CLIENTS & LEADS

USER GUIDE

Contents

About Clients and Leads in V2

This guide uses the V2 version of Service Autopilot. If you switch to V3, you'll see that Clients and Leads are combined into "Accounts." Either version is functional, and it's your preference on which version to use.

On the Client and Lead screens, you can add Clients and Leads, convert Leads to Clients, and manage the various data that you gather about both. You can also manipulate Jobs, view Job History, manage Payments, see Payment History, see past correspondence in SA, set up Contracts, and create or view Estimates.

Set Up User Rights for Client and Lead Screens

To fully use this area of SA, your Company roles need to be configured to allow access to Client and Lead information. To set up user rights for access to Clients, follow these steps:

1. Go to **Settings > User Roles & Rights > [Role Name]**
2. Under the **CRM** tab, select the checkboxes in the "Client Access" or "Lead Access" columns.

   For a role to access the Client Edit screen, check these rights:

   - Client List
   - Add Client
   - Allow Edit

Note: The "Add Client" and "Add Lead" options must be selected to see the **Show Map** feature for Smart Maps.

For descriptions of all rights associated with Clients and Leads, see:

Profile Icon > Help Center> User Guides > User Roles & Rights Guide

OR

Profile Icon > Help Center > Settings > User Roles & Rights

"Whether you think you can, or think you can't—you're right."
— Henry Ford

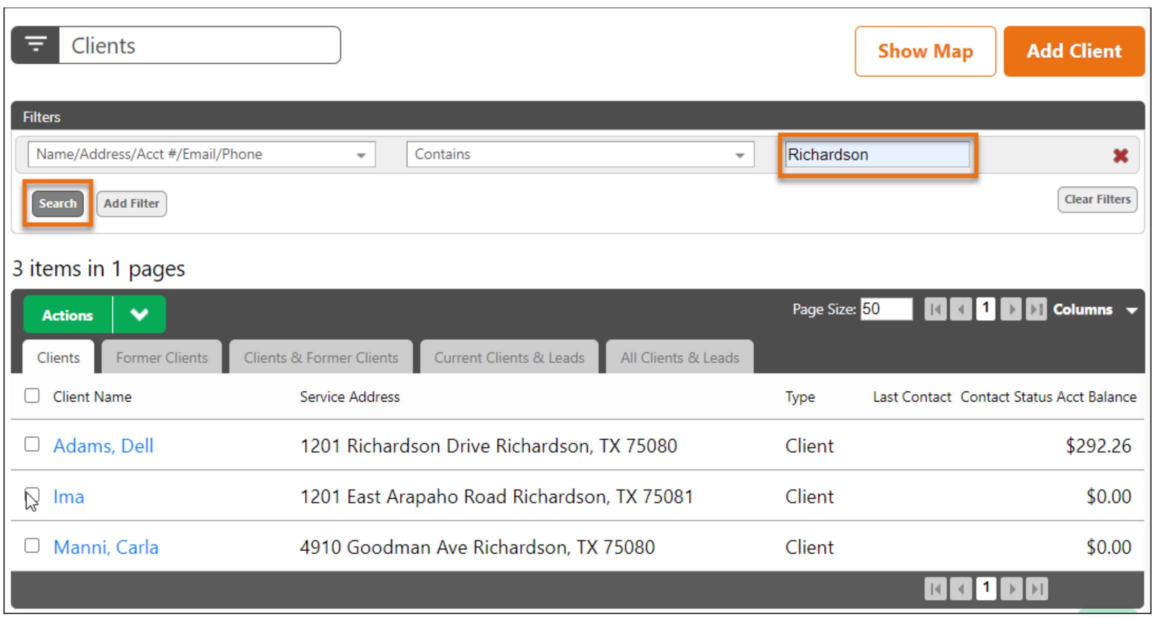
View the Client or Lead Lists

1. Go to **CRM > Clients** or **CRM > Leads** to see your entire list of Clients or Leads.

2. Use the filters to narrow the list.
   Remember that filters are "AND" conditions, meaning that all conditions must be met for a Client or Lead to appear. You can add as many filters as you need.
   The Client and Lead lists automatically load with a single filter ready to go:
   Name/Address/Acct #/Email/Phone.

3. You can search your Clients list on any of those fields by entering the information in the empty box to the right of the condition, like "Contains."

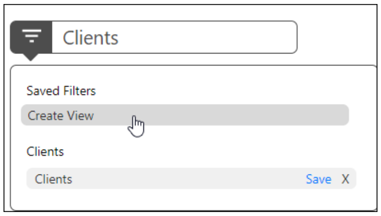
4. Click the **Search** button or press Enter on your keyboard.



Click the Clear Filters button to remove all filters and return to the full Clients or Leads list. To remove an individual filter, click the "X" on the filter row. When you delete a filter, the list is automatically updated to show the change.

Filter Data with Screen Views

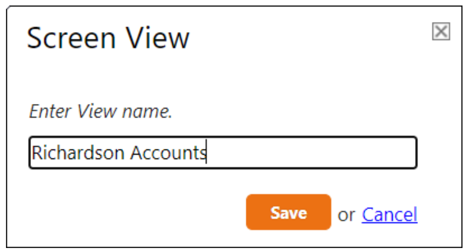
Screen Views let you save your data filtering using the dropdown list in the upper left corner. Click the down-arrow to access, create, save, and delete screen views.



An example of this would be a saved screen view named "Richardson Accounts" that only shows Client accounts in that city. This makes it easy to quickly send out a Marketing Email.

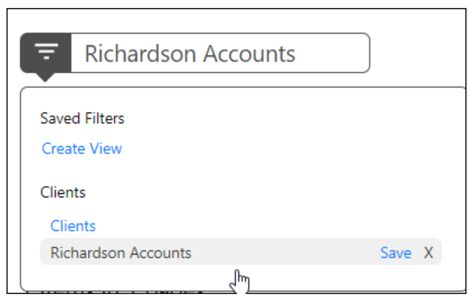
Create a Screen View

1. Click **Create View** from the Screen View menu. A dialog box asks you to name the new view.
2. Type in a descriptive name, then click **Save**.



Edit a Screen View

1. Click the dropdown list, then select the view you want to edit.
2. Make any changes to the filter, then click **Save**.



Delete a Screen View

1. Click the dropdown list, then select the view you want to delete.
2. Click the **X** next to the name.
3. At the prompt, confirm that you want to delete the view. Once the view is deleted, it cannot be recovered.

Bulk Actions for Clients

Under **CRM > Clients**, you can perform actions for multiple Clients at the same time, including **Bulk Edit**, **Bulk Schedule Jobs**, add a Client Note, Tag, Ticket, or Bulk Email.

Add a Tag

To narrow the Client list for bulk actions, you might want to filter the list and add tags. For example, you could use filters to identify all residential Clients, then do a bulk action to add the "Residential" **Tag** to each of the Client records.

For the residential Clients, you might send a special Marketing Email.

Bulk Edit the Client List

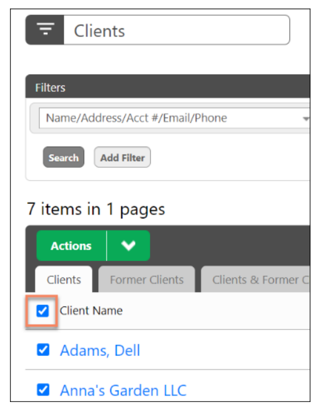
Bulk Editing lets you change information for multiple Clients at the same time. To modify a group of Clients, follow these steps:

1. Go to **CRM > Clients** to view the Clients list.
   You can select all, choose a predefined view, or use filters to specify a group of Clients.

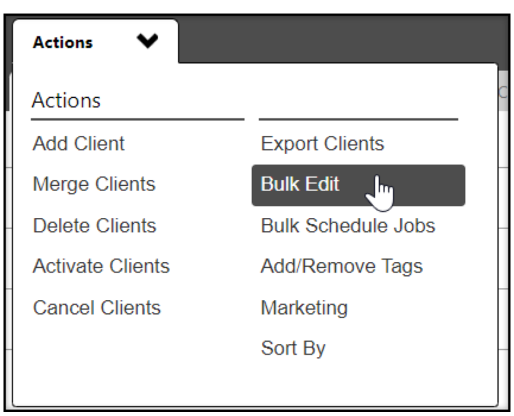
2, Once you have filtered the Clients list, select the checkbox for each Client you want to edit.

   OR

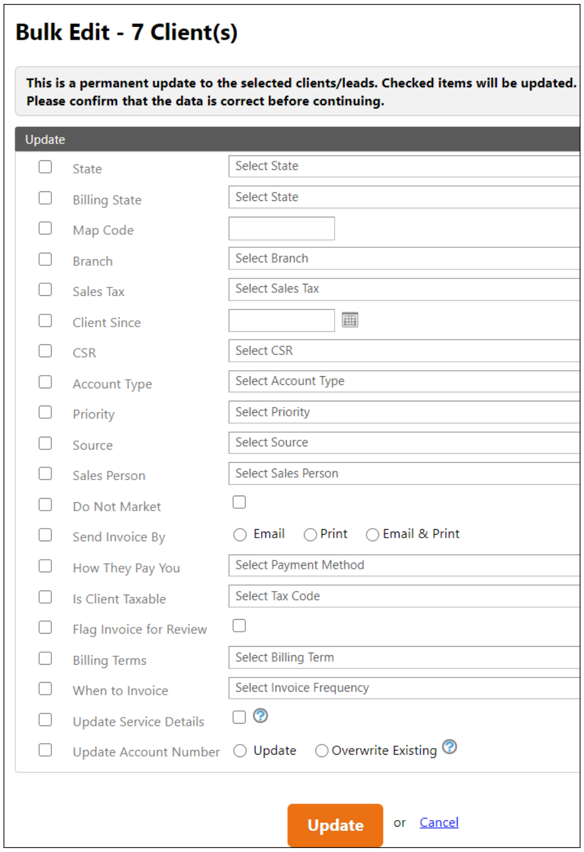
   Select the checkbox under the **Actions** menu to select all Clients that show on the grid.



3. Click **Actions > Bulk Edit**.



The Bulk Edit overlay appears. This overlay will always load with no fields selected, regardless of your current settings for those fields.



4. Select the checkbox next to the field you want to update. Once the checkbox is selected, the field to the right of it becomes enabled.

5. Select a new value from the list, enter new text, or make a new selection.

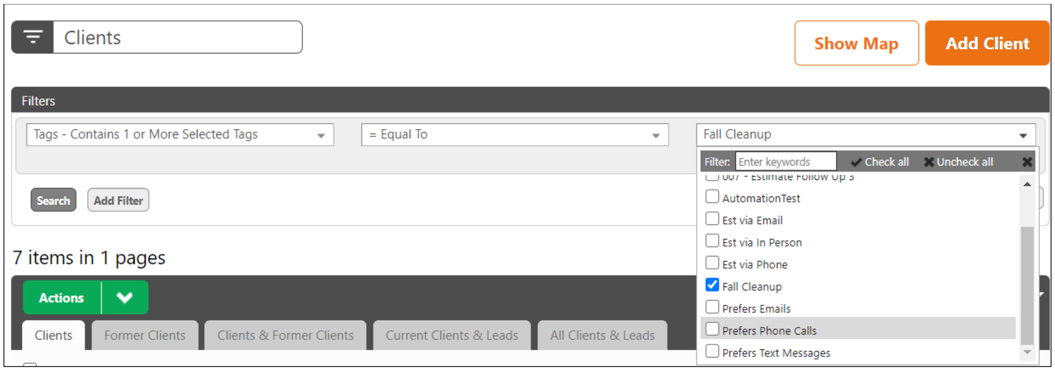
6. Click **Update**. A confirmation dialog reminds you that the change is permanent. This means any changes you make through the Bulk Edit overlay will remain in effect until you change them through another Bulk Edit.

7. Click **Yes** to make the changes to the Client records.

Bulk Schedule Jobs

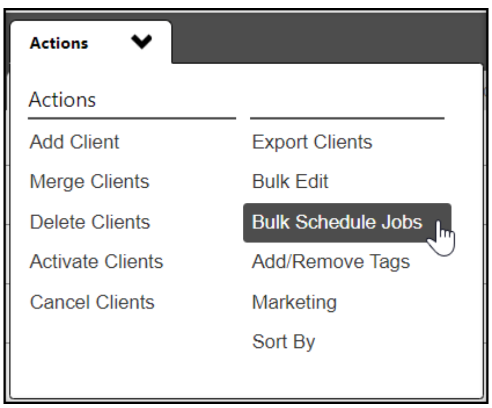
Bulk Scheduling is the process of adding a Job to multiple Clients at once. For example, you could have a group of Clients you tagged as "Fall Cleanup." It is now October, so you need to add a Fall Cleanup Job to these Clients by following these steps:

1. Go to **CRM > Clients** and set up the filter:

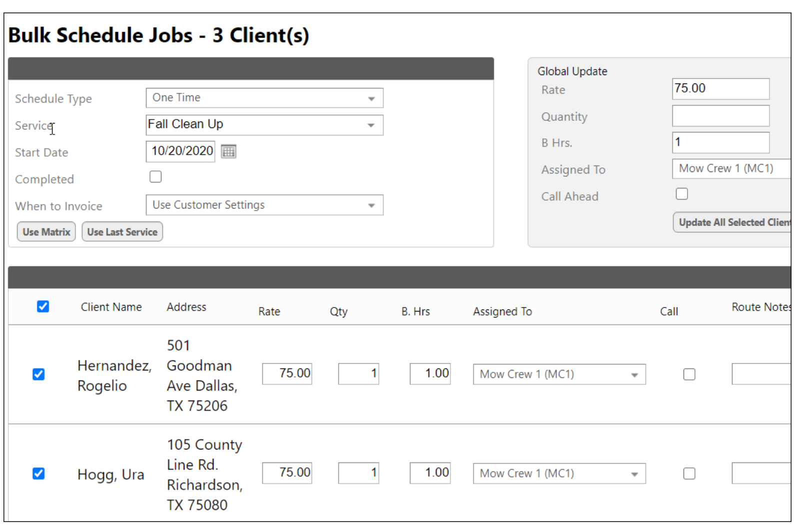


2. Click **Search** to filter down your Clients list to those who have the Fall Cleanup Tag.

3. Select the checkbox in the list header to choose your entire Clients list, then click **Actions > Bulk Schedule Jobs**.



The Bulk Schedule Jobs overlay appears.



4. Fill in the fields. For this example, we used these settings:

    - Select the "Schedule Type" as **One Time**, meaning you'll do this Job one time and never again.
    - Select **Fall Clean Up** from the Service list.
    - Under **Global Update**, enter "75.00" for **Rate** and "1" in the **Budgeted Hours**.

5. Optionally, enter a **Route Note** for the crew. For example, you may add "Make sure the gate is closed." This note will print on the crew's Route Sheet or appear on the Team or Legacy app.

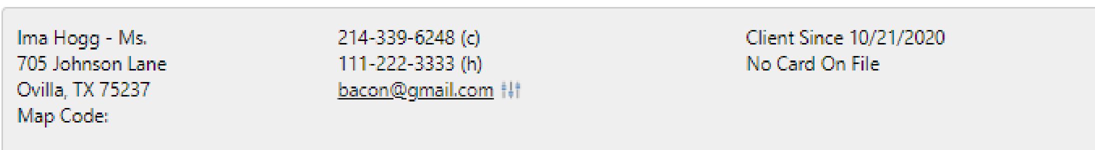
6. Click **Schedule Services**.
   Now, if you selected one of the Clients, you would see that this one-time Job has been scheduled for October 20. It will also appear on your Dispatch Board for that date.

Overview of Client and Lead Screens

Individual Client and Lead Screens are divided into several sections: Contact Information, Account Balance, and related information (or "Revenue Potential" for Leads), Office Notes, Tags, Jobs and related information, and an Activity Stream, which includes a history of Service Autopilot interactions with the Client or Lead. Each section groups related information and is set up for viewing the most important information immediately.

Client Contact Section

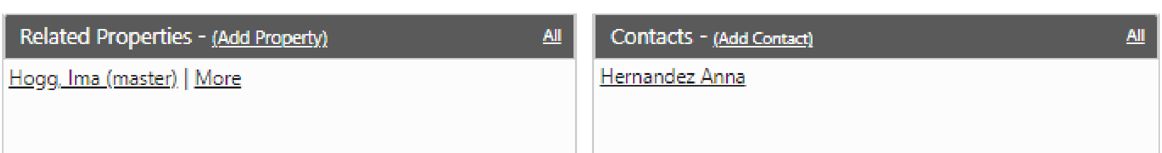
The Client Contact section on the Client Screen shows basic information.



The left column is the Client's physical address and Map Code. A Map Code is an alphanumeric code you create and put on a Client record to denote a service area, such as an HOA or apartment.
The Client's contact numbers and email address (or addresses separated by a semi-colon and no spaces) are in the middle column.
The right column provides some basic business information like when the Client started doing business with your company and the Credit Card Expiration (CC Exp) field, which tells you when the credit card on file expires.

Note: The **CC Exp** field will turn red when the credit card on file is within 90 days of its expiration date.

Related Properties and Contacts

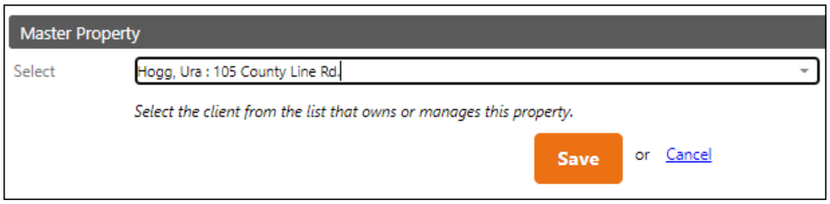


The Related Properties section lists all properties that are tied to this Client in some way. For example, you can tie a Client's lake house to their primary residence. If they also have you do work at their parents' house or a rental location, then those can also be associated with that Client.

The Contacts section lists all the additional contacts for a Client. These contacts are typically spouses, children, or even siblings.

Click **Add Property** to create those related properties while still maintaining the Client's existing billing information. The billing information will automatically populate into a new overlay screen in which you can type the Subordinate Property information.

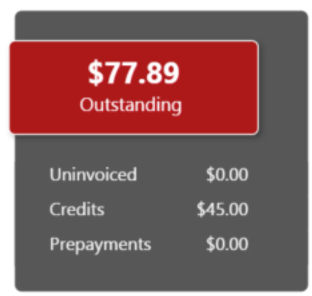
At the bottom of the screen, associate the new property with the Master Property by selecting from the dropdown list under Master Property.



All subordinate properties will appear as individual records on your Client list screen with the Master Property Prefixed to them.

Hernandez, Rogelio	501 Goodman Ave Dallas, TX 75206
Hogg, Ima	705 Johnson Lane Ovilla, TX 75237
Hogg, Ima:Hogg, Whole	419 Morgan Hill Road Ovilla, TX 75237

Client Account Balance



The Client Account Balance section on the Client screen quickly gives you a color- coded overview of the Client's account.

Red: The Client owes you money.

Green: The Client has credit on their account.

Gray: The Client has a zero-dollar balance.

Under the Balance section, there are three additional number fields:

- **Uninvoiced**: Work has been completed and is on an incomplete invoice. The uninvoiced amount will be added to the account balance after the invoice is completed.
- **Credits**: This is the sum of all unapplied credits for the Client's account. Once the credit is applied to an invoice, it is removed from this balance.
- **Prepayments:** This is the sum of all unapplied prepayments. As invoices are completed, prepayments are automatically applied to the invoice. SA lets you set aside a prepayment for a specific set of services. If services are specified, the prepayment will be applied only to the portion of the invoice that meets the service criteria.

Add Office Notes

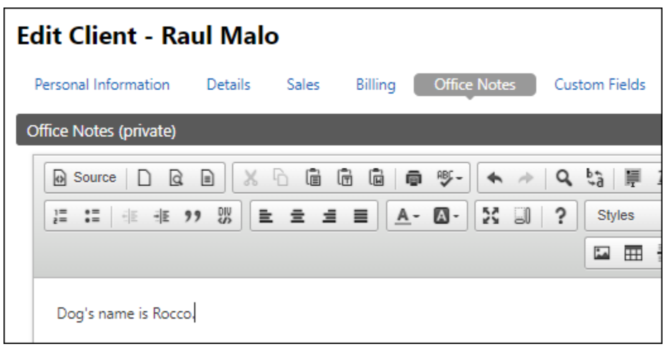
Office Notes are a free-form section on the Client screen where you can jot down information about a Client, such as favorite colors, special days of the year for the Client, invoicing preferences, etc.

The Office Notes section appears only if there is information on the Client record. To add Office Notes, follow these steps:

1. Go to **CRM > Clients > Edit** (next to the Client's name) then click the **Office Notes** tab.

2. Enter a note in the editor and click **Save**.

   The Office Notes section appears in the Client and Lead views. They will be marked as "(private)" to remind you that Clients cannot see these notes.

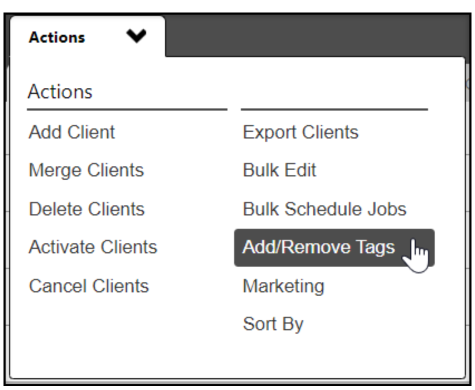


Add Tags to Clients

Tags are labels attached to a Client record that help you organize your Clients list. Tags are also a great tool to quickly narrow down the list.

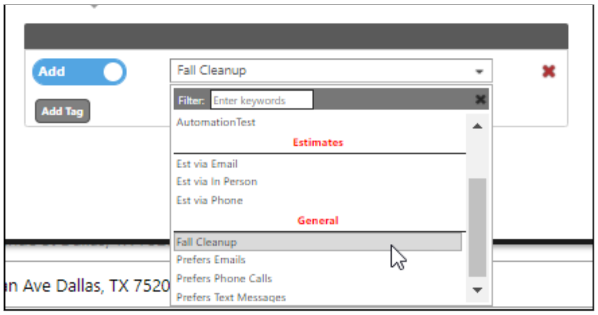
1. Go to **CRM > Clients** and select the Clients you want to tag.

2. Click **Actions > Add/Remove Tags**.



The **Add** toggle is selected by default.

3. Choose a tag from the list.



4. Click **Add Tags**.

You can now filter the Clients list by the tag you just added. In this example, you could search for Clients with the tag "Fall Cleanup," then use **Marketing** to send a bulk email offering a seasonal service. See also "Send Bulk Marketing Email to Clients

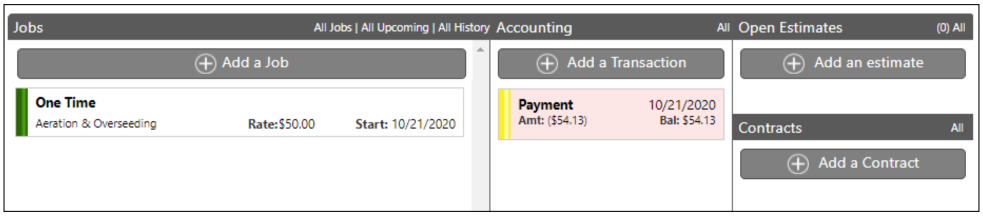
Jobs, Accounting, Open Estimates, and Contracts Section

This section of the Clients screen displays the latest information for a Client. If any of the information appears in red, then something is wrong, or action is required.

For example, if a Job is pink, hover over it to see a description of the problem. Most likely, the Job's **Schedule** or **Package** is expired. Here are some typical error conditions:

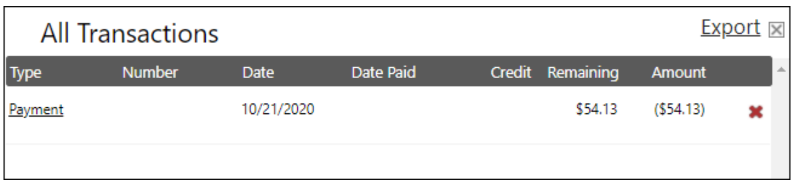
Error Condition	Description
Job	The Master Package or Schedule has expired.
Invoice	The Invoice is past due.
Payment	The Payment has an unapplied amount.
Credit	The Credit has an unapplied amount.
Estimate	The Estimate is over 14 days old.

A typical Jobs section for a Client looks like this:

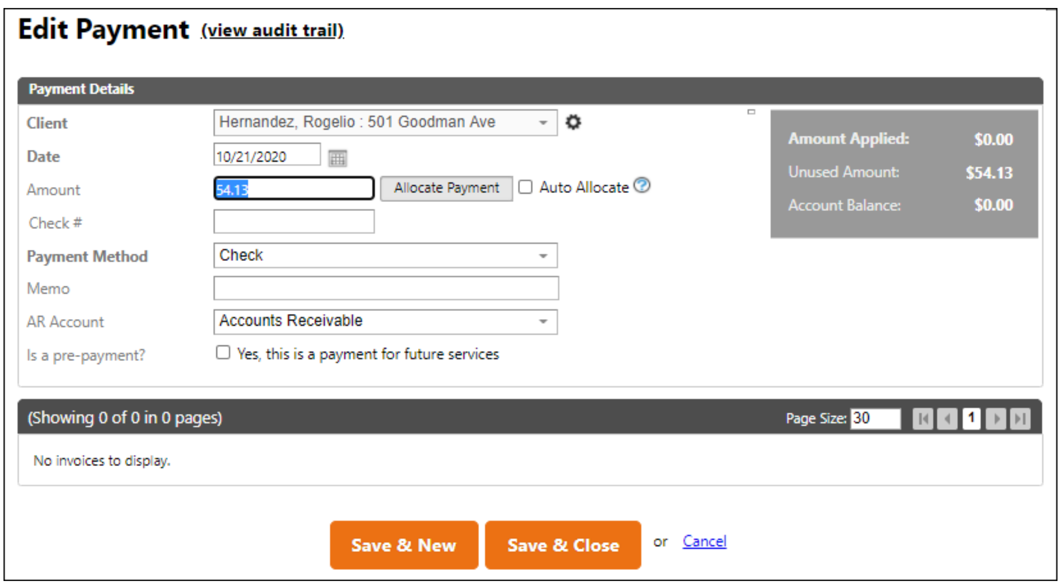


The header at the top of the section has links to view more information about each section. For example, to see all the transactions for a Client you would click the **All** link in the Accounting section.

The All Transactions dialog opens with a list of all invoices, payments, and credits for the Client. You can view any transaction by clicking on the row in the dialog.

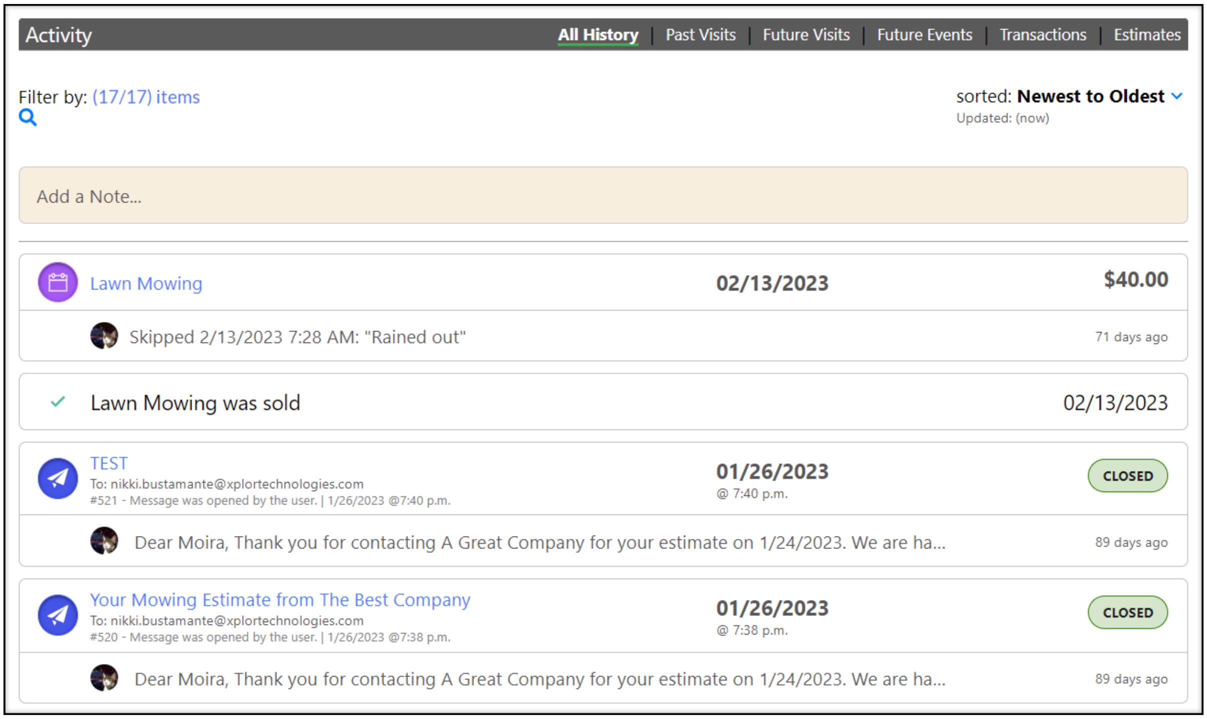


Clicking on a payment opens the Edit Payment screen.



The Activity Stream

The Activity Stream section of the Clients or Leads screen shows all the activity for that account, combined into a single view. It can contain Tickets, Emails, and Notes. The information is also listed from newest to oldest.

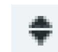


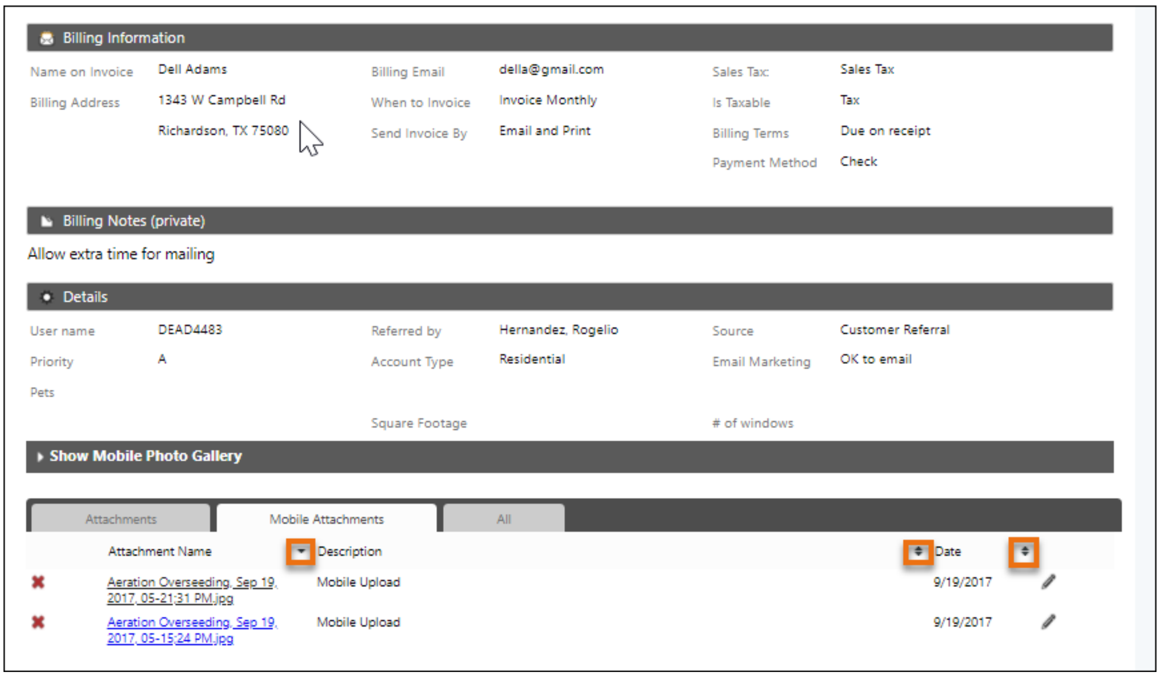
To quickly create Notes with the Activity Stream, follow these steps:

1. Navigate to a Client's account and scroll down to the Activity Stream.
2. Type your note in the "Add a Note" section.
3. Click **Add** or hit Enter on your keyboard when you're finished. The new note will be added to the Activity Stream.

Billing, Details, and Attachments on the Client and Lead Screen

The Billing Information, Details, and Mobile Photos for a Client or Lead are listed at the bottom of the screen.

Note: You can sort the order of attachments by clicking on the up and down arrow icon  located next to each header.



Manage Clients

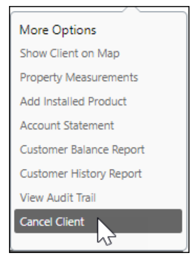
You can cancel or reactivate a Client's account and services from the Client list.

Cancel a Client

If a Client cancels service, you may need to cancel their account. To cancel a Client's account, follow these steps:

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

2. Click the **More** button in the upper right corner and select **Cancel Client.**



3. The Client Cancellation dialog prompts you to select a cancellation reason from the dropdown list.

4. Choose a reason, then click **Deactivate.** This will cancel all active services for the Client.

Any active tickets and invoices will remain active in case you need to collect final payments or past due amounts.

Activate a Former Client

You can also **Activate** a former Client:

1. Go to **CRM > Clients**, then go to the **Former Clients** tab.

2. Select the Client, then click **Actions** > **Activate Clients**.

3. At the prompt, verify that you would like to reactivate this Client. The Client will now appear in your Active Clients list.

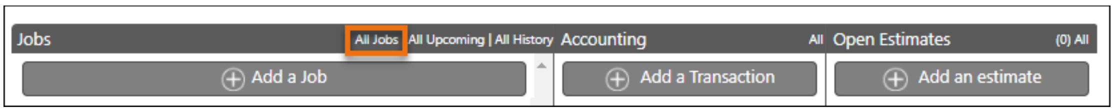
   Note: You also need to reactivate cancelled Services manually from the Clients screen.

Reactivate Services for a Client

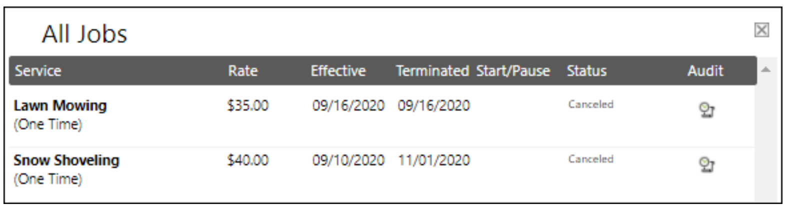
To reactivate the services of a Client you've reactivated, follow these steps:

1. Go to **CRM > Clients**, then select a Client from the list.

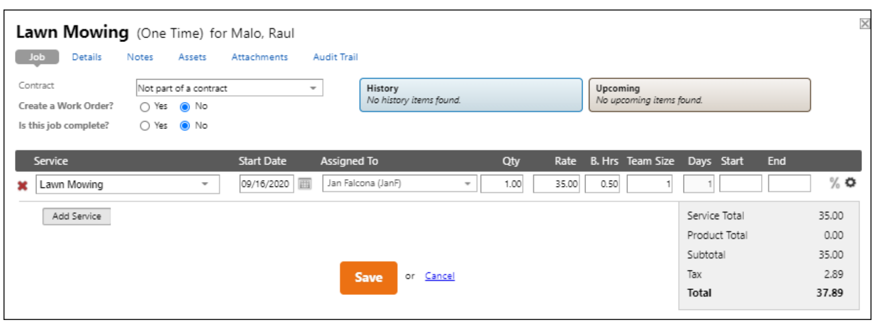
2. On the Clients screen, click the **All Jobs** link in the Jobs section header.



This opens a list of all Jobs your company has ever performed for the Client.



3. Click the Job you want to reactivate to open the Job Editor.



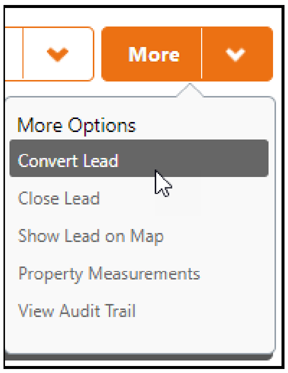
4. Make any needed changes to the Start Date, Assigned Resource, Rates, or Budgeted Hours.

5. When you're finished, click **Save**.

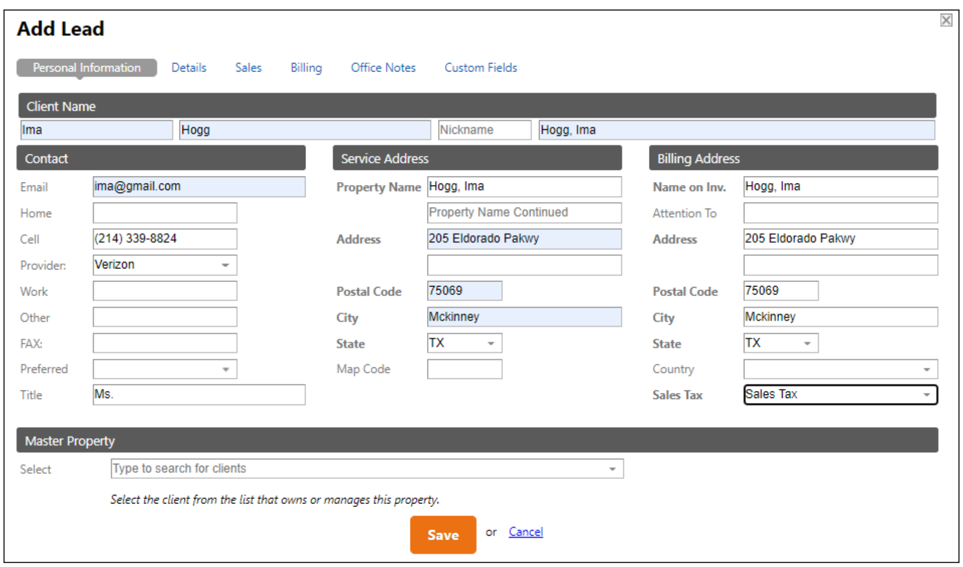
Convert a Lead to a Client

When a Lead you're tracking in SA signs up for service, you need to convert that Lead to a Client so you can begin scheduling Jobs. To do this, follow these steps:

1. Go to **CRM > Leads**.
2. In the Leads list, select a Lead then click **More > Convert Lead**.



3. Fill in the required fields (in bold).



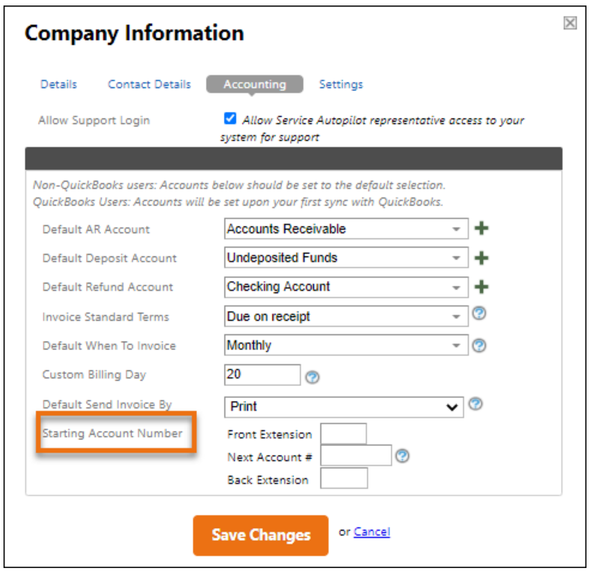
4. Enter any additional information you want to track with the new Client, then click **Save**.

Create Account Numbers for New Clients

Service Autopilot will automatically create account numbers for your new Clients, or you can manually generate the account numbers. This requires permissions to be set for the Account Number feature under **Company Settings**.

1. Go to **Settings > Company Information**.

2. Go to the **Accounting** tab, which contains a "Starting Account Number" line.



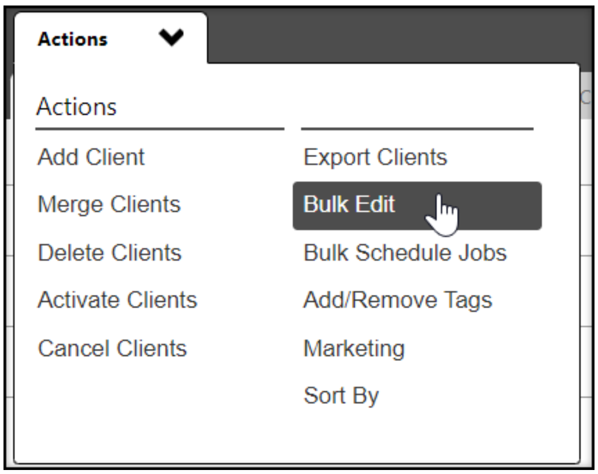
- **Front Extension** – The system will prepend any account numbers with the text entered in this field. This field is not required.
- **Next Account #** - This will be the next account number assigned to a Client. Leaving this blank will stop auto-generation.
- **Back Extension** – This will be appended to the new account number. This field is not required.

3. To turn on the feature, enter a starting number of your choice in the "Next Account Number" field. Entering data into this field turns on the Account Numbers feature.

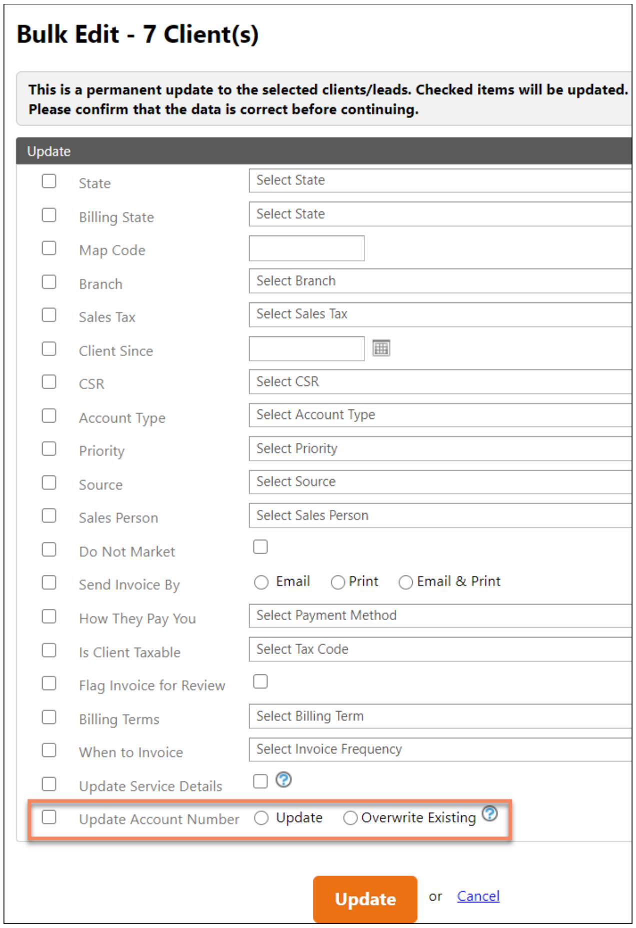
4. Click **Save Changes** at the bottom of the screen. Account Numbers are now enabled.

Update Client Account Numbers in Bulk

1. Go to **CRM > Clients** to update existing account numbers.
2. Set your Page Size to 500 (the max value) and press **Enter**. The Client list will now be reloaded with the first 500 clients.
3. Select the checkbox in the list header to select all Clients on the page.
4. Click **Actions > Bulk Edit**.



5. Select the checkbox next to the “Update Account Number” field.



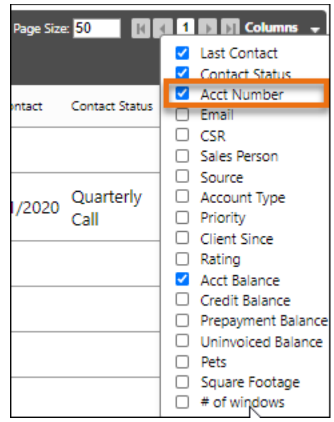
6. Select the **Update** or **Overwrite Existing** radio dial.

   Note: The **Update** option will assign account numbers only to Clients selected in the Client list who do not have existing account numbers. The **Overwrite Existing** option will create new account numbers for all Clients selected in the Client list.

7. Click the **Update** button at the bottom of the screen once you have made your selections.

8. At the confirmation message, click **Yes** to continue.

9. On the Clients screen, turn on the Account Numbers column by selecting it in the **Columns** dropdown list on the far right of the header.



The account numbers now appear in your Clients List.

Contact Clients

Service Autopilot provides a few options for contacting Clients through the system.

Send Text Messages to Clients

Service Autopilot sends the text message to Clients' phones using email technology. The Clients receive the messages as texts, but your messages are delivered to the phone company via email.

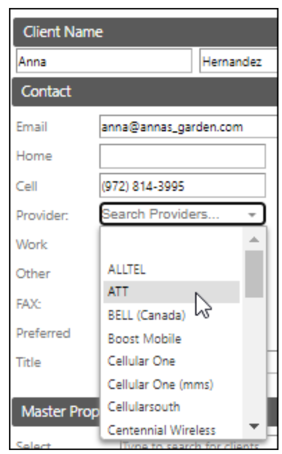
This requires you to know your Clients' cell phone carriers, since the text messages start out as emails. Each carrier has a special domain where you can send an email, and when the email is received the carrier translates it into a text message.

Note: Members with a Pro Plus subscription can opt for the additional Two Way Texting feature. For information on Two Way Texting, go to **Settings > Two Way Texting**.

Specify a Client's Cell Carrier

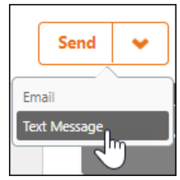
To associate a Client with a carrier, follow these steps:

1. Go to **CRM > Clients**, select a Client, then click **Edit**.
2. Click the **Personal Information** tab.
3. In the left column, select the Client's cell phone service provider from the "Provider" dropdown list.
4. Click **Save** when you are done.

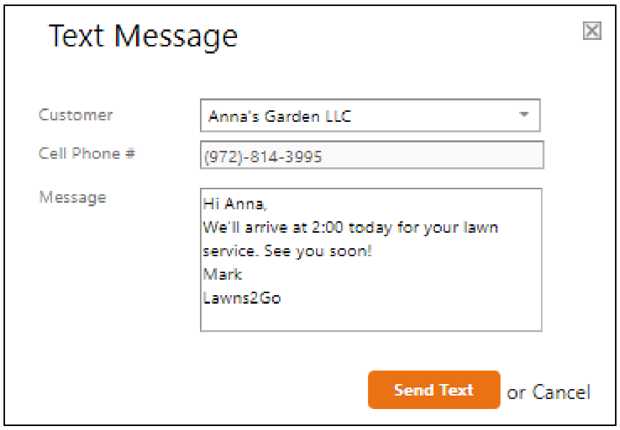


Send a Text

To send a text message from the Client screen, follow these steps:



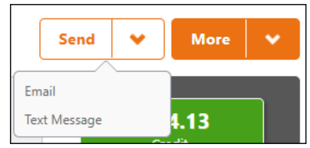
1. Go to **CRM > Clients** and select a Client.
2. On the Clients screen, click **Send > Text Message**.
3. Type your message in the dialog box.



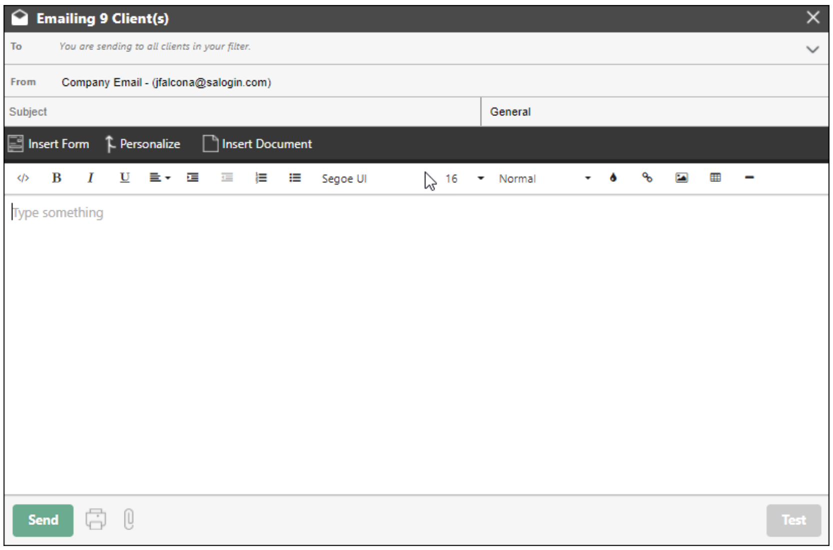
4. Click **Send Text** when you're done.

Send an Individual Email to a Client

To send an individual email to a Client, follow these steps:



1. You can send an email from the Clients screen by clicking **Send > Email**.
2. Use the Email overlay to compose your email.



   You can build your email from scratch using Personalization fields or load an existing document template into the editor to save time.

3. Click **Send** when you're done.

See "

Using the Email Tool" on page 26 for instructions.

Send Bulk Marketing Email to Clients

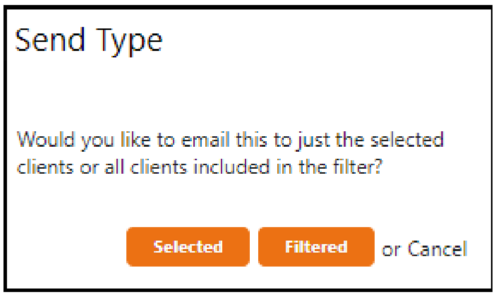
On the Clients screen, you can create and send bulk emails for marketing to Clients. To send a bulk email, follow these steps:

1. Go to **CRM > Clients** and select one or more filters to segment your list to the targeted audience.

Important: Be sure to include the filter “**Exclude Do Not Market Clients/Leads**.” This prevents you from sending unwanted emails to Clients who have requested to be removed from your marketing list.

2. If needed, remove more Clients individually by unchecking the boxes next to their names.

3. When you are satisfied with your list of Clients, click **Actions > Marketing**.
   The Send Type dialog appears:



4. In the Send Type dialog, click either **Selected** or **Filtered**.

   a. **Selected**: If you have a multiple-screen list of clients, and you select the checkbox at the top of the list, only the Clients showing on the current screen will be included in your bulk mailing.

   b. **Filtered**: All Clients that match your filters will be included, which can be more than appear on the page you are viewing.

5. Use the Email overlay to compose your email. You can build your email from scratch using the Personalization fields or load an existing document template into the editor to save time. You have the option to attach forms and documents, as well.

   Note: Attachments cannot exceed 20 MB. If this happens, you will get an error message that you’ve exceeded the limit.

6. After you have created a subject line and are satisfied with the content, click **Send**.

For information on Forms, go to **Profile Icon > Help Center > User Guides > Forms User Guide**

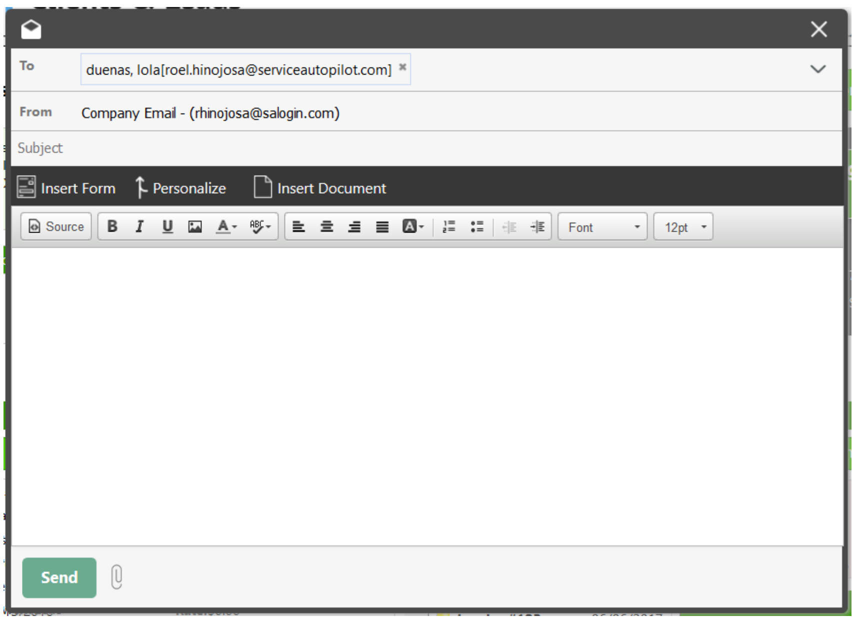
OR

Profile Icon > Help Center > Marketing > Forms

Using the Email Tool

The Email tool in SA lets you use previously created document templates and personalization fields. This lets you compose standard emails that appear to be written to individual Clients.

For example, assume you have a standard "Collections" email. You can store this document in SA for all your staff members to use. You can substitute Personalization fields for names, addresses, phone numbers, and more. After you select a standard email, you can always make changes in the Email editor.



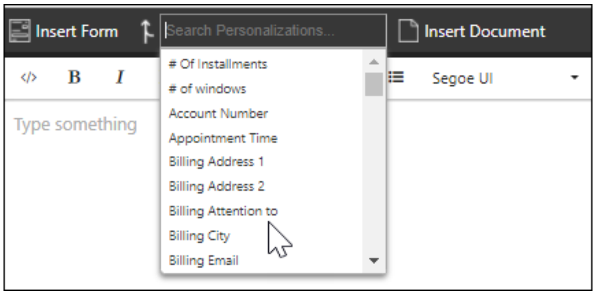
The top of the Email dialog has two dropdown lists where you can select previously created forms or documents.

To attach a form, click **Insert Form** then select a form from the dropdown list.

To attach a document, click **Insert Document** then select a document from the dropdown list.

Personalization Fields in Emails

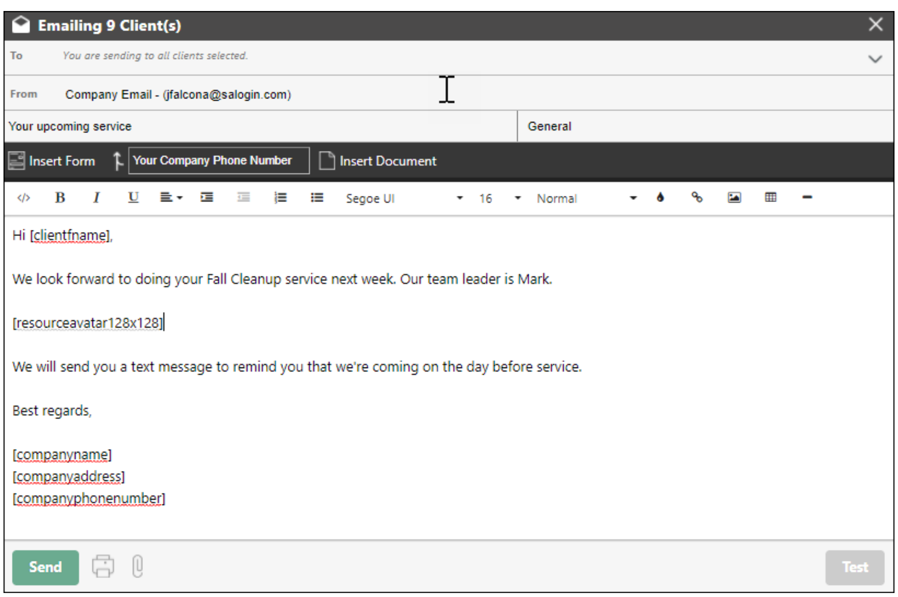
Use personalization fields to build standard documents that still have a personal feel. You can insert a Personalization field into the email body by positioning your cursor at the insertion point and double-clicking the field in the Personalization list.



Personalizations are specialized character strings. For example, "[accountbalance]" will be replaced in an outgoing document with the Client's actual account balance.

- **If the email is going to one client,** the personalization fields are replaced in the email editor.
- **If the email is going to multiple clients,** the document will contain personalization fields in the editor.

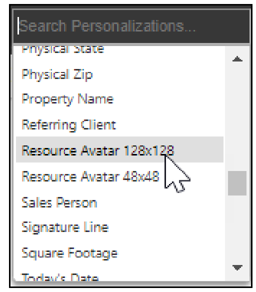
Don't worry if your document contains personalization fields that haven't been populated with specific data yet; the fields will be replaced before the email is sent.
Here's an example:



Pro Tip: Hit the **Test** button to make sure you like the email before you send it.

Include a Resource's Photo in a Client Email

If you want to share a scheduled Resource's photo in an email, you can include a Resource Avatar.



There are two sizes to choose from:

- [resourceavatar128x128]
- [resourceavatar48x48]

When the job is dispatched your email will include the profile photo for Resource assigned to the job.

Avoid Spam

We probably don't need to remind you that you don't want your Marketing Emails to be perceived as Spam. For detailed recommendations on avoiding the dreaded Spam folder, see:

Profile Icon > Help Center > CRM > Email Status - Spam - Improve Deliverability

OR

Profile Icon > Help Center > User Guides > Email Activity User Guide

Note to Members

In Canada and the US, the CAN-SPAM Act requires that Leads be given the ability to opt out of all emails sent by a company. Specific language must be placed at the bottom of each email you send.

SA is required to implement Black Listing to ensure Members cannot intentionally follow up with a Lead who opted out. The fine per violation of CAN-SPAM can reach up to $50,000.