



Service **Autopilot**[™]

TEAM APP

USER GUIDE

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About the Team App

Service Autopilot's **Team app** is a streamlined version of the Legacy Mobile app. Team is designed to help your field employees with a simple interface for logging in and getting job assignments. The Team app includes these features:

- Easy photo function, with the option to prompt users for before-and-after pictures
- Instantly updated Job Comments
- Colors indicate the status of every job
- Notifications appear on your phone any time, including when the Team app is not running
- Works with the map apps on your phone
- Offers Spanish language
- Shows all "Customer" associated Custom Fields if they are marked as "Print on Work Order"
- Shows all "Property" associated Custom Fields

This guide takes you through the basics of setting up and using the Team app.

"The team with the best players wins."

--Jack Welch

Settings and User Rights for the Team App

You have the option to enable these settings for employees who will use the features below.

Team Leader Permissions

Go to **Settings > Company > User Roles & Rights**, select the role for your team leader, then click the **Mobile** tab. Check the following rights:

- **Enable Push Notifications** - allows updates to appear on the Team Leader's phone
- **Edit Timesheets** - allows the Team Leader to allocate time spent on jobs
- **Edit Crew**—add or remove crew members, and clock them in for the day
- **Require “Before” Pictures and Require “After” Pictures** - Team app users will be prompted to add before-and-after photos like the Legacy Mobile app.

Touch ID or Fingerprint ID Setup

Users have the option to log in with a touch ID/fingerprint instead of a username and password.

On each user's device, go to:



Settings > Touch ID (for Apple devices)

OR

Settings > Fingerprint (for other operating systems)

Spanish Language

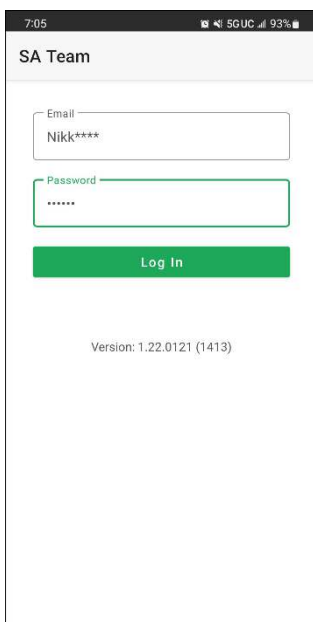
If you set the device's language to Spanish, the Team app will display text in Spanish.

Daily Operations

Follow these steps to use the Team app.

Log In to the Team app

1. Log in with your SA email and password.



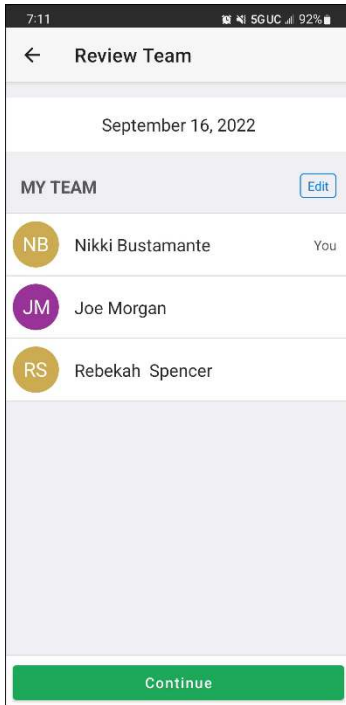
Your assigned jobs for the day appear.

2. The **Load List** shows the products you may need to load for today's visits.
3. Tap **Start Day** when you are ready to go to the first job site.



4. If you are a crew leader, clock in your team. You can tap **Edit** to change team members as needed.

Tap **Continue** to view your Visits.



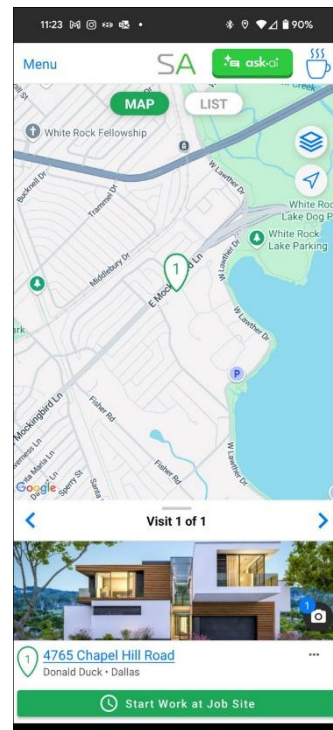
Tap the stack of maps to see the satellite view.



Tap the arrow to zoom to your current location.

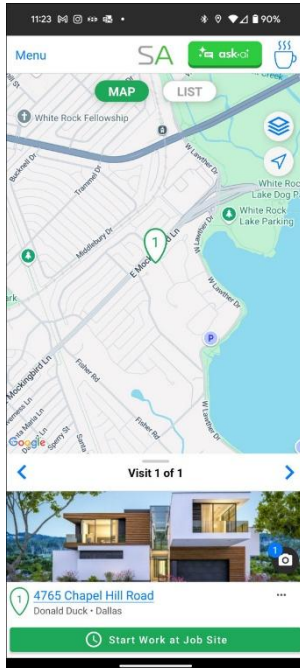


The blue dot shows your current location. Tap the blue dot to re-center the map.

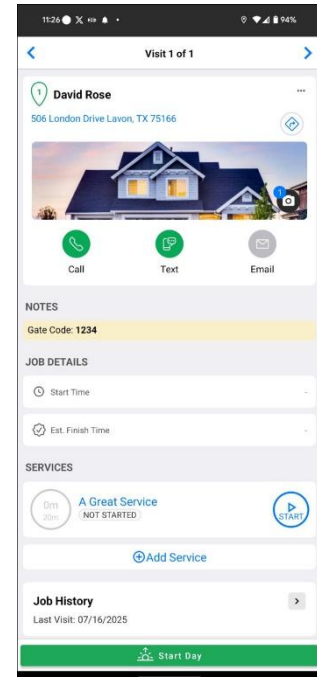


See Details About Today's Visits

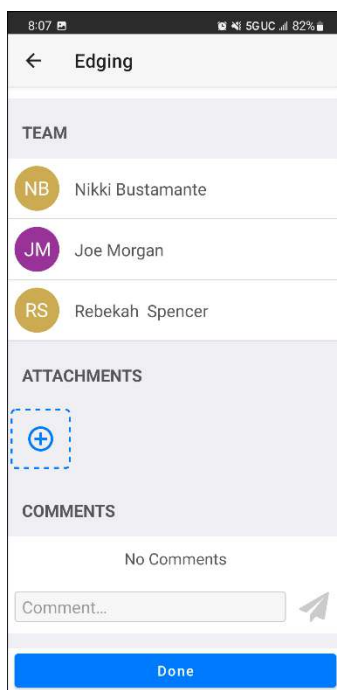
After you clock in for the day, the day's visits will be listed below the map.



Drag the title area up to see more details about a visit, such as products needed.



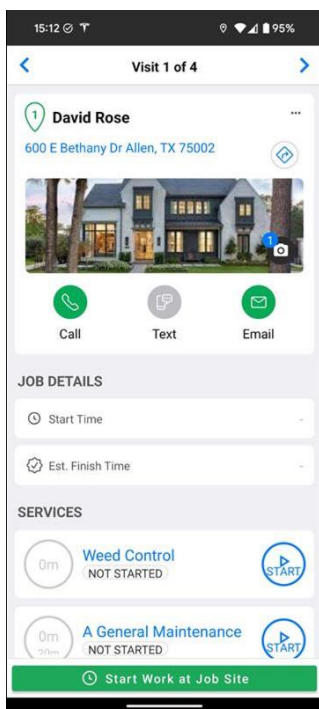
To add comments to a Visit, swipe up and select a service then scroll down to the **Comment** field.



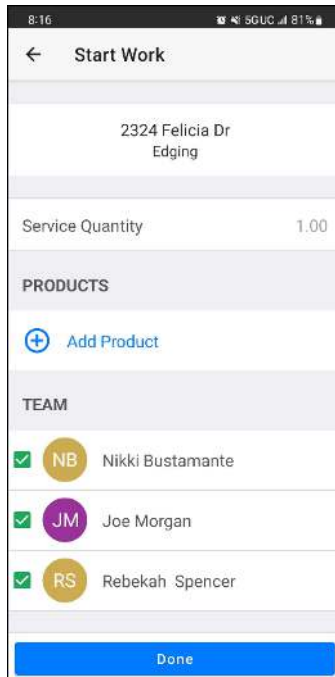
Get Directions

The Team app supports Apple Maps, Google Maps, and Waze.

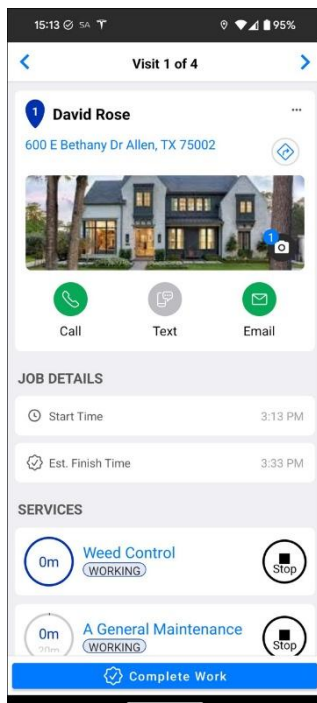
1. Tap the address, to reveal the navigational apps on your phone.
2. Select the navigational app you want to use.
3. When you reach the job site, tap **Start Work at Job Site**.



4. The Start Work window will appear. You can adjust the Service Quantity, Add Products, Attachments, and Comments as needed.
If you are a Team Lead, select the resources on your team that'll be working this Visit then tap **Done** to continue.



5. The bar and job icon turn blue. Tap **Complete Work** when the job is finished.



Get Turn-By-Turn Directions (iOS Only)

For Apple devices, the Team app can also show turn-by-turn directions when you tap an address at the job site.

To set it up, go to **Settings > Mapping App** then select your desired app.

Job Timer

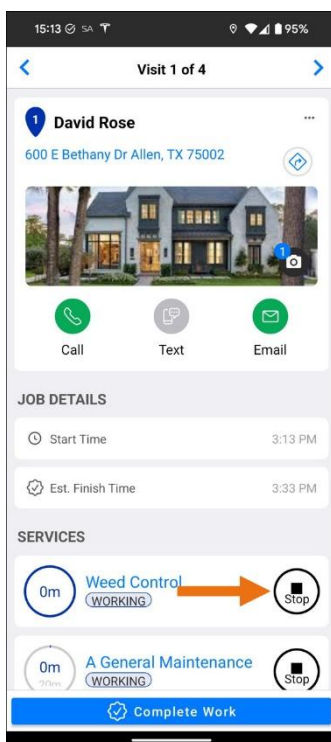
A countdown timer starts based on how much time is budgeted for the Visit, and how many team members are working. A progress bar shows how much time remains budgeted for the visit.

If no hours are budgeted, the timer tracks only the elapsed time.

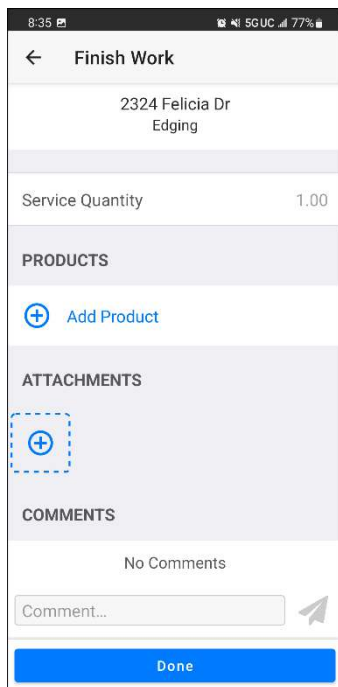
Pause Your Work

For accurate time tracking, you may need to pause a Visit once it's started. You remain on the clock, but your time record for the Visit is closed. This lets you stop the work temporarily to do other tasks, such as leave a job site to pick up supplies.

1. Tap **Stop** to access the Finish Work window.



2. The Finish Work window appears. Adjust the Service Quantity, Add Products, Attachments, and Comments as needed. Click **Done** to continue.



8:35 5G UC 77%

← Finish Work

2324 Felicia Dr
Edging

Service Quantity 1.00

PRODUCTS

+ Add Product

ATTACHMENTS

+ (dashed box)

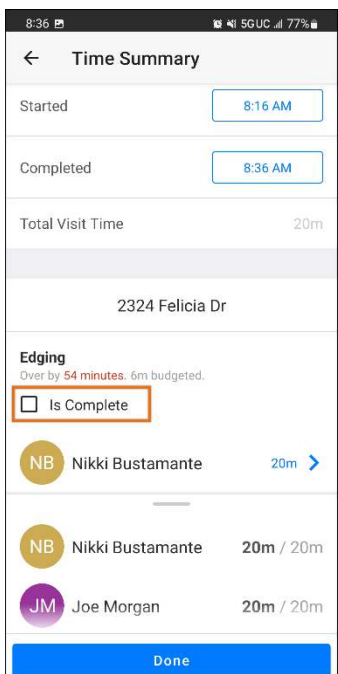
COMMENTS

No Comments

Comment...

Done

3. The Time Summary window appears. Adjust the start and end time for the Visit as needed. You can also tap a resource to adjust the amount of time they spent on the job. De-select the **Is Complete** checkbox then tap **Done**.



8:36 5G UC 77%

← Time Summary

Started 8:16 AM

Completed 8:36 AM

Total Visit Time 20m

2324 Felicia Dr

Edging
Over by 54 minutes. 6m budgeted.

☐ Is Complete

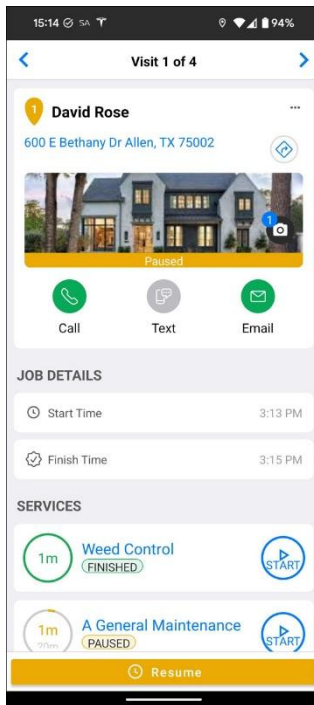
NB Nikki Bustamante 20m >

NB Nikki Bustamante 20m / 20m

JM Joe Morgan 20m / 20m

Done

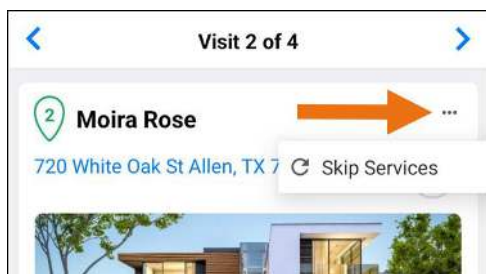
4. The bar and job icon turn yellow to indicate the job is paused. When you're ready to return to work, tap **Resume**.
5. The app creates another clock-in record for the Visit when you resume work. This function can be used in conjunction with taking a break.



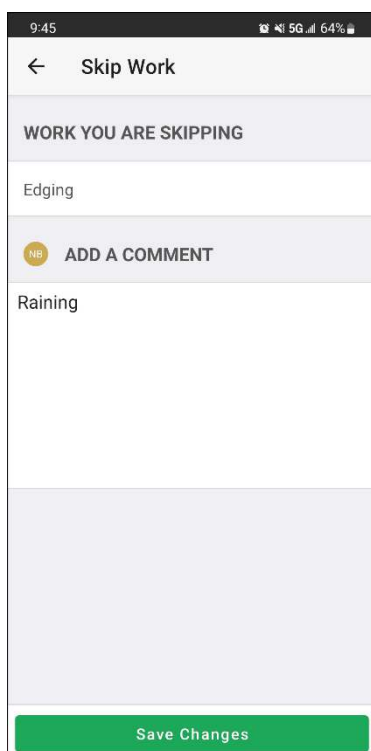
Skip Your Work

This option might be needed if the weather prevents you from doing a job.

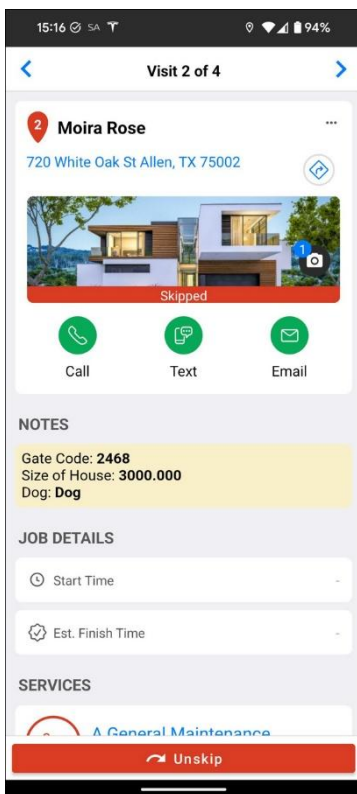
1. To skip the visit, tap the three dots at the top of the visit and tap **Skip**.



2. The Skip Work window appears. Enter a reason for skipping the visit in the Comments section then tap **Save Changes**.



3. The bar and job icon turn red to indicate the Visit has been skipped.

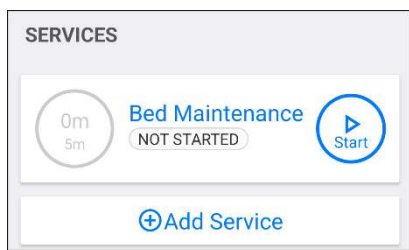


Add a Product or Service

You can add products and services on the same day to Visits that are already scheduled.

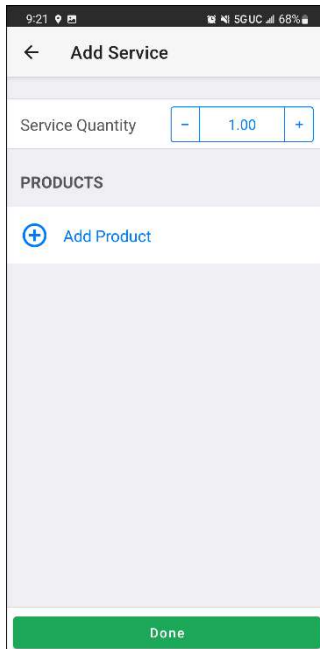
Add a Service to a Visit

1. Swipe up to view your Visit details then scroll down and tap **Add Service**.



2. Select your service.

3. Change the Service Quantity with the **+** and **-** buttons.

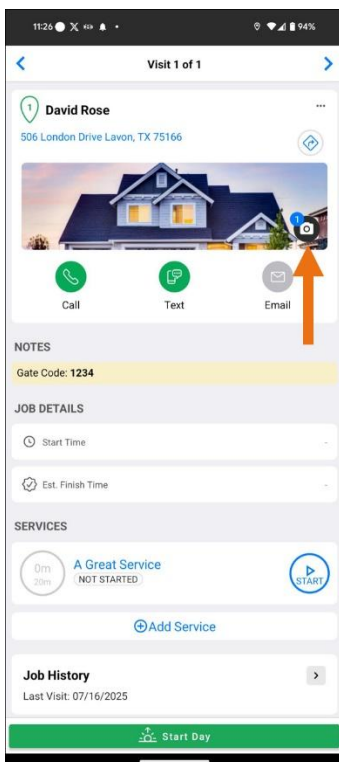


Add a Product to a Service

1. Tap the Service you want to add a Product to.
2. Tap **Add Product** then choose the Product.
3. Change the Quantity with the **+** and **-** buttons.
4. Add Attachments or Comments as needed, then tap **Done**.

Manage Photos and Attachments

At the job site, you can see any photos and attachments for a job by tapping the camera icon. The number badge shows the number of attachments for this job.



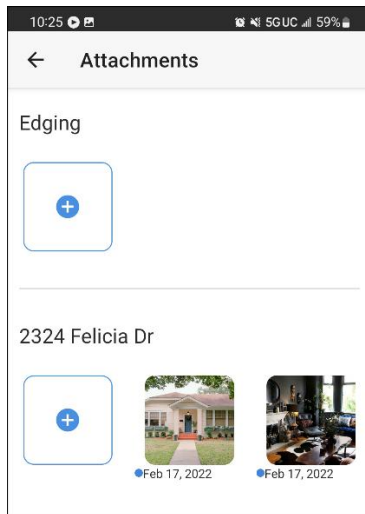
Add a photo

The **Attachments** screen shows photos or diagrams for the service and client.

You might receive a prompt to take *Before-and-After* photos, depending on your company's requirements.

To add a new photo:

1. Tap **+** on a blank square.



2. Choose **Take Photo**, **Select Photo**, or **Select File** to add your image.

Save a Photo as a Profile Picture

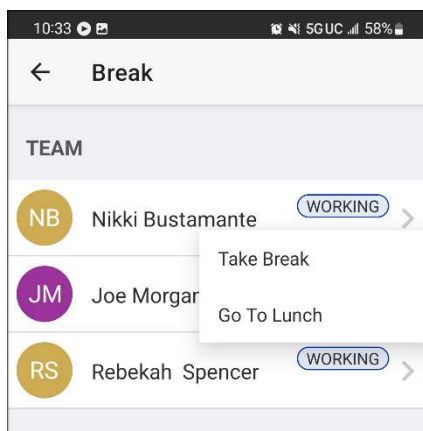
Tap the photo you want to make the profile picture then select **Set Profile Picture**. It will now display on the main screen.

Take a Break or Go to Lunch



You can use the Team app to track breaks or lunch times. If you are a Team Lead, you will be able to send your resources to break or lunch as needed.

1. Tap the coffee cup icon and select a resource, then tap one of the options:



Take Break

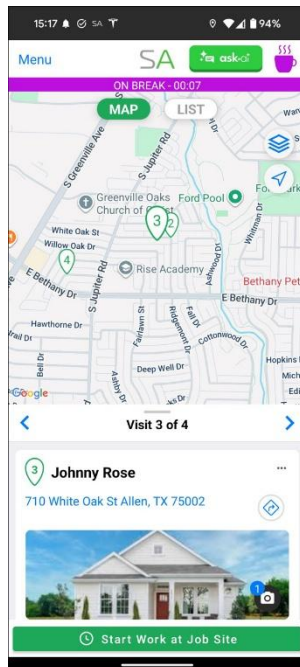
OR

Go to Lunch

Note: This closes the existing clock-in record for the visit, and the system creates a break or lunch timesheet record for payroll.

The color bar turns purple to indicate you're on a break or lunch.

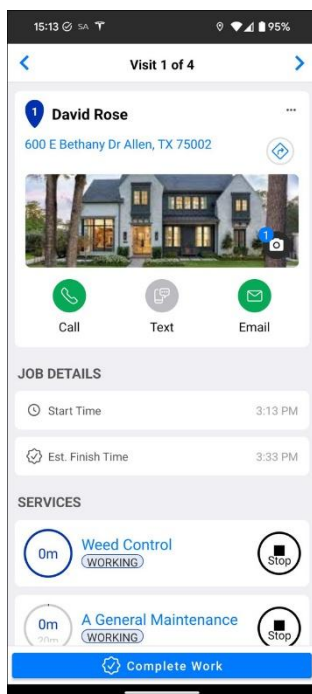
2. To clock the resource back in, tap the coffee cup icon and select the resource, then tap **End Break or End Lunch**.



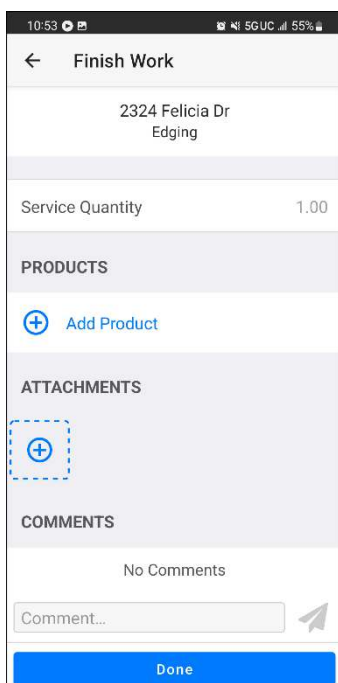
This closes the existing Break timesheet record and clocks you in again.

Complete a visit

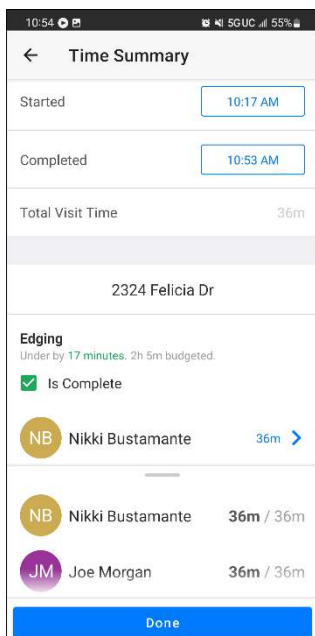
1. Tap **Complete Work** when the Visit is finished.



2. The Finish Work window appears. Make changes as needed then click **Done**.



3. The **Time Summary** window appears after you complete a Visit *if* you have the “Edit Timesheets” right enabled.



If there are budgeted hours on all tasks, the app automatically divides the time based on the budgeted hours.

If there are no budgeted hours, the app automatically assigns equal time to all the services in the job.

4. Adjust the start and end times as needed.

For overall time on the Visit: Select a different **Started** or **Completed** time.

For each service on the Visit: Tap a Resource then update the amount of time they spent on the job.

5. After making your changes, tap **Done**. Your next Visit appears.

Clock out for the day

1. After the last assignment for the day, tap **Finish Day** for time tracking.
2. Log out by going to **Menu > Log Out**.

The time spent on all your jobs appears on the Dispatch Board in Service Autopilot, and the system add a “Clock Out” record to the timesheet for payroll purposes.

Chemical Tracking in the Team App

Chemical Tracking on the Team app allows mobile users to log chemicals used at a Job site. The chemicals logged will be synced to the Chemical Tracking Report.

Important Note: If you use Forms to track additional chemical information, you must have a Form created in New SA Forms (V3). Classic Forms (V2) are not compatible with the Team App.

To log chemicals on the Team app, follow these steps:

1. Log in to the Team App and tap **Start Day**.
2. Tap **Start Work at Job Site** to open the Start Work overlay, then tap **Log Chemical Usage**.

The screenshot shows the 'Start Work' overlay in the Team App. At the top, there is a back arrow and the title 'Start Work'. Below this, the job details are displayed: '504 Jefferson Ln' and 'Fall Application'. A 'Service Quantity' section shows a value of '1.00' with minus and plus buttons. The 'PRODUCTS' section has an 'Add Product' button. The 'CHEMICAL USAGE' section has a 'Log Chemical Usage' button, which is highlighted with an orange border. The 'TEAM' section shows a user profile for 'Joe Morgan' with a green checkmark. The 'ATTACHMENTS' section has a dashed box with a plus sign. At the bottom, there is a 'COMMENTS' section and a blue 'Done' button.

3. Tap the checkbox next to each chemical used at the property then update the **Treated Areas, Targets, and Application Methods** as needed.
4. Tap the **Paper Airplane** icon in the top right to send an instruction email to the Client.
5. The Conditions will automatically fill in based on the local weather data. Make any updates if needed.
6. Tap **Save** when you're done, so you can work and complete the Job as usual.

← Log Chemical Usage →

CHEMICALS USED

✓ Broad Chem Edit

Quantity

5.5096

Measure

Gallons

Treated Areas

0 selected

Target

1 selected

App Method

Spray - Rider

View Label

+ Add a Chemical

CONDITIONS

Temperature

99.00 Refresh

Wind Speed

17

Wind Direction

Not Set

PH Level

0.0000

Save

If you need to access Chemical Tracking once the Job has begun, tap on the Service from the Visit Details overlay then tap **Log Chemical Usage** to change or update chemicals as needed:

Visit 1 of 1

No image available. Tap here to add a property photo.

504 Jefferson Ln
Number Five - Lake Dallas

Start Time 11:22 AM

Est. Finish Time

Contact Client

Turf Sq. Ft.: 15000.000

SERVICES

8m Fall Application WORKING Stop

+ Add Service

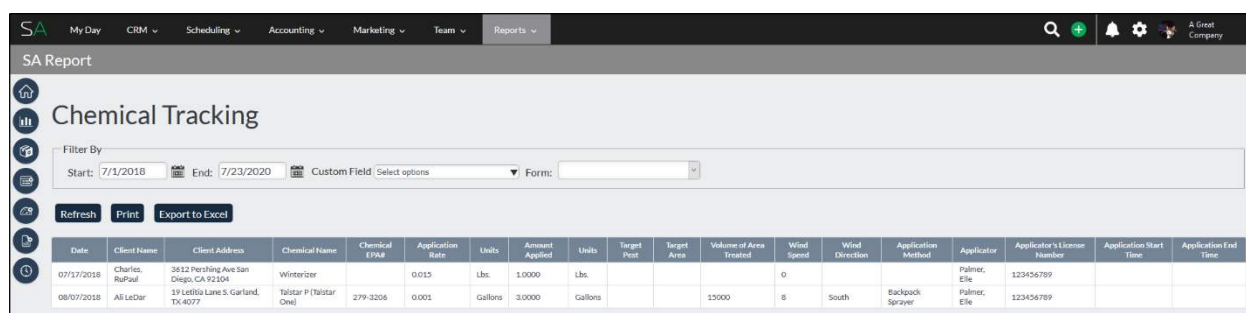
Complete Work

Chemical Tracking Report

This report is a list of applied chemicals including their details, such as EPA #, amount, and weather conditions. You *must* have Chemical Tracking enabled and set up for this report to be valid. This information is valid for the details entered on chemical jobs using **Chemical Services** and **Products**. For information on setting up chemical tracking, see the Chemical Tracking User Guide.

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

This report can be filtered by date range, custom field, and resource:



Date	Client Name	Client Address	Chemical Name	Chemical EPA#	Application Rate	Units	Amount Applied	Units	Target Pest	Target Area	Volume of Area Treated	Wind Speed	Wind Direction	Application Method	Applicator	Applicator's License Number	Application Start Time	Application End Time
07/17/2018	Charles, Rafael	2612 Pershing Ave San Diego, CA 92104	Winterizer		0.015	Lbs.	1.0000	Lbs.				0			Palmer, Eli	123456789		
08/07/2018	Al LeDor	19 Letitia Lane S. Garland, TX 4077	Talstar P (Talstar One)	279-3206	0.001	Gallons	3.0000	Gallons			15000	8	South	Backpack Sprayer	Palmer, Eli	123456789		

The columns on the report are as follows:

- **Date** - The date of the service.
- **Client Name** - The name of the client who was serviced.
- **Client Address** - The address of the property that was serviced.
- **Chemical Name** - The name of the chemical product used on the Job.
- **Chemical EPA#** - This corresponds to the **EPA Registration #** field on the **Product Mix** tab of the chemical product.
- **Application Rate** - The application rate for the product based on the information entered in the "Application Rate" section of the **Product Mix** tab of the chemical product.
- **Budgeted Concentrate Amount** - The total amount of chemical product to be used.
- **Actual Concentrate Amount** - The total amount of chemical product actually used.
- **Targets** - The targets the chemical product is designed to kill.
- **Areas Treated** - The areas the chemical product was applied.
- **Amount of Area Treated** - The custom field value on the account for the custom field designated on the **Product Mix** tab of the chemical product.
- **Temp** - The temperature entered at the time of application.
- **Wind Speed** - The wind speed entered at the time of application.
- **Wind Direction** - The wind direction entered at the time of application.
- **pH Level** - The pH level of the chemical product entered at the time of application.
- **Application Method** - How the chemical product was applied to the property.

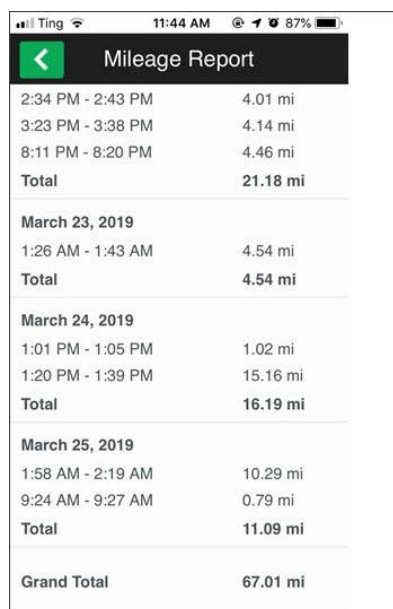
- **Applicator Name** - The resource who applied the chemical product. The resource applicator license number is required to populate this field.
- **Applicator License #** - The license number of the resource who applied the chemical product.
- **Application Start Time** - The time the job was started. The resource applicator license number is required to populate this field.
- **Application End Time** - The time the job was completed. The resource applicator license number is required to populate this field.

If your state requires more information than this report provides by default, you can create Forms that allow the field technician to log additional information. Be sure to associate the Form with the **Chemical Service** so it's available on the Mobile app for the technician. This information is added to the Chemical Tracking report once a Form is selected, and the report is refreshed. Each field on the form will become a column on the Chemical Tracking report.

Important Note: If using the Team app, the Form must be created in the New SA Forms (V3). If using the Legacy app, the Form must be created in the Classic Forms (V2).

The Mileage Report

The Mileage Report on the Team app shows the mileage driven while a user is logged in to Service Autopilot. The Mileage Report appears only on the mobile device of the field employee, if GPS/Location Tracking is enabled. It does *not* appear in Service Autopilot or the Report Center.



Mileage Report	
2:34 PM - 2:43 PM	4.01 mi
3:23 PM - 3:38 PM	4.14 mi
8:11 PM - 8:20 PM	4.46 mi
Total	21.18 mi
March 23, 2019	
1:26 AM - 1:43 AM	4.54 mi
Total	4.54 mi
March 24, 2019	
1:01 PM - 1:05 PM	1.02 mi
1:20 PM - 1:39 PM	15.16 mi
Total	16.19 mi
March 25, 2019	
1:58 AM - 2:19 AM	10.29 mi
9:24 AM - 9:27 AM	0.79 mi
Total	11.09 mi
Grand Total	67.01 mi

On the user's mobile device, go to **Menu > Mileage Report**. You can see mileage data for up to one week.

Note: Mileage data is based on GPS movement while the Team app is running, *not* Drive Time logged by the field employee.