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Release Notes

This release features enhancements to **Chemical Tracking**. In the previous release, we simplified Chemical Tracking Settings and consolidated Client Emails related to this feature. With this release, you'll see better options for **specifying mixes**; and **Chemical Tracking reports** have several new Member-requested enhancements.

As a reminder, we recently removed the requirement for watching a training video before you can start using Chemical Tracking.

This release also adds the useful **Mapping tool** to V3 Accounts with a Smart Maps subscription. If you've used Smart Maps in V2, you'll be familiar with this feature.

What's New at SA

Support Hours

Please note that Support will be **closed most Thursdays from 10:00 – 11:00 a.m**. Central Time.

This Knowledge Base article lists the regular hours for phone and live chat support (**Monday - Friday 8:00 a.m. – 5:00 p.m. Central Time**). Additional changes outside our normal Support hours will be announced in the banner.

Automations Workshop December 7-8

This two-day workshop includes four automations. Contact SA Sales at (972) 728-4040 for details and to take advantage of this offer.

Client Portal User Guides

You'll find these new user guides in the Knowledge Base:

Client Portal User Guide for Members. This guide describes how to set up the Client Portal and ways to assist your clients if they need help.

Client Portal User Guide for Clients. This client-facing user guide walks clients through setting up and using the Client Portal and Manage Service app for payments and other functions.

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V3 Smart Maps

Members with a Smart Maps subscription will now have additional **Map features** that you might have seen in V2 Smart Maps.

On the V3 **Accounts** List, click the **Show Map** button to see a Google map, filtered to your preferences. Note that the map will *not* be centered on the location of the current account you've selected.

Show Map

- The map shows all your accounts in clusters.
- The number on the pin shows the number of accounts within a cluster.
- The pins are a different color for clients versus leads.
- Zoom in to see smaller clusters of accounts.
- Click a cluster to zoom in further and see individual accounts.
- Click an individual account pin to see a popup with the client's name, invoice balance, and client since date.
- Click the avatar on the popup to open the **Account Review** overlay.
- Click **Update Filter** to dynamically change the filter requirements.

Group accounts on a map

1. Click **Group** at the top left of the map.

   A rectangle appears. Drag the corners to encompass the locations you choose. The **Group Filter** on the left of the map lists the number of locations selected.

2. Now that the accounts are grouped, you can perform any bulk action from the **Actions** menu, such as **Email**.

Create new leads on a map

You can use the map tool to quickly create new leads.

1. Zoom in enough to see individual locations.
2. Click the **Leads** button.
3. Right-click on individual properties to create new leads. The address of each new lead is listed to the left of the map.
4. Below the list of addresses, click **Create Leads**.
5. In the dialog box, type a name for the set of properties and select any tags you want. Then click **Create**.

6. To see your new list of leads, go to the **Accounts** list and filter by the property name you designated. Each lead will have the property name you entered, appended with 1, 2, etc.

Chemical Tracking Enhancements

We've heard from Members about changes you wanted in the Chemical Tracking feature, and we continue to work on implementing them. We hope you find these new enhancements help make Chemical Tracking more intuitive and efficient to use.

Note: The changes to Chemical Tracking are also reflected on the Legacy app.

Chemical Mixes

In SA, **Mixes are now treated just like Products**.

- You can include **chemical mixes in other areas of SA**, like Estimates and Invoices.

- You now can 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 new **Legacy Mixes List** contains all mixes you previously created, and you can still use them as before. You can find this list at **Settings > Chemical Tracking > Legacy Mixes**.

Chemical Tracking Enhancements (Cont.)

Create a New Chemical Mix

1. To **create a mix,** go to **Settings > Products**, then create a new chemical as a Product.

2. When you fill in the **EPA Registration #** field, you can add the URL for the EPA website. You'll see that link when you use the Chemical Tracking wizard.

3. On the "Product Mix" tab, select the radio button for either **Mixed with Water** or **Mixed with Products**, then select the products and quantities to mix.

   Note: The **Mixed with Products** option is new with this release.

4. The **Make Default** check box designates an application method and application rate as the default for the Mix.

   Select this check box 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.

5. Create additional application methods by clicking the link **Add another application rate**.
   Note: You can create *multiple application rates*, but you can have *only one application method* per product.

6. Click **Save** to save and exit, or click **Save & New** to save and create another chemical product.

Chemical Tracking Enhancements (Cont.)

Chemical Wizard

The Chemical Wizard has some new offerings described below.

Calculate Chemical Amount

- In the **Chemicals** section of the wizard, we've changed the **Chemical Amount** to **calculate the ratio of chemical to solution**.

- If you have set up multiple application methods for a product, you can select a method from the dropdown list. The wizard automatically recalculates your solutions based on the application method.

- If this is a Mix, a link will appear. You can click the link to see the **breakdown of each chemical.**

Weather Conditions

- If you include Temperature, Wind Speed, and Wind Direction on the Wizard, you can click **Save and Next** and these fields will auto-populate the next screen.

- Weather conditions you include on the Wizard will appear on the Chemical Tracking report.

EPA Link

- When you set up a chemical product, if you add the URL for the chemical on the EPA website, you'll see that link on the wizard.

- On the wizard, **click the blue link** to go directly to the chemical on the **EPA website**.

Chemical Tracking Enhancements (Cont.)

We've added additional information to the Chemical Tracking reports in response to Member requests.

Chemical Tracking Report

Go to: **SA Reports > Service Reports > Chemical Tracking**.

New Filters for the Chemical Tracking Report

- You can now filter the report by **Resource/Team**
- We replaced the Form Filter with **Filter for Resource/Team**

Chemical Tracking Report Fields

The report now includes these new fields:

- **Chemical Concentration**
- **Budgeted Concentrate Amount**
- **Actual Concentrate Amount**
- **Temp**
- **pH**

These fields have been renamed:

- Applicator field is now **Applicator Name**
- Applicator License Number field is now **Applicator License #**
- Target Pest field is now **Targets**

- Target Area field is now **Areas Treated**
- Volume of Area Treated field is now **Amount of Area Treated**

Planned Chemical Usage Report

You can access this report from the Dispatch Board if you have chemical jobs scheduled for the date range you're viewing.

Select **More > Chemical Tracking**, then from the Chemical Tracking Wizard, click the **Planned Chemical Usage** icon in the top right corner.

- This report now lets you **filter by Resource** by selecting from the **Resource** dropdown list.
- **Concentrate** and **Water** amounts now display separately to help your technicians load their tanks properly.
- Concentrate amounts are truncated to **four decimal places**.
- The **Chemical Usage** section contains a separate row for each Job.
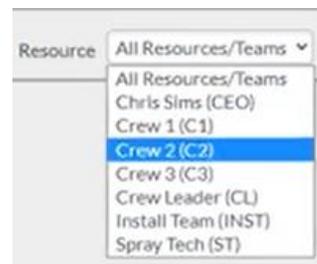
Updates to Correct System Issues

Client Portal

- **Tickets** that were created from Automations or in the Client Portal were not appearing in the Activity Stream. This has been corrected.

- In some cases, clients saw an unnecessary "**Paused Services" banner**. This has been fixed.

- **Registrations** sometimes were incorrectly assigned to the wrong client. This now works as expected.

Main Site

V3 Accounts

- On the V3 **Accounts List**, some custom field values were not displaying in the "Custom Fields" column. This now works as expected.

- **Installment Plans** were sometimes creating unnecessary blank invoices. This has been corrected.

Emails

- When sending an email from a Job, if you tried to add attachments, the **Upload Attachments** overlay was hidden behind the email screen. This has been fixed.

Estimates

- When adding the "**Signature Line" merge tag** to a Document, the merge tag was incomplete, causing the signature line to not display on the Document for customers. This has been fixed.

- In some cases, when a discount was added to a Product on an Estimate and sent to a client, the **discount was being calculated twice**. This has been corrected.

- When a client signed an Estimate on the **View My Proposal** screen from a mobile device, their signature would appear too small on the PDF that was created. This has been fixed.

Message Center

- In some cases, after threads in the Message Center were deleted, they still appeared after refreshing the screen. This now works as expected.