7-Step Setup Wizard Guide

August 2021

Welcome to Service Autopilot! Follow this checklist while using the **7-Step Setup Wizard** to set up your Service Autopilot (SA) software.

Step 1. Company Settings

- It's crucial to enter your active company email address, because correspondence from SA will go here.
- Enter your company name as you would like it to appear to your clients. This can be either your actual company name or how you want your clients to know you.
- The primary address is the company address where your employees start and end their workday, for example, your field office or meetup location. This address will be used as the starting point for scheduling and routing.
- Enter a primary start and end time of your workday to be used for scheduling purposes.

Note: The settings you choose will be your default company settings, but they can be changed at any time. If you are not sure of some details now, you can still go ahead with the installation.

Step 2. QuickBooks Sync

Step 2 determines whether your company will sync SA with QuickBooks.

If you sync with QuickBooks:

- Click **Yes**.
- You'll be taken to Step 2a.

  DO NOT go past Step 2 before your sync is complete.

  See *Quick Guide to the QuickBooks Sync* to walk you through this section. You'll specify your Sales Tax information at this time.

  OR

***If you do not sync with QuickBooks**:*

- Click **No**.
- You'll be taken to Step 3.

Step 3. Invoice Settings

- **Non-QuickBooks users:**
  If you charge **sales tax**, select **Yes** and enter the accurate sales tax rate to apply to invoices. This is your default sales tax. You can later create additional sales tax rates for your clients as needed.

  If you select **No**, the **Sales Tax** field disappears.

- **QuickBooks users**:
  If you're using QuickBooks or another software tool for invoicing, enter the ***next* invoice number** to keep future invoices in order.

  If you charge **sale tax**, your sales tax will sync over from QuickBooks.

- Upload your logo: The recommended height is **130px**. If needed, you can resize it on the **Invoice Settings** screen:

  1. Click the **Edit** link on the left side of the screen.
  2. In the Editor, click the **Resize** icon in the center of the toolbar.

  3. Resize the image.
  4. Click the **Save** icon on the left of the toolbar.

  If you need help with uploading or resizing the logo, contact **Launch@serviceautopilot.com**

Step 4. Resources

- You are already in the system as a user. Be sure to **not** remove yourself as an active employee, which will keep you from accessing your SA account.
- **QuickBooks users**: If you see a resource name with {EMP} at the end, please contact the SA QuickBooks team to assist in correcting this.
- When adding an employee or vendor, the **resource code** is a short version to identify them, such as their initials.
- A **contractor** is a resource who is not a W2 employee. Add them as a resource, then select them as a **contractor**.

  This could also be a vendor or third-party company you buy from. (You'll see the term "vendor" instead of "contractor" elsewhere in SA.)

Step 5. Teams

- Use the Employees and/or Vendors you set up in Step 4 to create teams.
- When creating a team, we advise you to *not* make a team name the same as an employee name. This can cause confusion when you later want to schedule either that team or the individual employee. So rather than calling a team "Tia Smith," it's better to name it "Tia's Team." Best practice is to name the team after its function—such as "Snow Plow Team 1."
- A **Team resource code** is a short version to identify the team; for example, "SP1" stands for "Snow Plow Team 1."

Step 6. My Services

QuickBooks users:

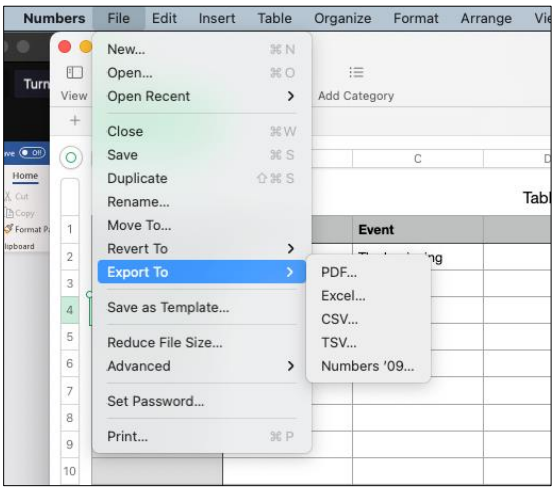
Step 6 does not apply to you. Your clients and services will be imported through the QuickBooks sync. So go on to step 7 on the next page.

Non-QuickBooks users:

This step optionally lets non-QuickBooks users add the services you provide to your clients. But it's preferable to let us do this for you.

The **SA Imports Team** will perform the process of importing your clients and services free of charge. If you opt for this, you can skip this step. Then at Step 7, select "Yes" to importing, and the SA Imports team will contact you.

If you want to perform your own imports, follow these tips:



- **Mac users**: If you use the **Numbers** app, you need to convert your spreadsheet data to Excel sheets in order to import services. There is a built-in converter as shown at right.
- Better yet, let the **SA Imports Team** do this for you.
- You'll later have the chance to import additional data into your SA account, like Clients, Products, Custom fields, etc.

  If you are not comfortable working with Excel, we recommend using the **SA Imports Team** for help free of charge.

Step 7. Final Questions

Depending on how you answer the final questions, you might be contacted by a Service Autopilot representative. If you're not sure of an answer, leave it at **Yes**.

What's Next?

When you finish the 7-Step Setup, you're ready to start using Service Autopilot! The first step we recommend is creating a couple of **test clients**. These practice accounts are handy for trying out new functions, especially when it's time for sending invoices or mass marketing emails.