Service Autopilot™

CHEMICAL TRACKING

USER GUIDE

Contents

What's New in Chemical Tracking

If you haven't set up Chemical Tracking in SA, the **Chemical Tracking Setup Wizard** will take you through simple steps for setting up your Chemical Services and Products.

We also streamlined some items in Chemical Tracking, including:

- The **Chemical Wizard** now **calculates the ratio** of Chemical to solution.
- **Mixes** can have multiple application methods.
- **Products and Services** can now be copied.
- **Chemical Tracking Settings** are consolidated to simplify setting up this feature.
- **Chemical Tracking Emails** are grouped to allow easier management.
- **Chemical Tracking** and **Planned Chemical Usage** reports reflect the changes above.

Why Use Chemical Tracking?

The Chemical Tracking feature is available with the Service Autopilot Pro, Pro Plus, and Elite memberships. Benefits include:

- Helps ensure your compliance with state regulations.
- SA automatically calculates the quantities of Chemicals to apply at each property.
- Reports help you before and after Chemical Jobs. See "Reports for Chemical Tracking for more information.
- If the Chemical Tracking report doesn't have all the data you need for your state requirements, you can create a form to enhance the report.

Learning Resources

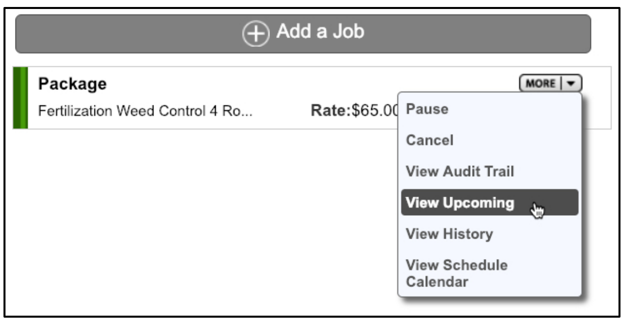
Click this link to see the **Chemical Tracking Webinar** or search for Chemical Tracking in our **Help Center**.

Need Help with Forms?

To find training videos and written documentation on Forms, search for Forms in our **Help Center**.

Chemical Tracking Overview

- You can set up Chemical tracking using the Chemical Tracking Setup Wizard OR manually.
- Add a Job, then add a Chemical Tracking Service to the Job. You can add a Chemical Service to any of the four Job types: One Time, Recurring, Package, and Waiting List.
- Finish setting up the Job as you would any other scheduled Service.
- After you add a Chemical Job to a Client's Account, you can see the Job on the Client's Account screen.
- The master Job appears under the "Add a Job" section, and the Job details appear under **More > View Upcoming**.

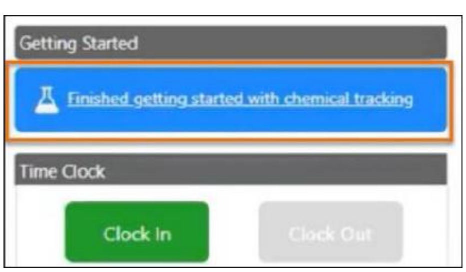


- The Waiting List and Dispatch Board show the Job for scheduling.
- After the Jobs have been dispatched, your field technicians can see them on printed Chemical Route Sheets and the **Chemical Usage** screen of the Legacy app.
- After the technician logs the Chemicals and then completes the Job, the Chemicals will appear on the Chemical Tracking Report.

Set Up Chemical Tracking with the Wizard

The Chemical Tracking Setup Wizard takes you through simple steps for setting up your Chemical Services and Products.

On the **My Day** page, click the link for the setup Wizard on the top right of your screen.



When the Chemical Tracking Setup Wizard launches, you'll see five tabs across the top of the screen.

Click each of the tabs to fill in the information:

1. Company Info

Under **Company Info**, fill in the type of work. You can select one or more standard options or fill in a custom option.

The options are:

- Fertilization/Weed Control
- Interior Pest Control
- Exterior Pest Control
- Pool Cleaning
- Other

2. License Numbers

Under **License Numbers**, add the license numbers of your technicians.

3. Fields

Fill in the **Application Methods**, **Locations**, and **Units**.

- Select from a list of standard data or add your own.
- You can modify the standard data or delete it.

4. Chemicals

The Wizard supplies a list of Chemical Products based on the information you set up in the **Company Info** step. Click any Chemical Products in the column on the right to select them. When you select them, optional fields appear on the same line: **Scientific Name**, **EPA #**, and **Cost**.

- Fill in the fields as needed.
- Click the trash icon to delete the line.

5. Services

Click any Chemical Services in the column on the right to select them. When you select a Chemical Service, optional fields appear on the same line: **Product**, **Start**, and **End**.

- Fill in the fields as needed.
- Click the trash icon to delete the line.

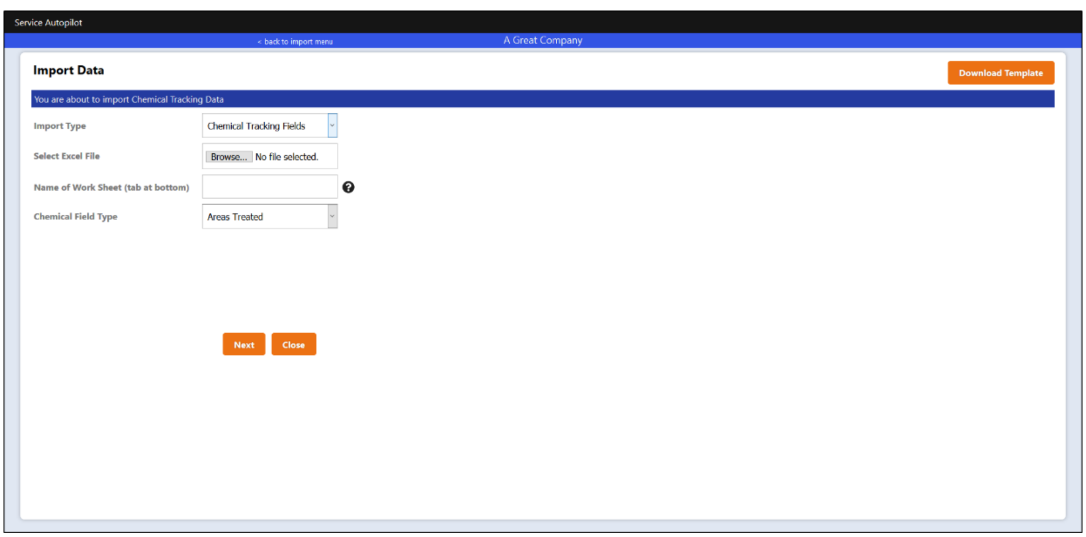
Set Up Chemical Tracking Manually

Chemical Tracking is one area of SA that requires intensive setup *if* you intend to use the feature to its fullest potential. Follow the instructions in this section to import your initial data, then in Step 2, manually enter any additional Chemical data you need.

1. Import Chemical Data

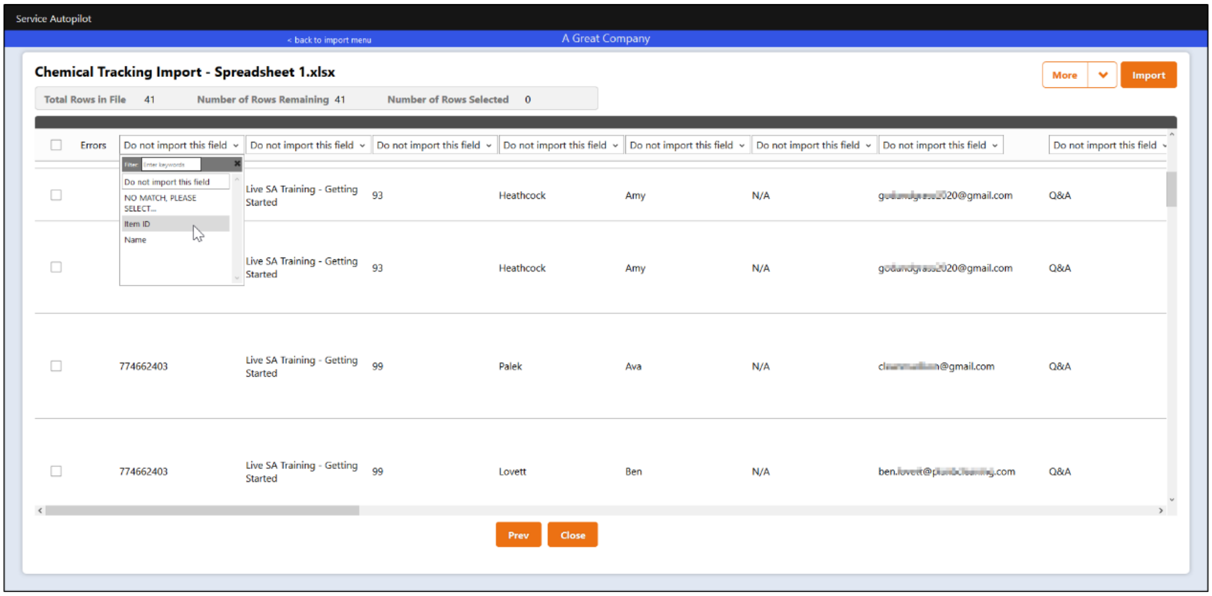
You can import some Chemical Tracking data if you already have it in an Excel file, such as from another software solution. To import this data, follow these steps:

1. Hover over your **Avatar** icon on the upper right and select **Import/Export**.
2. On the Import/Export Data screen, click **Import Data**.
3. From the "Import Type" dropdown, select **Chemical Tracking Fields**.



4. To ensure your spreadsheet is formatted correctly, click the **Download Template** button on the upper right to see example formatting.
5. Select the Excel file that you want to import from your computer.
6. Enter the name of the tab on the spreadsheet you're importing. This *must* match the name on your spreadsheet exactly.

7. Select the "Chemical Field Type" that corresponds to the tab name you entered in the previous field.
8. Click **Next**.
9. The next screen displays the number of rows that will be imported. Use the dropdown lists at the top of the table to designate where in SA each column will map to.



10. If there are any rows you do not need to import, select the checkbox on the far left, then delete them using the **More** menu on the upper right.
11. When you're satisfied with the column mapping, click **Import**. A progress bar displays during the import. If there are any errors, you'll see a message. If the import is successful, you won't see a confirmation message; the status bar will simply disappear.

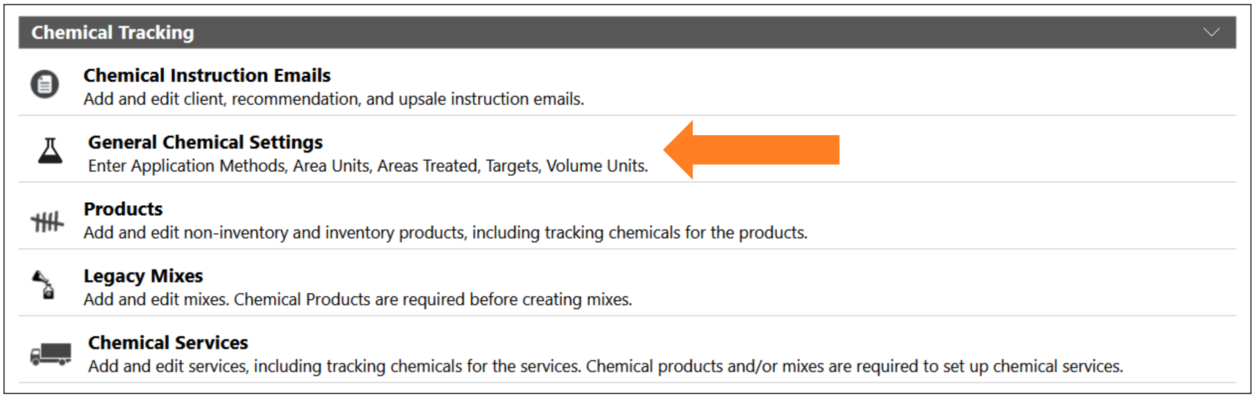
2. Enter Additional Chemical Data

After importing your Chemical data, you can enter additional data manually if needed. Under **Settings > Chemical Tracking**, click each section and supply the data as shown in this section.

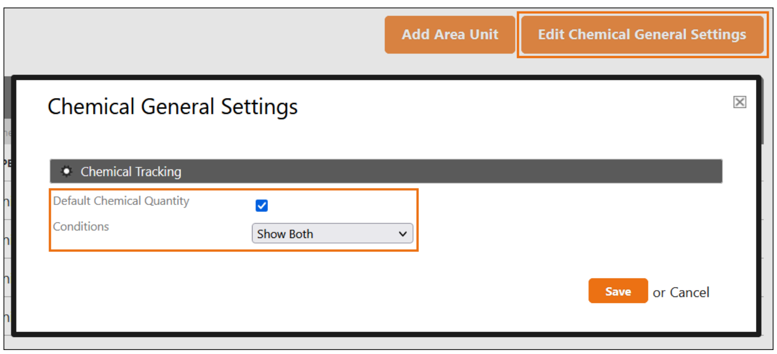
Define General Chemical Settings

General Chemical Settings include Application Methods, Area Units, Areas Treated, Targets, and Volume Units of Measure. These settings can also affect what appears in the Chemical Tracking Wizard on **Scheduling** screens. To manage these settings, follow these steps:

1. Go to **Settings > General Chemical Settings**.



2. Click the **Edit General Chemical Settings** button on the top right.



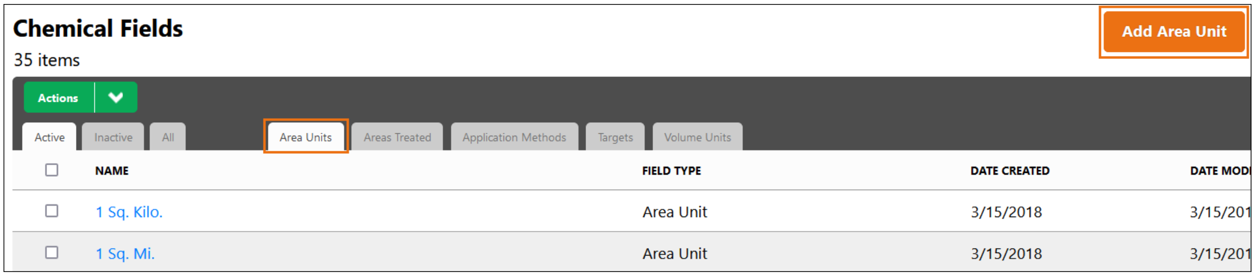
3. Select or clear the "Default Chemical Quantity" checkbox. If you select this, and you also set up the rest of the Chemical system properly, then Service Autopilot will automatically calculate the quantity of each Product to apply at the property based on the applicable custom field value on the Account.
4. In the Conditions dropdown, select one of these options: **Show Weather Conditions**, **Show pH Level**, **Show Neither**, or **Show Both**.
5. When you're done, click **Save**.

Area Units

This tells the system the different ways you want to designate the size of the area to which Chemicals are being applied, such as yards or square feet. You can make any existing entries active or inactive using the **Actions** menu.

1. Go to **Settings > General Chemical Settings**.

2. Under the **Area Units** tab, click the **Add Area Unit** button.



3. Enter a name in the “Name” field.
4. Click the **Save & New** button to add additional area units quickly.
5. Click **Save** after the final entry.

Areas Treated

This tells the system all the possible area locations at a property that need Chemical treatment. Some examples include total turf, front lawn, side lawn, or back lawn. You can make any existing entries active or inactive using the **Actions** menu.

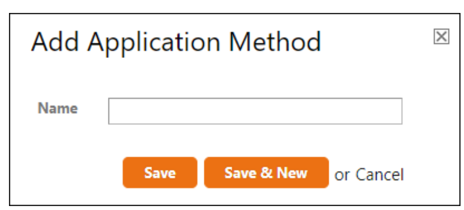
1. Click the **Areas Treated** tab.
2. Click the **Add Area Treated** button.
3. Click the **Save & New** button to add additional areas quickly.
4. Click **Save** after the final entry.

Application Methods

The application method tells the system how Chemicals will be applied, such as by spray, spread, or broadcast. You can also add specific pieces of equipment to this list.

Note: The Chemical Technician in the field can make changes to the application method on the Legacy app if they have permission to do so.

1. Click the **Application Methods** tab.
2. Click the **Add Application Method** button.
3. Fill in the dialog box, then click the **Save & New** button to add additional methods quickly.
4. Click **Save** after the final entry.



Targets

Targets allow you to specify what your Chemical treats, such as different types of insects or weeds. You can make any existing entries active or inactive using the **Actions** menu.

1. Click the **Targets** tab.

2. Click the **Add Target** button.
3. Fill in the dialog box, then click the **Save & New** button to add additional targets quickly.
4. Click **Save** after the final entry.

Volume Units of Measure

Volume Units of Measure (UoMs) allow you to specify how your Chemicals are measured when applying or mixing, such as by ounces or gallons. You can make any existing entries active or inactive using the **Actions** menu.

1. Click the **Volume Units** tab.
2. Click the **Add Volume Unit** button.
3. Fill in the dialog box, then click the **Save & New** button to add additional UoMs quickly.
4. Click **Save** after the final entry.

3. Set Up Email Templates for Chemical Tracking

There are a few different ways of communicating information about Chemical Products and Services to your Clients through SA. These include:

- **Client Instruction Emails**, which notify Clients about the Chemicals that have been applied to their property and any necessary follow-up care.
- **Recommendation Instruction Emails**, which are general recommendation emails about a Client's property that were noticed while you were on site but are not necessarily an upsell opportunity.
- **Upsale Email Instructions**, which let Clients know about other Services and Products they have not yet purchased but could supplement current Service.

If you want your technician to send any of these emails, they can do so from the Legacy Mobile app. If not, your technician can simply add a Job comment to the Job to notify office personnel that an email needs to be sent and why.

Go to **Settings > > Chemical Instruction Emails** to set up email templates for communicating instructions, recommendations, and upsells.

Tip: Make sure the subject line indicates the content of the email. This allows the technician to quickly find the correct email on the Legacy app. This subject line will appear in the subject line to the Client, so use common language that they will understand.

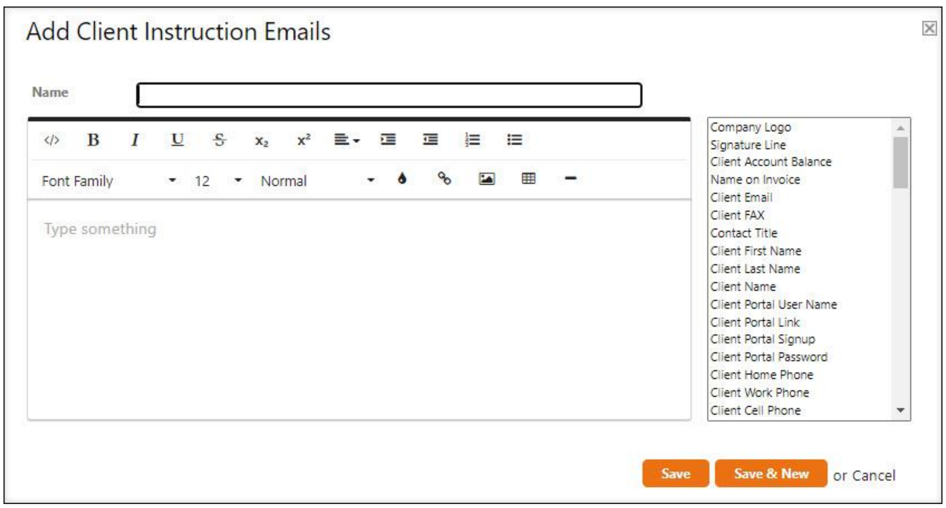
Create Client Instruction Emails

SA allows you to set up emails with specific instructions for Clients regarding Chemicals that have been applied to their property. These emails can be sent from the Dispatch Board or the Legacy app.

You can create a different instruction email for Chemicals that require specific instructions. If you're not required to give specific instructions, you can create a generic instruction email. To do this, follow these steps:

1. Go to **Settings > Chemical Instruction Emails**.
2. Click the **Client Instruction Emails** tab, then click the **Add Client Instruction Emails** button.

3. Fill out the Add Client Instruction Emails overlay. Use the list on the right to add personalization fields or merge tags to your email as needed.



4. Click the **Save & New** button to add additional emails quickly.
5. Click **Save** after the final email.

Create Recommendation Instruction Emails

These emails are general recommendations for the Client regarding their property, typically based on observations your technician or team has made while at their property. These might include recommendations, such as future treatments, watering instructions, damage, or something you want to notify the Client about.

1. Go to **Settings > Chemical Instruction Emails**.
2. Click the **Recommendation Instruction Emails** tab, then click the **Add Recommendation Instruction Emails** button.
3. Fill out the Add Email overlay.

4. Click the **Save & New** button to add additional emails quickly.
5. Click **Save** after the final email.

Create Upsale Instruction Emails

You can send these emails to the Client to suggest additional Services you offer. They may or may not relate to the Chemicals you applied to the property.

1. Go to **Settings > Chemical Instruction Emails**.
2. Click the **Upsale Instruction Emails** tab, then click the **Add Upsale Instruction Emails** button.
3. Fill out the Add Email overlay.
4. Click the **Save & New** button to add additional emails quickly.
5. Click **Save** after the final email.

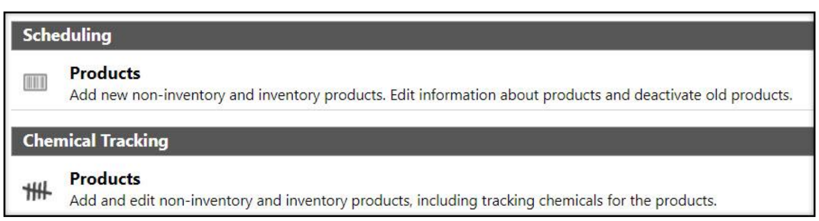
If you want your technician to send these, they can do so from the Legacy app. If not, your technician can simply add a Job comment to the Job from the app, which will appear on the Dispatch Board. The office staff can then see the comment and send an upsell email directly from the Dispatch Board.

4. Set Up Chemical Products

When setting up Chemical Products, you tell the system that Products can be scheduled individually with a Service, and also added to a Mix with other Products (see "Add a New Chemical Mix").

Here, you can designate inventory or non-inventory Products for Chemical Tracking. Use this process for existing or new Products. Most dropdown lists have a **Create New** button that lets you quickly add new items.

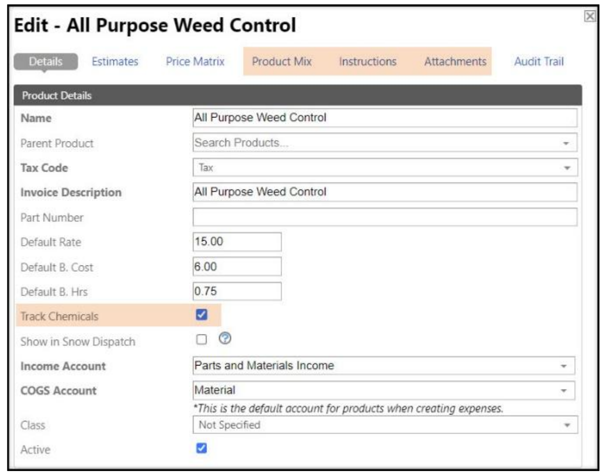
1. Go to **Settings > Products**. There are two entries (under the **Scheduling** and **Chemical Tracking** sections) where Chemical Products can be entered.



If you click the entry under **Chemical Tracking**, then the list will automatically be filtered to show Chemical Products *only*. This is because of the "Only Products with Mixes" filter. To see Products you've already entered in the system, click the **X** next to the filter on the top left.

2. Add a new Product or click an existing Product to open the Edit Product overlay.

3. Select the "Track Chemicals" checkbox. This step is required for Chemical tracking. At the top of the Edit Product overlay, three new tabs appear:
    - The **Product Mix** tab shows the individual Product Mix and application rates specific to this Product. It can be viewed on the Legacy app.



    - The **Instructions** tab includes a "Label Instructions" section and a "Client Route Sheet Instructions" section for the Product. Only Label Instructions are viewable on the Legacy app. Client Route Sheet Instructions are *only* viewable on printed Chemical Route sheets.
    - The **Attachments** tab lets you attach things like documents, pictures of Product labels, SDS instructions, and more. Attachments *cannot* be viewed or selected on the Legacy app.
4. Fill out the rest of the **Details** tab like you would for any other Product.
5. Click **Save**.

Add a Chemical Product

If you need to add new Products for Chemical Tracking, follow these steps:

1. Choose either the **Inventory** or **Non-Inventory** tab for the Chemical Products you want to add.

2. Click the **Add Product** button.
3. Name the Product.
4. Add the Tax Code.
5. Add the Purchase Description and Sales Description.

    Note: Chemical products don't need to be invoiced because the Service rate typically covers the Product cost.
6. Select the "Track Chemicals" checkbox to designate it as a Chemical Product.
7. Add an Income Account.
8. Add a COGS Account.

9. Click the **Product Mix** tab and fill out the fields as needed.
10. Click **Save** when you're done.

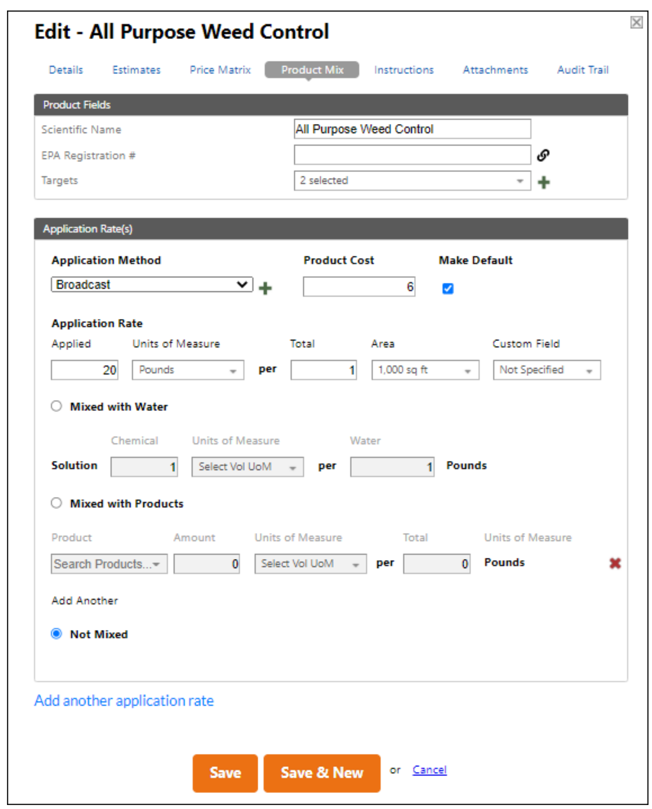
5. Set Up Chemical Mixes

Mixes are treated just like Products.

- You can include Chemical Mixes in other areas of SA like Estimates and Invoices.
- You can now create Multiple Application Methods for a Chemical Product. This saves you time and makes Chemical Tracking Reports more accurate.
- The system always refers to Chemicals as the original item; after it's combined with something else, it's a Mix.
- The Legacy Mixes list contains all Mixes you previously created. You can still use them like before. They can be found under **Settings > Legacy Mixes**.

Add a New Chemical Mix

Mixes let you specify the ratio of two or more liquid Products and water, which are then added to a container, such as a large tank or backpack sprayer. You won't be able to set up Mixes until you've added all the component Chemical Products you need to your Account. To add a new Mix, follow these steps:



1. Go to **Settings > Products**, then add a new Chemical as a Product.
2. On the **Product Mix** tab, fill in the "Scientific Name." Some states require this.
3. Fill in the "EPA Registration #" field. Optionally, you can add the URL for the EPA website. You'll see that link when you use the Chemical Tracking Wizard.
4. Select your "Targets." These specify what issues the Chemical treats, such as insects or specific types of weeds, algae, and more.
5. Choose an "Application Method" from the dropdown. This tells the system how the Chemical will be applied to the area.
6. Enter the "Product Cost." This is the per-unit cost as it relates to the

Application Rate. This cost will appear on the Job Costing report after the Chemical Job has been completed in the system. The report shows your costing information for each of the Jobs where this Product is used.

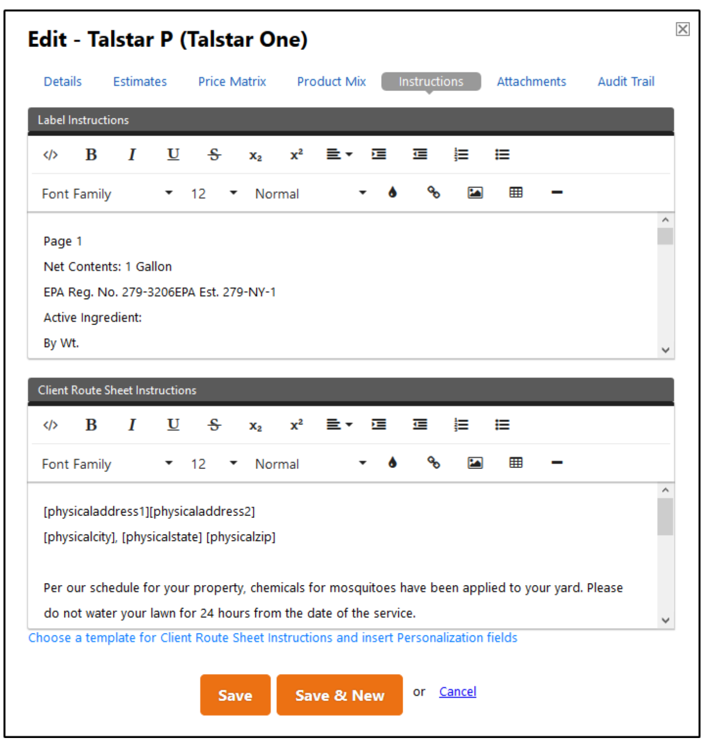
7. Select the "Make Default" checkbox when you have an application method and rate that you use more often. It will be the first option that appears when you use the Chemical Wizard.
8. Select the radio button for either **Mixed with Water** or **Mixed with Products**, then select the Products and quantities to Mix.
   OR
   Select the radio button for **Not Mixed**.
9. Specify how much of the mixed Product is applied per a given area unit of measurement. An example might be 1 gallon per 1000 sq. ft.
10. Create additional application methods by clicking the **Add another application rate** link.

    Note: You can create multiple application rates, but only one application method per Product.
11. Click **Save** to exit or click **Save & New** to create additional Chemical Product Mixes.

After you create a Mix, you can link it to a Chemical Service.

Add Instructions

If needed, add instructions to your Product Mix with the **Instructions** tab. This tab includes "Label Instructions," which are viewable on the Legacy app. It also has "Client Route Sheet Instructions," which appear on Chemical Tracking Route Sheets. These can be torn off and left with the Client.



Label Instructions - Add the Product Label Instructions so the technician can see them on the Legacy app. The technician will be able to click the **Label** button to see these.

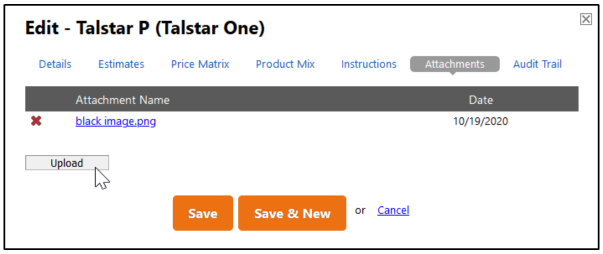
Client Route Sheet Instructions - These are instructions that can be torn off the Route Sheet and provided to the Client at the time of Service.

Click the link below the text field to import text from an existing Client Instruction Email (**Settings > Client Instruction Emails**). You may have to condense the content because space is limited on the Route Sheet.

Click **Save** or **Save & New**.

Add Attachments

Attachments might be documents, photos of product labels, or SDS instructions.



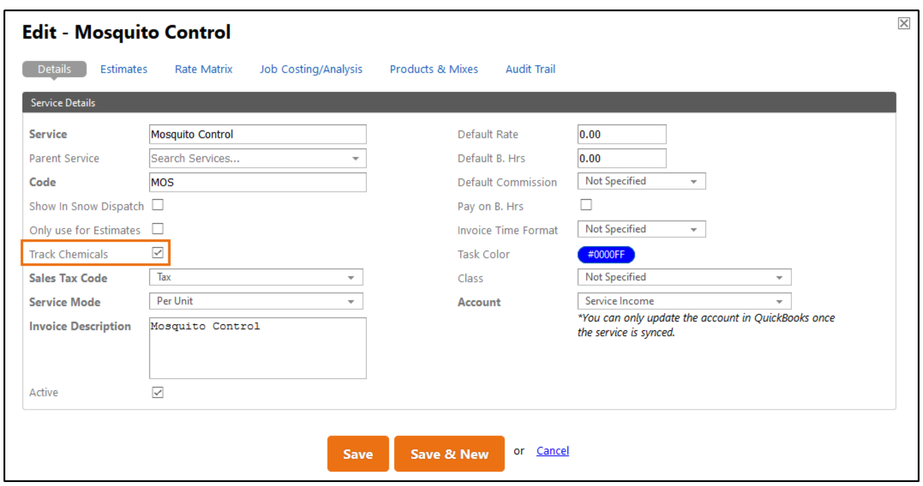
Click **Upload > Attach A File** to browse for your attachment.

Note: These attachments are not viewable or selectable on the Legacy app.

6. Set Up Chemical Services

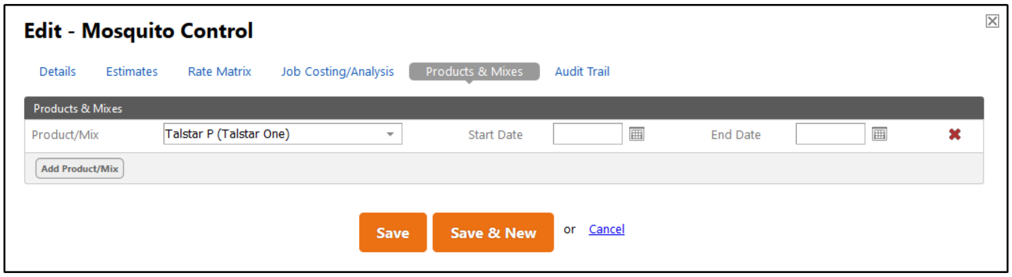
Chemical Services are set up like any other Service with one key exception: selecting the "Track Chemicals" checkbox.

1. Under **Settings > Chemical Services,** click a Service to open the Edit Service overlay.
2. Select the "Track Chemicals" checkbox.



You must select this checkbox for a Service to appear on the Chemical Tracking Reports and the Chemical Tracking Wizard (**Scheduling > Dispatch Board (New)**).

3. The **Products & Mixes** tab is added to the overlay. Use this tab to include Chemical Products for that Service.



4. To add a new item to the tab, click **Add Product/Mix**. The selection list shows your active Chemical Products and any Mixes you've already set up.
5. Optionally, you can add a start and end date for each Product or Mix. This is in case you use the same Service year-round, but the Products used vary by season.
6. Click **Save** or **Save & New**.

See "Add a Chemical Product" for more information.

7. Set Up Chemical Jobs

After completing the Chemical Tracking setup, you're ready to set up Chemical Jobs.

- *Existing Jobs* that include Chemical Services will now be designated as Chemical Jobs, so they can be tracked. You do not have to set up those Jobs again.
- *New Jobs* can be set up as Chemical Jobs by adding a Chemical Service to any Job Type: One Time, Waiting List, Package, or Recurring.

Add a New Chemical Tracking Job

You can set up a new Chemical Job like you would any other Job:

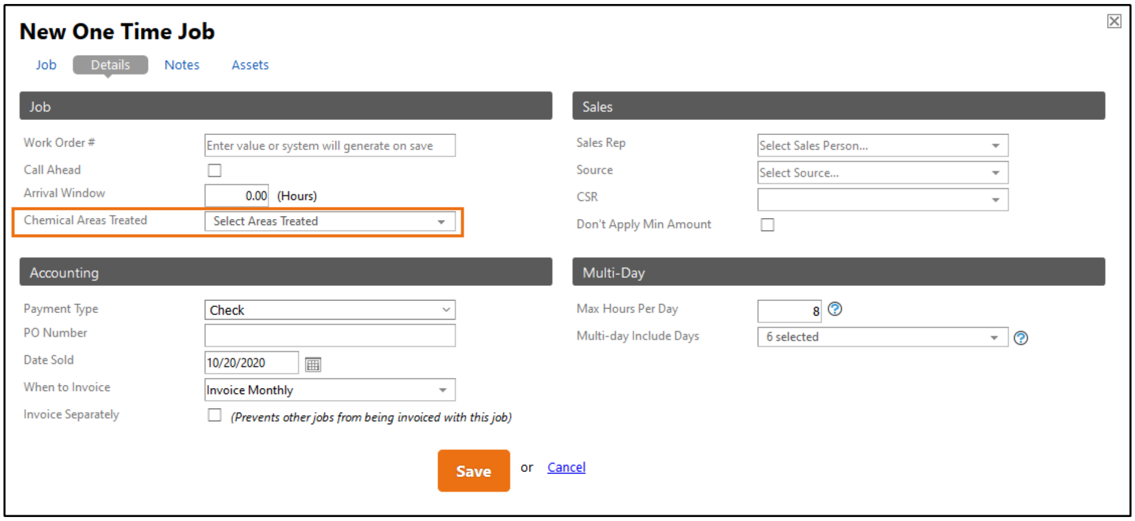
1. Add a Chemical Service or Package composed of Chemical Services to the Job.
2. Once Services are added, add Chemical Products to the Job the same way you would add any other Product (unless the Chemical Products have been applied to the Service on the Service-level).

Note: For Chemical Jobs, you should *not* add Chemical Products within the Job because you already linked the Chemical Product to the Chemical Service during setup.

Identify a Chemical Job

If you add Services that are designated as "Chemical" to a Job, then the Job automatically becomes a Chemical Job.

On the **Details** tab of the Add Job overlay, the "Chemical Areas Treated" field tells the technician what areas to treat. This can be customized on the Job-level because Areas Treated may vary from the default for a property.

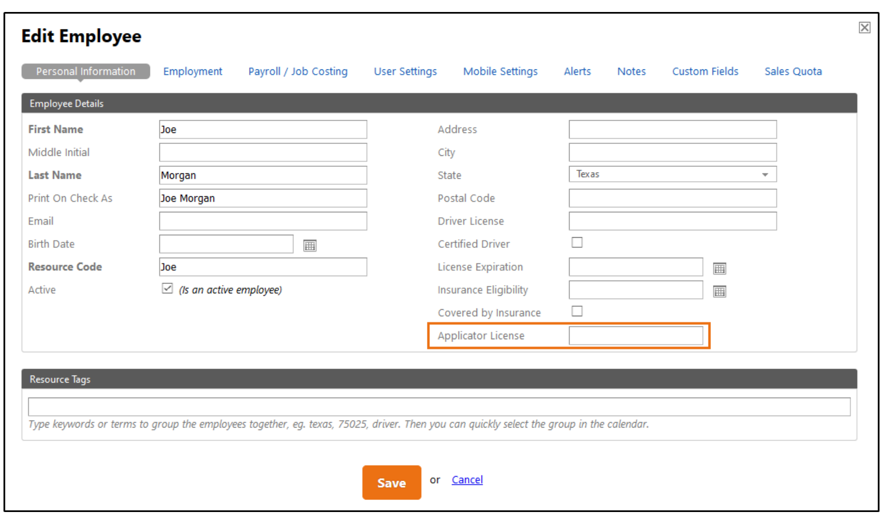


8. Add a Chemical Applicator License Number

If your business is required to document the Applicator License number for your technicians, you can do this for an Employee or Vendor. This number will appear on the Chemical Tracking Report for Services completed by each Resource.

For an Employee

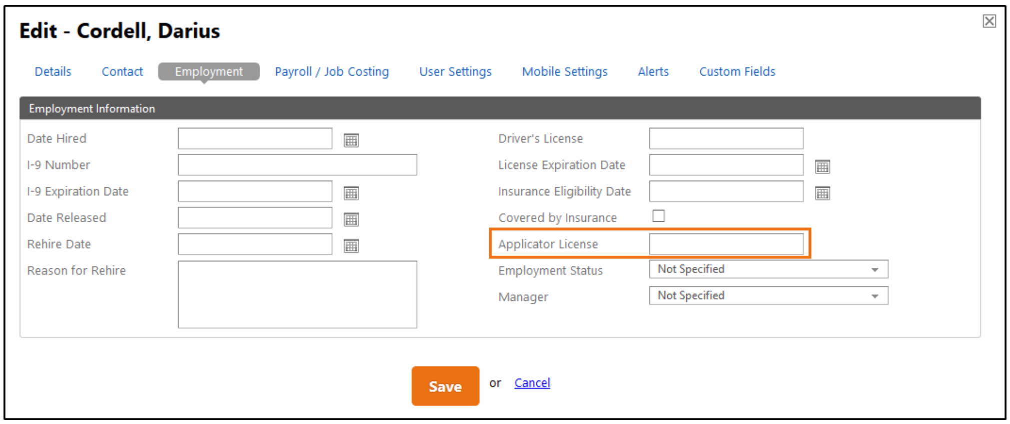
1. Go to **Team > Employees > (Employee Name)**.
2. Click **Edit**.
3. Click the **Personal Information** tab and fill out the "Applicator License" field.



4. Type in the license number. This number will appear in the Chemical Tracking Report.
5. Click **Save**.

For a Vendor

1. Go to **Team > Vendors > (Vendor Name)**.
2. Click **Edit**.
3. Click the **Employment** tab to fill out the “Applicator License” field.



4. Type in the license number. This number will appear in the Chemical Tracking Report.
5. Click **Save**.

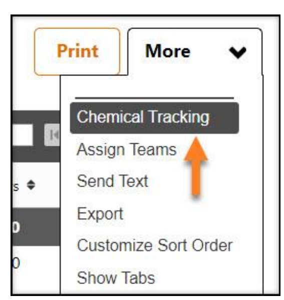
Manage Chemical Services with the Wizard

The Chemical Tracking Wizard is a tool on the Dispatch Board that lets you manage Chemical Tracking Services. You can use it to:

- **Adjust quantities** of Chemicals that were used on a Job.
- **Add new Chemicals** that were used.
- **View Reports** related to future and past Chemical applications.
- **Display weather conditions** and pH settings, if these General Settings are enabled.

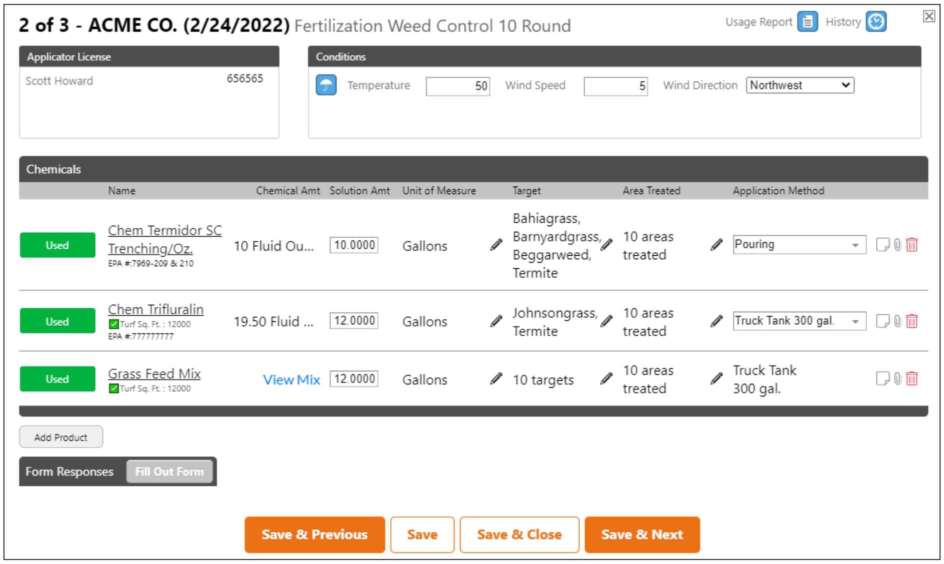
Access the Chemical Tracking Wizard

From the Dispatch Board, click **More > Chemical Tracking** to open the Wizard:



Note: You *must* have Chemical Jobs scheduled for the day to see this option.

The Chemical Tracking Wizard is divided by Job with the number of Chemical Jobs listed on the top left of the overlay.



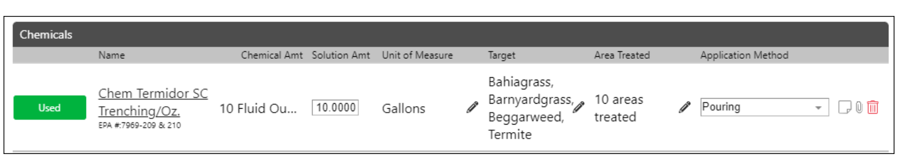
The "Conditions" Section

This section lets you manage Products, Mixes, and some Form responses.

- The "Conditions" section applies to all Jobs when a value is entered.
- If you include Temperature, Wind Speed, and Wind Direction on the Wizard, then you can click **Save & Next** so these fields auto-populate on the next Job.
- Add the values for these fields relevant for the date when Chemicals are to be applied. If you don't know this information when scheduling a Job, then the technician on the Job can enter the information via the Legacy app.
- Weather conditions you include on the Wizard will appear on the Chemical Tracking Report**.**

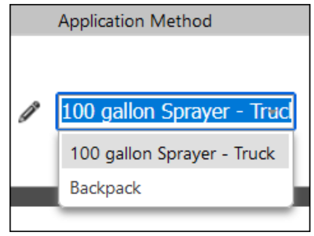
The "Chemicals" Section

This section allows you to manage the Chemical Products for a Job.



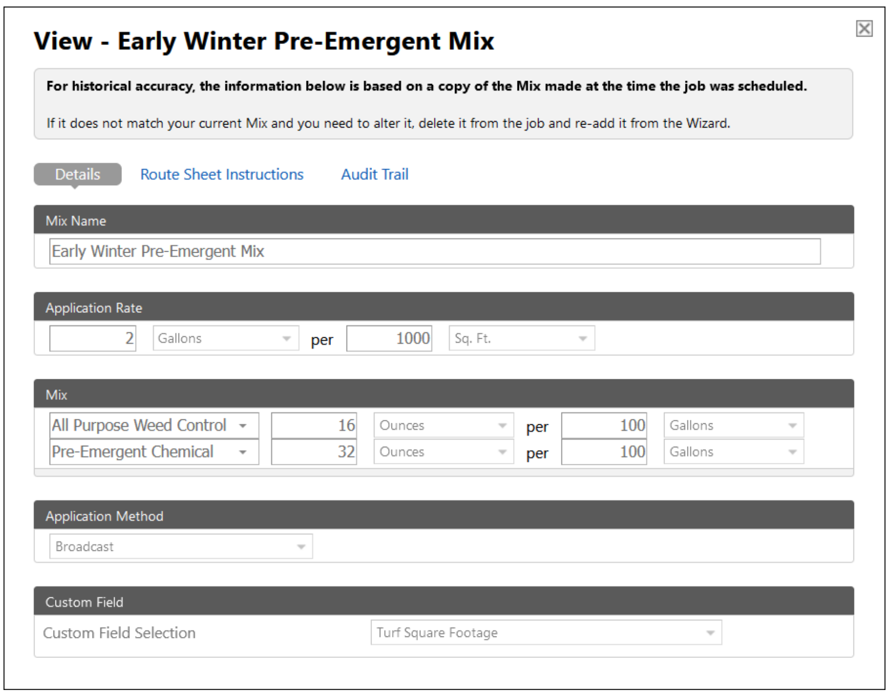
- To confirm a Product was used, click the **Used/Not Used** button.

- Click the name of any item to edit it, including the application rate and Mix ratio.
- Use the **Pencil** icons to change the **Target**, **Areas Treated**, or **Application Method**.
- The Chemical Amount automatically calculates the ratio of Chemical to solution.



- If you set up **multiple application methods** for a Product, you can choose a method from this dropdown. The Wizard automatically calculates your solutions based on the application method.

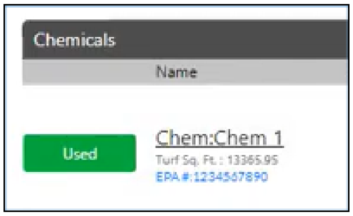
- If this is a Mix, a link will appear. Click the **View Mix** link to see a breakdown for each Chemical.



- Use the buttons on the top right to access the **Planned Chemical Usage Report** and the **Chemical History** for the property currently in view.

EPA Link

If you add the EPA website's URL to the Chemical Product when setting it up, then a link will appear on the Wizard:



Click the blue link to go directly to the Chemical on the EPA website.

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 easily move from Job to Job to make sure details are accurate for billing.

To access the Wizard, follow these steps:

1. From the Dispatch Board, go to **More > Chemical Tracking.** The Chemical Tracking Wizard appears.
2. After the Jobs are completed using the Legacy app, you can see updates to Products and Jobs on this Wizard. If needed, update anything that was entered via the Legacy app 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.
3. During the Close Out Day for Chemical Jobs, you need to verify that the appropriate Chemical Products have the green **Used** button next to them, indicating the Product was used in the quantity seen. The buttons on the left toggle between (red) **Used?** and (green) **Used**.
   Click the **Next** button at the bottom to move between Jobs easily to review Products and quantities for each.
4. If you send Client Instruction Emails from the Legacy app or from SA, enable the "Instruction Emails Sent" column for your Close Out Day view on the Dispatch Board. To do this, hover over the column selection on the top right of the table and select the column. The column will populate on the right side of the grid as an icon. This icon will appear to the left of the **Products** and **Job Notes** icons. The icon *will* change when an Instruction Email has been sent.

Chemical Tracking on the Legacy App

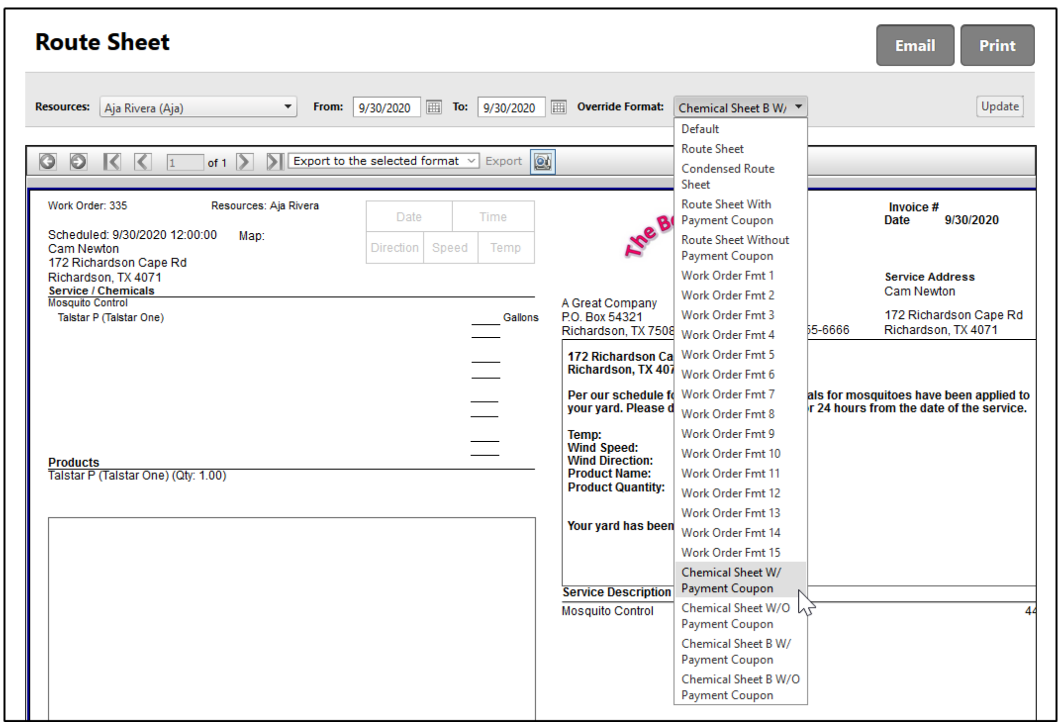
If they have the correct User Rights enabled, then mobile users *can* modify all fields on the Chemical Tracking Wizard from the Legacy app.

On the Legacy app, your technician will be able to enter a different quantity if they end up applying a different amount.

Print Chemical Tracking Route Sheets

Your technicians can see Chemical Tracking Job information on the Legacy app, or you can print Route Sheets from the Dispatch Board. To print Route Sheets, follow these steps:

1. Go to **Scheduling > Dispatch Board (New)**.
2. Select the checkbox for all the Jobs you want to dispatch, then click **Actions > Dispatch**
3. Click **Print** to access the Route Sheet screen.
4. Select your options:
   - Resource(s)
   - Date
   - Override Format (either "Chemical Sheet W/Payment Coupon" or "Chemical Sheet W/O Payment Coupon")



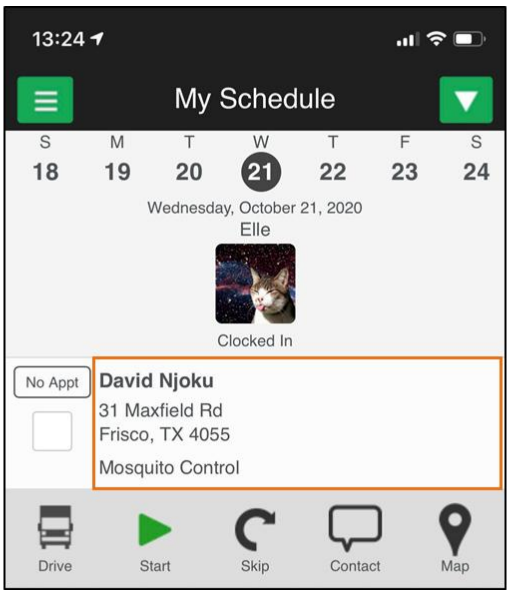
5. Click **Print** to open the pages in a new tab and view the print dialog.

Note: 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 so they can return it to the office for your records.

Chemical Tracking on the Legacy App

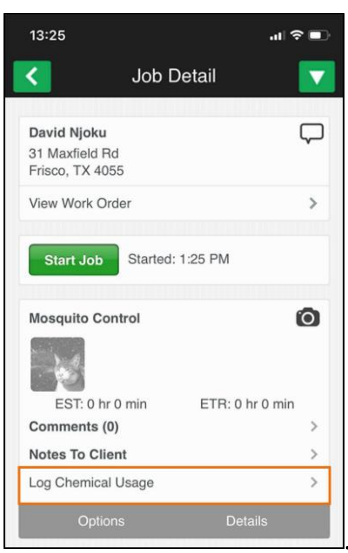
Chemical Tracking features are available on the Legacy mobile app for Chemical Jobs. To update Chemical Tracking Jobs in the field, technicians can follow these steps:

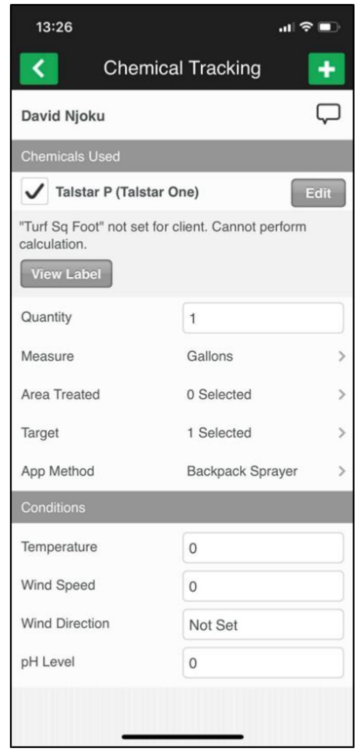
1. On the Legacy app, log in and clock in.



2. Tap a Chemical Job, then tap the **Start Job** button.

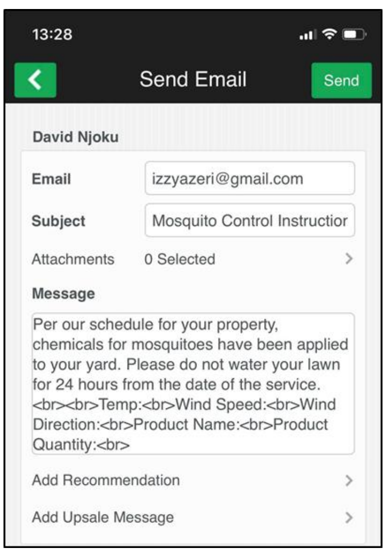
3. Tap **Log Chemical Usage** to view Chemical details.





4. Tap the checkbox for all Products you used at a property. If needed, you can edit the weather conditions at the bottom of this screen.
5. To add additional Chemical Products from this screen, tap the "**+**" in the upper right corner.
6. To see label instructions for the Product, tap the **View Label** button.

   Note: Label instructions must first be added to the Product from the Products list (**Settings > Products**).
7. To email the Client with Client instructions, tap the cartoon bubble in the top right corner, below the "**+**". You can either choose the appropriate Chemical instructions and send them in the pre-written email or edit the email if needed.
8. Select an email template **or** manually type an email.
9. Edit the email as needed. Any code you see in the body of an email template will not be visible once the email has been sent.



10. To send the email, tap **Send** in upper right corner.
11. Tap the back arrow button (**<**) to get back to the Job screen.

Reports for Chemical Tracking

Two pre-built reports in the Report Center will help with Chemical Tracking:

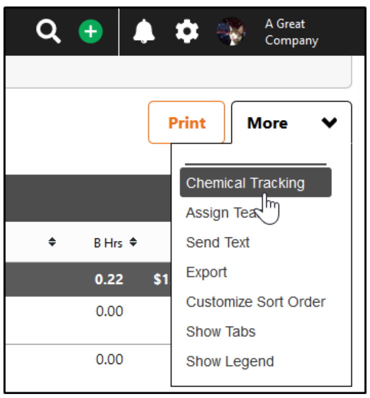
- Planned Chemical Usage Report

- Chemical Tracking Report

Planned Chemical Usage Report

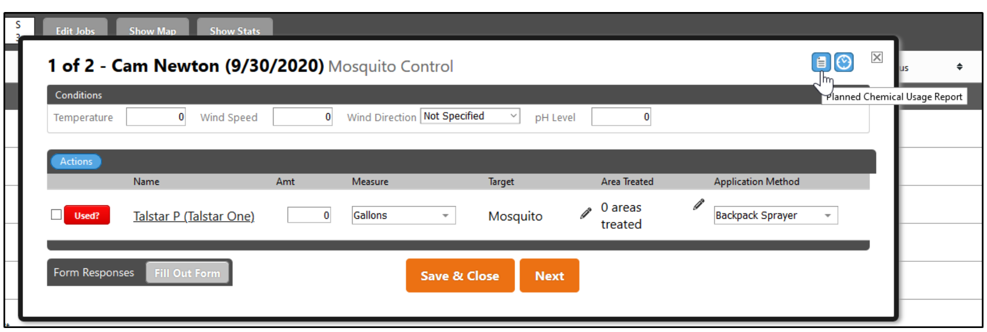
Before a Chemical Tracking Job, you can print the Planned Chemical Usage Report for the technician so they know what Chemicals will be used and how much of each to take into the field. The Planned Chemical Usage Report will tell the technician the overall quantities of Product to load on the truck and the individual quantities for each Client they'll be servicing on the date or date range you select.

1. From the Dispatch Board (**Scheduling > Dispatch Board (New)**), select **More > Chemical Tracking**:

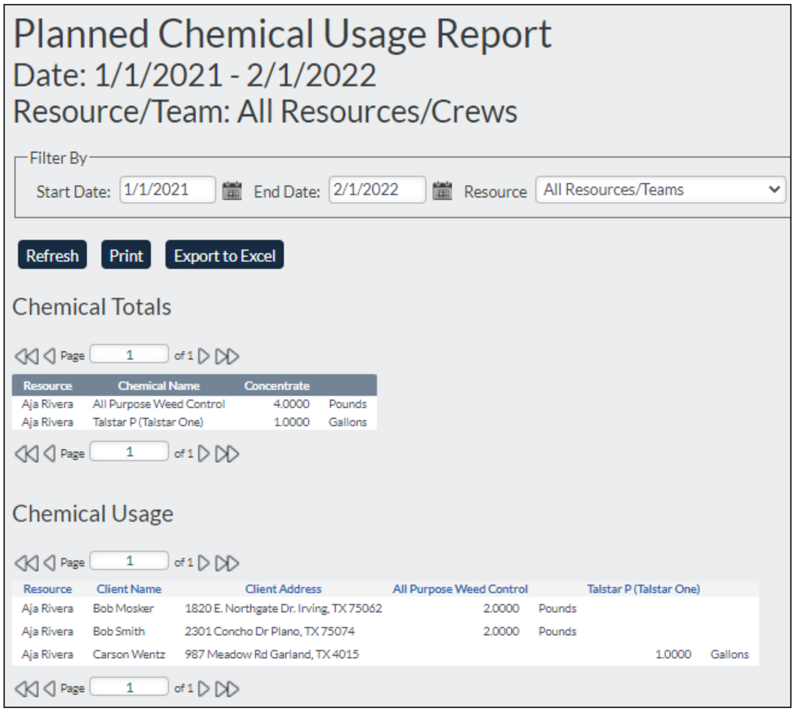


   The **Chemical Tracking** option will only appear if you have Chemical Jobs scheduled for the date range you are currently viewing on the Dispatch Board.

2. To access the Report from the Chemical Tracking Wizard, click the **Planned Chemical Usage Report** button in the upper right corner of the overlay:



3. The Report opens in a new tab and will look something like this:


Planned Chemical Usage Report
Date: 1/1/2021 - 2/1/2022
Resource/Team: All Resources/Crews

Filter By
Start Date: 1/1/2021 End Date: 2/1/2022 Resource All Resources/Teams

Refresh Print Export to Excel

Chemical Totals

Page 1 of 1

Resource	Chemical Name	Concentrate	
Aja Rivera	All Purpose Weed Control	4.0000	Pounds
Aja Rivera	Talstar P (Talstar One)	1.0000	Gallons

Page 1 of 1

Chemical Usage

Page 1 of 1

Resource	Client Name	Client Address	All Purpose Weed Control		Talstar P (Talstar One)	
Aja Rivera	Bob Mosker	1820 E. Northgate Dr. Irving, TX 75062	2.0000	Pounds		
Aja Rivera	Bob Smith	2301 Concho Dr Plano, TX 75074	2.0000	Pounds		
Aja Rivera	Carson Wentz	987 Meadow Rd Garland, TX 4015			1.0000	Gallons

Page 1 of 1

Description

Chemical Totals show the overall quantity for each Chemical to be used for the day.

Chemical Usage shows the Client Name, Client Address, and the quantity of Chemical to be used at the property.

Note: Concentrate and water amounts display separately to help your technicians load their tanks properly. Concentrate amounts are truncated to four decimal places.

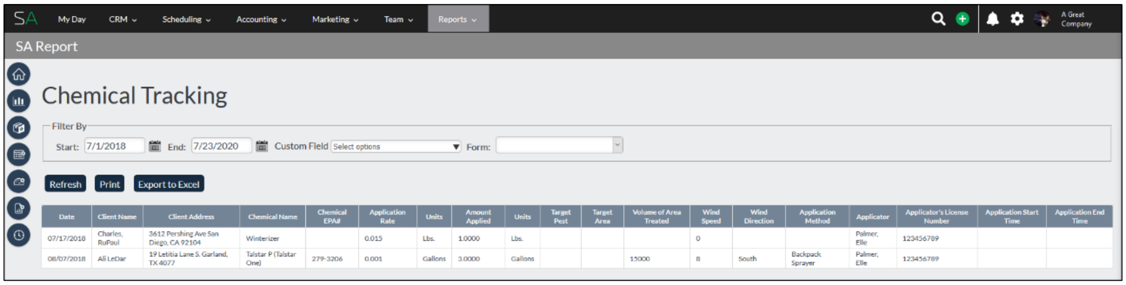
Chemical Tracking Report

This Report is a list of applied Chemicals including their details, such as EPA number, amount, and weather conditions. You must have Chemical Tracking enabled and set up for this Report to be available.

The Report is based on the information entered on Chemical Jobs using Chemical Services and Products.

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

The Chemical Tracking Report can be filtered by date range, custom field, and resource team:



Description

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 for the Chemical Product
Chemical Amount Applied	The total amount of Chemical Product actually used.
Solution Amount Applied	The total amount of Chemical solution that was actually used.
Amount of Area Treated	The value in the custom field that's designated on the **Product Mix** tab for the Chemical Product.
Temp	The temperature entered at the time of application.
Wind Speed	The wind speed entered at time of application.
Wind Direction	The wind direction entered at time of application.
pH Level	The pH level of the Chemical Product entered at the time of application.
Areas Treated	The areas where the Chemical Product is to be applied.
Application Method	How the Chemical Product was applied to the property.
Application Rate	The application rate for the Product based on the information entered in the "Application Rate" section on the **Product Mix** tab for the Chemical Product.

Applicator Name	The Resource who applied the Chemical Product. The resource applicator license number is required to populate this field.
Applicator's License #	The license number of the Resource who applied the Chemical Product.
Application Start Time	The time the Job was started. This requires the "Applicator License #" field be filled in.
Application End Time	The time the Job was completed. This requires the "Applicator License #" field be filled in.
Budgeted Concentrate Amount	The total amount of Chemical Product to be used.
Targets	The Target the Chemical Product is designed to kill.

If your state requires more information than this Report provides by default, you can create Forms the field technician can log additional information with.

When creating a Form, make sure the Form is associated with the Chemical Service, so that it's available on the Legacy app for the technician. This information is automatically added to the Chemical Tracking report. Each field on the form will become a column on the Chemical Tracking Report.