ONBOARDING

USER GUIDE

Contents

Getting Started

Welcome to Service Autopilot, a software that sets your business growth on autopilot. This Onboarding user guide is an introduction to the software and its many important features. It's intended to assist in the set up and use of your Service Autopilot account.

Note: Content is listed in the recommended order of operation.

Phase 1 - Basic Training Points

Configuration

Complete the QuickBooks Sync	This optional sync allows for updates from and to Service Autopilot. Assistance is available or you can complete the initial sync by following these guidelines.
Complete the 7-Step Setup Wizard	Use the wizard to get your SA account up and running. If you already completed the wizard, then these settings must be managed elsewhere. **Note**: Do *not* go past the 7-Step Setup Wizard if you still need to sync with QuickBooks.
Set Up Sales Tax Records	If you charge sales tax, create Sales Tax Records for Accounting purposes (estimates, invoices, and more). **Warning**: If you sync with QuickBooks, then you *must* do this from within QuickBooks.
Download the Onboarding Bundle	Don't have the Onboarding bundle? Then download this Marketplace item, which includes basic Documents, Forms, and more. This is typically done for you during your initial setup and onboarding configuration call.
Create Custom Fields	Custom Fields are used on Accounts to keep track of information that isn't on the Client overlay. They can be used for property information like a gate code or if the Client has dogs. They're also commonly used to create custom rates for Services on Estimates or Jobs.
Create Services	Services are what you offer to Clients as work performed at their property. The services you create will be the foundation of any job you schedule in SA.
Create Products	Products are materials you use on a job regardless of whether the Client pays for them directly. These might be things you keep on hand (inventory) or things you get as needed depending on the job (non-inventory).

Create Chemical Mixes	A Mix lets you specify the ratio of two or more liquid products to water, which is then added to a container such as a large tank or backpack sprayer.
Create Employees and make them users	Add your active employees and assign them a user type, such as a Full User, Mobile Only User, or Not a Service Autopilot User. You *must* assign employees a user type if they'll be using SA on the desktop or mobile app.
Set up Two Way Texting Number and Rights	The Two-way Texting feature is available to all Members with Pro, Pro Plus, and Elite subscriptions. If you have this feature, know that registration can take weeks to process, so start now if applicable.
Create Clients or import them	Add Clients to your SA account.
Import Data	You can Import different items into your SA account, which saves you time and energy. This is especially useful if you're making certain changes, or you're switching software and have information that needs to be moved over.
Create Teams	Create Teams for your Resources. This is useful if you have multiple Resources working together, such as in Truck 1 or Truck 2.
Create Master Schedules	Master Schedules allow you to create a scheduling template that can be used on **Recurring Jobs** for your Clients. You can assign multiple Jobs to a Master Schedule.
Create Master Packages	Master Packages are a collection of Services, typically offered to a client as a bundle, that are each scheduled based on a date range rather than a specific date. Master Packages are commonly used for things like fertilization jobs or pest control.
Understand the different Job Types	Learn what job type to use for certain services.

Recurring Jobs (weekly and biweekly jobs)

A Recurring Job is a Job that occurs regularly based on a Master Schedule that can be applied to any Service or Account

- Create and schedule Recurring Jobs
- Dispatch Jobs
- Review Route Sheet Formats
- Start Jobs > Stop Jobs > Complete Jobs on:
    - The SA Team app or the Service Autopilot Legacy app
    - The Dispatch Board
- Build Routes for Recurring Jobs

Invoicing and Payments

After you complete a job in SA, it'll be ready to Invoice. When and how often invoices are completed depends on the settings you created for that specific Account. When you close out the day on the Dispatch Board, you'll see the amount that'll be on the invoice. You have the option to send Invoices in bulk or individually. You can find the Invoice List by going to **Accounting > Invoices**.

You can also take payment for an individual Invoice or multiple Invoices. Payments can be in the form of cash, check, or credit card *if* you have set up credit card processing. You can find the Payments List by going to **Accounting > Payments**.

- **Generate Invoices**
- Review **Contracts** and **Installment Plans**
- Review **Invoice PDF and Formatting**
- Create an **Invoice Grid**
- Learn the **Document Editor**
- Create **Custom Invoice Email Documents**
- **Email Invoices**
- **Collect Payments on Invoices**

The Client Portal

The Client Portal is an additional subscription that can be added to your Pro and Pro Plus Service Autopilot account. It gives your clients the ability to manage their accounts and payments online. With the Client Portal, your clients can see scheduled visits, pay open invoices, make ACH payments, and open a ticket.

- Set up the **Client Portal**
- Send **email invitations**

Forms

Service Autopilot Forms can help you quickly collect data from clients and employees for almost anything your company needs. You can associate a Form with jobs, accounts, services, or with actions or events on the Team app.

The SA Forms Builder offers simple templates that you can customize, or you can create your own Form from scratch. You can even add videos from YouTube or Wistia to a Form. When the Form is ready, you can email it, embed it into your website, or send it by Automation. You can find Forms by going to **Marketing > Forms**.

- Create a **New SA (V3) Lead Intake Form**
  Note: You *must* use Classic (V2) Forms on the Legacy App and New SA (V3) Forms on the Team App.
- Manage the **Credit Card Capture Form**
  Note: This is *only* needed if you do not have the Client Portal.
- Send **Bulk Emails**
- Review the **Estimate workflow**

Automations - (Pro Plus and Elite *only*)

Automations from Service Autopilot can save you time and money by improving efficiency. Even tasks that involve multiple resources can be automated, and the automation can be reused for similar events.

An Automation might be long and complex, like the process of converting a lead to a client with a scheduled service; or it might be simple, like an appointment reminder. Either way, Automations can help your business to run smoothly and keep things from falling through the cracks. In the end, it's all about saving time and making money. You can get to Automations by going to **Marketing > Automations**.

- Complete the **Automations Interactive Training Course**
- Request and schedule an **Automations Training session**

Phase 2 - Advanced Training Points

Estimates

Estimates are an important part of marketing your business, and it's all about the presentation. Service Autopilot offers the tools you need so you can build an estimate, send it to clients and leads, receive notifications about its status, and schedule jobs. You can get to Estimates by going to **CRM > Estimates**.

- Review **Estimates**
- **Review** and **build** Estimate Documents
- Manage your **Estimate Descriptions for Services**
- **Create and send Estimates**
- **Schedule Jobs from Estimates**
- Create a **Rate Matrix** for your Services
- Revisit **Custom Fields**
- Review **Calculations for Rate Matrices**

Chemical Tracking

The Chemical Tracking feature is available with Service Autopilot Pro, Pro Plus, and Elite memberships. SA's Chemical Tracking reports will also help you before and after Chemical jobs. This feature ensures your compliance with state regulations, and automatically calculates the quantities of chemicals to apply at each property. If the Chemical Tracking report doesn't have all the data you need for your state requirements, then you can create a form to enhance the report.

- Review **Chemical Tracking**
    - Add **Chemical Applicator licenses**
        - Set up **Chemical Products**
        - Review **Chemical Tracking on the app**

Automations

Automations allow Service Autopilot to automatically perform money-making daily activities. Set any automated workflow once, and it will run by itself until you stop it.
You can complete mundane, time-consuming tasks in the background, such as client communication, without hiring a team to do it. This can include sending past due reminders, following up on estimates, collecting on invoices, and more. You can get to Automations by going to **Marketing > Automations**.

- Request an Automations Training and Setup session
- Create a Test Automation
  - Review Automation Triggers
  - Review Wait Periods and "email between" times
  - Test a simple Automation
  - Review the Automation Sequence Pipeline
  - Learn how to remove Clients from an Automation Sequence Pipeline

Accelerate

The Accelerate Team can build Documents, Forms, and Automations. The items available for you are dependent on your Tier Subscription. Talk to your Account Manager for more information on signing up for Accelerate.

Are you enrolled with Accelerate but have questions? Schedule a meeting to learn more.