Service Autopilot™

SNOW
USER GUIDE
V2.5

Contents

SA Version 2.5 for Snow

This user guide is written for Version 2.5 of Service Autopilot. When all Snow dispatching can be done in SA V3, we'll produce a V3 version of the instructions.

Workflow of a Snow Event

If you follow the steps in this guide for setup, all your preparations will pay off when you create Snow jobs. Here's the basic sequence of events.

1. Get forecast for an upcoming snow event.

2. Verify all Master Routes are up to date.

3. Create a Snow Dispatch on the Snow Dispatch Board.

4. Add Snow Jobs to the new Snow Dispatch at **Scheduling > Snow Dispatch > More**.
   Click "Add to Dispatch" in the dropdown list.

5. Add the jobs you need to the Dispatch Board.

6. On the Snow Dispatch Board, verify that all jobs are:
   - correct
   - in appropriate route order
   - assigned to correct resources

7. Dispatch all snow jobs.
   - Change your Snow Dispatch from "Pending" to "Working"
   - Your field resources see their snow jobs on either the SA Legacy app or printed Route Sheets

8. Get to work (stay warm).

9. Close Out Day on the Snow Dispatch Board.

10. Invoice the Snow jobs.

11. Get Paid!

"Not all storms come to disrupt your life, some come to clear your path."

Set Up the Snow System

This section walks you through setting up the Snow System in SA:

1. **Turn On the Snow Feature in Service Autopilot** page 3

2. **Set up Team Leaders** page 3

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4. **Set Up Snow Services** page 5

5. **Set Up Snow Products** page 6

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10. **Set Up Master Routes for Snow Jobs** page 19

Turn On the Snow Feature in Service Autopilot

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

2. Click the "Settings" tab and select the **Enable Snow** check box

3. Click **Save Changes**

Set up Team Leaders to Use the Snow System

If needed, set up your Snow Teams to use the Legacy app. Only the Team Leader needs login credentials.

Note: The *Team app* does **not** support the Snow system in SA.

1. Go to **Team > Employees**, click an employee name, then click **Edit** to see the **Edit Employee** overlay. For a Team Leader, go to the "Mobile Settings" tab and check **Is Team leader**. For full instructions, see the *Legacy App Setup Guide*.

2. Go to ⚙ **Settings > User Roles & Rights**, click a role name, then go to the "Scheduling" and "Mobile" tabs to select the permissions and requirements. On the "Mobile" tab, you can require before-and-after pictures. For more information, see the *User Roles & Rights Guide*.

3. We recommended that you **enable Location Services and wi-fi** on each mobile device to improve location tracking.

Set Up Snow Teams

Depending on your operations, create separate teams for your various snow assignments.

Tip: The best practice is to designate a team for snow services, even if you typically have just one employee for this work. Why? It will save you time later if you have a personnel change. It's a simple step to switch employees on the **Team Assignment** screen, which carries over to each snow job. Otherwise, you'll need to make assignment changes to every job affected.
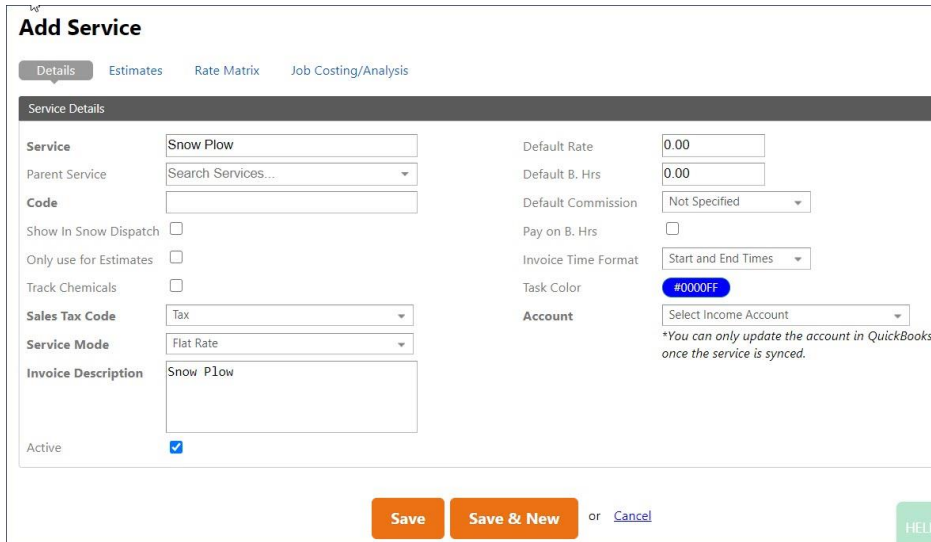
1. Go to **Team > Teams** and click **Add Team**.

2. Name the teams to indicate their job; for example:
   Snow Plow Team 1, **Snow Plow Team 2**
   Snow Shovel Team 1, **Snow Shovel Team 2**

3. Give each team a "Team Code," which is an abbreviation for its name. This code appears on the Snow Dispatch Board. For example, "SP1" for Snow Plow Team 1.

4. In the **Tags** field, add a "SNOW" tag. This will enable you to filter on tags on the Calendar screen, to see only your Snow jobs.

5. If you know who will be assigned to the team, click the "Team Assignments" tab and set up the resources as you would any other team.

6. Click **Save**.

Set Up Snow Services

You will later set up a *Pricing Matrix* for each On Demand snow job, so it's not necessary to set up Snow services with different depths. You also don't need to set up pricing matrixes at the service level.

1. Go to ⚙ **Settings > Scheduling > Services**, then click **Add Service**.

Set up the various Snow Services that you offer, such as Snow Plowing, Snow Removal, Snow Shoveling, De-icing, Salting, or Sanding, and so on.

2. Within each Snow Service, note these settings:

    Service – The best practice is to start the name of each of your snow services with the word "Snow..." or suitable abbreviation. This makes it easy to find your snow services in various service dropdown lists, and other areas like reports.

    Show In Snow Dispatch – Check this check box; it's a *required field* for the Snow system. If it is not checked, you will **not** be able to see your snow services when adding On Demand Snow jobs to your clients.

    Invoice Time Format – Optional: if you need to log any of these options on your Snow Invoices in the **Invoice Description** area, choose the one that best fits your situation.

3. Fill in the rest of the service fields as with any other service in SA.

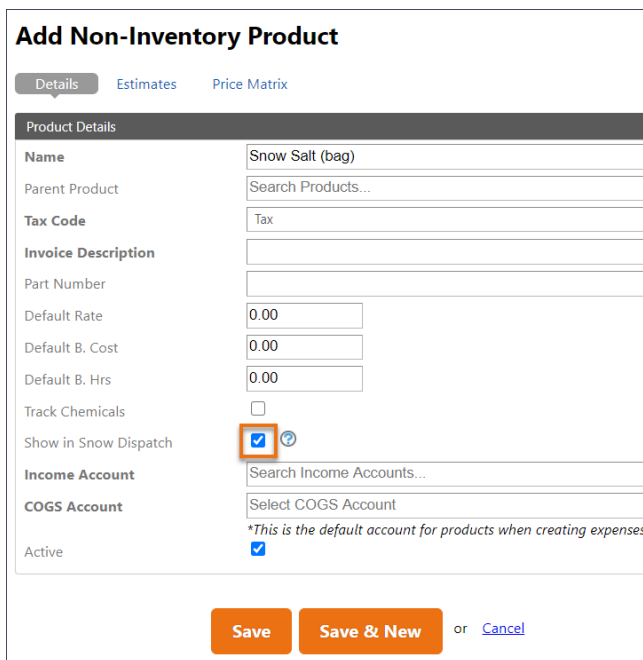4. Click **Save**.

Set Up Snow Services for Contract Billing

If you plan to use contract billing, we recommend you set up a separate Snow Service exclusively for contract billing. Doing so lets you easily track your contract revenue on the Profit/Loss report. The service will not be scheduled, but it will appear on your contract invoices.

Name the service something like "Snow Contract Agreement."

Set Up Snow Products

Follow these steps for each product you might use for Snow services.

1. Go to ⚙ **Settings > Scheduling > Products** and click **Add Non-Inventory Product**. Products can be either Inventory or Non-Inventory.

Add Non-Inventory Product

Details	Estimates Price Matrix

Product Details

Name	Snow Salt (bag)
Parent Product	Search Products...
Tax Code	Tax
Invoice Description	
Part Number	
Default Rate	0.00
Default B. Cost	0.00
Default B. Hrs	0.00
Track Chemicals	☐
Show in Snow Dispatch	☑ ⊘
Income Account	Search Income Accounts...
COGS Account	Select COGS Account
	This is the default account for products when creating expenses
Active	☑

Save   **Save & New**   or   Cancel

About inventory products

- Inventory products are **not** tracked as inventory in Service Autopilot.
- If you sync with QuickBooks, you can use its inventory tracking feature.

2. Add any products you want to track or invoice for snow.

   Tip: Start the name of each product with "Snow" so you can easily find them later, such as Snow Salt, or Snow De-Ice, and Sand.

3. Check the **Show in Snow Dispatch** check box.

4. Click **Save & New** to add another product, or click **Save** if you are done.

Set Up Asset Types for Snow Jobs

An advantage of using the Snow System in SA is the option of *Asset Billing*—it lets you bill by the equipment, or *assets*, used for each job.
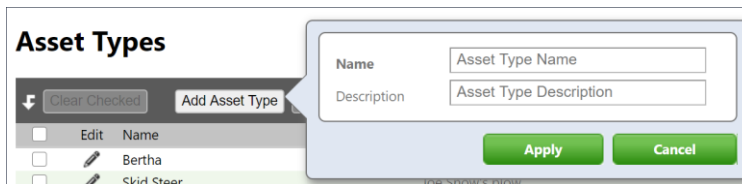
For example, you might set up a single snow plow service, but you would bill each client differently depending on the specific equipment used. At invoice time, just select the piece of equipment that was used on the job, and the pricing will be calculated automatically.

Note: This function is not for asset tracking, just for billing.

Follow these steps to set up each type of equipment.

1. Go to ⚙ **Settings > Scheduling > Asset Types**

2. Click **Add Asset Type**
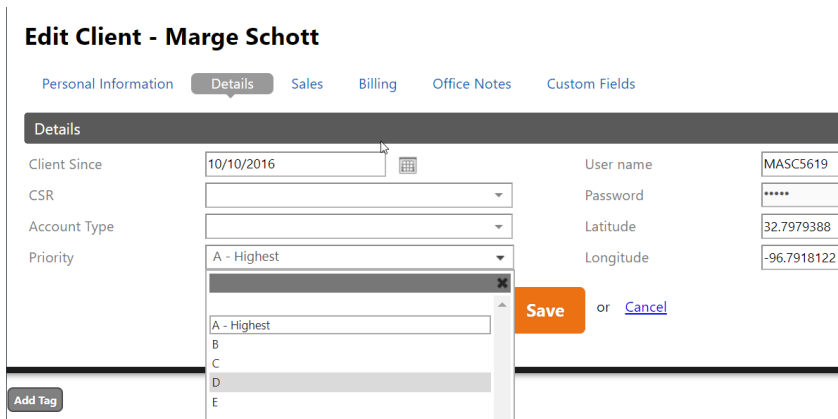
3. Fill in the **Name** and **Description** fields, then click **Apply**

Set Up Client Priority for Routing Snow Jobs (Optional)

You don't have to set a priority on every client for snow jobs, but if you have clients who run essential services or you need to serve sooner for any reason, setting the priority can be helpful. At the time you are routing, you'll be able to see the higher-priority properties at a glance, so you can more quickly decide the route order.

Follow these steps for each client who will use Snow services.

1. Go to **CRM > Clients**, click a client, then click **Edit**.

2. Select the **Details** tab, then choose the priority for this client from the dropdown list. **A** is the highest and **E** is the lowest.

You can see this priority in two places:

- Master Route
- Snow Dispatch Board

Set Up Snow Contracts

If you plan to bill a client a set amount for Snow services each month, you need to set up a Snow Contract. You also might want to set up a contract if you bill a client for an entire season.

Contract billing in SA is also known as *installment billing*.

1. From an individual client's **account** screen, click **Add a Contract**.
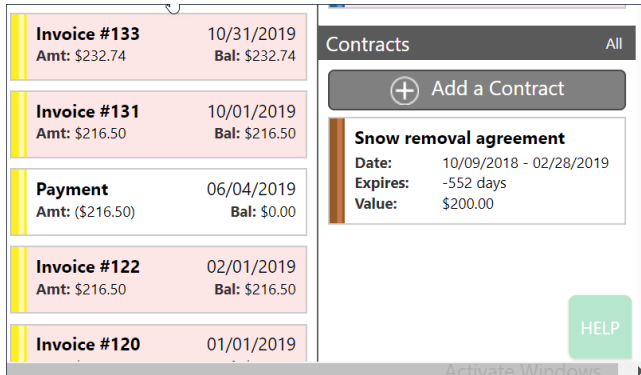
2. Click **Add a Contract** to see the **New Contract** screen.

Here, you'll create a contract that will automatically generate a Contract Invoice based on the parameters you set.

Client

3. The **Client** field defaults to the client for whom you are creating the contract.

4. In the **Contract Name** field, the best practice is to include "Snow" in the name. Otherwise, set up the contract as you would any other contract.

   Tip: A simple name such as "Snow Contract Agreement" is helpful. This name is internal only; your clients will not see it.
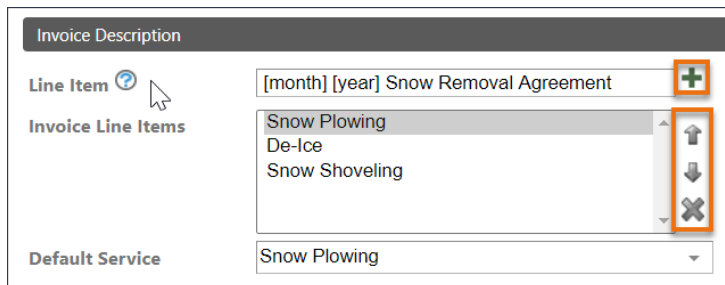
Contract Start and End Date

5. Fill in the **Start Date** and **End Date** fields.

   These dates are for your reference and define the overage period.

   Note: You can set up your jobs with caps based on inches, pushes, or event. The **date range** on your snow contract defines your season if you use seasonal caps on your snow contracts. So make sure the **Start Date** and **End Date** includes your entire season if you have a seasonal cap in the On Demand snow job.

Invoice Description

6. Under **Invoice Description**, fill in at least one **Line Item**, then click the **+** sign next to the **Line Item** field. This description will appear on the invoice. You have the option to use personalization fields like [month] [year].

7. Click the plus sign (**+**) next to the **Line Item** field to add another line to your invoice description. You can use the additional lines to add more descriptive information to the invoice.

8. To edit items In the **Invoice Line items** field, select a line item and:
   - Use the up and down arrows to change the order of the line items
   - Click the **X** to delete the line item

9. In the **Default Service** dropdown list, select a service. If you previously set up a Snow Contract Agreement service, select it here.

   If you don't already have services set up for contract revenue reporting, go to ⚙ **Settings > Scheduling > Services** to create them.

   Note: This service does not affect scheduling; it is the service used to calculate revenue for this contract on your Profit / Loss report for tracking contract revenue.

Invoice Details

10. Under **Invoice Details**, fill in how much to charge your client for the months that fall within your snow season. Months that have **0.00** dollar amounts will not generate contract invoices.

Tip: To quickly fill in the rest of the fields, type a dollar amount in the **January** field, then click **Auto Fill**. The rest of the fields will automatically be filled in with the same amount. Just clear the fields that aren't included in the date range you need.

For clients who pre-pay for the whole season, fill in the full amount in the month you'll bill them.

11. Fill in the **Billing Day of Month** field. This is the date when SA will automatically generate your contract invoice for this client.

    Note the help message. You can see this by hovering over the **(?)** icon for this field.

12. For the "Bill 1 Month in Advance" check box:

    Check this if you want the invoice to be created in advance of the billing month. The invoice would be generated on the date you put in the **Billing Day of Month** field, for the following month.

    Leave this unchecked for the invoice to be generated in the current month.

13. Fill in the rest under **Invoice Details**.

    The check boxes are preselected, but you can change any of them as needed:

    Payment Type: Any selection here will carry over to the invoice as the default for this contract. (You will have the option to override the payment method in an individual job.)

    PO Number: If applicable.

    Auto Generate: Check this to have SA automatically generate the contract invoice according to the billing day you specified.

    Active: Check this if the contract is active. Uncheck to deactivate the contract.

Include Sub Properties by Default: For clients (master properties) with sub-properties, checking this includes both the master property and its sub-properties under this contract.

Note: Everything above the **Services & Packages** section applies to billing, and everything below applies to scheduling. By adding services and packages to the contract, you are telling SA which services to bill under contract.

Services and Packages

14. Hover over **Actions** and click **Add Contract Item**.

    Add a contract item for each service the contract will include. This creates a blank line for each service.

15. Fill in each line with all possible services under contract for the client.

    If this is a master property, and you checked **Include Sub Properties by Default**, all the sub-properties will have the same services billed by the contract. So add to this list any additional services you'll provide for the sub-properties.
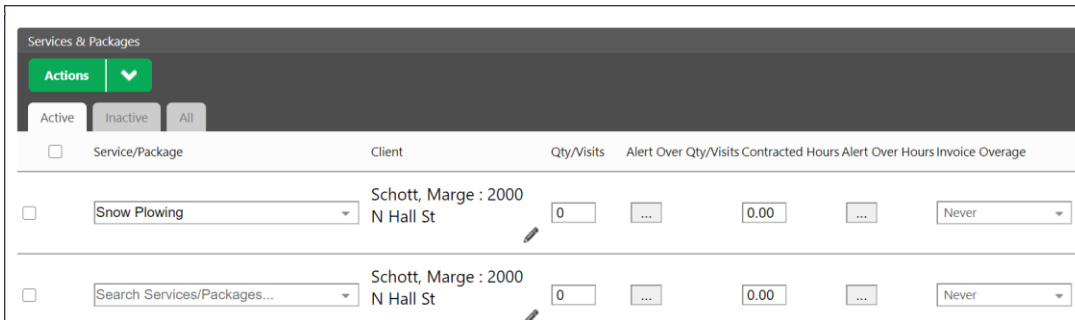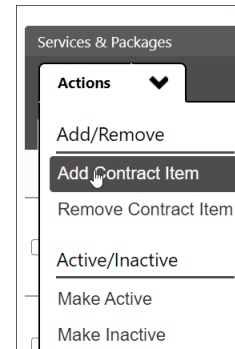
The fields on the right side of this section *don't* apply to snow contracts: **Qty/Visits**, **Alert Over Qty/Visits**, **Contracted Hours**, **Alerts Over Hours**, and **Invoice Overage.** These fields are used with On Demand jobs.

Note: In the Snow system, you *will not* set up a rate matrix for overages within a contract or service. But you have the option at the job level to set up a rate matrix for caps and overages. This is explained in "Add a Rate Matrix" on page 15.

16. Click **Save**.

Set Up *On Demand* and *One-Time* Snow Jobs

Two types of jobs can be used on the Snow Dispatch Board:

- *On Demand jobs* are typically used for existing clients who will be serviced throughout the snow season or across multiple snow events.

- *One-time jobs* are typically used for requests that are last-minute or outside the norm. These can be useful for clients who are not already in your SA account.

Add an On Demand Snow Job

For snow clients who need recurring services, you need to set up On Demand jobs.

Note: These jobs will not appear under "Upcoming" when you hover over the job and select **More > View Upcoming** on the client account screen. This is because SA does not put them on a schedule until you add them to a "Snow Dispatch" for an individual snow event. This is different than other types of jobs in SA.

When adding an On Demand job, you must set up both the initial scheduling parameters and invoicing parameters in advance.

1. On the Client account screen
   (**CRM > Clients > [Client Name]**)
   click **Add a Job,** then click
   Add an on demand job.
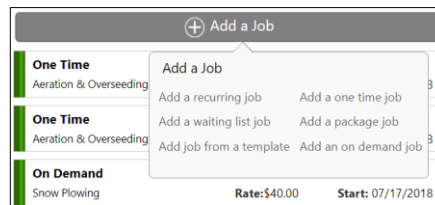
2. In the **New On Demand Job** overlay, select a service from the **Service** dropdown list.

   The only services that appear in this list are those you designated as "Show in Snow Dispatch" when you created the service.

3. **Best practice**: in the **Assign To** dropdown list, select a Team or Resource--this will save you from having to assign them every time a snow event occurs. Assigning a team is the most flexible solution.

4. Optionally, fill in the **# Inch-Trigger** and **Days Authorized** fields. This will later allow you to filter using the **Exclusions** fields on the **Add to Dispatch** screen for the Snow Dispatch.

 # Inch-Trigger defines how many inches must fall before you service this client.

Days Authorized defines any days that the client allows you to service them. Uncheck any check boxes for days that are not allowed.

5. Under **Invoice Setup**, select the way the client will be billed in the **Invoice Type** dropdown list:

- Contract

- Per Push, Per Inch
  Each time a field resource clocks into and out of a per-push per-inch job, a separate line item will appear on the Snow Dispatch Board, and the Snow invoice.

- Per Event, Per Inch

- Hourly

6. In the **Invoice Type** dropdown list, select a contract that you previously set up (see "**Set Up Snow Contracts**" for details).

7. In the **Cap Type** dropdown list, choose an option to set up an overage:

- No Cap

- Number Inches

- Number Pushes

- Event

If you chose options that have a cap, additional fields appear.

- In the **Cap** field, enter the number for the Cap Type you chose.
- For **Cap Reset Period**, choose "Monthly" or "Contract Year."

- For the **Overage Invoice Desc** field, type the description to appear on the Overage Invoice. This invoice is automatically generated in addition to the contract invoice any time an overage occurs.

If you are billing by asset type, fill in the **Rate Matrix** section for each asset, such as a piece of equipment.

Add a Rate Matrix

A rate matrix, when set up properly, creates pricing for any type of on-demand job. For snow jobs, a rate matrix can calculate your fees based on a range of snow depths, pushes per inch, the number of inches for a snow event, and/or equipment used.

In any of these cases, the rate matrix also helps you prepare for billing above the standard contract invoice amount.

Tip: It's a good idea to run a "test" Snow Event to make sure the rate matrix is working correctly.

1. At the bottom of the **Edit On Demand Job** overlay, select an asset in the **Asset Type** dropdown list.

2. Fill in the inch inches, rates, budgeted hours, and billing type for that range.

   The best practice is to have a range that starts at 0. Also, there should be no overlap in the **From** and **To** fields. In the example, the ranges are 0 – 4.0, 4.1 – 6.0, 6.1 – 8.0, etc.

3. Optionally, click the note icon 📝 to add an **Invoice Description** for this range.

4. Click **Add Range** to add a new line to the rate matrix.

5. Continue filling in the ranges. In the sample, we are creating new lines for each two inches, at an additional cost of $10.00 for each increment.

Note: If you are billing by assets, the best practice is to add an additional blank matrix group that can be used for exceptions when closing out the day on a Snow event.
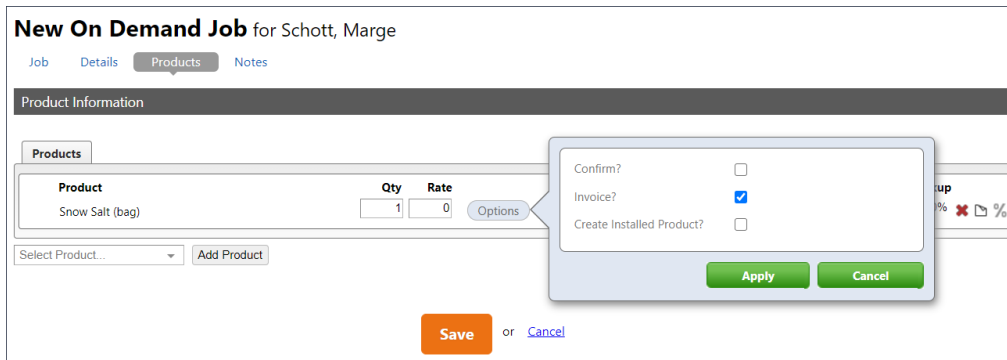
Elements of the Rate Matrix screen

- **Copy Group** – Click to easily copy an entire group of ranges and create a new group. Just select another asset, then adjust the price fields as needed.

- **Delete Group** – Click to delete the group above this button.

- **Add Group** – Click this button to add a new blank group.

- Click this icon to see the **Invoice Description**, which comes from this service in the Service List.

  You can edit the description to be more specific for each line in the Rate Matrix. The example shows a description of the inch range you will bill for.

- **+** (**Copy Range**) – Click **+** to copy the increments and save time filling out fields. You need to have a minimum of two range lines for this function.

- **X** (Delete) – Click **X** to remove this line from the rate matrix.

6. Each increment will probably be a flat rate until you get to the last range. That final range should be all-inclusive, make it very large and set the **Bill As** field to **Hourly**, to account for any possibility.

7. After you have built out the rate matrix for an asset, you can click **Copy Group** to duplicate it, change the **Asset Type,** and update the other fields as needed.

8. Optionally, click the **Products** tab to make additional selections for Snow products. To set up products, go to ⚙ **Settings > Products**.

9. Click the dropdown list to select a product for this snow job, then click **Add Product**.

10. For each product, click the **Options** button and select the check boxes you need:

Confirm – After the job is complete, this will highlight the line item in red on the Snow Dispatch Board, as a reminder to confirm that you used the product, and if so, that the quantity used was correct.

Invoice – To list the product as a separate line item on the invoice.

Create Installed Product – This is not applicable for snow, so leave it unchecked.

Tip: Product quantity always defaults to **1**, so if you want to know whether your field employee added any product on the Legacy app, you can change the quantity to something different, such as ".01," so you'll be able to tell if the field employee changed it.

11. Click **Save**. The On Demand Snow job is now added to the client's account.

Add a One-Time Snow Job

Scenario: Two hours before a snowstorm is predicted to arrive, your snow service company gets a call from a new lead who wants plowing services. The best practice to handle a new service call is adding a One-Time Job. One-Time Jobs work for any last-minute request or for a service that you don't normally perform for a client.

Later, you can set up the new client with an On Demand job if they want to sign on for future service.

1. If needed, create the new client (**CRM > Clients > Add Client**).

2. In the client's account, click **Add a Job > Add a one time job**.
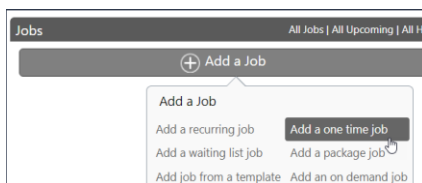
3. In the dropdown list under **Service**, select a snow service.

A new **Dispatch** dropdown list appears. Select a snow dispatch to add this job to.

4. Select a resource under the **Assigned To** dropdown list (optional).

5. Complete the rest of the fields as for any other job.

6. Click **Save**. The job will now appear on the Snow Dispatch board for that event.
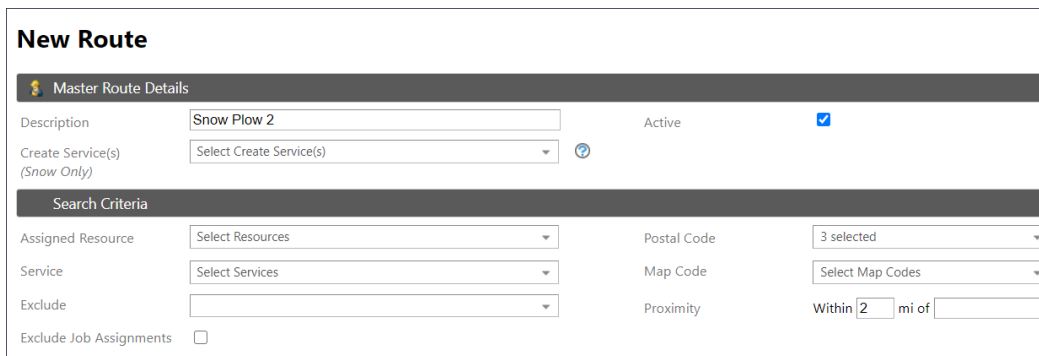
Set Up Master Routes for Snow Jobs

Setting up Master Routes is optional, but highly recommended. Master Routes let you decide the route order in advance, so that you don't have to do as much routing work when the Snow event happens. This will help you dispatch your jobs and get your employees and vendors to work much more quickly when a Snow Event happens.

SA's Master Routes are flexible, so you can set them up according to your needs.

- You might create a route for each Team and include all possible services, such as plowing, shoveling, and salting.

- Another option is to create a separate route for each service team. For example, Snow Plow Team 1 would have its own route, and Snow Plow Team 2 would have its own route. You might also have other teams like Snow Shovel Team 1 with its own route.

1. Go to ⚙ **Settings > Scheduling > Master Routes**.

2. Click **Add Master Route**.

3. On the **New Route** screen, name the route in the **Description** field.

4. Under **Search Criteria**, use the filter options to locate clients who meet your criteria for this Snow Route. (*As we like to say, "Filters Are Your Friends!"*)

- It's best to not filter by Assigned Resource, because it depends on you having assigned the same resource when you set up the On Demand job

- For the **Exclude** check box, check all except "On Demand Jobs"

5. In the **Service** dropdown list, check one or more Snow services for this route.

- Check the **Exclude Job Assignments** check box, which applies to assigned resources. This check box confines the search to On Demand jobs at the client level.

- Optionally, use any of the filters for Postal Code, Map Code, and Proximity.

6. Click the **Search** button. All clients who meet the search criteria will appear in the Route List.

7. You can auto-route the client properties, or manually refine the route as needed.

    a. Select the first property you would visit during a snow event for this Master Route.

    b. Drag that property to the top of the list using the blue arrows seen when hovering next to the property on the left side.

8. Click **Route**.

    Select either **Group Stops** or **Optimize Route**. This creates a route order based on the first client's starting location.

9. Check to be sure the order is what you want. To adjust the order, click a property, then drag and drop it into another place in the list. Or type new numbers in the fields under **Order**.

10. When the list is complete and routed in the correct order, click **Save Changes** to save the Master Route.

When a Snow Event happens, this Master Route will be available on the Snow Dispatch Board.

Create as many Master Routes as you need.

Dispatch Snow Jobs

This process includes:

- Checking your Master Routes, below
- Adding jobs to a Snow Event, then dispatching them, page 23
- Creating Route Sheets, page 27

Check Master Routes for Snow Jobs

Before a snow event arrives in your area, double-check your Master Routes to make sure they are still correct and up to date. You'll need to select the services that are needed for this route based on the forecast. For example, if the storm will include ice, you might want to add services like de-ice and salting in addition to plowing, etc.

If you've added any recent clients who have snow jobs that can be included in an existing route, perform these steps for each new client:

1. Go to ⚙ **Settings > Scheduling > Master Routes** and click the Master Route to open.

2. Click **Search** to update the list.

   Any new clients you've added since you created your Master Route will be at the top of the list and shaded in blue. They will have a number of 0.


- Click the **Route** button, or manually drag each new client into the list where you prefer.
- Remove any clients as needed, by selecting them and clicking **Delete**.

3. In the **Create Service(s)** dropdown list near the top of the screen, select the check boxes for all services to include in the route for this snow event.

4. If the dropdown list is blank, first go to the **Service** field Under **Search Criteria** and select snow services. They will then appear in the **Create Services** dropdown list.

5. Reroute the order of the properties as necessary by doing one of the following:

   Manually: hover over a property to see the blue up/down arrow on the left, then click and drag the line to a different place in the list.

   Automatically: Click the **Route** button and choose either **Group Stops** or **Optimize Route**.

6. Click **Save Changes**.

Create a Snow Event

Because you set up your Snow jobs as On Demand jobs they are not scheduled until you create an Event. When a snowstorm is coming, follow these steps to add a new Snow Event and add your jobs. You can even add more than one Snow Event for the same snowstorm.

1. Go to **Scheduling > Dispatch Snow Jobs**.

2. Create a new Snow Event by clicking the small green plus sign "**+**".
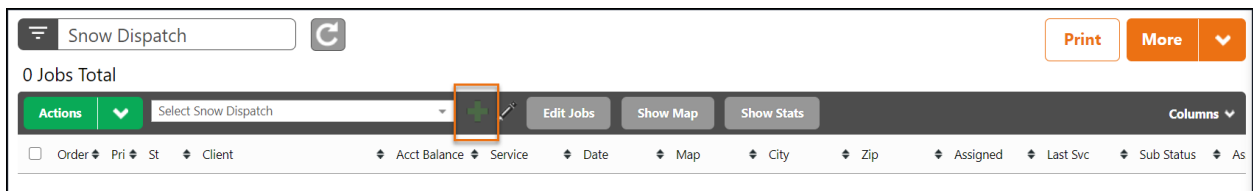
The **Add Event** overlay appears. Leave the Dispatch Status as "Pending" for now. You'll update this to **Working** when it's time to dispatch the Snow job.

3. For **Dispatch Date/Time**, it defaults to the current date. Change this to the date and time you'll begin working the event.

4. The **Event Description** is what you'll see in the Snow Dispatch selection list. Keeping the date and time in the description is helpful, but you can change the description as needed.

5. Check or clear the check box to indicate whether the event is active or inactive.

6. Click **Save**.

The page reloads to view a new, empty Event to which you'll add jobs.
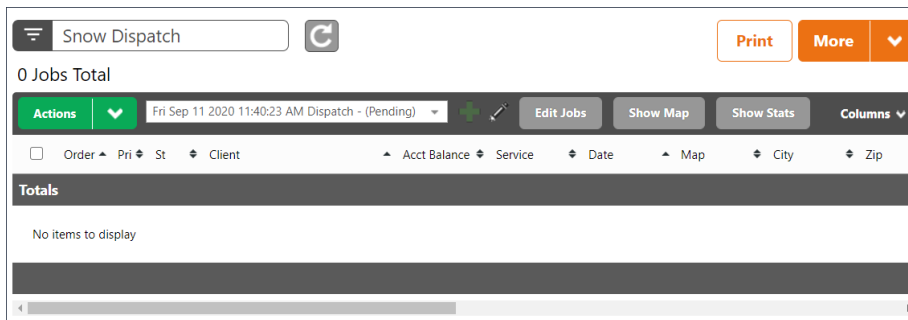
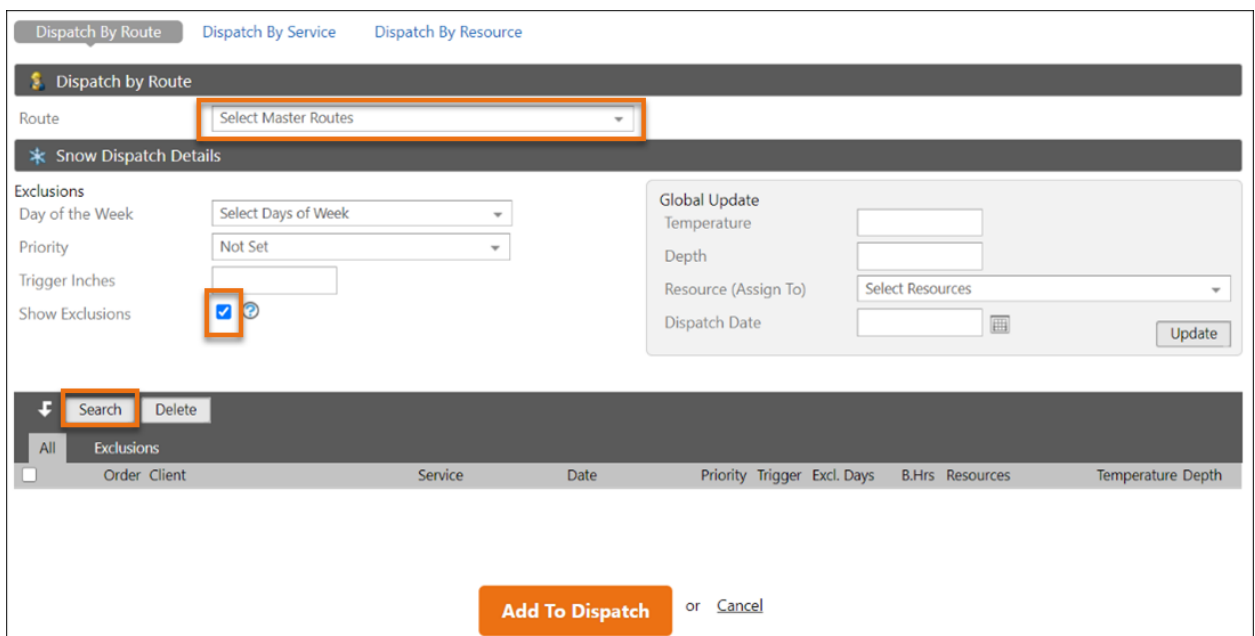## Add Jobs to the Snow Event

7   Add your jobs to this Snow Event by hovering over the **More** dropdown list and clicking **Add To Dispatch**.
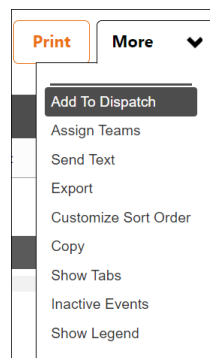
The **Add to Dispatch** overlay defaults to the "Dispatch By Route" tab.

8.   Select the Master Routes you previously created to add to the event.

9.   Optionally, under **Snow Dispatch Details**, add any exclusions, if needed.

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The most common exclusion is the **Trigger Inches** field where you might exclude jobs that have a higher inch trigger.

For example, if you add a **2** in the **Trigger Inches** field, then all clients with triggers *over* 2 inches will be excluded from the list, *unless* they have the **Show Exclusions** check box selected.

If you leave **Show Exclusions** checked, then any jobs over 2 inches will appear in the list, highlighted in red. You can then make a judgement call about adding them to this Snow Event, possibly based on the snowfall patterns in your area.

10. Click **Search**.

    All client jobs appear for the Master Route you chose and any criteria you may have added.

11. Optionally, you can update the **Temperature** or **Depth** fields for individual client jobs, or use the **Global Update** box to make bulk changes to multiple jobs.

    a. Select the check boxes next to the jobs, then change the data fields in the **Global Update** box.

    b. Click **Update**. The appropriate columns will be updated with the new data.

12. In the list of Snow jobs, reroute them if needed, or delete any jobs that aren't applicable for this Snow Event.

    Neither rerouting nor deleting jobs from this screen will affect your Master Routes or On Demand jobs at the client level. This option simply lets you handle any changes or exceptions during a Snow Event.

    Note: You can add additional jobs to an Event at any time during a snow event. This gives you more flexibility to respond to an evolving situation.

13. When you're satisfied with the list of jobs and their order, select the check boxes for the jobs, then click **Add to Dispatch**. The jobs will appear on the Snow Dispatch Board.
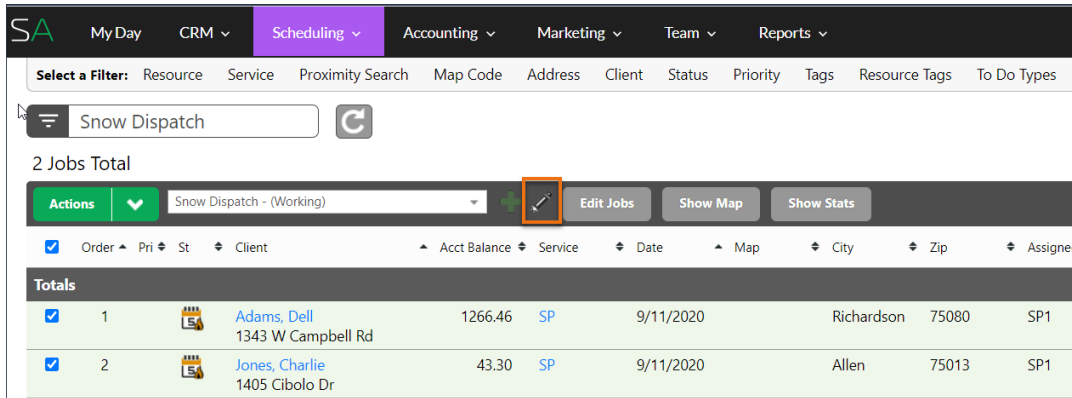
14. On the Snow Dispatch Board, review the list of jobs to be sure all clients are included, and the work assignments and route are correct.

Make changes as needed:

- Add additional jobs at **More > Add to Dispatch**

- Assign resources at **Edit Jobs**

- Change the Route Order at **Actions > Routing > Manual**

- Change Team assignments at **More > Assign Teams**

Dispatch Snow Jobs

Dispatching Snow Jobs is a two-step process: changing the **status**, then **dispatching**.

1. On the Snow Dispatch Board, click the pencil icon, and on the **Edit Event** overlay, change the **Dispatch Status** to **Working**, then click **Save**.

2. Select all the check boxes, then click **Actions > Dispatch**.
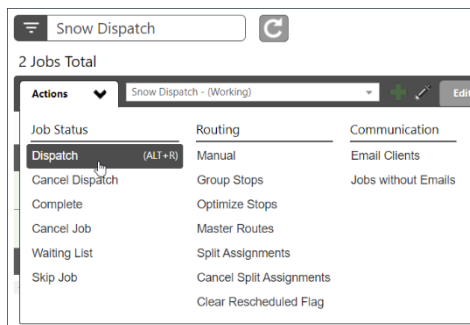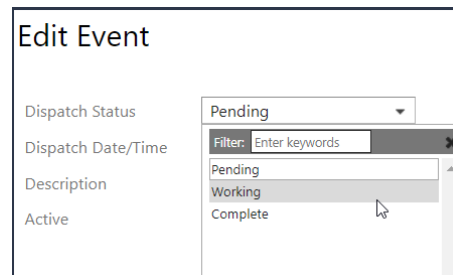
Print Route Sheets for Snow Jobs, if Needed

On the Snow Dispatch Board, after you dispatch your Snow Jobs by clicking **Actions > Dispatch**, you might need to print Route Sheets.

1. Click the **Print** button, then choose the Resources, date, and printing format.

2. Click **Update**.

    The Route Sheet appears.

3. If you are unable to print, click **Email** to send Route Sheets to field resources. This also is useful if your teams start work from somewhere other than your office.
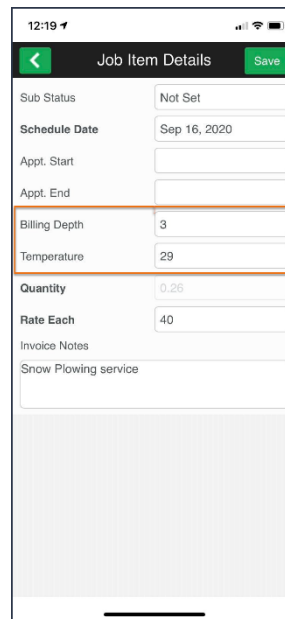
Using the Legacy App for Snow Jobs

One difference when using the Legacy mobile app for Snow Jobs versus other types of jobs: a Snow Event will maintain a status of "Working" on the Legacy app, even after it's completed. This allows your field resources to clock into Snow jobs multiple times as needed.

Update the Job Details

The Team Leader in the field can update some snow-related items on the **Job Item Details** screen, such as:

- **Billing Depth**
- **Temperature**

Permissions to make updates like these are set in **Settings > User Roles & Rights**.
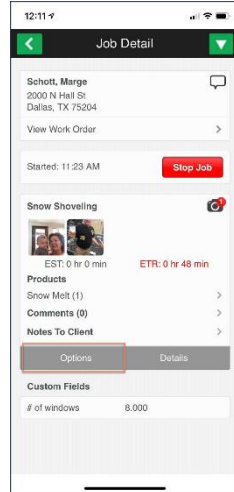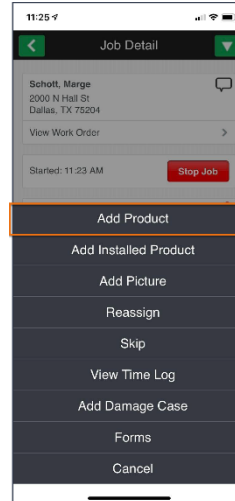
Add Snow Products from the Legacy App

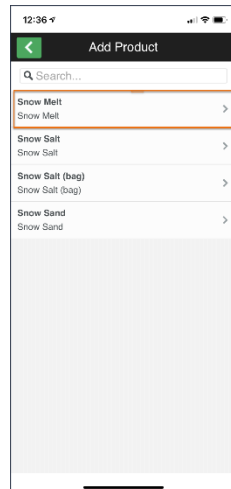The Team Leader can add products and adjust quantities on the Product screen.

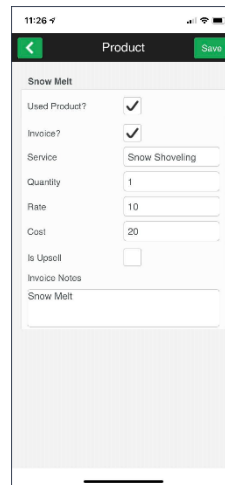1. On the **Job Detail** screen, tap **Options**.

2. Tap **Add Product.**

   .

3. On the **Add Product** screen, tap a product.

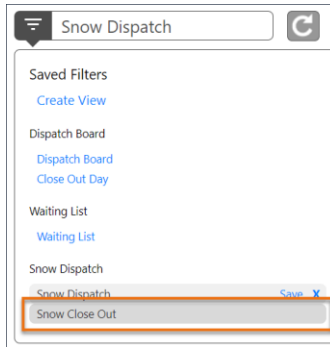4. Fill in the quantity and other details as needed.
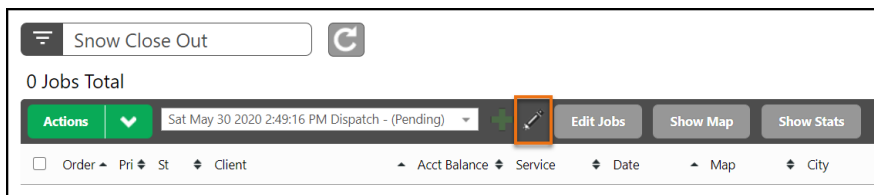
5. Click **Save**.

Close Out Snow Jobs

When the Snow Event is over, follow these steps to close out the jobs.

1. Go to **Scheduling > Dispatch Snow Jobs** and select **Snow Close Out** from the dropdown list.

2. Edit the Snow Event by clicking the pencil icon.

   Change the **Dispatch Status** to **Complete**.

3. Click **Save**.

4. Complete the jobs in one of these ways:
   - If you use the Legacy app, jobs are completed when the field resource completes the job.
   - If you don't use the Legacy app, select the jobs by checking the check box on the left, hover over **Actions**, and click **Complete**.
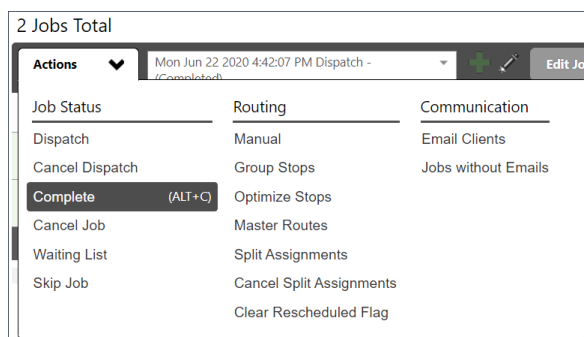
5. Select the check box next to all the jobs for specific Bulk Editing, then click the **Edit Jobs** button.

6. On the **Edit Jobs** overlay, enter applicable data for the Plan Depth, Temperature, Bill Depth, and Asset Type for the actual Snow Event.

   Take care with the accuracy of **Bill Depth** and **Asset Type**, because when applicable, your billing will be calculated on these fields.

7. Click **Update**. This will add all information necessary for billing your snow jobs.

8. Make sure all resource times and amounts are correct, then save any changes.

   Note: If a job goes past midnight, there will be a two time records to account for two calendar dates.

9. If you track products with your Snow jobs, click the **Product** icon at the far right of the grid.

   Check the **Job Detail** overlay to confirm that the product and quantities are correct. This can affect Invoicing and Job Costing.

10. Click **Confirm?** for each product line item, and select either:

    - **Add to Invoice**

      OR

    - **Used, do not Invoice**

11. Click **Save**.

Now, you are ready to invoice your Snow Jobs. The Snow System in Service Autopilot has separate, manual invoicing. This is due to some states requiring that snow records must be maintained.

Invoice Snow Jobs

After you close out your Snow Jobs, follow these steps to invoice your clients.

1. Go to **Accounting > Snow Invoicing.**

   Filter by **Client**, **Service**, and/or **Date** to find the Snow jobs.

2. Select the event(s) for which you want to create Invoices from the **Event** dropdown list. You can select multiple events to invoice together.

4. Select the **Invoice Date** and **Terms**.
   All jobs will appear for the events you selected.

5. Select the check box for all the jobs you want to Invoice, then click **Generate Invoices**.

6. A confirmation message appears. Click the link to view the invoices.

7. The link takes you to **Accounting > Invoices** and pre-sets the date filter to show the invoices you just created.

Note: You can't delete Snow Invoices until you cancel the job from the Snow Dispatch Board.