|--------|-----------|
| 0 Inches   | 4 Inches   | 175.00              | 0.00   | Flat Rate |
| 4.1 Inches | 6 Inches   | 244.00              | 0.00   | Flat Rate |
| 6.1 Inches | 8 Inches   | 324.00              | 0.00   | Flat Rate |
| 8.1 Inches | 999 Inches | Hourly Rate: 105.00 | 0.00   | Hourly    |
| 0 Inches   | 0 Inches   | 0.00                | 0.00   | Flat Rate |

+ Add Range Copy Group Delete Group

Asset Type: **Bertha** +

| Range From | To         | Rate                | B. Hrs | Bill As   |
|------------|------------|---------------------|--------|-----------|
| 0 Inches   | 4 Inches   | 180.00              | 0.00   | Flat Rate |
| 4.1 Inches | 6 Inches   | 175.00              | 0.00   | Flat Rate |
| 6.1 Inches | 8 Inches   | 200.00              | 0.00   | Flat Rate |
| 8.1 Inches | 999 Inches | Hourly Rate: 150.00 | 0.00   | Hourly    |

+ Add Range Copy Group Delete Group Add Group

**Note:** If you're billing by Assets, it's best practice to add an additional blank matrix group that can be used for exceptions when closing out the day on a Snow Event.

### Elements of the Rate Matrix Screen

- Copy Group** – Click this button to easily copy an entire group of ranges and create a new group. Just select another Asset, then adjust the price fields as needed.
- Delete Group** – Click this button to delete the group above this button.
- Add Group** – Click this button to add a new blank group.
-  Click this icon to see the Invoice Description, which comes from this Service in the Service list.

You can edit the description to be more specific for each line in the Rate Matrix. The example shows a description of the inch range you'll bill for.

**Invoice Description**

Snow Plowing from 12.1" to 14"

Apply Cancel

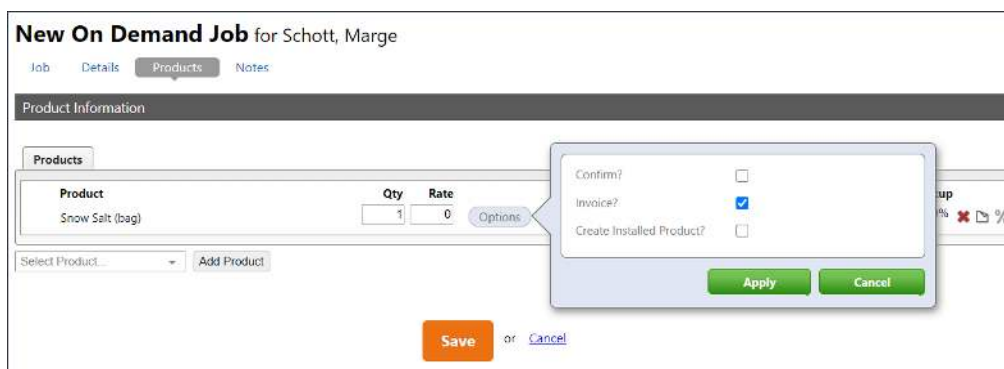
- **+** (Copy Range) – Click **+** to copy the increments and save time filling out fields. You need to have a minimum of two range lines for this function.
- **X** (Delete) – Click **X** to remove this line from the Rate Matrix.

Each increment will probably be a flat rate until you get to the last range. The final range should be all-inclusive meaning you should make it very large and set the “Bill As” field to **Hourly** to Account for any possibility.

After you build out the Rate Matrix for an Asset, click **Copy Group** to duplicate it, change the Asset Type, and update the other fields as needed. Optionally, click the **Products** tab to make additional selections for Snow Products.

**Note:** To set up Products, go to  **Settings > Products**.

Click the dropdown to select a Product for this Snow Job, then click **Add Product**. For each Product, click the **Options** button and select the checkboxes you need:



- **Confirm** – After the Job is complete, this will highlight the Line Item in red on the Snow Dispatch Board as a reminder to confirm that you used the Product, and if so, that the quantity used was correct.
- **Invoice** – To list the Product as a separate Line Item on the Invoice.
- **Create Installed Product** – This is not applicable for Snow, so leave it unchecked.

**Tip:** Product quantity always defaults to 1. If you want to know whether your field Employee added any Products on the Legacy app, then you can change the quantity to something different, such as “.01.” This will help you determine if the field Employee changed it.

Click **Save**. The On Demand Snow Job is now added to the Client’s Account.

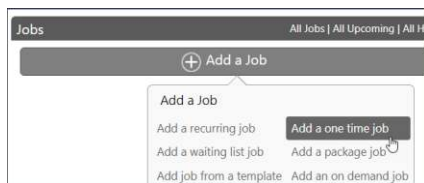
## Add a One-Time Snow Job

**Scenario:** Two hours before a snowstorm is predicted to arrive, your Snow Service company gets a call from a new Lead who wants plowing Services. The best practice to handle a new Service call is adding a

One Time Job. One Time Jobs work for any last-minute request or for a Service that you don't normally perform for a Client.

Later, you can set up the new Client with an On Demand Job if they want to sign on for future Services.

1. If needed, create the new Client (**CRM > Clients > Add Client**).
2. In the Client's Account, click **Add a Job > Add a one time job**.



3. In the dropdown under the Service section, select a Snow Service. A new Dispatch dropdown appears. Select a Snow Dispatch to add this Job to.

**New One Time Job**

Job Details Notes Assets

Client: Hogg, Ura : 105 County Line Rd. History: No history items found.

Contract: Select Contract...

Create a Work Order? ☐ Yes ☒ No

Dispatch: Select Snow Dispatch

Is this job complete? ☐ Yes ☒ No

| Service        | Start Date | Assigned To        |
|----------------|------------|--------------------|
| ✖ Snow Plowing | 12/18/2020 | Select Resource(s) |
| Description    | Category   | Prepay             |
| Shrub Trimming | Service    |                    |
| Snow Plowing   | Service    |                    |

4. Select a Resource under the "Assigned To" dropdown (optional).
5. Complete the rest of the fields like you would any other Job.
6. Click **Save**. The Job will now appear on the Snow Dispatch Board for that Snow Event.

**Note:** The Attachment tab only appears after you save and reopen the newly added Job. If you attach an image to the Master Job, it will attach to the Visit on the Snow Dispatch Board, as well. If you attach an image from the Snow Dispatch Board, it only attaches to the Visit, not the Master Job. If you attach an image from the Legacy app, it only attaches to the Visit, not the Master Job.

## Set Up Master Routes

Setting up Master Routes is optional but highly recommended. Master Routes let you decide the Route order in advance, so you don't have to do much routing work when the Snow Event occurs. This will

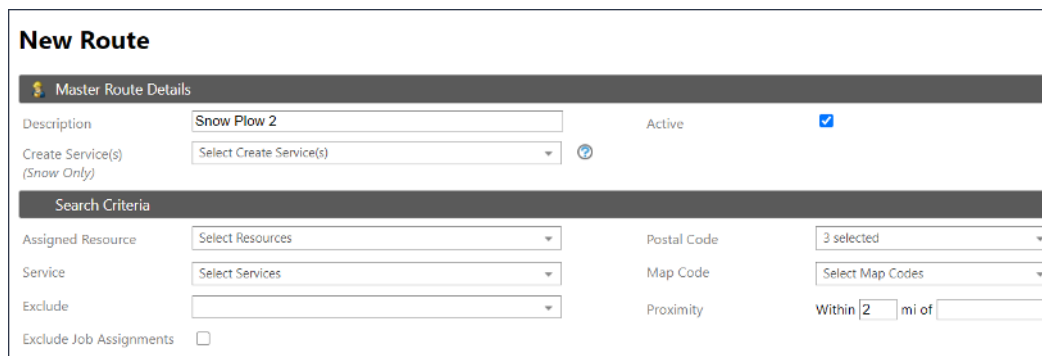
help you dispatch your Jobs and get your Employees and Vendors to work more quickly when a Snow Event happens.

SA's Master Routes are flexible, so you can set them up according to your needs.

- You might create a route for each Team and include all possible Services, such as plowing, shoveling, and salting.
- Another option is to create a separate route for each Service Team. For example, Snow Plow Team 1 would have its own route, and Snow Plow Team 2 would have its own route. You may also have other Teams like Snow Shovel Team 1 with its own route.

To add a Master Route, follow these steps:

1. Go to  **Settings > Master Routes > Add Master Route.**
2. On the New Route screen, name the route in the "Description" field.



**New Route**

**Master Route Details**

Description:  Active: ☒

Create Service(s) (Snow Only):

**Search Criteria**

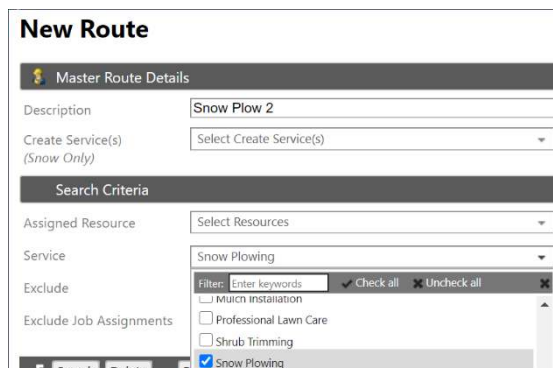
Assigned Resource:  Postal Code:

Service:  Map Code:

Exclude:  Proximity: Within  mi of

Exclude Job Assignments: ☐

3. Under the Search Criteria section, use the filter options to locate Clients who meet your criteria for this Snow Route. As we like to say, *"Filters Are Your Friends!"*
  - It's best to not filter by Assigned Resource because that depends on you having assigned the same Resource when you set up the On Demand Job.
  - For the **Exclude** checkbox, select all except **On Demand Jobs**.
4. In the "Service" dropdown, check one or more Snow Services for this route.



**New Route**

**Master Route Details**

Description:

Create Service(s) (Snow Only):

**Search Criteria**

Assigned Resource:

Service:

Exclude:

Exclude Job Assignments: ☐

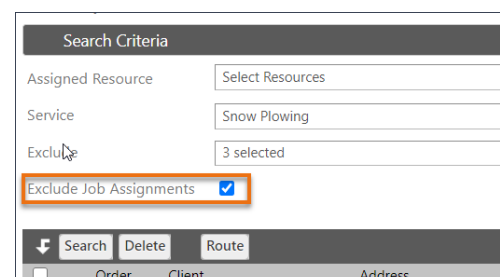
Filter: Enter keywords ☐ Check all ☒ Uncheck all ☒

☐ Mulch Installation

☐ Professional Lawn Care

☐ Shrub Trimming

☒ Snow Plowing



**Search Criteria**

Assigned Resource:

Service:

Exclude:

Exclude Job Assignments: ☒

☐ Order Client Address

- Select the “Exclude Job Assignments” checkbox, which applies to assigned Resources. This checkbox confines the search to On Demand Jobs at the Client level.
- Optionally, use any of the filters for Postal Code, Map Code, and Proximity.

5. Click the **Search** button. All Clients who meet the search criteria will appear in the route list.

**New Route**

**Master Route Details**

Description:  Active: ☒

Create Service(s):  (Snow Only)

**Search Criteria**

Assigned Resource:  Postal Code:

Service:  Map Code:

Exclude:  Proximity: Within  mi of

Exclude Job Assignments: ☒

**Route**

| Order | Client         | Address             | City       | State | Postal | Map Code | Priority | Apx Mileage |
|-------|----------------|---------------------|------------|-------|--------|----------|----------|-------------|
| 0     | adams, Dell    | 1343                | Richardson | TX    | 75080  | A        |          | 0           |
| 0     | Jones, Charlie | 1405 Cibolo Dr      | Allen      | TX    | 75013  |          |          | 10.58       |
| 0     | Hogg, Ura      | 105 County Line Rd. | Richardson | TX    | 75080  |          |          | 11.09       |
| 0     | Schott, Marge  | 2000 N Hall St      | Dallas     | TX    | 75204  | A        |          | 10.85       |

[Save Changes](#) or [Cancel](#)

6. You can auto-route the Client properties, or manually refine the route as needed.

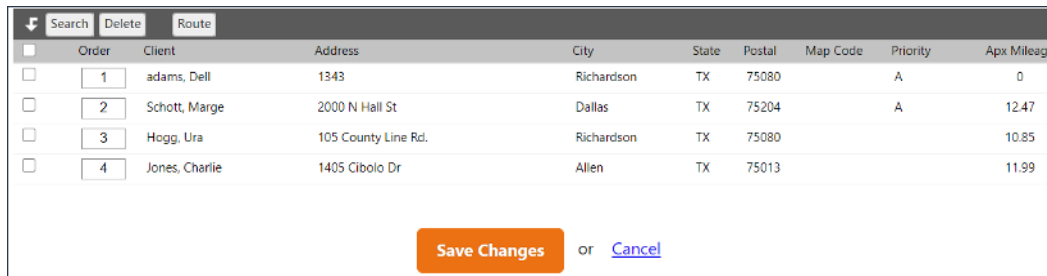
- Select the first property you would visit during a Snow Event for this Master Route.
- Drag that property to the top of the list using the blue arrows, seen when hovering next to the property on the left side.

| Order | Client         | Address             |
|-------|----------------|---------------------|
| 0     | adams, Dell    | 1343                |
| 0     | Jones, Charlie | 1405 Cibolo Dr      |
| 0     | Hogg, Ura      | 105 County Line Rd. |
| 0     | Schott, Marge  | 2000 N Hall St      |

7. Click **Route** then select either **Group Stops** or **Optimize Route**. This creates a route order based on the first Client’s starting location.

| Order | Client         | Address             |
|-------|----------------|---------------------|
| 1     | Hogg, Ura      | 105 County Line Rd. |
| 2     | adams, Dell    | 1343                |
| 3     | Jones, Charlie | 1405 Cibolo Dr      |
| 4     | Schott, Marge  | 2000 N Hall St      |

8. Ensure the order is to your liking. To adjust the order, click a property, then drag and drop it into another place in the list. Alternatively, you can type a new number in the “Order” field.
9. When the list is complete and routed in the correctly, click **Save Changes** to save the Master Route.



|                          | Order | Client         | Address             | City       | State | Postal | Map Code | Priority | Apx Mileage |
|--------------------------|-------|----------------|---------------------|------------|-------|--------|----------|----------|-------------|
| <input type="checkbox"/> | 1     | adams, Dell    | 1343                | Richardson | TX    | 75080  |          | A        | 0           |
| <input type="checkbox"/> | 2     | Schott, Marge  | 2000 N Hall St      | Dallas     | TX    | 75204  |          | A        | 12.47       |
| <input type="checkbox"/> | 3     | Hogg, Ura      | 105 County Line Rd. | Richardson | TX    | 75080  |          |          | 10.85       |
| <input type="checkbox"/> | 4     | Jones, Charlie | 1405 Cibolo Dr      | Allen      | TX    | 75013  |          |          | 11.99       |

or [Cancel](#)

When a Snow Event happens, this Master Route will be available on the Snow Dispatch Board. Create as many Master Routes as you need.

## Dispatch Snow Jobs

This process includes:

- Checking your Master Routes as shown below
- Adding Jobs to a Snow Event, then dispatching them - page 20
- Creating Route Sheets - page 23

## Check Master Routes

*Before a Snow Event arrives in your area*, double-check your Master Routes to ensure they’re still correct and up to date. You’ll need to select the Services that are needed for this route based on the forecast. For example, if the storm will include ice, you might want to add Services like de-ice and salting in addition to plowing.

If you’ve added any recent Clients who have Snow Jobs that can be included in an existing route, perform these steps for each new Client:

1. Go to  **Settings > Master Routes** and select the Master Route.

- Click **Search** to update the list. Any new Clients you've added since you created your Master Route will be at the top of the list and shaded blue. They will have an order number of 0.

- Click the **Route** button, or manually drag each new Client in the order you prefer.

- Remove any Clients as needed by selecting them and clicking **Delete**.

- In the "Create Service(s)" dropdown, select the checkboxes for all the Services you want to include in the route for this Snow Event.
- If the dropdown is blank, first go to the "Service" field under Search Criteria and select Snow Services. They will then appear in the "Create Services" dropdown.
- Reroute the order of the properties as necessary by doing one of the following:
  - Manually** - Hover over a property to see the blue up and down arrows on the left, then click and drag the line to a different place in the list.
  - Automatically** - Click the **Route** button and choose either **Group Stops** or **Optimize Route**.
- Click **Save Changes**.

| Order | Client         | Address             | City       | State | Postal | Map Code | Priority | Apx Mileage |
|-------|----------------|---------------------|------------|-------|--------|----------|----------|-------------|
| 0     | Malo, Raul     | 2115 Malaga Drive   | Richardson | TX    | 75080  |          |          | 0           |
| 1     | adams, Dell    | 1543                | Richardson | TX    | 75080  |          | A        | 1.52        |
| 2     | Schott, Marge  | 2000 N Hall St      | Dallas     | TX    | 75204  |          | A        | 12.47       |
| 3     | Hogg, Ura      | 105 County Line Rd. | Richardson | TX    | 75080  |          |          | 10.85       |
| 4     | Jones, Charlie | 1405 Cibola Dr      | Allen      | TX    | 75013  |          |          | 11.99       |

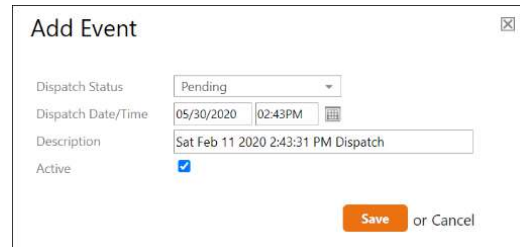
## Create a Snow Event

Because you set up your Snow Jobs as On Demand Jobs, they are *not* scheduled until you create a Snow Event. When a snowstorm is coming, follow these steps to add a new Snow Event then add your Jobs. You can even add more than one Snow Event for the same snowstorm.

- Go to **Scheduling > Dispatch Snow Jobs**.
- Create a new Snow Event by clicking the small green plus sign "+". The Add Event overlay appears. Leave the Dispatch Status as **Pending** for now. You'll update this to **Working** when it's time to dispatch the Snow Job.

| Order        | Pri | St | Client | Acct Balance | Service | Date | Map | City | Zip | Assigned | Last Svc | Sub Status | As |
|--------------|-----|----|--------|--------------|---------|------|-----|------|-----|----------|----------|------------|----|
| 0 Jobs Total |     |    |        |              |         |      |     |      |     |          |          |            |    |

3. For **Dispatch Date/Time**, it defaults to the current date. Change this to the date and time you'll begin working the event.
4. The "Event Description" is what you'll see in the Snow Dispatch selection list. Keeping the date and time in the description is helpful, but you can change the description as needed.
5. Select or clear the checkbox to indicate whether the event is active or inactive.
6. Click **Save**.



**Add Event** [X]

Dispatch Status: Pending

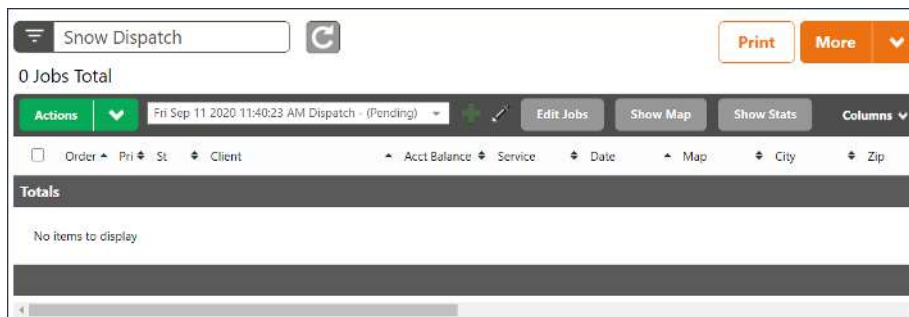
Dispatch Date/Time: 05/30/2020 02:43PM

Description: Sat Feb 11 2020 2:43:31 PM Dispatch

Active: ☒

**Save** or **Cancel**

The page reloads to show a new, empty event that you can now add Jobs to.



Snow Dispatch [Refresh] [Print] [More]

0 Jobs Total

Actions [Dropdown] Fri Sep 11 2020 11:40:23 AM Dispatch - (Pending) [Edit Jobs] [Show Map] [Show Stats] [Columns]

Order Pri St Client Acct Balance Service Date Map City Zip

**Totals**

No items to display

## Add Jobs to the Snow Event

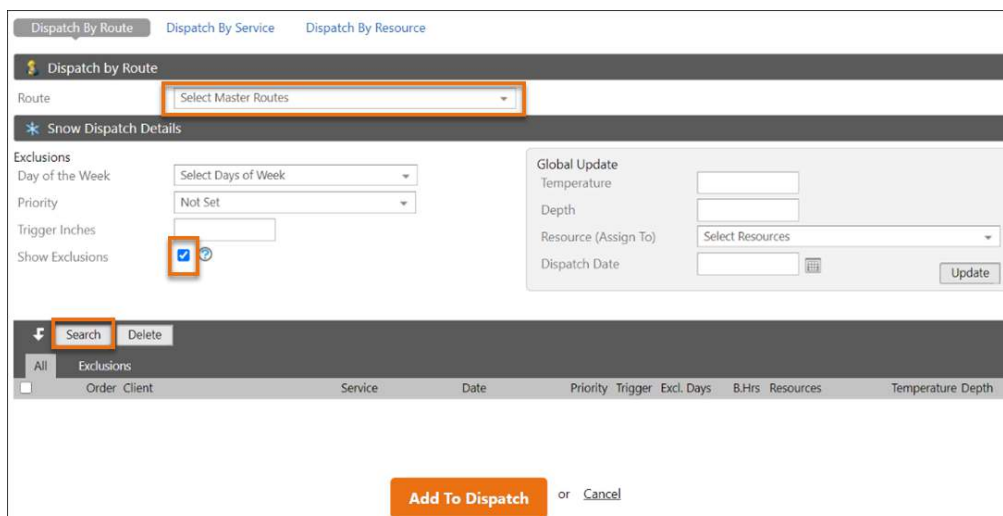
To add your Jobs to this Snow Event, hover over the **More** dropdown and click **Add To Dispatch**.

The Add to Dispatch overlay defaults to the **Dispatch By Route** tab.



**Print** **More** [Dropdown]

- Add To Dispatch
- Assign Teams
- Send Text
- Export
- Customize Sort Order
- Copy
- Show Tabs
- Inactive Events
- Show Legend



Dispatch By Route | Dispatch By Service | Dispatch By Resource

**Dispatch By Route**

Route: Select Master Routes

**Snow Dispatch Details**

Exclusions

Day of the Week: Select Days of Week

Priority: Not Set

Trigger Inches: [Input]

Show Exclusions: ☒

Global Update

Temperature: [Input]

Depth: [Input]

Resource (Assign To): Select Resources

Dispatch Date: [Input]

**Update**

**Search** [Dropdown] **Delete**

All Exclusions

| Order | Client | Service | Date | Priority | Trigger | Excl. Days | B.Hrs | Resources | Temperature | Depth |
|-------|--------|---------|------|----------|---------|------------|-------|-----------|-------------|-------|
|       |        |         |      |          |         |            |       |           |             |       |

**Add To Dispatch** or **Cancel**

Select the Master Routes you previously created to add to the event. Optionally, under the Snow Dispatch Details section, add any exclusions if needed.

Snow Dispatch Details

Exclusions  
Day of the Week: 5 selected  
Priority: A - Highest  
Trigger Inches: 2  
Show Exclusions: ☒

The most common exclusion is the “Trigger Inches” field where you might exclude Jobs that have a higher inch trigger.

For example, if you add a 2 in the “Trigger Inches” field, then all Clients with triggers over 2 inches will be excluded from the list, *unless* they have the “Show Exclusions” checkbox selected.

If you leave “Show Exclusions” checked, then any Jobs over 2 inches will appear in the list in red. You can then make a judgement call about adding them to this Snow Event, possibly based on the snowfall patterns in your area.

When you’re ready, click **Search**. All Client Jobs appear for the Master Route you chose and any criteria you may have added.

Optionally, you can update the “Temperature” or “Depth” fields for individual Client Jobs or use the Global Update box to make bulk changes to multiple jobs.

To do this, select the checkboxes next to the Jobs, then change the data fields in the Global Update box then click **Update**. The appropriate columns will be updated with the new data.

Global Update  
Temperature: 30  
Depth: 4  
Resource (Assign To): Snow Crew 2 (SC2)  
Dispatch Date: 02/11/2020

In the list of Snow Jobs, reroute them if needed or delete any Jobs that aren’t applicable to this event.

Neither rerouting or deleting Jobs from this screen will affect your Master Routes or On Demand Jobs at the Client level. This option simply lets you handle any changes or exceptions during a Snow Event.

**Note:** You can add additional Jobs to an event at any time during a Snow Event. This gives you more flexibility to respond to an evolving situation.

When you’re satisfied with the list of Jobs and their order, select the checkboxes for the Jobs then click **Add to Dispatch**. The jobs will then appear on the Snow Dispatch Board.

SA
My Day
CRM
Scheduling
Accounting
Marketing
Team
Reports

Select a Filter: Resource Service Proximity Search Map Code Address Client Status Priority Tags Resource Tags To Do Types

Snow Dispatch

2 Jobs Total

Actions
Snow Dispatch - (Working)

☒
☒

Edit Jobs
Show Map
Show Stats

| Order | Pri | St | Client                            | Acct Balance | Service | Date      | Map | City       | Zip   | Assigned |
|-------|-----|----|-----------------------------------|--------------|---------|-----------|-----|------------|-------|----------|
| 1     |     |    | Adams, Dell<br>1343 W Campbell Rd | 1266.46      | SP      | 9/11/2020 |     | Richardson | 75080 | SP1      |
| 2     |     |    | Jones, Charlie<br>1405 Cibola Dr  | 43.30        | SP      | 9/11/2020 |     | Allen      | 75013 | SP1      |

On the Snow Dispatch Board, review the list of Jobs to ensure all Clients are included, and the work assignments and routes are correct.

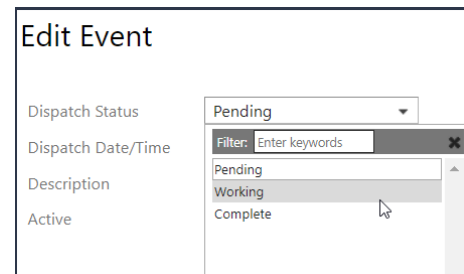
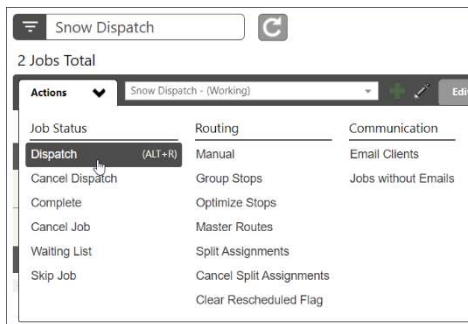
Make changes as needed:

- Add additional Jobs under **More > Add to Dispatch**.
- Assign Resources under **Edit Jobs**.
- Change the Route Order under **Actions > Routing > Manual**.
- Change Team Assignments under **More > Assign Teams**.

## Dispatch Snow Jobs

Dispatching Snow Jobs is a two-step process: changing the **status**, then **dispatching**.

1. On the Snow Dispatch Board, click the **Pencil** icon to see the Edit Event overlay.
2. Change the “Dispatch Status” to **Working**, then click **Save**.
3. Select all the checkboxes, then click **Actions > Dispatch**.



## Print Route Sheets

After you dispatch your Snow Jobs, you can print Route Sheets if needed. To do this, follow these steps:

1. Click the **Print** button, then choose the Resources, date, and printing format.
2. Click **Update**. The Route Sheet appears.

- If you're unable to print, click **Email** to send Route Sheets to your field Resources. This is also useful if your Teams start work from somewhere other than your office.

## Using the Legacy App for Snow Jobs

There's one difference when using the Legacy mobile app for Snow Jobs versus other types of Jobs: a Snow Event will maintain a **Working** status on the app, even after it's completed. This allows your field Resources to clock into Snow Jobs as many times as needed.

### Update Snow Job Details

The Team Leader in the field can update some Snow-related items on the Job Item Details screen, such as:

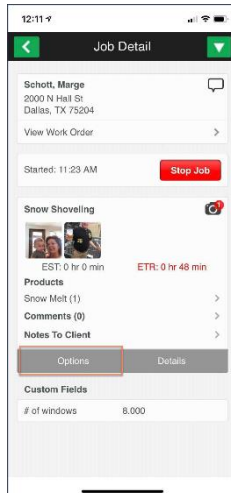
- **Billing Depth**
- **Temperature**

Permissions to make updates like these are managed under **Settings > User Roles & Rights**.

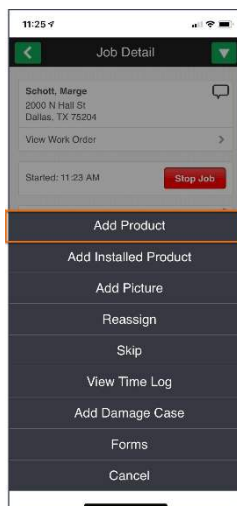
## Add Snow Products from the Legacy App

The Team Leader can add Products and adjust quantities on the Product screen.

1. On the Job Detail screen, tap **Options**.



2. Tap **Add Product**.



3. On the Add Product screen, tap a Product.



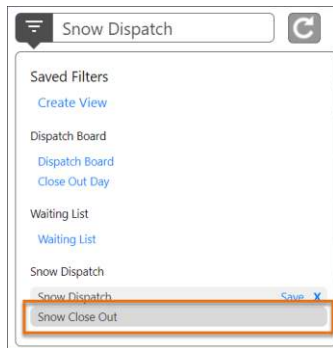
4. Fill in the quantity and other details as needed

5. Click **Save**.

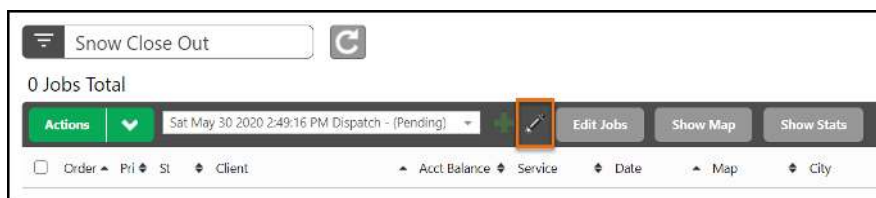
## Close Out Snow Jobs

To close out the Jobs when the Snow Event is over, follow these steps:

1. Go to **Scheduling > Dispatch Snow Jobs** and select **Snow Close Out** from the dropdown.



2. Edit the Snow Event by clicking the **Pencil icon**. Change the Dispatch Status to **Complete**.



3. Click **Save**.
4. Complete the Jobs in one of these ways:
  - If you use the Legacy app, Jobs are completed when the field Resource completes the Job.
  - If you don't use the Legacy app, select the checkbox for the Jobs, hover over **Actions**, then click **Complete**.



5. Select the checkbox next to all the Jobs for specific Bulk Editing, then click the **Edit Jobs** button.

- On the Edit Jobs overlay, enter applicable data for the Plan Depth, Temperature, Bill Depth, and Asset Type for the actual Snow Event.

Take care with the accuracy of Bill Depth and Asset Type because when applicable, your billing will be calculated on these fields.

- Click **Update**. This will add all the information necessary for billing your Snow Jobs.
- Make sure all Resource times and amounts are correct, then save any changes.

**Note:** If a job goes past midnight, there will be two-time records to account for two calendar dates.

- If you track Products with your Snow Jobs, click the **Product** icon on the far right of the grid. Check the Job Details overlay to confirm the Product, and quantities are correct as this can affect Invoicing and Job Costing.
- Click **Confirm?** for each Product Line Item, and select **Add to Invoice** or **Used, do not Invoice**.
- Click **Save**.



Now, you're ready to Invoice your Snow Jobs. The Snow system in Service Autopilot has separate, manual Invoicing. This is because some states require Snow records be maintained.

## Invoice Snow Jobs

To Invoice your Clients, follow these steps:

- Go to **Accounting > Snow Invoicing** and filter by Client, Service, and Date to find the Snow Jobs.
- Select the event(s) for which you want to create Invoices from the "Event" dropdown. You can select multiple events to Invoice together.
- Select the Invoice Date and Terms. All Jobs will appear for the events you selected.
- Select the checkbox for all the Jobs you want to Invoice, then click **Generate Invoices**.
- A confirmation message appears. Click the link to view the Invoices.
- The link takes you to **Accounting > Invoices** and pre-sets the date filter to show the Invoices you just created.

**Note:** You can't delete Snow Invoices until you cancel the Job from the Snow Dispatch Board.