Service Autopilot™

# THE NEW DISPATCH BOARD

## USER GUIDE

# Contents



# About the Dispatch Board

The new optimized Dispatch Board under **Scheduling > Dispatch Board (New)** is the scheduling hub of Service Autopilot. Much of the information you enter in other areas of the software ends up here at some point. The general look and feel of this dispatch board is similar to the **Scheduling > Dispatch Jobs** option, but we have spent many months optimizing and scaling the dispatch board to deliver a better experience. We will continue to improve and optimize it for speed to ensure that SA scales with your growing businesses.

From the Dispatch Board, you can:

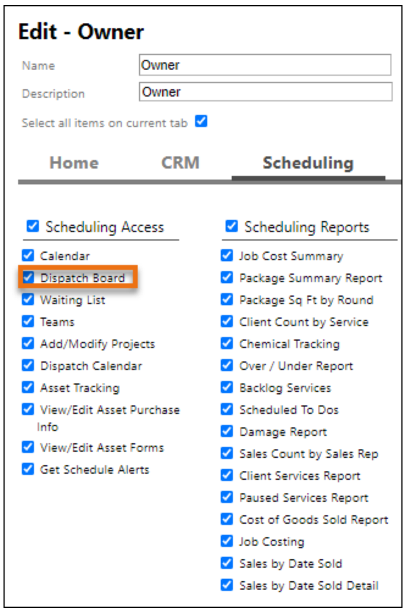
- Send out your teams.
- See what jobs you have scheduled.
- Change service dates.
- Make and view notes.
- Set and change route order.
- Print route sheets.

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

# Set Up User Rights for the Dispatch Board

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

## Dispatch Board Permissions




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

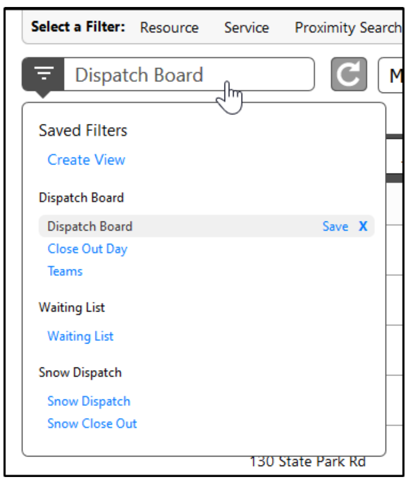
**Note: Snow Dispatch** is not enabled under these permissions. For information on Snow and the Snow Dispatch Board, see the *Snow User Guide*.

# Overview of the Dispatch Board

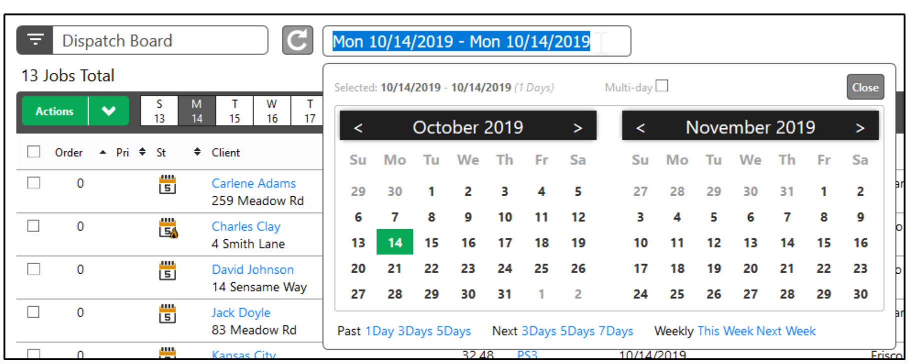
This is an overview of the functionality available on the Dispatch Board. You can access the Dispatch Board by going to **Scheduling > Dispatch Board (New)**.

At the top of the page under the Navigation Bar, you'll see the filters. Click any filter to display the criteria and apply it.

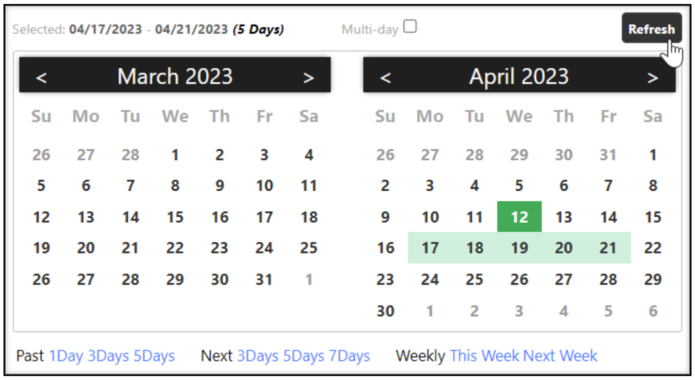

Under the filters, you have the view selector:



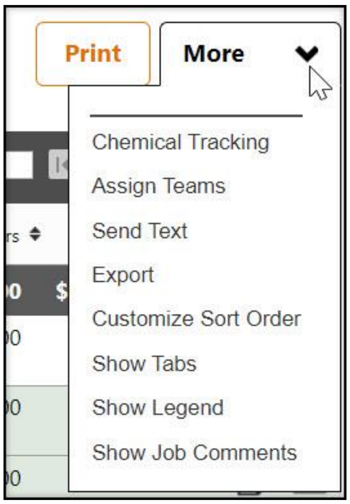

This allows you to create and access different views.
To the immediate right of the view selector is a **Refresh** button.
To the right of the **Refresh** button is the date selector. Click the date selector to open the calendar:



Once you select your dates, click **Refresh** to apply them and close the dialog.




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

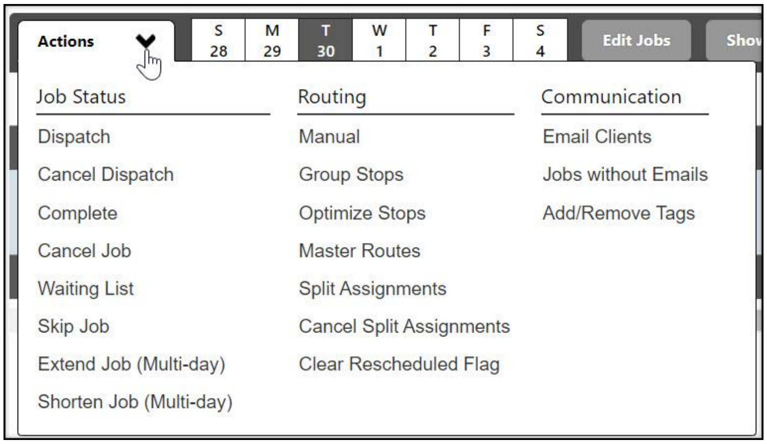



Use the **Print** button to print Route Sheets for dispatched jobs.

The **More** dropdown options include Chemical Tracking (if you have chemical services scheduled), **Assign Teams**, **Send Text**, **Export**, **Customize Sort Order**, **Show Tabs**, **Show Legend**, and **Show/Hide Job Comments**.

**Note**: Your Job Comments selection will be saved as a default until your browser cookies are cleared.

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

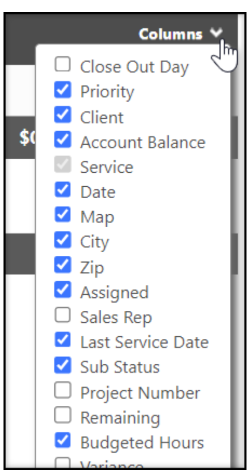



This lets you take different actions, including changing the job status, routing, communication with Clients, and more.

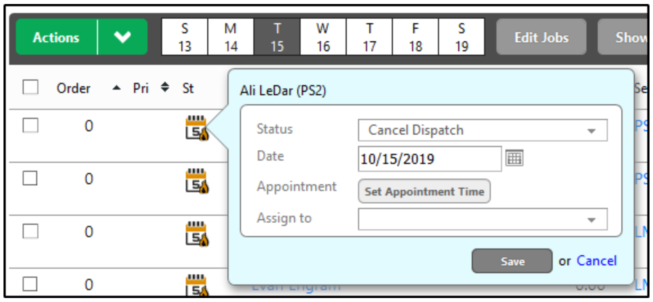
To the right of the **Actions** dropdown is a quick date selector for the current week. Choose a date to automatically refresh the page:


The **Edit Jobs** button lets you reassign or reschedule one or more jobs. The **Show Map** button displays the Map so you can see jobs in physical relation to each another. The **Show Stats** button displays the B. Hrs., job count, and total amount by resource.

On the far right is the column selector for the Dispatch Board:



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




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

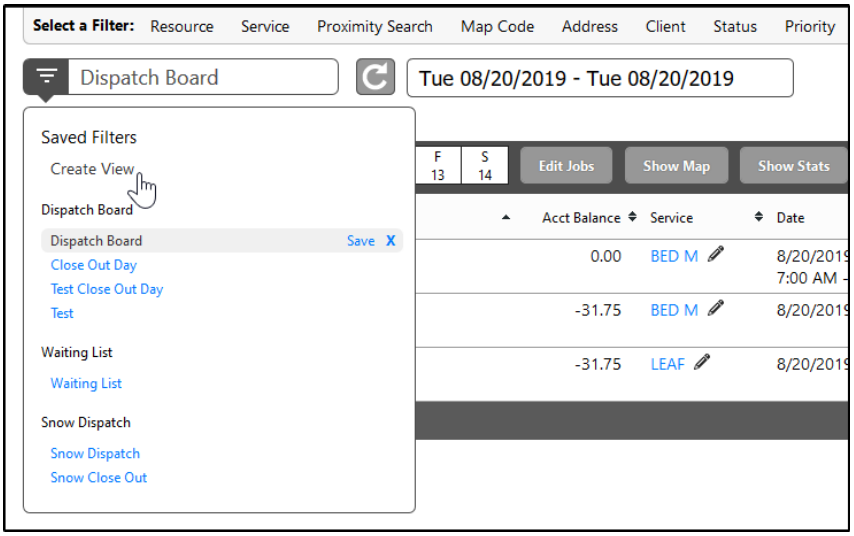

# Create Screen Views on the Dispatch Board

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

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

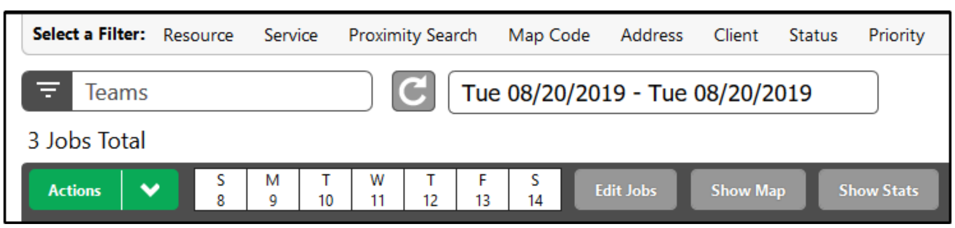
1. Go to **Scheduling > Dispatch Board (New)** and add your desired filters.

2. Select the dropdown list next to the Dispatch Board heading and select **Create View**.



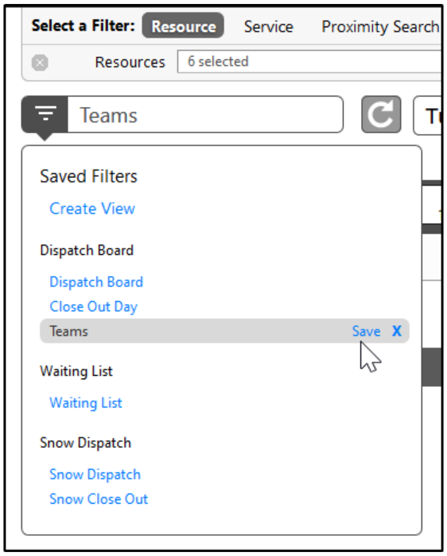

3. The Screen View dialog appears. Enter a name for the view then click **Save**.


4. Once you save, the view will be applied.




5. If you decide that you want to add additional filters to your view, add and apply those filters.

6. Go back to the view selector and click the **Save** link next to your current view to update it.




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

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

## Columns for Multi-Day Jobs

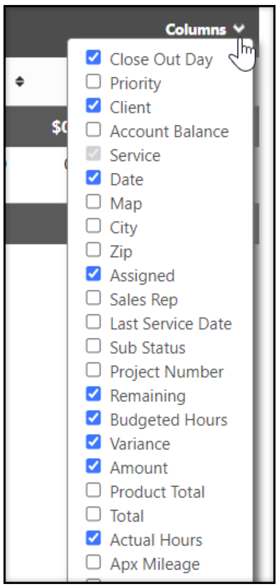
There are several columns you can enable on your Dispatch Board that have particular relevance to Multi-Day Jobs. You may want to create a view specifically for Multi-Day Jobs that includes, at a minimum, the following columns:

- **B. Hrs.** –Shows the budgeted hours per day as the top value and the remaining B Hrs on the overall Multi-Day Job as the lower value. Any positive or negative variance to the B Hrs vs. actual hours will be calculated on the following day. For example, I have 10 B. Hrs. on a Multi-Day Job, which is split into 8 B. Hrs. for day one and 2 B. Hrs. for day two. If I only use 7 hours on day one, the system will take the remaining hour for day one and allocate it to day two for a total of 3 B. Hrs.
- **Actual** – Shows the total actual time worked on that day. For example, if three people worked for five hours each, the column would show "15".
- **Variance** – Shows two numbers: the **Daily Variance** and **Running Variance** (in parenthesis). Negative values display in **green** while positive values display in **red**.
    - **Daily Variance** – The top number displayed. This is the actual hours worked minus the B. Hrs. for the day.
    - **Running Variance** – The bottom number in parenthesis. This is how far under or over time you are on the entire project as of that day. Think of this number as a comparison against your original plan.

- **Men** – The number of people assigned to an instance of the job. When time is logged, it shows the actual number of Resources who clocked time regardless of the Assignment. This column is enabled by selecting "Close Out Day" from the Column dropdown list.
- **Amount** – The daily amount earned on the job based on the total job amount and daily B. Hrs. OR actual time logged.

  Example: A job for $1000 will last two days. If there are 15 B. Hrs. on day one and 5 B. Hrs. on day two, the Amount for day one would be $750 and the Amount for day two would be $250. For the same job, if you logged 10 hours on the first day, the amount on day one would be $500.

With these columns enabled, your Columns dropdown list will look something like this:

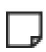
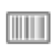



With those selections, you would see the columns displayed like this:

# Status Icons on the Dispatch Board

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

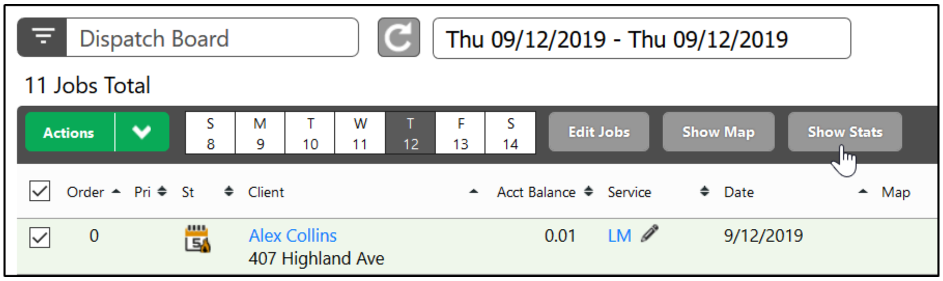
| | | |
|---|---|---|
|  | **Scheduled** | Job is scheduled |
|  | **Scheduled-New** | Job is new for this Client |
|  | **Dispatched** | Job is dispatched and can be seen on mobile apps |
|  | **Completed** | A Resource has completed the Job |
|  | **Canceled** | The job has been canceled |
|  | **Skipped**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

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

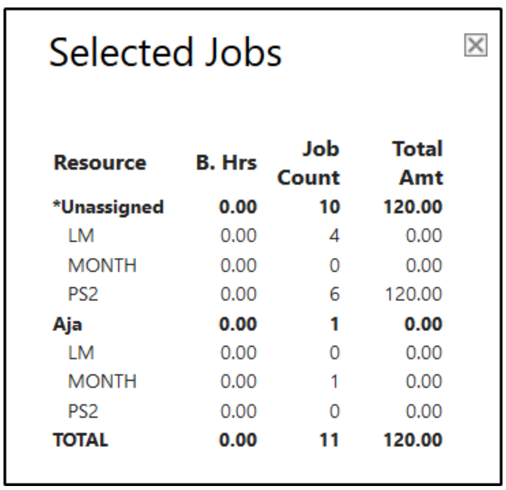
# Show Job Statistics

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

1. Go to **Scheduling > Dispatch Board (New)**.
2. Select the checkbox next to the Jobs you want to see statistics for. If you want to see statistics for all the jobs, click the top checkbox to select all.
3. Click **Show Stats**.




4. An overlay shows statistics for the selected Jobs.

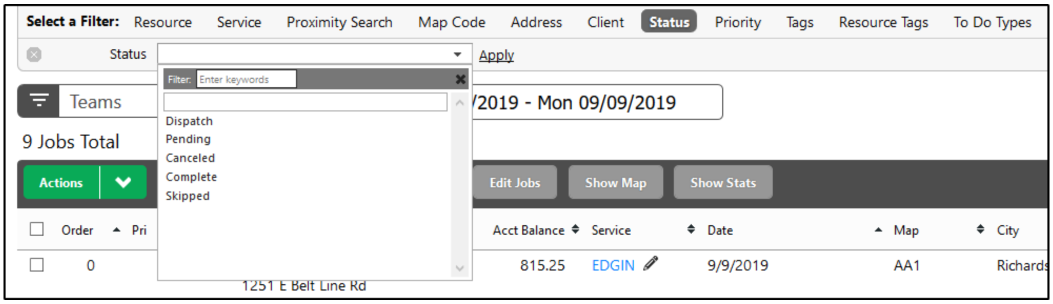


Selected Jobs

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

# Filter the Dispatch Board by Status

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




The Status filter can be used for the following statuses:

- Dispatch
- Pending
- Canceled
- Complete
- Skipped

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

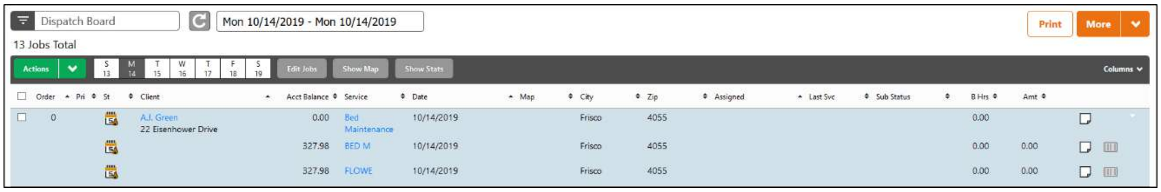
# Work Orders on the Dispatch Board

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

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

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

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




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

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

# Change Job Statuses

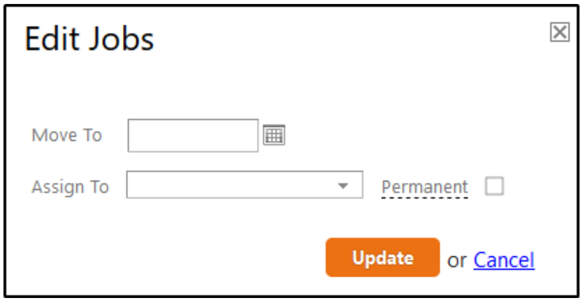
## Reassign Jobs from the Dispatch Board

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

### Edit Assignments in Bulk

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

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

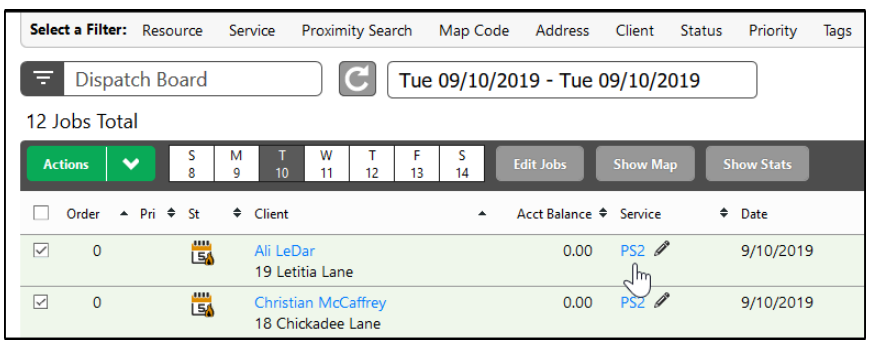



5. Click **Update**.

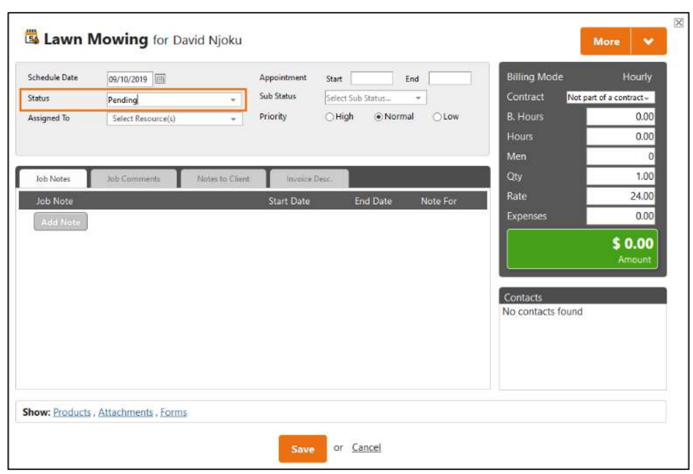
## Edit Assignment for One Job

### Option 1

1. Go to **Scheduling > Dispatch Board (New)**.
2. Under the Service column, click the Service for the Job you need to reassign.



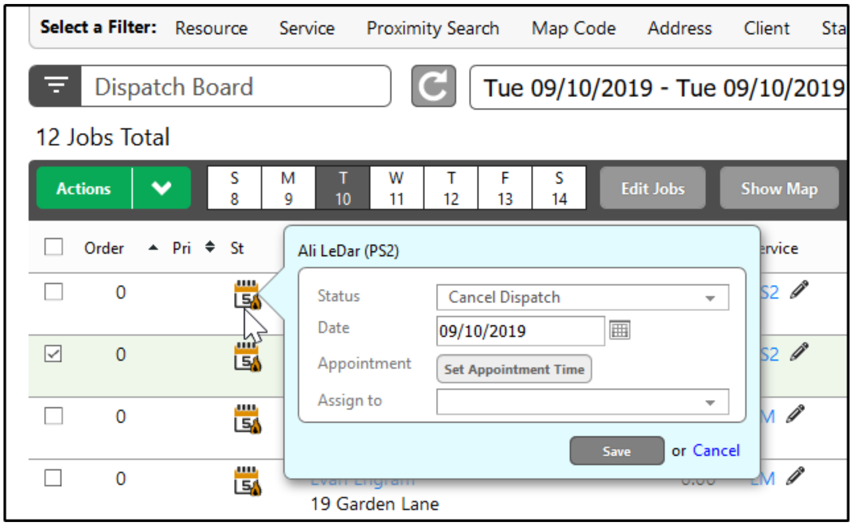

3. The Job Details overlay appears. Change the job assignment with the "Assigned To" field by selecting a different Resource.




4. Click **Save**.

### Option 2

1. Go to **Scheduling > Dispatch Board (New)**.
2. Click the **Status** icon for a job.



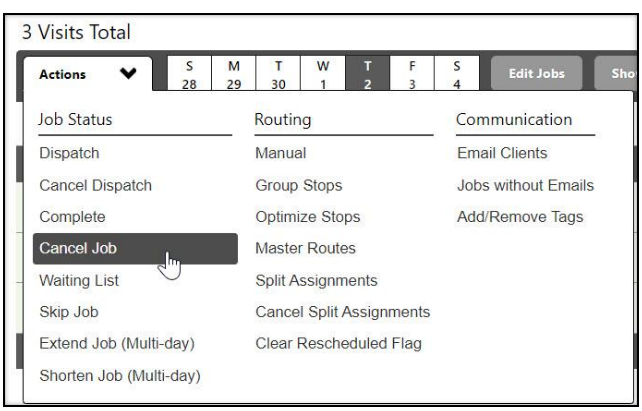

3. Use the overlay to change the assignment.
4. Click **Save**.

# Cancel Jobs

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

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

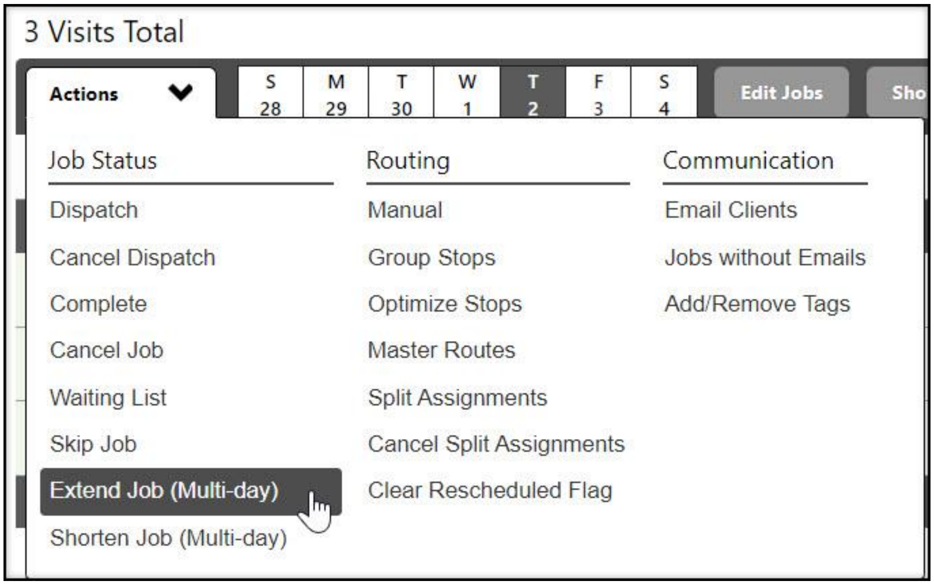
*To cancel a job on the Dispatch Board*, simply check the box next to the job you want to cancel, hover over the **Actions** menu, then select **Cancel Job**.



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

# Extend or Shorten a Multi-Day Job

You have the option to extend or shorten a Multi-Day Job on the Dispatch Board. This is helpful for scenarios where actual work doesn't quite go as planned. Both options are available from the **Actions** menu.




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

# Complete a Multi-Day Job

All instances of a Multi-Day Job work together as a single job. Therefore, certain changes, such as status changes, affect all instances of the job. This is particularly important when marking Multi-Day Jobs as complete. It's best to not complete any job instances until the last day when all work is complete. If you were to complete the job before the last instance, no job history will be recorded past the point where the job was completed.

When you go to mark an instance as complete from the Dispatch Board, you will receive this prompt:


If the date you select on this prompt is before the last job instance, any instances after that date will be removed from the Dispatch Board. Any time logged will be retained but you will not have any of the budgeting or job costing information for those days.

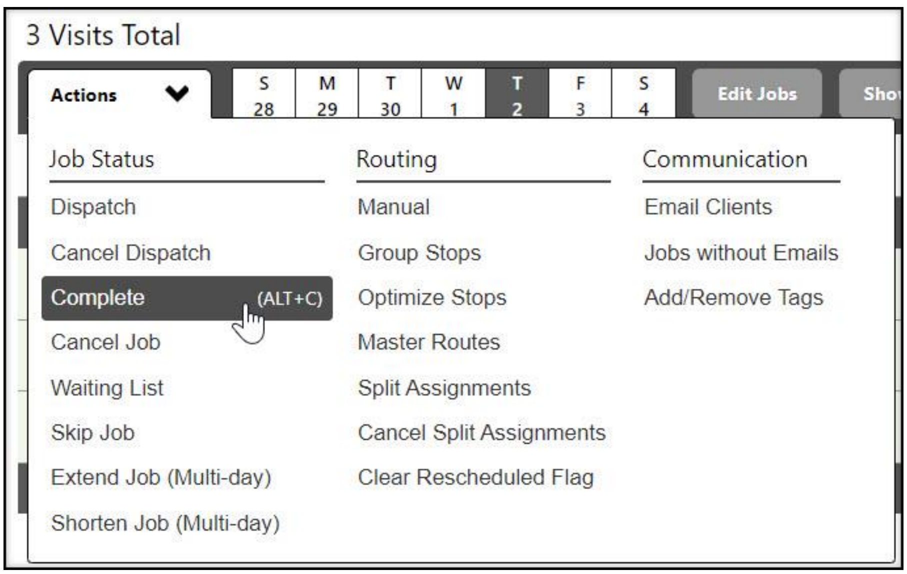
When the Invoice for a Multi-Day Job is generated, there will be one line item for each completed Service regardless of how many days it took to complete the Job. If your Multi-Day Job only had one Service that means it was not a Work Order. The Invoice would only show a single line item for that single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

# Complete a Job

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

## Complete One or More Jobs

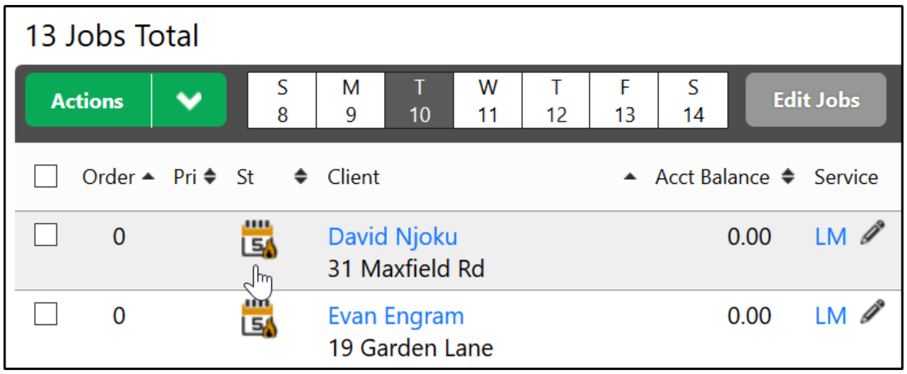
1. Go to **Scheduling > Dispatch Board (New)**.
2. On the Dispatch Board, locate the Job(s) to be marked as complete.
3. Click the checkboxes next to each Job.
4. Hover over **Actions** and select **Complete**.



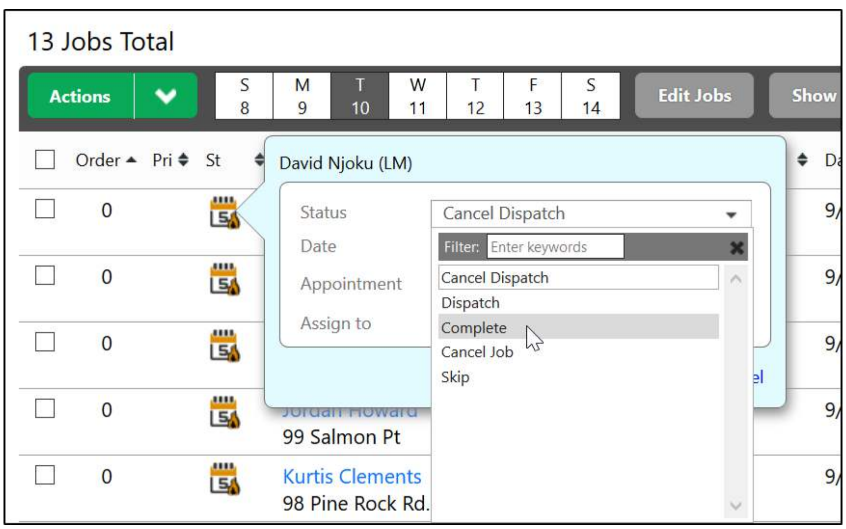
# Complete One Job

## Option 1

1. Go to **Scheduling > Dispatch Board (New)**.
2. Click the **Status** icon for the Job you want to complete.



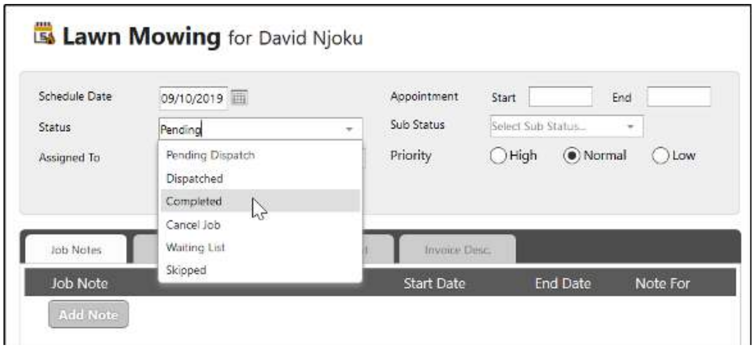

3. Click the Status dropdown list.
4. Select **Complete**.




5. Click **Save**.

### Option 2

1. Go to **Scheduling > Dispatch Board (New)**.
2. Click the Service for the Job you want to complete. This will open the Job Details overlay.




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

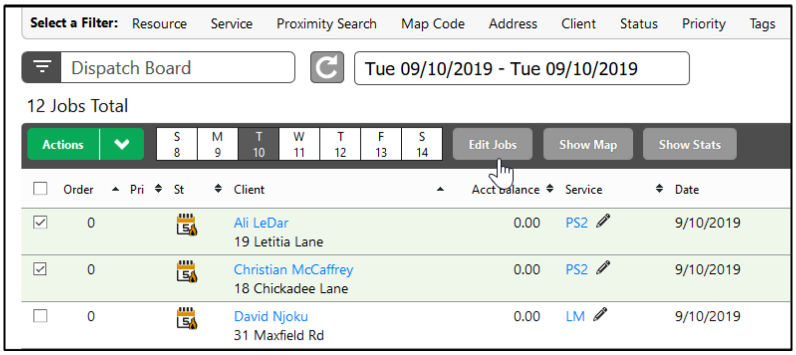
## Reschedule Jobs from the Dispatch Board

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

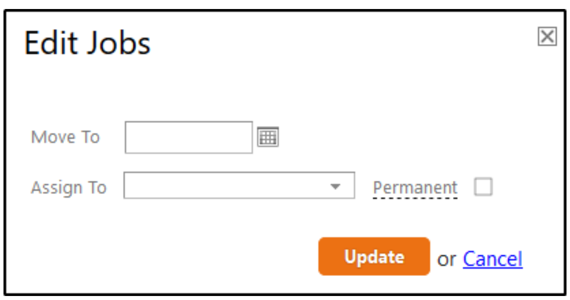
Remember that recurring schedules, such as Weekly – Monday, will auto-adjust whenever a job instance is skipped or rescheduled. That means that even if one Job is rescheduled, the others will remain on the selected schedule. If you need to update all future rounds, you'll have to update the Master Schedule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

## Reschedule and Edit Assignments in Bulk

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




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

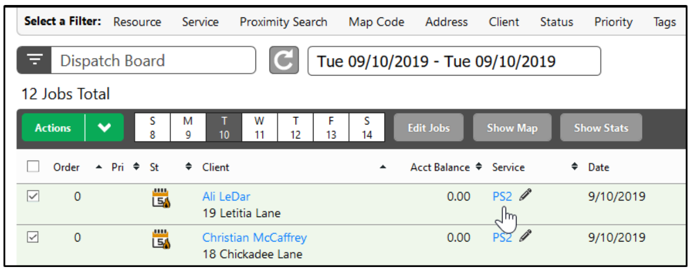



5. Select the new Assignment. This is optional and will affect all selected Jobs. The **Permanent** option refers only to the Resource Assignment and is effective for all dates moving forward. Checking this box *will* update the assignment on the Master Job.
6. Click **Update**.

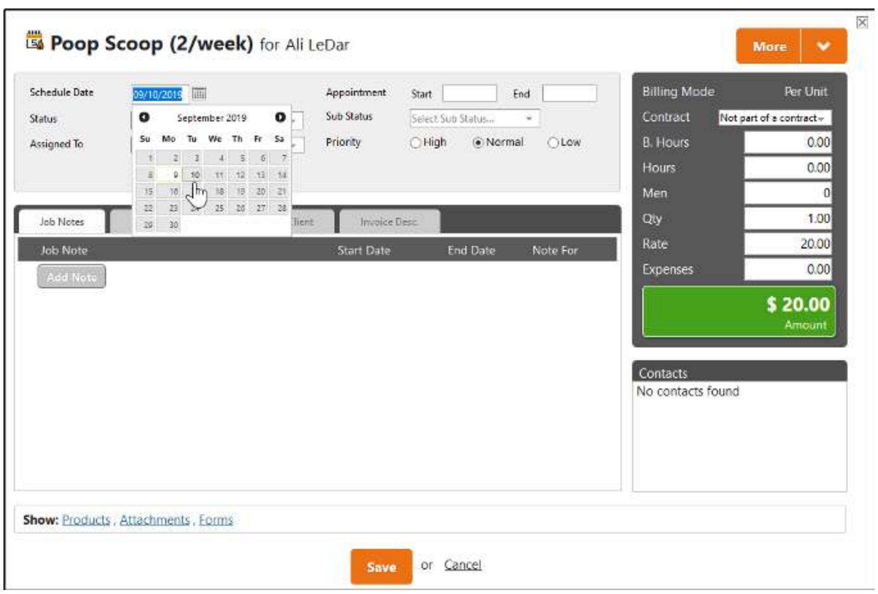
# Reschedule and Edit Assignment for One Job

## Option 1

1. Go to **Scheduling > Dispatch Board (New)**.
2. In the Service column, click the Service for the Job you need to move.



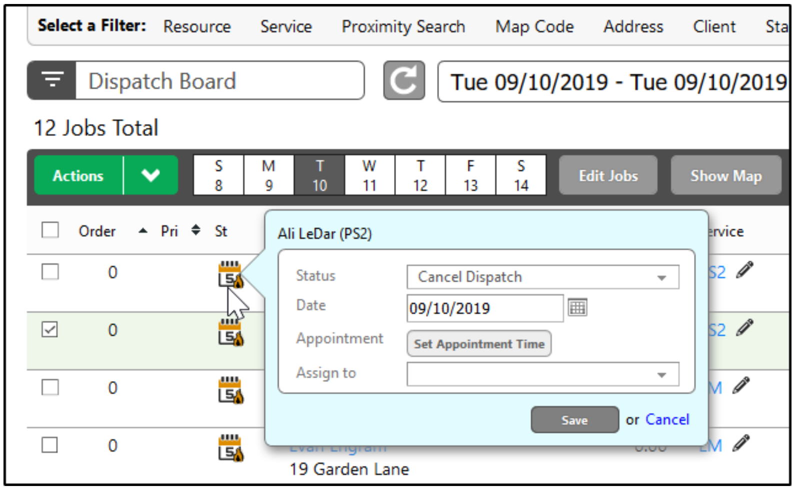

3. In the Job Details overlay, find the Schedule Date and manually change it, or click the calendar to select a new date.




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

### Option 2

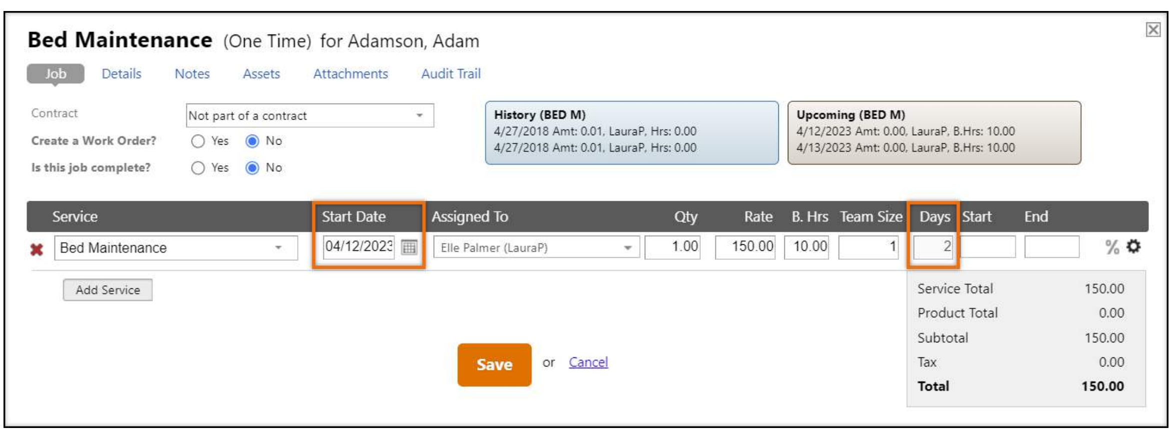
1. Go to **Scheduling > Dispatch Board (New)**.
2. Click the **Status** icon for a job.




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

## Schedule a Multi-Day Job

If you create a One-Time Job as a Multi-Day Job, the Job will automatically be scheduled on the Dispatch Board based on the Start Date, number of days, and Multi-Day Include Days:




In this example, the first day of the Job would be 04/12/2023 and the second day would be 04/13/2023. Both of those dates are weekdays that would typically be worked. If, for example, you do not schedule work on weekends, but a three-day job starts on a Friday, the next two days would be scheduled on Monday and Tuesday.

If you create a Waiting List Job as a Multi-Day Job, it will remain on the Waiting List until you move the job to the Dispatch Board. Once you schedule the job, it will follow the same rules as a One-Time job.

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

# Reschedule a Multi-Day Job

## One-Time Multi-Day Jobs

If you need to move a One-Time Multi-Day Job after it's been scheduled, this can be an inconvenience. Regardless of the Job Status, each job instance would need to be rescheduled. For example, let's say you had a job scheduled on Monday/Tuesday/Wednesday, but it now needs to start on Wednesday. Each instance needs to be moved because the job costing allocations are different for each day. Monday's instance would be moved to Wednesday, Tuesday's to Thursday, and Wednesday's to Friday. A scenario like this could become very confusing. If you anticipate this happening frequently, consider using Waiting List jobs rather than One-Time jobs.

## Waiting List Multi-Day Jobs

The advantage to using Waiting List jobs for Multi-Day jobs is that they can be sent back to the Waiting List from the Dispatch Board. If you need to re-schedule one of these jobs, you can send the job back to the Waiting List then reschedule all occurrences with only a few clicks. This avoids the confusing shuffling that can occur with One-Time jobs.

If you have a scenario where you don't know exactly when you're going to start a job, it's best to use a Waiting List Job. These might be scenarios where weather is a factor, or if you must wait on equipment or personnel that you normally don't have on hand. This way, you'd have the added advantage of being able to easily reschedule the job without any other loss of functionality.

# Modify a Job Rate from the Dispatch Board

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

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

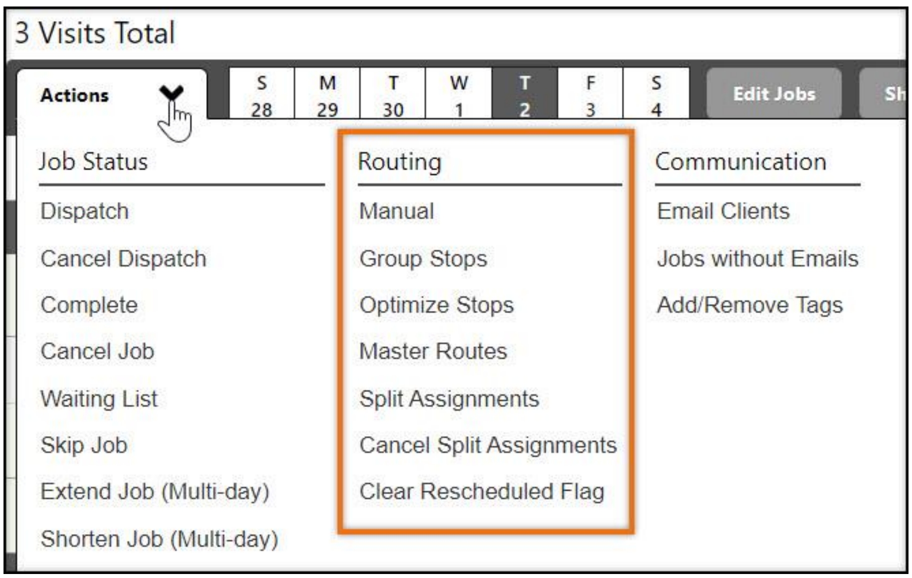
**Note**: If the Service Mode of the service is Hourly, the Amount will change based on the total time worked on the job. For example: Amount = Number of Staff x Hours x Rate.

# Routing

## Routing Overview

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

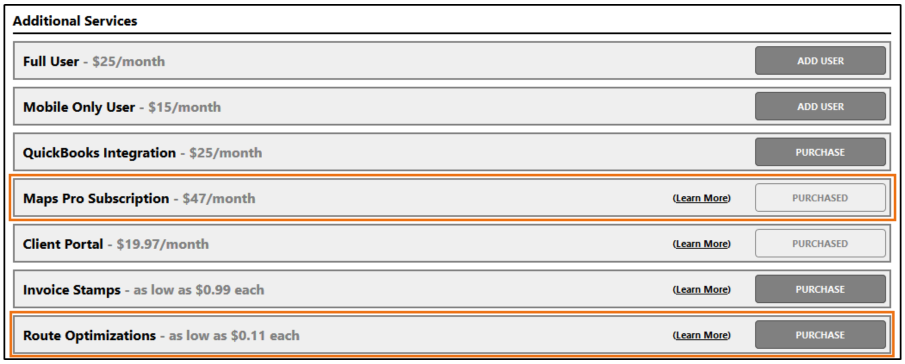
1. Go to **Scheduling > Dispatch Board (New)**.
2. Hover over **Actions** and locate the Routing section.




You have four options to choose from.

- **Manual** - This option allows you to drag and drop jobs in the order you would like to perform them.
- **Group Stops** – "As the crow flies" routing. This option will order jobs by distance, traveling in a straight line. It does not take into consideration things like lakes and mountains, housing complexes, or road systems.
- **Optimize Stops** - Very similar to how Group Stops works, this option will place jobs in order by distance but will take into consideration roads, natural barriers, and the best route from A to B. There are two ways you can optimize your route: TrackRoad and Google.
    - **Google**- Comes with the Smart Maps subscription. You can route as many times as you want but you're limited to 23 stops per resource. For example, a crew with 30 jobs per day couldn't be routed through Google, but a crew with 20 stops could.
    - **TrackRoad**- You purchase routing credits. Each credit is good for one Team's route, and you can route up to 100 stops per resource.

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




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

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

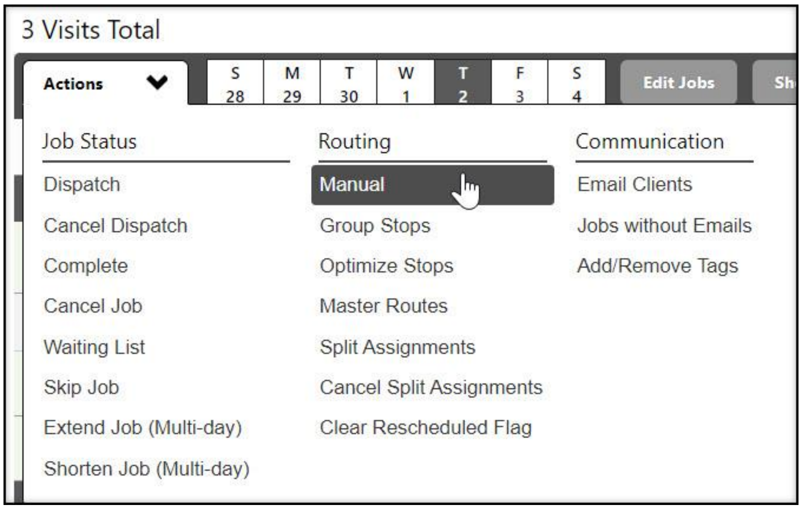

- **Update Today's Route Only** - Updates the route only for the current day being routed.
- **Update Every Week** - Updates those jobs every single week if they are Recurring Jobs. This is useful for weekly schedules.
- **Update Every Other Week** - Updates the jobs every other week. This is useful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

In addition to these routing options, you can also route from the Dispatch Board map. For more information, see "Reassign or Reschedule Jobs from the Dispatch Board Map" on page 67.

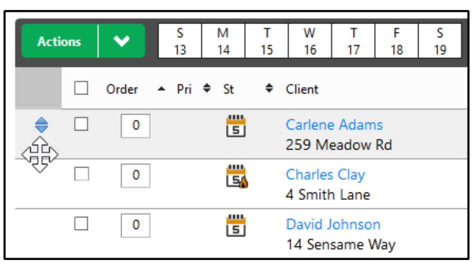
# Change Route Order

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

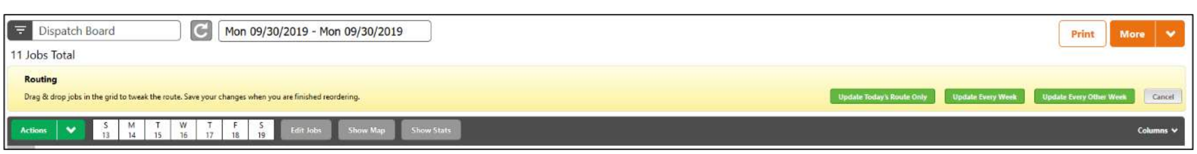
1. Make sure you are viewing the correct date on the Board, then hover over **Actions,** and select **Manual**.




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



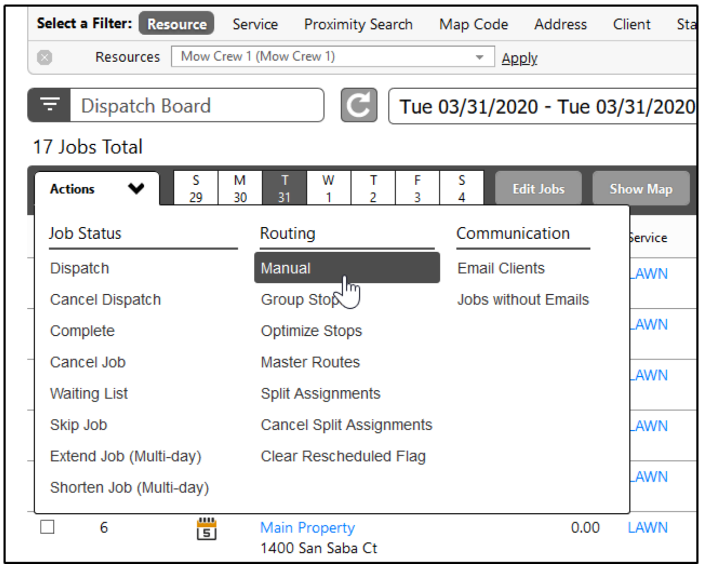

3. Use the arrows to drag and drop the jobs to a different position. You can also type in the **Order** field to re-route.
4. When you are finished with your adjustments, use the yellow bar at the top of the grid to save your changes:



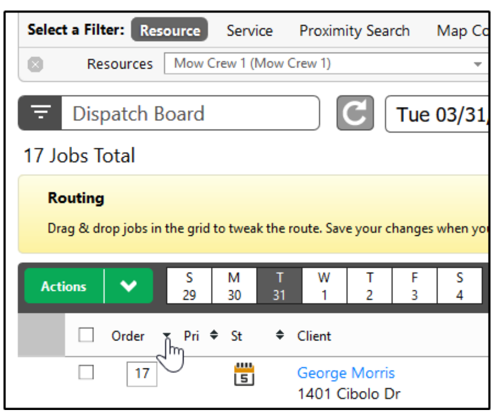
# Reverse Route Order

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

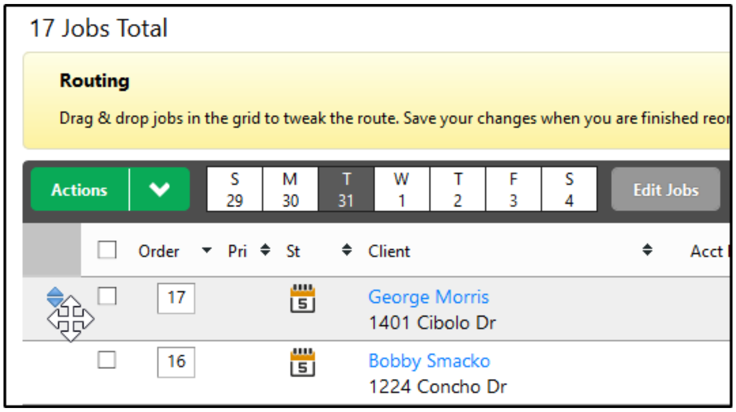
1. Hover over **Actions** and select **Manual** under the Routing column.




2. Click the arrow to the right of the Order column to sort the column in reverse numerical order.



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




4. Click and drag the first Job down to the second spot then back to the first. This will re-number the list in the reverse order.
5. When you are finished with your adjustments, use the yellow bar at the top of the grid to save your changes.

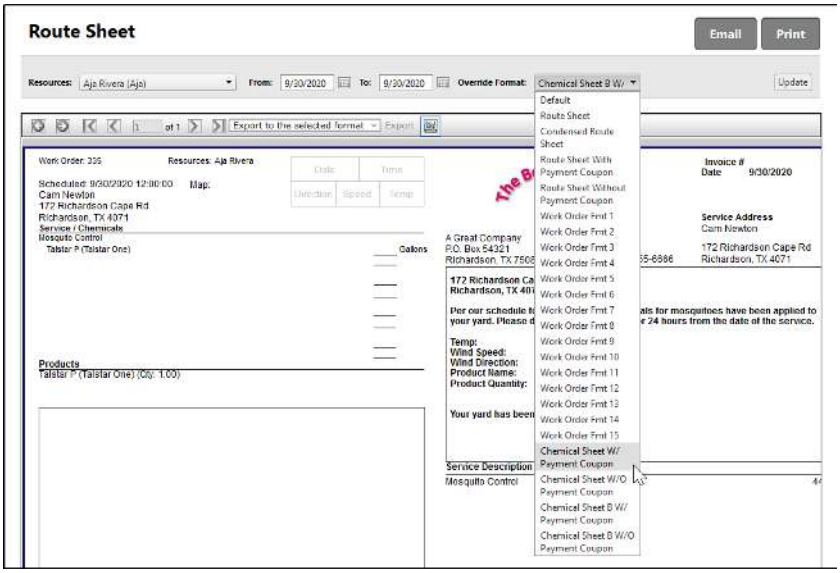
## Print Chemical Tracking Route Sheets

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

To print chemical Route Sheets, follow these steps:

1. Go to **Scheduling > Dispatch Jobs**.
2. Select the checkbox next to every job that needs to be dispatched, then go to **Actions > Dispatch**.
3. Click **Print** at the top right corner of the Dispatch Board.

4. Select the Resource, Date, and override format at the top of the page then click **Update**.




**Note**: The options for Chemical Route Sheets are at the bottom of the Override Format list.

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

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

# Troubleshoot Print Issues in Chrome

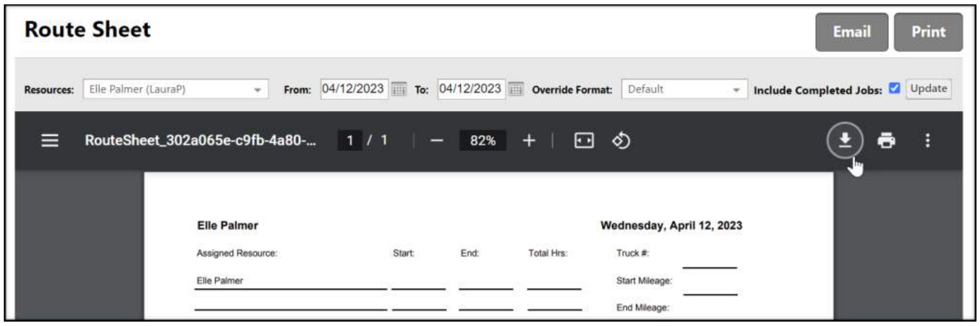
Google Chrome recently did an update which removes the ability to print documents from a tab in your browser. You may have noticed that nothing happens when you try to print Route Sheets and Invoices while in Chrome. There are two workarounds:

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

## To Print Route Sheets

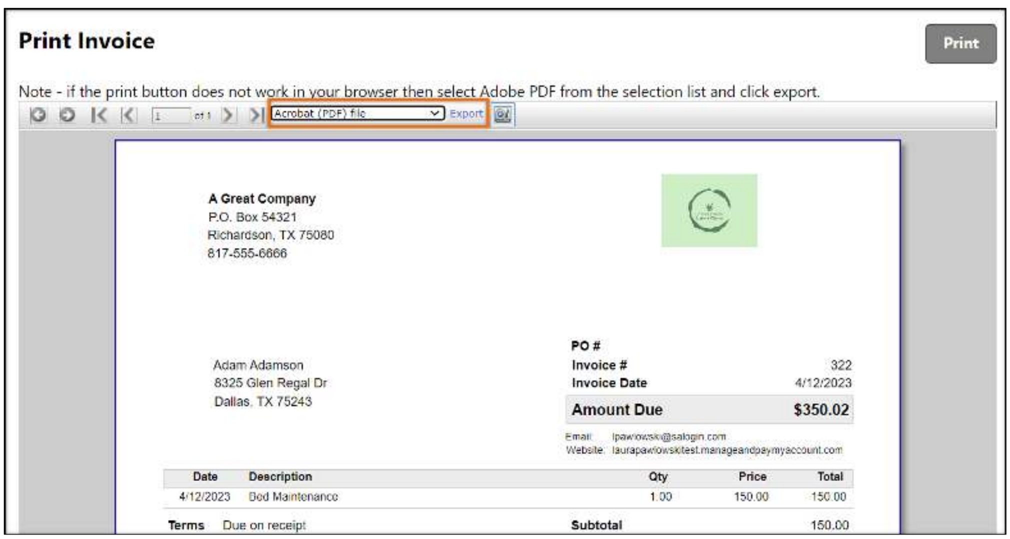
1. Instead of clicking **Print** on the Route Sheet screen, select the **download arrow** icon.

2. Rename the PDF if needed then click **Save**. The Route Sheets download as a PDF.




### To Print Invoices

1. Instead of clicking **Print** on the Print Invoice screen, select **Export to the selected format**.
2. From the dropdown list, select **Acrobat (PDF) file**.
3. Click **Export.** The Invoice will download as a PDF file.




# The More Dropdown List

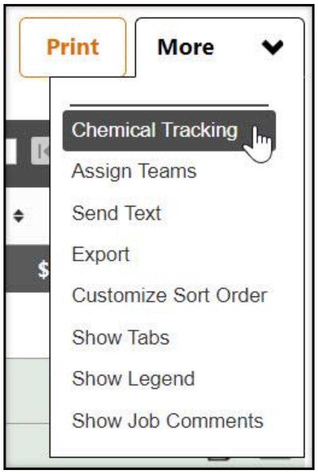
## Chemical Tracking Wizard

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

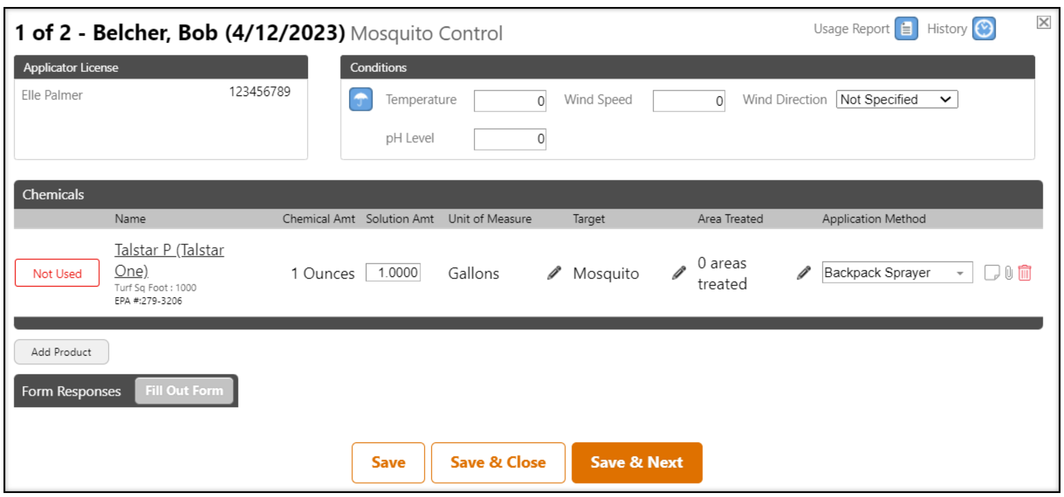
- Adjusting quantities of chemicals that were used on a job.
- Adding new chemicals that were used.
- Viewing reports related to future and past chemical applications.

- Displaying weather conditions and pH settings if these General Settings are enabled.

To access the wizard from the Dispatch Board, hover over the **More** dropdown and select **Chemical Tracking.**




This opens the Chemical Tracking Wizard:




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

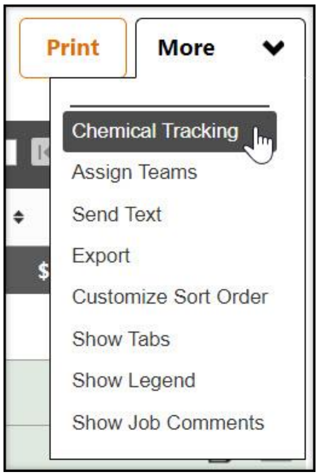
The "Conditions" section applies to all Jobs when a value is entered. This is where you can manage Products, Mixes, and Form responses. To confirm the Product used, click the **Used** button. Clicking the name of any item will allow you to edit it including the application rate and mix ratio. Use the pencil icons to modify the **Areas Treated** or **Application Method**.

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

# Planned Chemical Usage Report

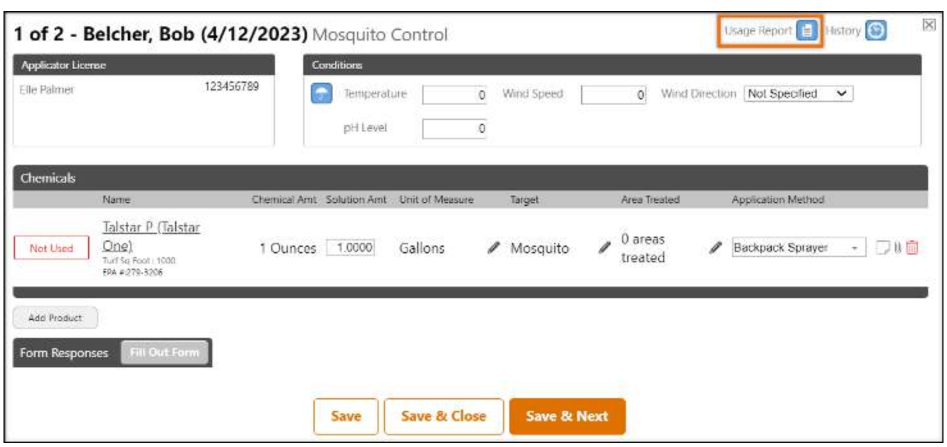
Before a Chemical Tracking job, you can print the Planned Chemical Usage Report for the technician, so they know what chemicals and how much of each to take into the field. The Planned Chemical Usage Report will tell the technician the overall quantities of product to load on the truck and the individual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

Access the report from the Dispatch Board (**Scheduling > Dispatch Board (New)**) by hovering over **More** and selecting **Chemical Tracking**:




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

From the Chemical Tracking Wizard, click the **Usage Report** button in the upper right corner of the overlay to access the report:



The report will open in a new tab and will look similar to this:


Planned Chemical Usage Report
Date: 4/12/2023 - 4/12/2023
Resource/Team: All Resources/Crews

Filter By
Start Date: 4/12/2023 End Date: 4/12/2023 Resource All Resources/Teams

Refresh Print Export to Excel

Chemical Totals

Page 1 of 1

| Resource | Chemical Name | Concentrate | |
|---|---|---|---|
| Elle Palmer | Dry Product 1 | 2.0000 | Lbs. |
| Elle Palmer | Talstar P (Talstar One) | 1.0000 | Ounces |

Page 1 of 1

Chemical Usage

Page 1 of 1

| Resource | Client Name | Client Address | Talstar P (Talstar One) | | Dry Product 1 | |
|---|---|---|---|---|---|---|
| Elle Palmer | Belcher, Bob | 901 W Parker Plano, TX 75023 | 1.0000 | Ounces | | |
| Elle Palmer | Rose, Alexis | 5220 Grovewood Drive McKinney, TX 75071 | | | 2.0000 | Lbs. |

Page 1 of 1

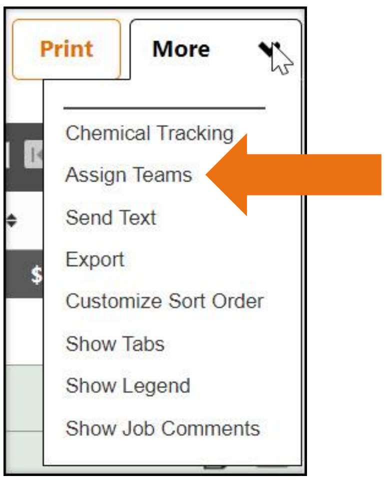
The **Chemical Totals** refer to the overall quantity for each chemical that is to be used for the day.
The **Chemical Usage** portion will display the Client Name, Client Address, and the quantity of chemical that is to be used at the property.

# Assign Teams

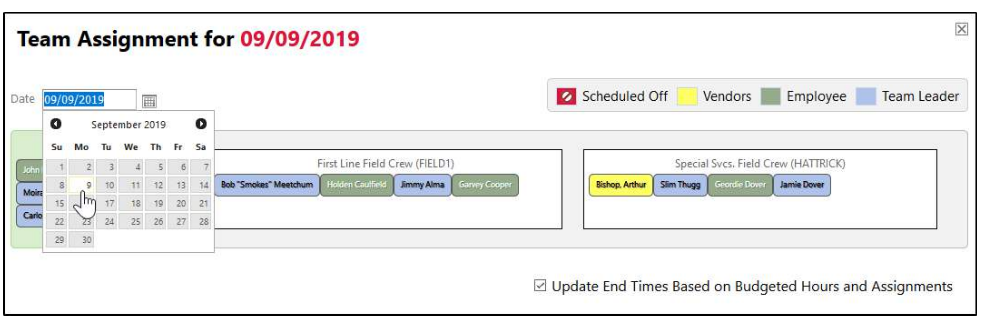
When creating or scheduling Jobs, you may not know who will be doing the actual work. You can assign Resources to different Teams directly from your Dispatch Board to make sure you have the most accurate personnel for the day's Jobs.

To assign Teams, follow these steps:

1. Go to **Scheduling > Dispatch Board (New)**.
2. Hover over **More**.
3. Select **Assign Teams**.




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




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

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

# Auto-Adjust Job End Times with Team Changes

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

For example, let's say a job has an appointment time of 1:00 pm - 2:00 pm, the B. Hrs. are set to one hour, and there's one resource assigned to the Team. If you update the Team by adding two additional resources for a total of three, the appointment time will change from 1:00 pm to 1:20 pm.

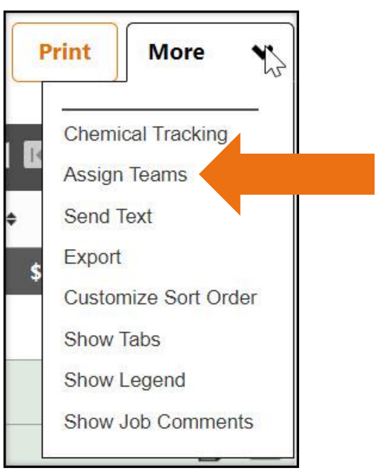
## Enable the Feature

You can enable this option from your Calendar Settings or from the Dispatch Board. If you update the setting in one location, it will update in the other.

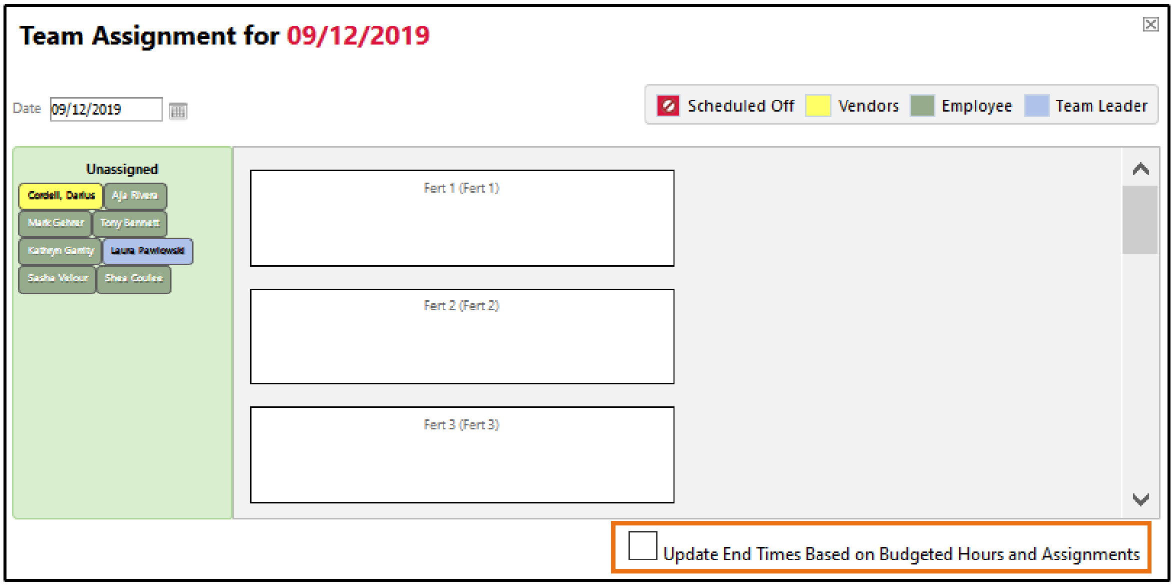
For instructions on how to enable this setting on the Calendar, go to **Scheduling > Calendar > "Calendar Settings- Auto-Adjust Job End Times with Team Changes"** in the Help Center.

## On the Dispatch Board

1. Go to **Scheduling > Dispatch Board (New)**.
2. Hover over the **More** dropdown list.
3. Select **Assign Teams**.



4. Check the box next to "Update End Times Based on Budgeted Hours and Assignments."




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

## How the Feature Works

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

- Appointment Times
- Budgeted Hours
- Team Assignments

If you add or remove Resources from a Team (in the Calendar or Dispatch Board), the end times for the Team's jobs will adjust based on the total number of Resources.

### Example

Let's say you have a job with two Budgeted Hours assigned to a Team of two Resources, and the appointment time is 4:00 pm - 5:00 pm.

You add another Resource to the Team for a total of three Resources. The Job's appointment time will reduce by a third (20 minutes). That makes the new appointment time 4:00 pm – 4:40 pm.

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

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

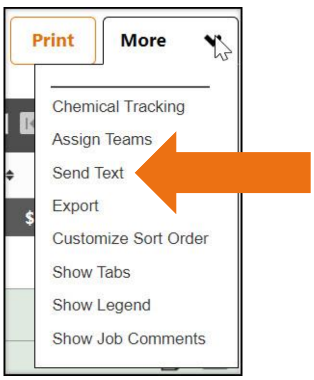
**Note**: Any Jobs that are dispatched will not adjust automatically, even if you have the Auto-Adjust option selected. You must change the Job Status to Pending, then make your Team changes.

## Send a Text Message to a Resource

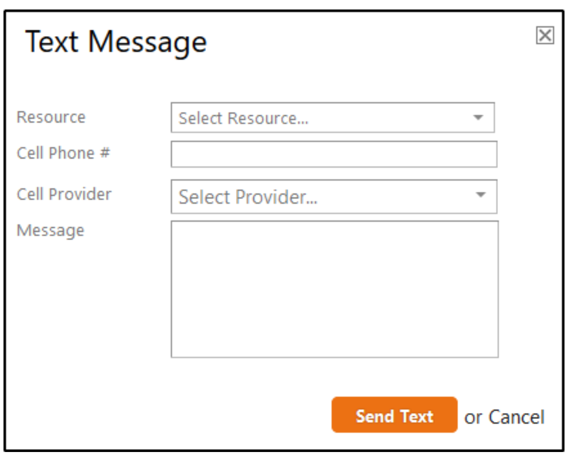
From the Dispatch Board, you can send text messages to your resources or clients. You do *not* need to have a Pro Plus or Two-Way Texting subscription to do this, just the cell phone number and provider of the person you want to message.

To text a Resource, follow these steps:

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




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




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

4. Type in your message.

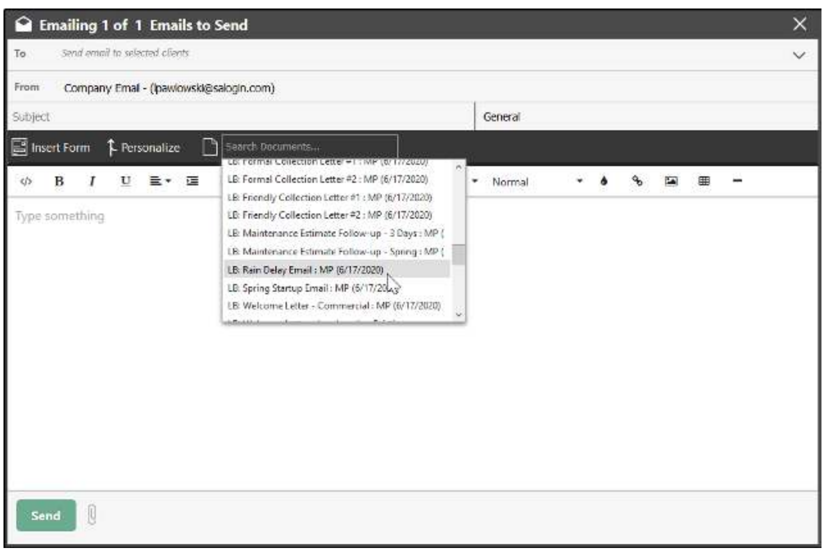
5. Click **Send Text**.

## Send Emails from the Actions List

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

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

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




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

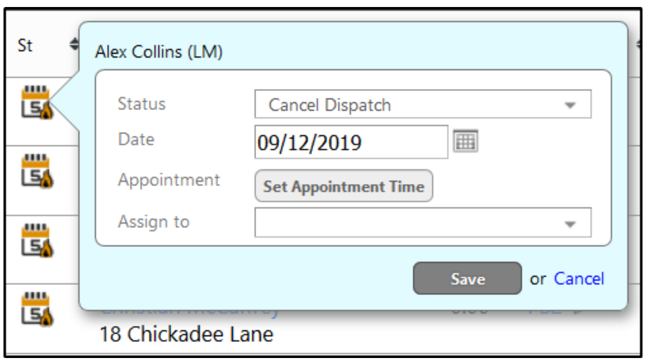
# Set Appointment Times on the Dispatch Board

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

## Using the Status icon

To add an Appointment time from the Dispatch Board, follow these steps:

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




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

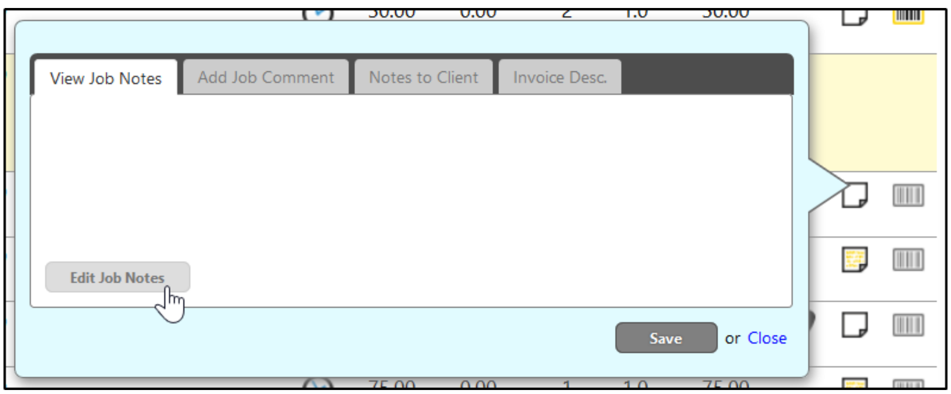
# Add a Job Note from the Dispatch Board

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

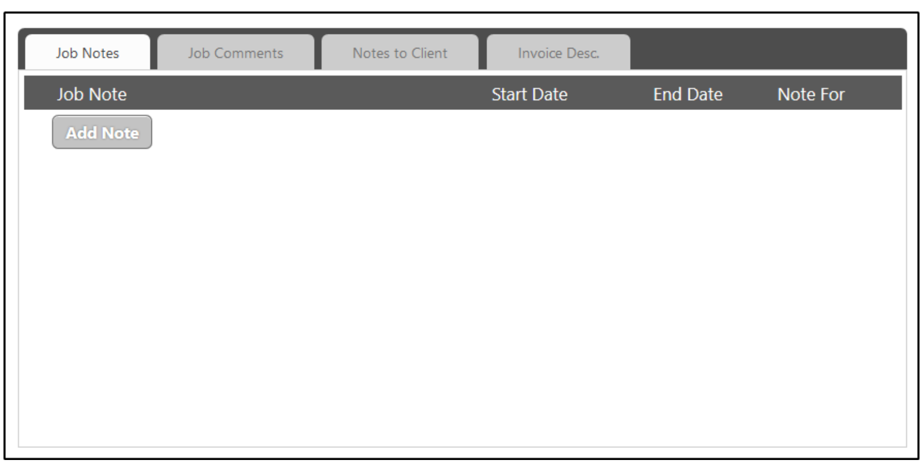
You can add a Job Note when you first create a Job or to a Master Job at any time. You can also view and add Job Notes from the Dispatch Board.

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

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




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



6. Enter your note.
7. Click **Save**.

By default, adding a Note through these steps will update the Master Job. If it is a Recurring Job, the new Note will appear on all occurrences going forward.

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

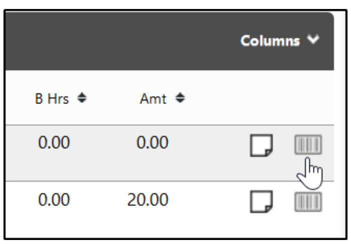
You can still add or edit these notes by clicking **Edit Job Note**.

# Add or Confirm Products on the Dispatch Board

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

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

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




3. In the Product section, adjust the Product information. You can change the Product, add a new one, or adjust any of the fields: **Qty**, **Cost Per**, and/or **Rate**.


4. If the Job is complete and you previously marked to confirm the product, click the **Confirm?** button.

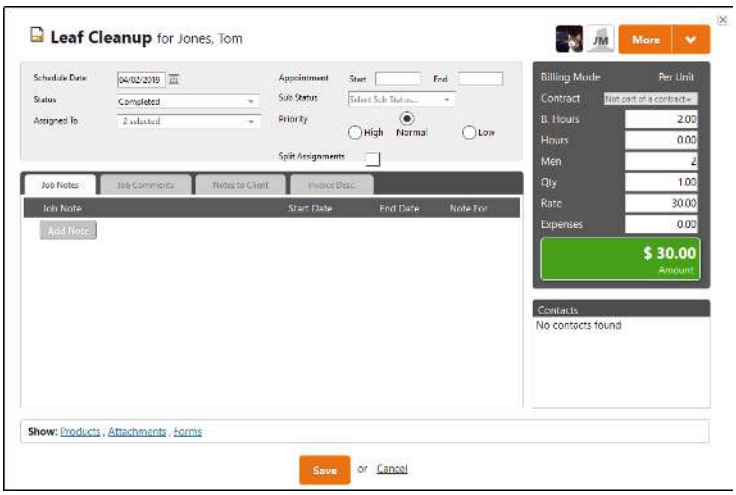
5. Click one of the items in the dropdown list:
   - Add to Invoice
   - Used, do not Invoice

- Not Used, Cancel

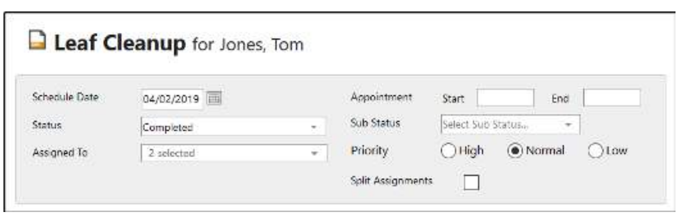

6. Click **Save**.

# Overview of the Job Details Overlay

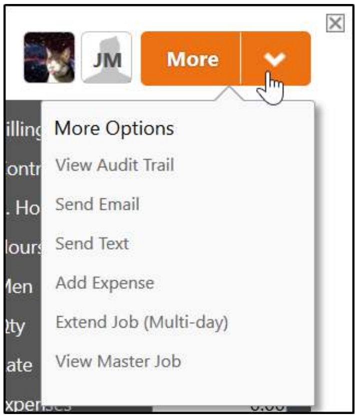
On the Dispatch Board in Service Autopilot (**Scheduling > Dispatch Board (New)**), click the Service in any row to display the Job Details Overlay screen with all the information attached to that Job.



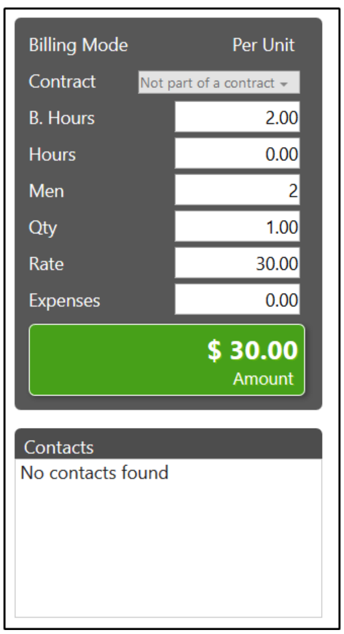

The top portion of the overlay shows your scheduling and accounting information and Notes. The status of the Job is on the left of the service name, matching the dispatch icons. The information in the light gray box shows scheduling information at a glance. If the Job is Invoiced and the Invoice is locked,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



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

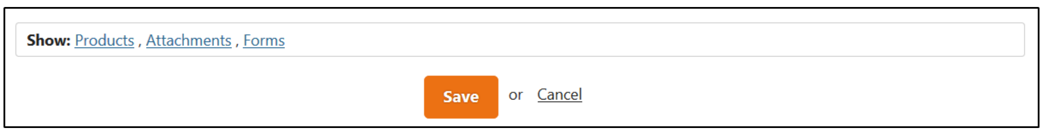



Accounting information is shown in the dark gray box. After the Invoice is generated, it's best to update any of this information on the Invoice level rather than the Job level. Contacts for the Client show beneath the Accounting information section.



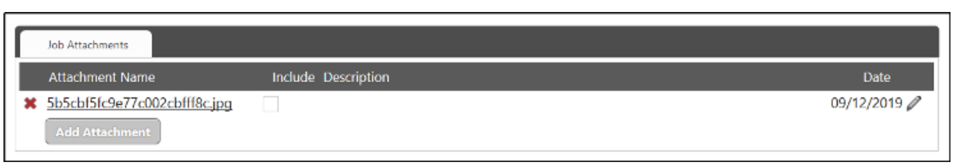
The Notes section allows you to view, edit, and add Notes under four different tabs: **Job Notes**, **Job Comments**, **Notes to Client**, and **Invoice Description**.


The "Show" links at the bottom let you view **Products**, **Attachments**, and **Forms**. Each will expand when you click the link.

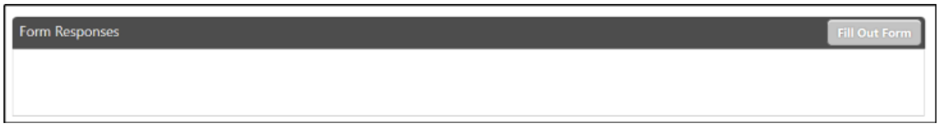



You can add or delete Products from a Job. The button to the right reveals more options regarding the Product. The **Note** icon will display the Invoice Notes for the Product.


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



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

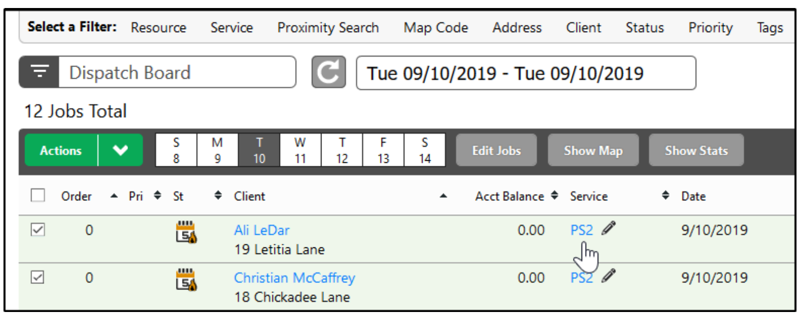



## Reassign Jobs from the Job Details Overlay

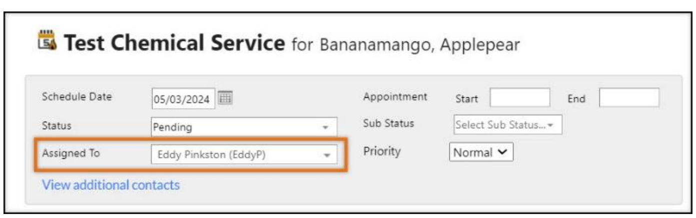
There are a few different ways you can reassign work on the Dispatch Board. This is useful if a Resource calls out sick because you can easily reassign multiple Jobs at once.

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

1. Go to **Scheduling > Dispatch Board (New)**.
2. In the Service column, click the Service on the Job you need to reassign.




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




4. Click **Save**.

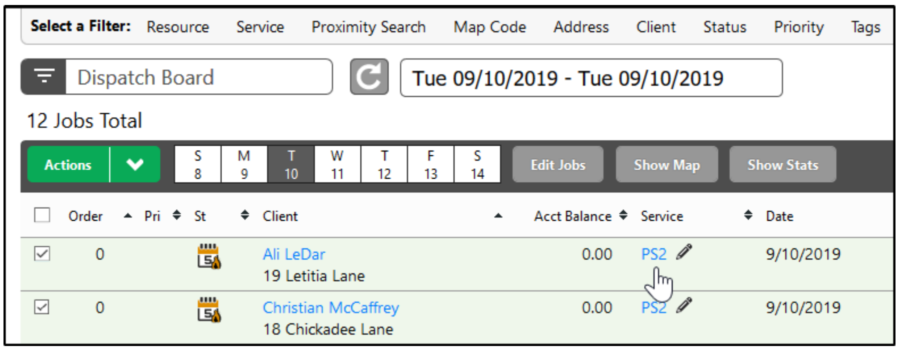
## Reschedule Jobs from the Job Details Overlay

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

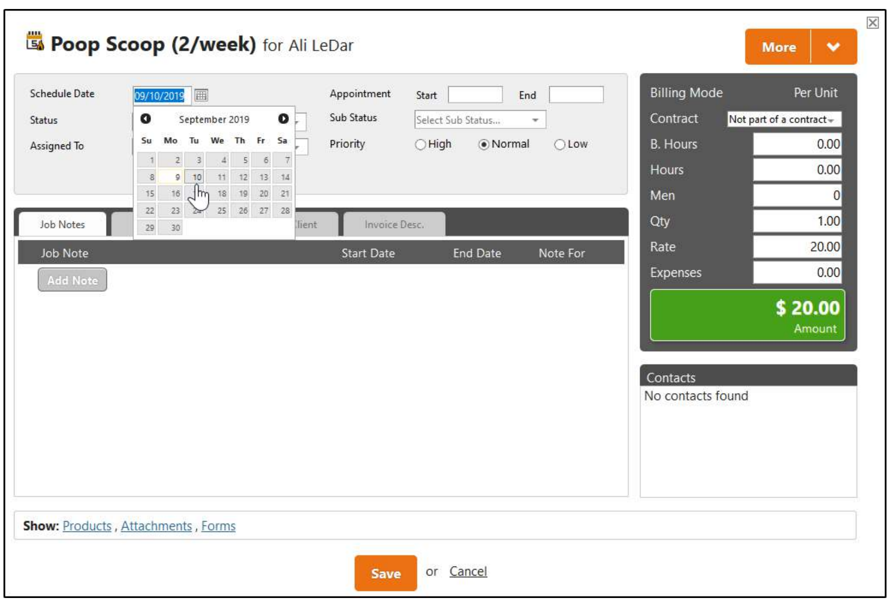
the Job Details overlay.
For a full explanation, see “Reschedule Jobs from the Dispatch Board” on page 21.

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

1. Go to **Scheduling > Dispatch Board (New)**.
2. In the Service column, click the Service on the Job you need to move.




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

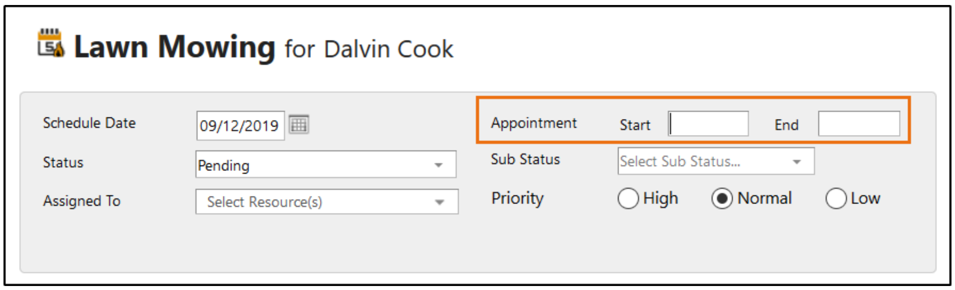



4. Change the job assignment in the “Assigned To” field by selecting a different Resource.
5. Click **Save**.

# Set Appointment Times from the Job Details Overlay

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

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



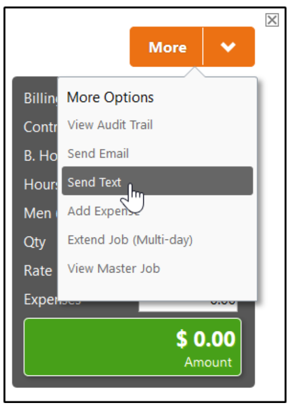

4. Click **Save**.

# Send a Text Message to a Client

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

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

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



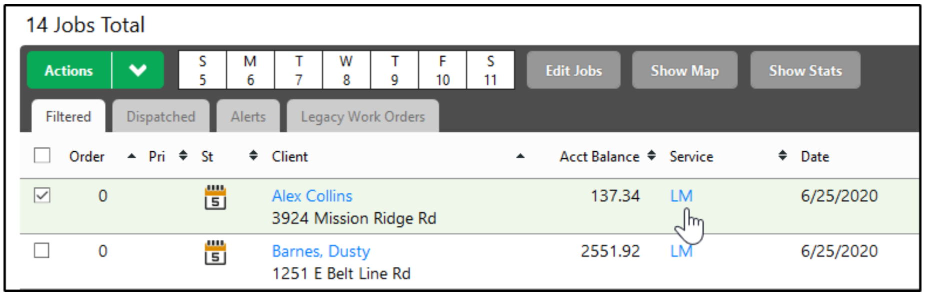

4. On the Text Message dialog, enter your message. If the Cell Phone Number and Provider are already on the Account, it will automatically fill in. If not, you need to enter this information on the dialog before sending your message.


5. Click **Send Text**.

# Send Emails from the Job Details Overlay

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

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



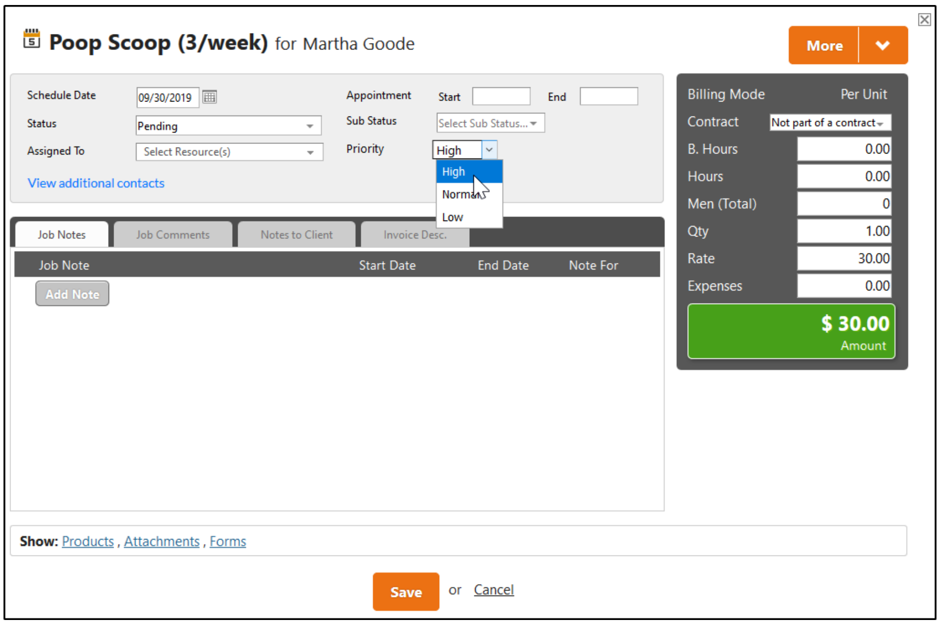

2. On the Job Details overlay, click **More** and select **Send Email**.


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

# Change a Job's Priority

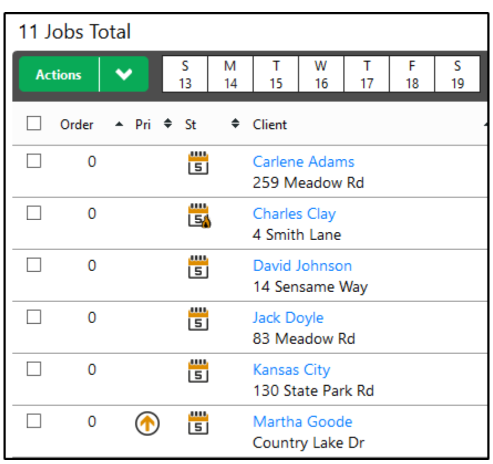
If you have jobs that need to be done sooner for whatever reason, you can change the Priority of the job on the Dispatch Board. This adds and icon to help aid you in routing and scheduling. To change the Priority from the Dispatch Board, follow these steps:

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

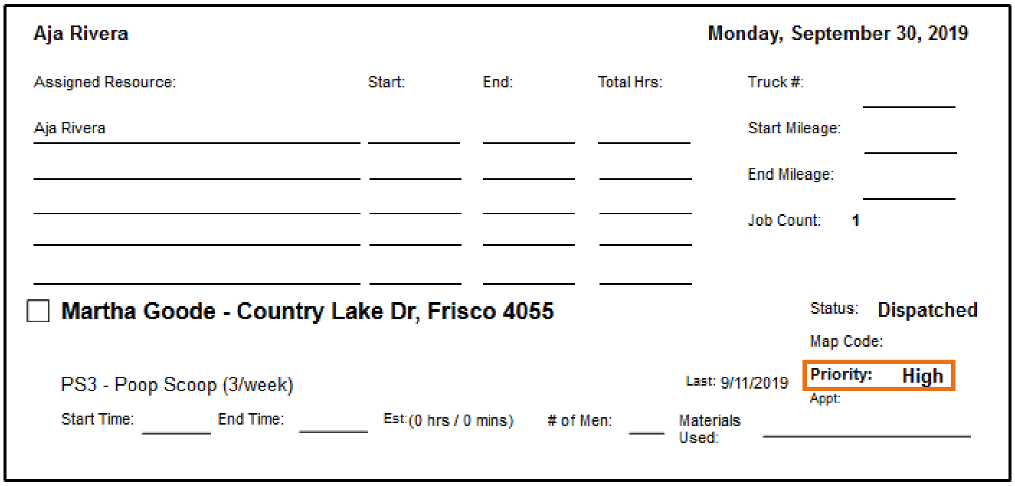



4. Click **Save**.

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



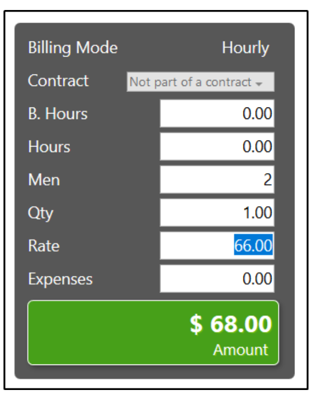
The Priority also appears on Route Sheets:




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

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

1. Go to **Scheduling > Dispatch Board (New).**
2. Click the Service for the Job you want to modify. This will open the Job Details overlay.
3. Change the number in the "Rate" field on the right of the overlay.




4. Click **Save.**

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

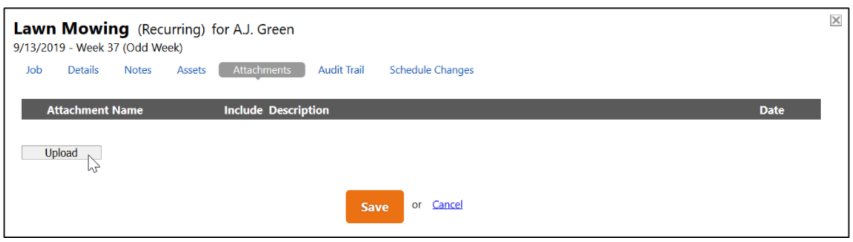
# Add Attachments to Job from Office Notes

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

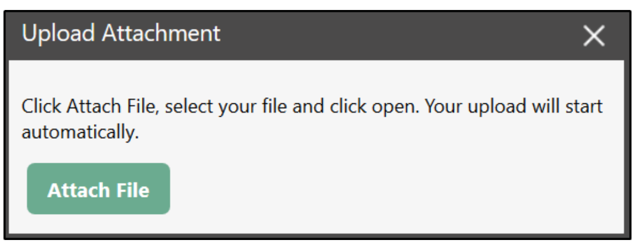
If Attachments are added to the Master Job, they can be viewed on all Job instances. You can also add Attachments to a single Job instance. If it's a Recurring Job, Mobile Users will see the Attachments only on the date added.

## Add Attachments to a Master Job

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




4. Click **Attach File** then select the image you want to add.



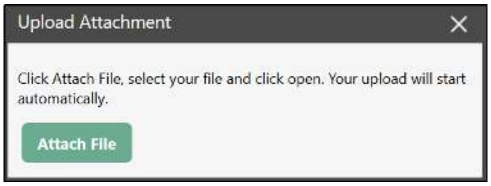

5. Once the image is selected, click the **X** to close the Attachment dialog.
6. Click **Save**.

## Add Attachments to a Job Instance

1. Go to **Scheduling > Dispatch Board (New)**.
2. Click the Service of the Job you would like to add Attachments to.
3. On the overlay, click the **Attachments** link.

4. Click **Add Attachment**.


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

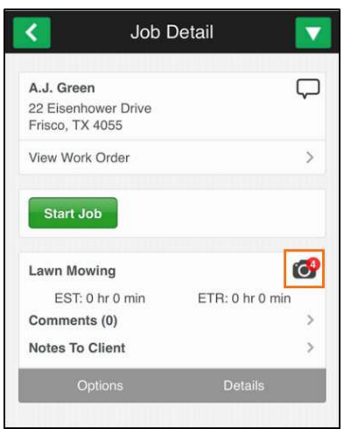


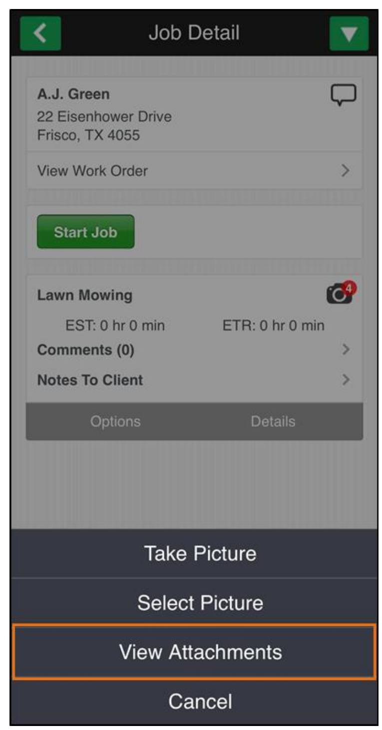

6. Click **Save**.

## View Attachments on the SA Legacy App

Mobile users can see job attachments in the SA Legacy app. To do this, follow these steps:

1. Tap a Job and then the **Camera** icon.




2. Tap **View Attachments**.

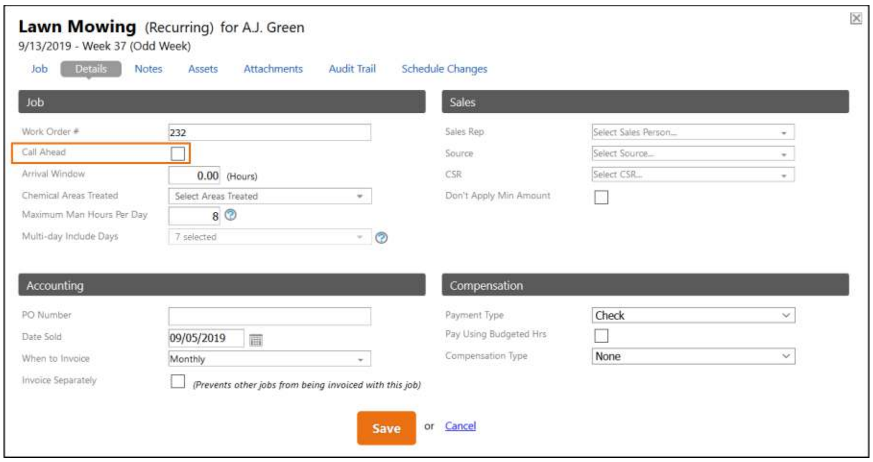
3. Tap the attachment to view it.

# Set a Call Ahead Reminder for a Master Job

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

To set Call Ahead Reminders, follow these steps:

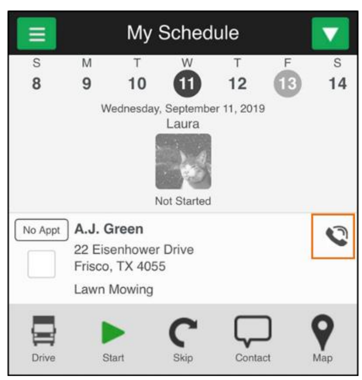
1. Navigate to a Master Job record (from the Dispatch Board, go to the Job Details overlay and click the **More** dropdown list).
2. On the Master Job record, click the **Details** tab.
3. Check the box next to “Call Ahead.”




4. Click **Save**.

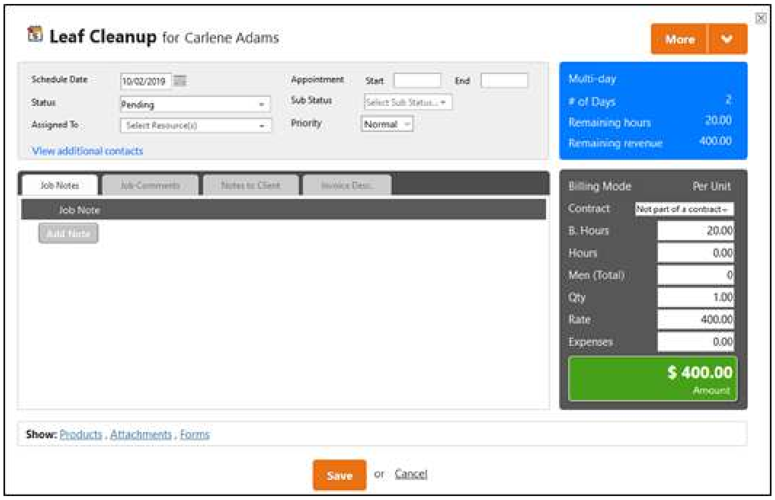
A phone icon now appears next to the job on the Dispatch Board.


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



## Job Details Overlay for Multi-Day Jobs

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



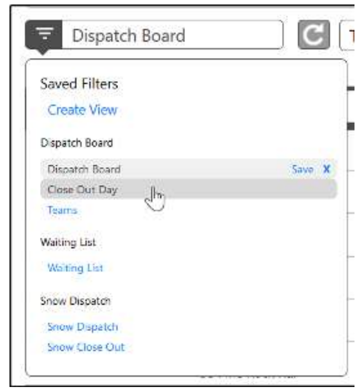

The “# of Days” field is a fixed number, so you can see at a glance how many days the job lasts. “Remaining hours” and “Remaining revenue” update as time is logged on the job.

# Close Out Day: Update Job Times

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

# Access the Close Out Day View

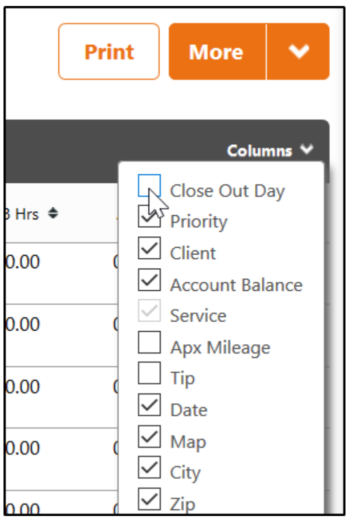
You can access the **Close Out Day** view in one of two ways from the Dispatch Board (**Scheduling > Dispatch Board (New)**).




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

OR

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




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

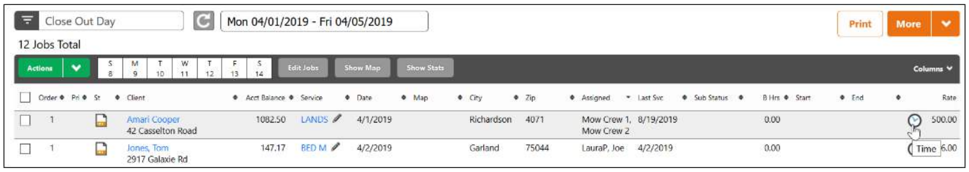
- Start Time
- End Time
- Rate
- Hours
- Men
- Quantity

## Enter the Time Worked

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

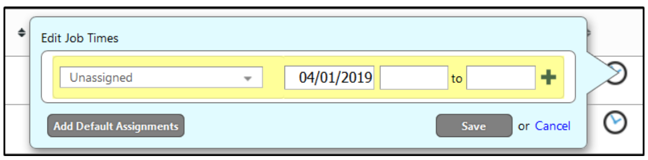
To enter different job times for each resource, follow these steps:

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




2. In the dropdown list, select the resources who worked.

3. Click **Add Default Assignments** if you want the Team assignments to appear automatically.

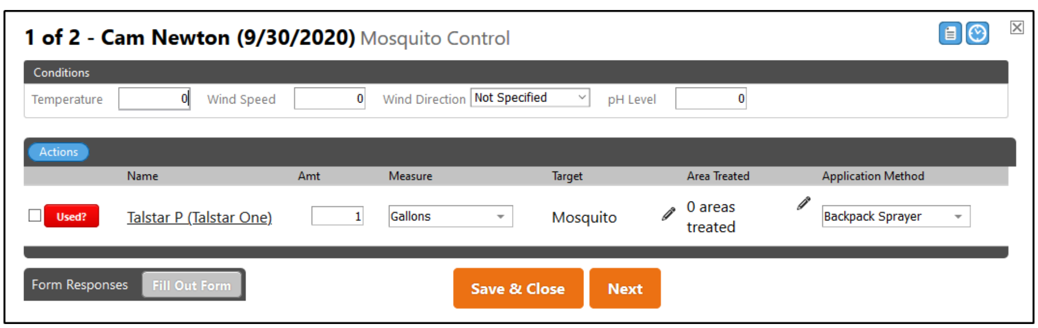



4. Enter the date and time for each resource.

5. Click **Save**.

# Close Out Day for Chemical Tracking

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




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

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

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

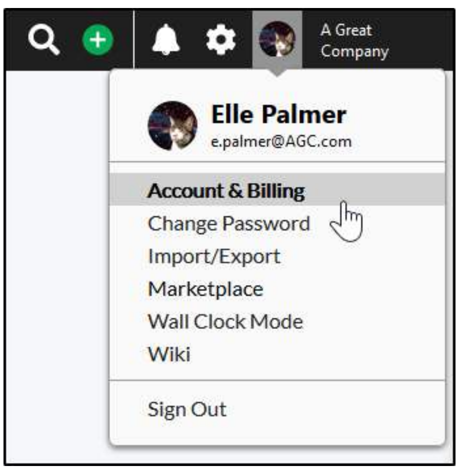
If you send Client Instruction Emails from the Legacy app or from the full site, enable the "Instruction Emails Sent" column on your **Close Out Day** view on the Dispatch Board. To do this, hover over the column selection at the top right of the table and select the column checkbox. The column will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

# Smart Maps Overview

Service Autopilot offers basic map routing to all Members. The Smart Maps subscription (with an additional monthly fee) does much more than mapping. Smart Maps allows you to measure properties and optimize your routes from your office. Use Smart Maps as a Marketing tool to easily identify existing clients for upsells and import new leads into SA expanding your sales strategy options.

Smart Maps is an add-on subscription for Pro and Pro Plus accounts. To add this subscription, follow these steps.

1. Hover over your **avatar** icon and select **Account & Billing** from the dropdown list:




2. Scroll down to the "Additional Services" section then click **Purchase**.

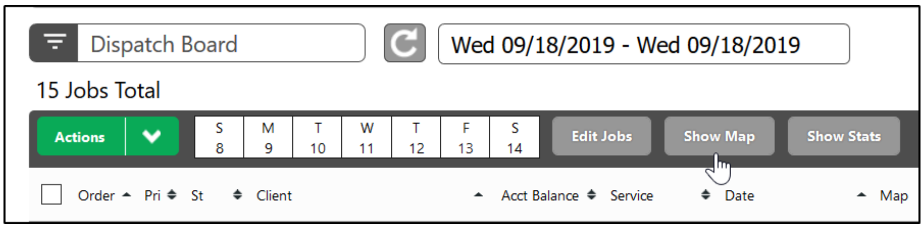
The Smart Maps feature lets you measure a property using Google® satellite images. You can quickly measure any outdoor surface of a property, including square footage of turf, beds, and parking lots, as well as any linear measurement. All measurements are stored for future use. You also have the option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

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

# View the Map on the Dispatch Board

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

1. Go to **Scheduling > Dispatch Board (New)**.
2. Select the Jobs you want to see on the Map by clicking the checkboxes next to them. To see all Jobs, click the top checkbox.
3. Click **Show Map**. This opens the Map showing all selected Jobs as pins.

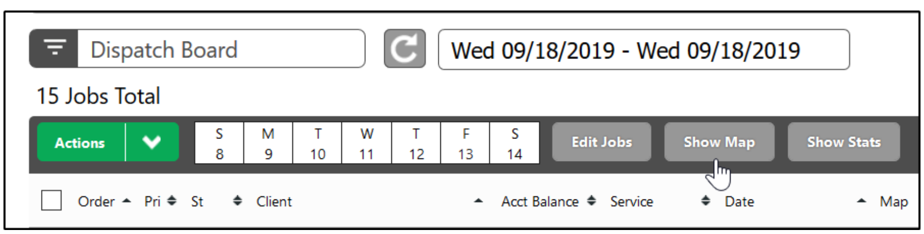



4. To discontinue viewing the Map, click **Hide Map** in the header where the **Show Map** button was previously.

# Dispatch Board Map Console - Stop Tab

The Smart Maps map console is available from several locations in SA: Dispatch Board, client accounts, client and lead lists, and the Dispatch Calendar. The functions available are different depending on where you bring up the map.

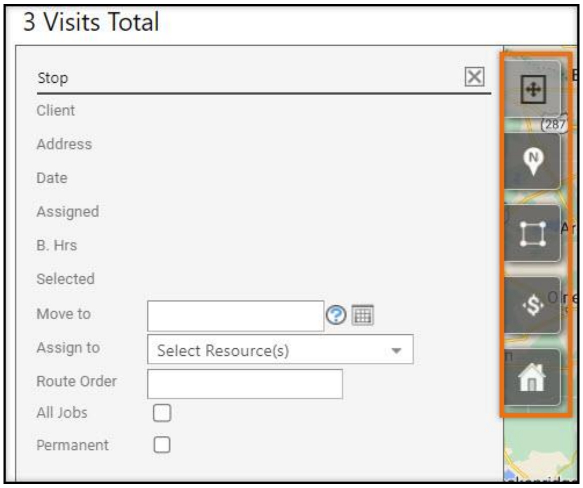
1. From the Dispatch Board, select one or more jobs, then click **Show Map** from the top of the table:




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

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

The map console has multiple tabs on this screen:




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

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

## Stop Tab

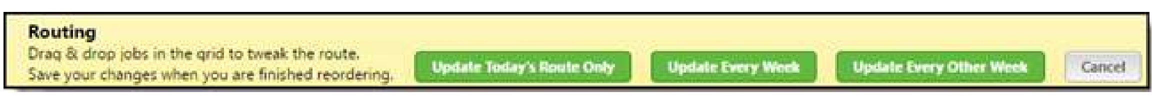
Stop displays the selected map marker's job information and lets you update or dispatch services. There are five fields you can update for the selected services:

- **Move to** updates the scheduled date for the service(s) if set from the Dispatch Board. This is a required field on the Waiting List.
- The **Assign to** dropdown list lets you select Resources, such as teams, employees, and vendors, to add to the selected service(s).
- **Route Order** is an optional field that changes the route order for the selected service(s).
- The "All Jobs" checkbox includes all the services that are checked in the table for the selected client.
- The "Permanent" checkbox makes your changes apply to future instances of the "Assign To" option. Other changes will apply to this occurrence only. For instance, if you change the schedule for a recurring job, the change applies only to the current job.

The button on the bottom of the panel displays **Update** on the Dispatch Board and Close-Out Day screen. The changes selected will update the services with only the values you changed for **Move to**, **Assign to**, and **Route Order**. On the Waiting List, the button displays **Dispatch**. The system will make

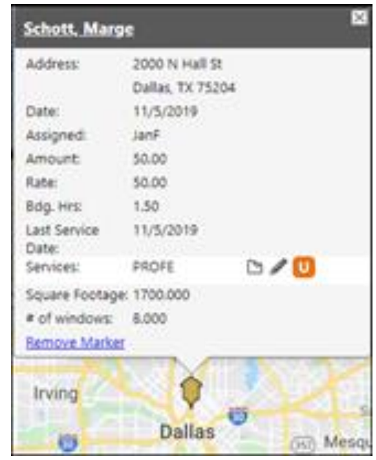
the changes to the selected services and dispatch the jobs when you update it.
The bottom of the **Stop** panel has four buttons for making changes to the map markers:


- **Show Resource Code** displays the resource code on all the map markers if services are assigned to a resource with a Resource Code.
- **Show Route Order** displays the route order of all the services.
- **Set Route Order** temporarily sets all service route orders to zero. You can then click to update the route order:
    - *Left-click* a map marker to decrease the route order.
    - *Right-click* a map marker to increase the route order.
- **Show Priority/Conflicts** changes the icon of any job with priority or conflicts based on days. The job with the red “up” arrow is a priority job.
- To undo changes, click the **Cancel** button below the map.
- To save changes, click one of three buttons that appear when you set a route order.:




**Update Every Week** and **Update Every Other Week** are for Recurring and Custom Recurring services; they do *not* work with Waiting List, One-Time, and Package services.

## Stop Map Markers




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

The color of the marker indicates the assigned resource. If you are viewing more than one day on the Dispatch Board, the marker color will be by day and a legend will display on the top right of the map.

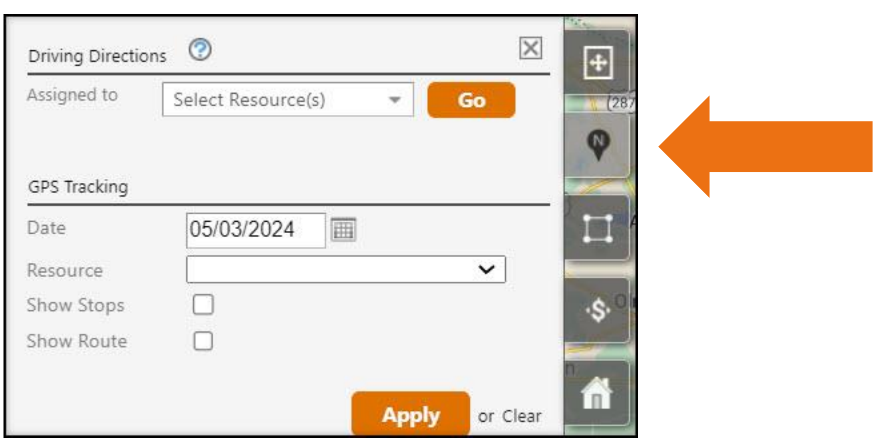
The popup shows client information and the services displayed in the table:

- The **client name** is a hyperlink to the client account.
- The **Services** list has two icons and a button on the right.
  - The **note** icon opens the job dialog and displays the notes for the Service.
  - The **pencil** icon will display the job dialog for the Service.
  - The **U button** stands for Update and displays only when on the Dispatch Board or Close-Out Day screen. This button displays as "D" when on the Waiting List screen and stands for Dispatch. The **Update/Dispatch** button performs the same as using the **Stop update/dispatch** button in the left panel.
    The **Update Services** button updates all services with the values set in the Stop panel (on Dispatch). It appears as Dispatched Services on the Waiting List.
- The **Remove Marker** link on the bottom left removes the marker from the map but will not remove the service(s) from the grid.

Additional fields can be displayed on the Map Marker dialog for custom fields if they are displayed on the grid. They can be added to the grid by going to the Columns dropdown on the top right of the Services grid.

# Dispatch Board Map Console - Navigation Tab

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



## Driving Directions

You can get driving directions for any services from the table. Select a resource and click **Go**. Directions are generated for the route order if every service for the selected resource is selected in the table. If the services have no route order, SA will try to optimize the route before it shows the driving directions. You can generate directions for a maximum of 24 unique devices per request.

Click any of these options below the directions:

- **Toggle Jobs** hides the map markers from the console temporarily to help with viewing the direction markers.
- **Print Directions** opens the Print Preview dialog, where you can print the directions.
- **Clear** hides the driving directions, direction markers, and route drawn on the map.

## GPS Tracking

Use GPS Tracking to display GPS points on the map for a selected resource on a specific date. If you have either the SA Team app or Mobile App, you must enable GPS Tracking for the resource who will be using the app.

- The **Date** input field is used to select the date you want to view GPS data for.
- The **Resource** dropdown list contains employees and vendors, but not teams, as teams cannot log in as a group. The Resource who logs the team in, however, can be tracked.
- The **Show Stops** checkbox displays the services on the map for the resource.
- The **Show Route** checkbox displays the GPS points on the map after you click **Apply**.

## Enable GPS Tracking

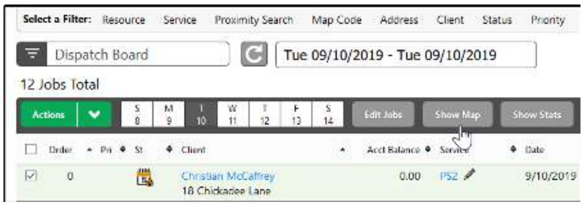
1. Go to **Team > Employees** or **Team > Vendors**.
2. In the Employee or Vendor list, click the name of the Resource you would like to modify.
3. Click **Edit** next to the Resource's name.
4. Click the **Mobile Settings** tab.
5. At the bottom, select an option for GPS Tracking. Choose anything other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

# Dispatch Board Map Console - Driving Directions

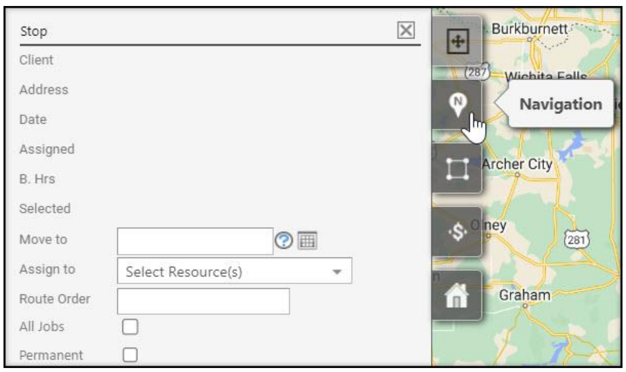
If you are not yet using the Service Autopilot Mobile App or need to use paper Route Sheets, you can also generate and print driving directions from the Dispatch Board. Please note, the **Show Map** button appears *only* if you have the Smart Maps subscription.

To do this, follow these steps:

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

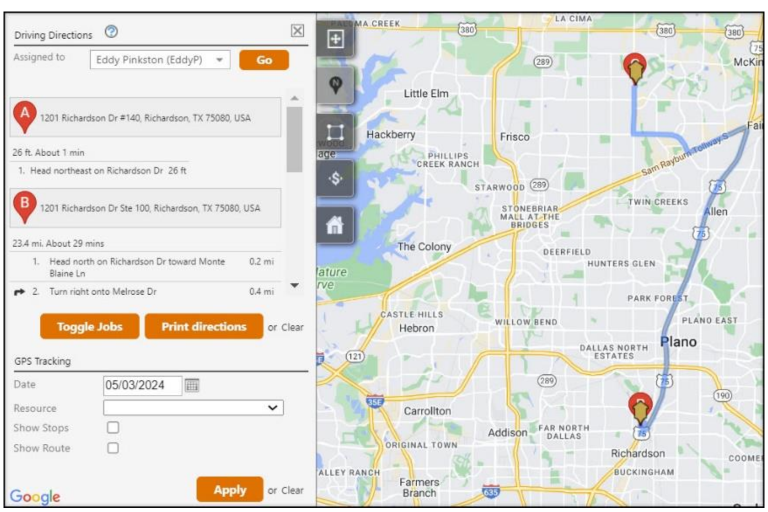



4. Click the **Navigation** tab on the map menu.




5. Select the Resource the jobs are assigned to.
6. Click **Go**.

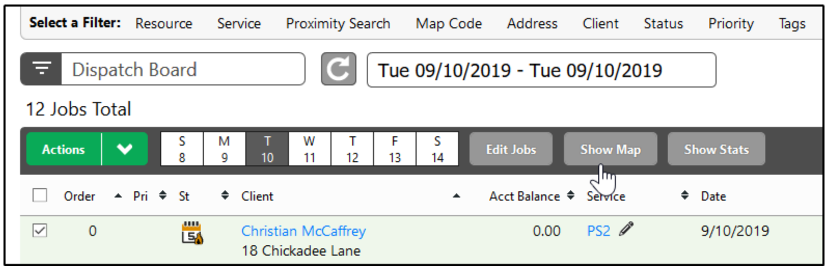
The directions will load, and you'll have the option to **Toggle Jobs** (change the direction) or **Print directions**.



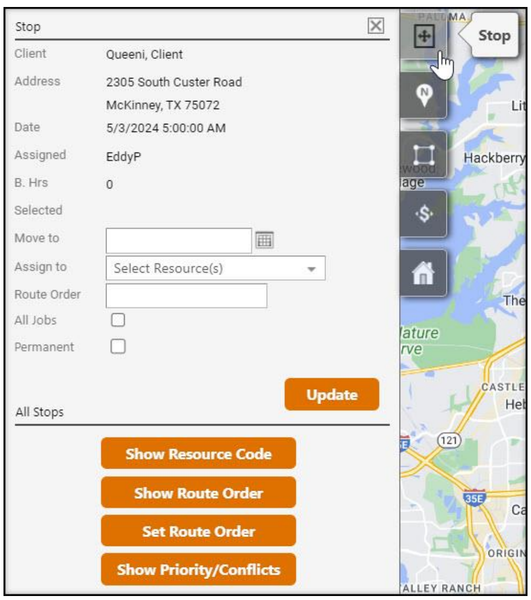
# Reassign or Reschedule Jobs from the Dispatch Board Map

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

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




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



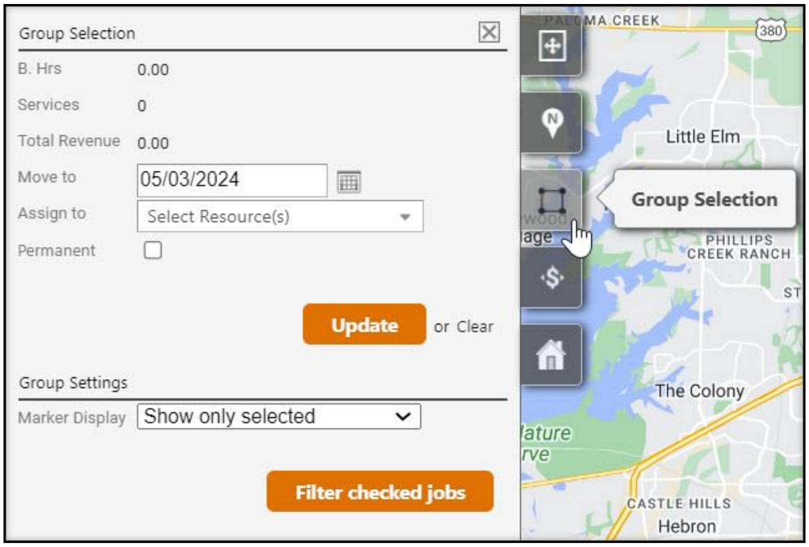

3. Make sure the correct job is selected. You can either select the checkbox next to the job or select the corresponding pin on the map.
4. To change the assignment, use the “Assign to” dropdown list and select a Resource.
5. Click **Update** to save your reassignment.

*You can reschedule the Job* from the same panel:

1. Simply type a date into the “Move to” field or select a date from the calendar icon.
2. Click **Update** to save your changes.

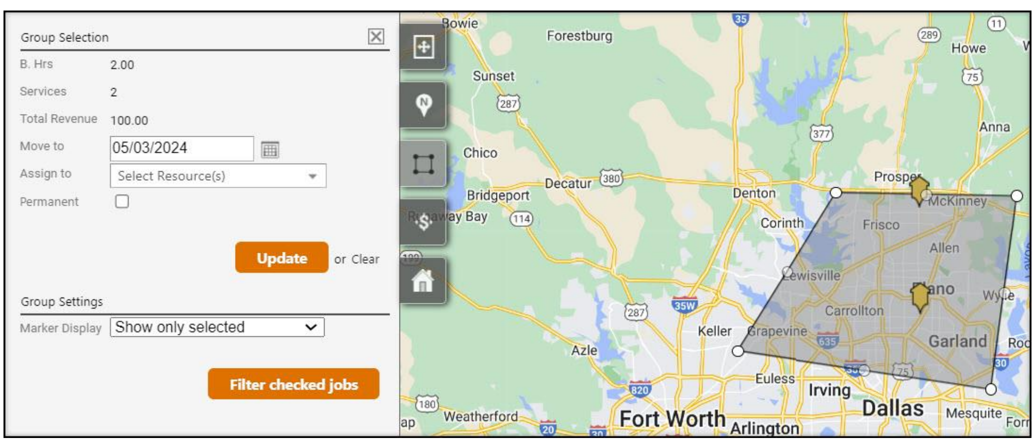
# Dispatch Board Map Console - Group Selection Tab

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




To use this feature, follow these steps:

1. Use your mouse to right-click and form the points of the shape on the map.
2. Click the first point to close the shape.




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

- The **Update** button appears on the Dispatch Board and Close Out Day mode. The **Dispatch** button is available *only* on the Waiting List.

- The “Group Settings” section contains a dropdown list for Marker Display, which contains two options:
    - The **Show only selected** option removes any markers/deselects Services that aren't within the drawn area and display markers/selects Services within the area.
    - The **Show all markers** option does not remove any markers from the Map; it will select *only* the services on the grid that are within the area.
- The **Filter Checked Jobs** button below the Marker Display list removes all jobs not falling within the drawn area from the map and the grid.

### Undo changes

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

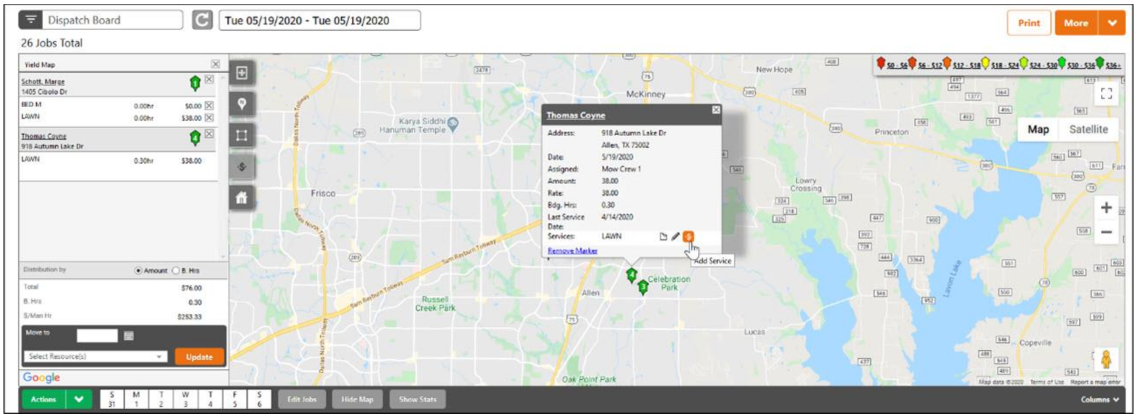
## Dispatch Board Map Console - Yield Map

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

The map marker colors are set from the bottom of the left panel and vary based on the dollar amount for the job:


Or the budgeted hours:


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




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

In the map below, **Stop 8** on the left is the job with the highest price tag, and Stops 4 and 7, in orange, appear to be more profitable than the remaining red jobs.

View those jobs by budgeted hours, however, and you see that the job with the highest budgeted hours is Stop 7, and all other jobs are in the lowest budgeted hours bracket. So, Stop 8 is your most profitable job, paying the most and for a short budgeted time.