

Release Notes

January 21, 2022

This release includes **optimizations for Automations** to improve speed and performance, a new **Chemical Tracking Setup Wizard**, a time-saving **List View** on the Team app, and improvements to **Master Schedules**.

As always, we've made various updates to correct system issues. Read on for more details.

What's New at SA

Virtual In-House Training

Click [here](#) to see details and sign up for In-House training.

Basic In-House Training

February 1-3	February 8-10	March 14-16
March 8-10	April 5-7	April 12-14

Advanced In-House Training

February 22-24	March 29-31	April 26-28
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Enhancements

Automations

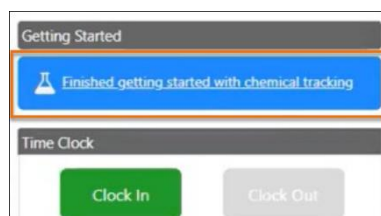
We've added **optimizations for Automations** to improve speed and performance, and we'll continue working on this for future releases.

Chemical Tracking Setup Wizard

If you have not yet set up Chemical Tracking in SA, there is a new **Chemical Tracking Setup Wizard**.

The wizard takes you through simple steps for setting up your chemical products.

On the **My Day** page, click the link for the setup wizard at 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 and fill in the information:



1. Company Info

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

Chemical Tracking Setup Wizard (Continued)

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 if you wish.
- Click the trashcan 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 if you wish.
- Click the trashcan icon to delete the line.

QuickBooks Online

QuickBooks Online users can now check your account balances using the **Balance Comparison Report**.

Enhancements (Continued)

Master Scheduler

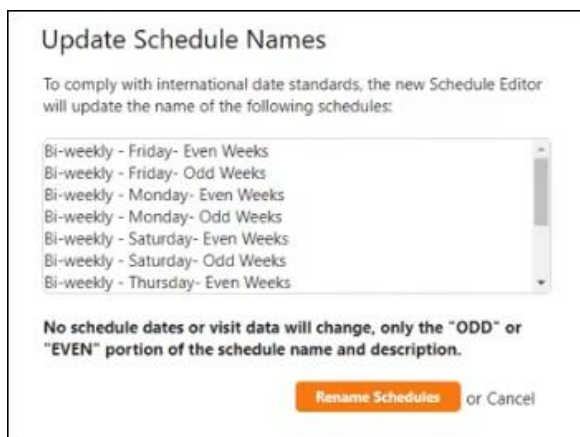
The previous release debuted a new **Schedule Editor**. For this release, we're addressing some schedule names and descriptions that might need to be updated. This is so they will indicate the correct **odd or even weeks** that could get thrown off in certain years.

So if you have schedules with **odd weeks/even weeks in the name and description**, you can automatically update these names so they don't look incorrect.

Note that no visit dates or schedules will be changed—just the naming convention in the schedule name and description.

1. When you bring up the **Master Recurring Schedules** screen, you'll now see a button **Use New Schedule Editor**.
2. Click **Use New Schedule Editor**.

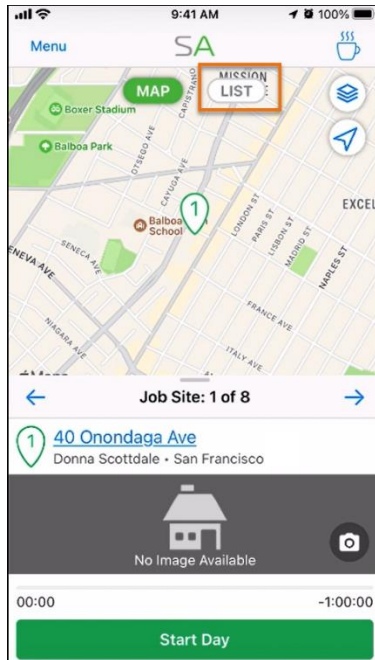
The **Update Schedule Names** dialog lists all schedule names that will be updated.



3. On the **Update Schedule Names** dialog, click **Rename Schedules**.

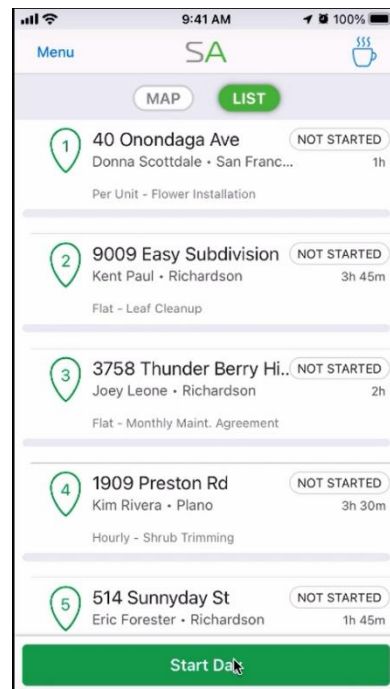
Team App Enhancements

The Team app has a new **List View** that gives field users the option to perform **bulk actions on jobs**, like starting or skipping multiple jobs.




On the Map view, the **service address** now appears above the image box.


Previously, you would select one job on the map, then swipe up to see details about the job.




Now, you can click the **List** button to see details for all jobs that day, including the time allotted and services planned for each client.

Map icons indicate the current status of a job:

 Green outline - job has not started

 Solid blue - job is in progress

 Solid green - job is finished

Team App Enhancements (Continued)

1. Click **Start Day** on the List view, and you'll see check boxes appear on the left side of each service address, as shown here.

2. Select the check boxes for one or more jobs.
3. Click **Start Work At Job Site** to clock into all jobs you've selected.

The status indicator changes from **NOT STARTED** to **WORKING**.

OR

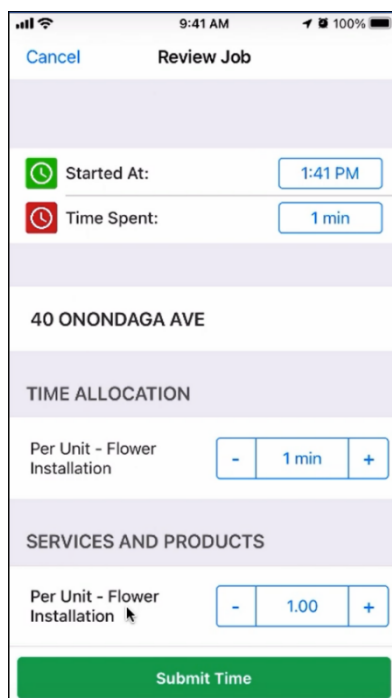
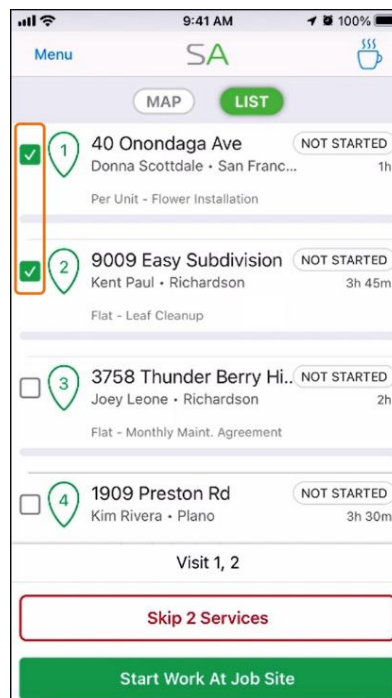
Click **Skip Services** to skip all the selected jobs.

Note that after you click **Start Work At Job Site**, the check boxes disappear.

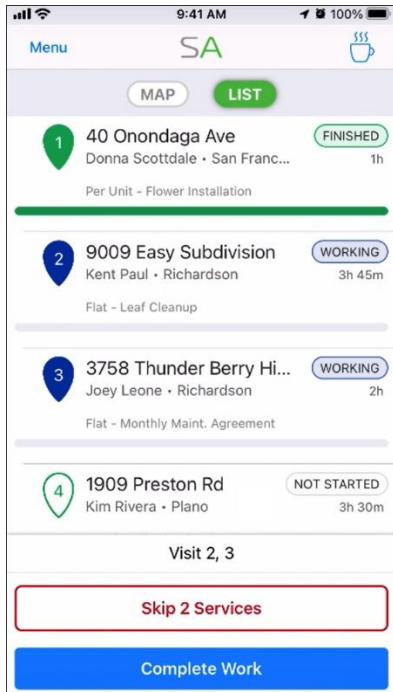
4. Click any address to see the **Detail** screen for that client.

Here, you can see job notes and add comments.

5. Click **Complete Work** at the end of the job.
6. On the **Review Job** screen, adjust any data as usual.
7. Click **Submit Time**.



8. The status of the job changes from **WORKING** to **FINISHED**.



Updates to Correct System Issues

Accounts

- In some V2 Accounts, the **Master Job was not appearing in the Job section**. This now works as expected.
- Some **Master Jobs** that had been completed in the past were **incorrectly cancelled**. This has been fixed.
- In some cases, when an **automation sent an email to multiple email addresses**, they did not appear on the Client Timeline. It's working now.
- Some Members got an error when **saving a Payment Method**. This has been correct.

Invoices

- When sending **Snow Invoices**, some duplicates were generated. This has been corrected.
- In some cases, the **invoices for Contracts** did not auto-generate. This now works as expected.

V2 Forms

- In some cases, the V2 Forms **Review field** appeared **blank on form responses**. This has been corrected.
- On V2 Forms Responses, a **maximum of only four photos** would appear, even when more were attached. This now works as expected.

V3 Forms

- The **Email Notification** in V3 Forms was not including the link for the form copy. The link now appears correctly.

Legacy App

- Previously, some **deleted custom fields** still appeared in the Legacy app. This has been fixed.

QuickBooks Online

- While syncing, a **QBO system issue** caused a trashcan icon to appear. This has been fixed.