ServiceAutopilot™

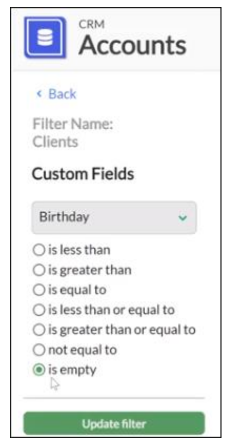
Release Notes

September 24, 2021

This release continues our drive toward making existing processes *simpler and faster*. New enhancements include **Search Bars** on list pages, a **simpler setup for Chemical Tracking**, improvements to the **Job Wizard**, and the ability to **"watch" Tickets**. Enjoy!

Enhancements

Accounts



- You can **filter for Custom Fields** on the V3 **Accounts** list.

  We added a new option to the **Custom Fields** filter, **is empty**, based on Member feedback.

  Note: You can search on only one custom field at a time, not combine multiple custom fields in a search.

Calendar Events

- When you are creating a Calendar Event, the **Body field is no longer required**. This is for consistency with other screens.

Chemical Tracking Enhancements

No more restricted entry

With the growing popularity of SA's **Chemical Tracking** feature, we've **removed restrictions for using it**. You are no longer required to attend the training webinar before you're allowed access.

*But do check out all the **free training resources**! There are videos, a user guide, and articles on Chemical Tracking in the Help Center.*

Go to **Settings > Chemical Tracking** to set up your company for the Chemical Tracking feature.

Consolidated Settings

- We've consolidated **Chemical Tracking Settings** into one tab, at **Settings > Chemical Tracking > General Chemical Settings**. Here, you can add or change any of your chemical information.

Consolidated Emails

- We consolidated **Chemical Tracking Emails** into one screen. Here, you can manage your emails for clients, with separate tabs for Client emails: **Instructions, Recommendations, and Upsells**.

Copy Products

- You now can **copy a product** to save time with creating new items that are similar. This is particularly helpful for Chemical Tracking to help you replicate application rates and product mix instructions.

  To create a Product copy:

  1. In the **Non-Inventory Products** list, select a product.
  2. In the **Actions** dropdown list, click **Copy**.
  3. In the **Copy Product** dialog, fill in the **New Name** field to create the new product in your Products list.
  4. Open the new product copy and edit it as needed.

Chemical Tracking Enhancements (Continued)

Copy Services

- You now can **copy a service** to save time when creating new services that are similar.

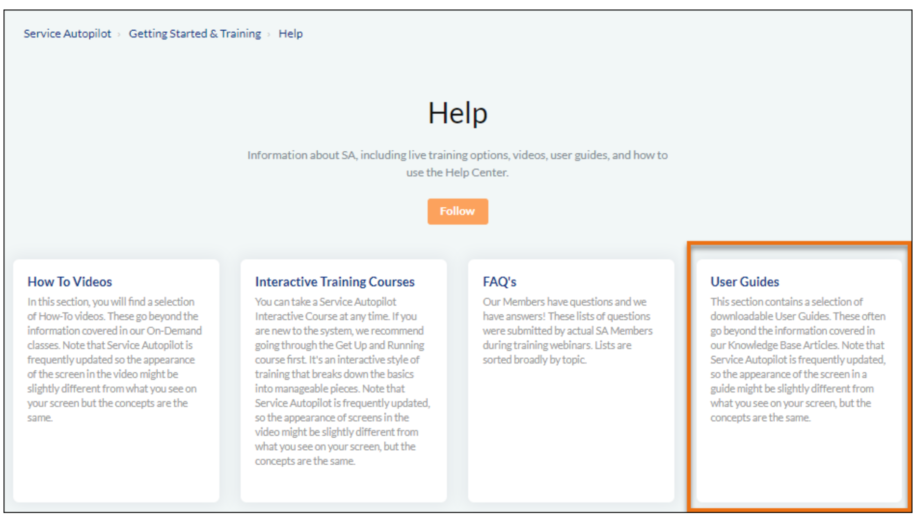
  To create a Service copy:

  1. In the **Services** list, select a service.
  2. In the **Actions** dropdown list, click **Copy**.
  3. In the **Copy Service** dialog, fill in the **New Name** field to create the new service in your Services list.
  4. Open the new service copy and edit it as needed.

Help Center

- Have you checked out the Help Center lately? We've added a section for [SA User Guides](#).

  Click **Help Center** under your avatar, then go to **Getting Started & Training > Help > User Guides**.

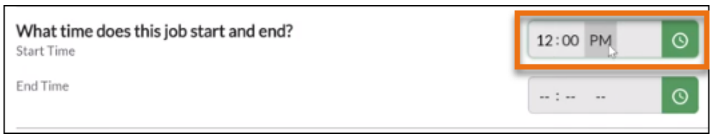


Job Wizard Enhancements

Appointment times

We simplified setting **Appointment Times** on the Job Wizard.

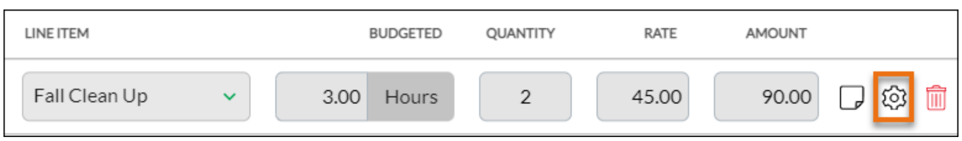
- You can still select from the Calendar tool, but now you have the option to **type the time and AM or PM** directly into the field, similar to the V3 Calendar Event Editor.



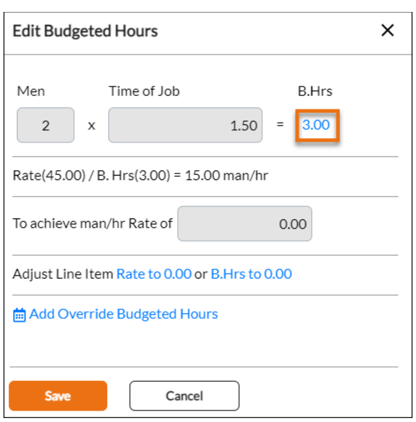
Budgeting tool

We've added a **Budgeting tool** to the Job Wizard, similar to the tool in V2. This tool lets you **calculate your budgeted hours** and set up **budgeting overrides for repeating jobs.**

1. When scheduling a job on the Job Wizard, click the cog icon to bring up the **Edit Budgeted Hours** dialog.



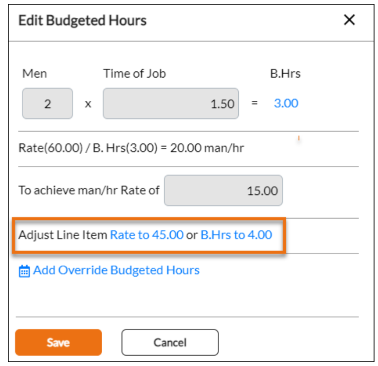
2. Enter the number of staff members and hours into the **Men** and **Time of Job** fields. The system calculates your budgeted hours appear under **B.Hrs**.

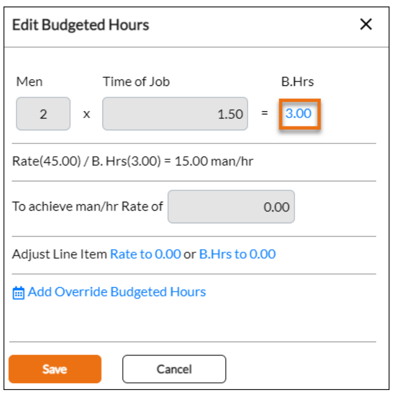


Job Wizard Enhancements (Continued)

3. You can type your target staff hour rate into the field labeled **To achieve man/hr Rate of**

   The dialog then shows you what to change in order to get the rate you want.



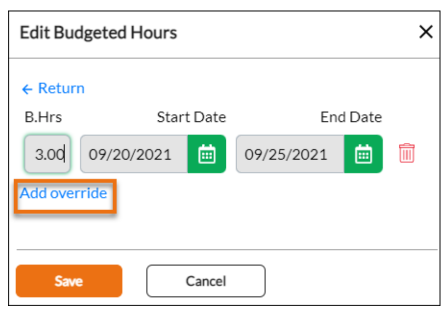


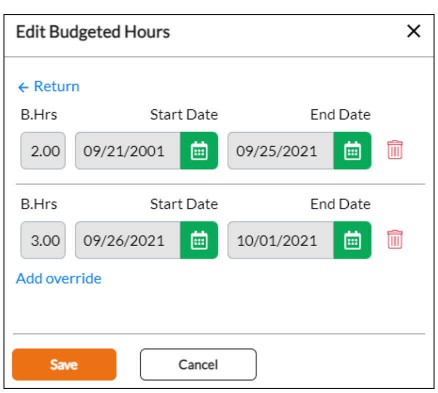
4. Click the number under **B.Hrs** if you want to adjust the budgeted hours.

5. Click **Add Override Budgeted Hours** to make changes to the budgeted hours for a specific date range. This can be useful for repeating jobs.

   Type a date into the **Start Date** and **End Date** fields, or use the calendar tool.

   Click **Add override** to add more time periods, if needed.





Enhancements (Continued)

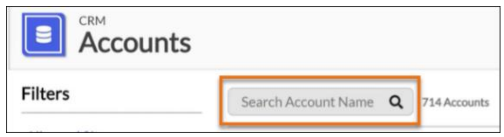
Invoices

- The **Activity Stream on the Invoices** list lets you quickly see if a **payment is owed** or has been over-applied to an invoice.

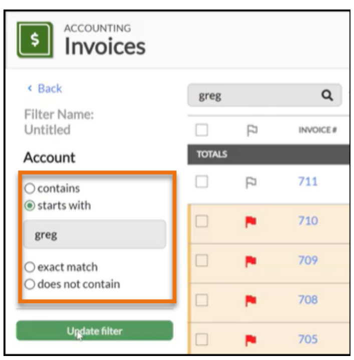
  The **Remaining Amount** appears with a red border if a payment is owed**.**

List Pages Search Bar

- To help you quickly search for records, we've added **Search Bars** to these V3 list pages:



  Accounts, Tickets, Invoices, Payments, Credits, Expenses, Installment Plans, and **Forms**



As usual, you can **add more filters** to narrow your search.

Change your search filter by selecting another radio button and clicking **Update filter**.

There's still an overall search feature at the top of every screen.

Tickets Enhancements

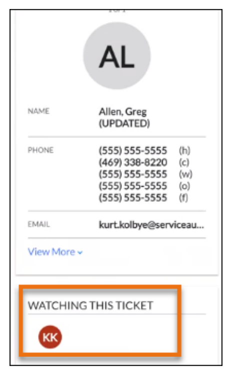
Watch Tickets 👀

You now can specify **Tickets to watch**, and you'll receive alerts about any changes.

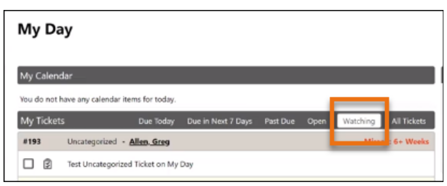
1. Open an individual Ticket or select multiple Tickets in the **Tickets** List.
2. Under **Advanced Actions**, select **Start Watching** or **Stop Watching**.

- When you open a watched Ticket, you'll see this banner on the screen:

- You and others watching this Ticket will see **alerts** when there are changes to it.
- Anyone looking at the Ticket will see the initials of others who also are watching it on the bottom right of the screen.



- And that's not all! The **My Day** page now has a **"Watching" tab** for Watched Tickets.



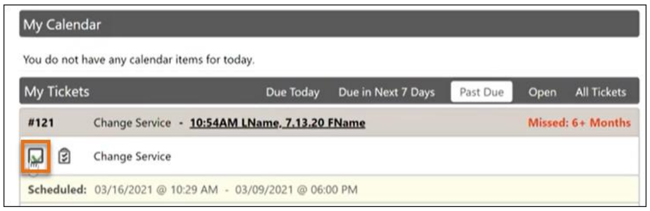
Click the tab to see a list of all your watched Tickets.

Tickets Enhancements (Continued)

Complete a Ticket from **My Day**

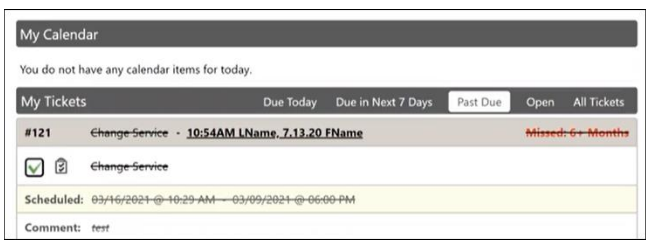
You now can **complete a Ticket from the My Day** page.

1. Select the check box for a Ticket you want to complete.



2. At the prompt, click **Confirm**.

3. The Ticket information shows a strikethrough to indicate the Ticket is complete.



4. If you want to re-open the Ticket, select the check box again and click **Reopen** on the confirmation dialog.

   If you don't reopen it, the Ticket is removed from **My Day** after you refresh the screen.

Client Portal Enhancements

Autopay

- ***If you offer Autopay:***

  If your client has a credit card on file for autopay, the system will automatically **update their payment information for any scheduled jobs**, and future invoices will use that credit card as the payment method.

  If you disable Autopay:

  If the **client updates their credit card** information, their payment information will be updated correctly with that information for future invoices.

  Note: Any job that has manually updated payment information will NOT be changed.

Create Tickets from Services

- With this release, your clients can **create Tickets from Services on the Client Portal**.

  They can create the Ticket under **My Services** from either the main job or an individual visit. When the Ticket appears in SA, it will be marked as a **Related Item**.

  Note: This function does not reschedule a visit or service. It simply creates a Ticket related to the job or service. Maintenance-only businesses like lawn care might want to disable this feature because it probably would not apply to most of your clients.

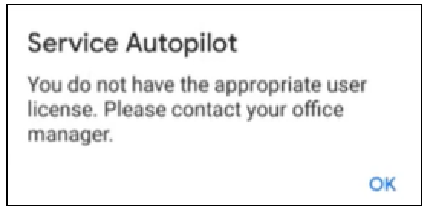
Client Portal App Enhancement

- Clients can now **submit Ticket requests** from Jobs and Visits on the Client Portal app. This gives clients a simple way to notify your company of changes, issues, or other requests.

Legacy App Enhancements

Failed Login Message

- We **reworded a generic error message**, “invalid username,” which a user might see if they didn’t use the correct credentials to log into the Legacy app.



  The message now notifies the user that their manager must update the user license.

Attachments for Tickets

- If Legacy app users send or receive emails with **attachments that are too big or not a supported file type**, the Ticket that’s created will not have the attachment. You’ll instead see a message stating that attachments were blocked.

  Attachments must be less than **20 MB**.

  Supported file types:
  doc, **docx**, **xls**, **xlsx**, **ppt**, **pptx**, **pdf**, **rtf**, **txt**, **png**, **gif**, **jpg**, **jpeg**, **and bmp**.

Updates to Correct System Issues

Accounts

Activity Stream

- On the **Activity Stream**, the **Past Visits card** sometimes showed the paper clip icon to indicate an attachment, even after the attachment was removed. This has been corrected.

Edit Account screen

- For non-U.S. Members using **Payroc** credit card processing**:** On the **Edit Account** screen, closing the **Add Card** dialog sometimes caused a blank error message to appear. That's not helpful, so we fixed it.

Automations

- In a few cases, the "Invoice was Paid" stop condition would not stop a running instance triggered by an "Invoice Past Due" condition. This now works as expected.

Client Portal

Payments

- In a few cases, if a client paid an invoice on the Client Portal, it would **still display in the list of invoices to pay**. The list is now updating immediately.

Registration

- We addressed some issues with **Client Portal registration**.

Scheduling

- In some cases, if a past service was still scheduled (not completed, cancelled, or skipped), it would show the incorrect month for the schedule. This was fixed.

Tickets

- If a client **submitted a Ticket from a Visit**, they would see the **@ symbol**, even though no appointment time was set. This has been fixed.

Updates to Correct System Issues (Continued)

Email Integration

Mobile Devices

- We made some usability fixes for mobile devices.

Yahoo Email Addresses

- We fixed a **Reply All** issue for Yahoo Email users.

V2 Forms

- For non-U.S. Members who use **CardConnect or Open Edge** credit card processing: **Chrome** users had problems submitting the **CC Update Form**. This has been fixed.

V3 Imports

- When on a V3 screen, navigating to Imports was going to the incorrect screen. It now takes you to the correct one.

Jobs

- For Chrome users, **Avatars for resources** were not displaying on the **Review Job** screen, but they're back now.

Legacy app

- In a few cases, **signatures on Estimates** were not being saved. This now works as expected.

Service Autopilot

- In some cases, if you were setting a **sales tax** and an error prevented it from saving, the system would let you close the screen without telling you about the problem. This has been fixed, so you'll now be alerted when such an error occurs.