Service**Autopilot**™

CUSTOM PACKAGES

USER GUIDE

V2

Contents

"Those who stand for nothing fall for anything."
*-- Alexander Hamilton*

Custom Packages

As a member of Service Autopilot (SA) you have the ability to create custom packages for your clients. You may use this feature to create a package consisting of your choice of services which you can then tailor to individual clients on a yearly basis.
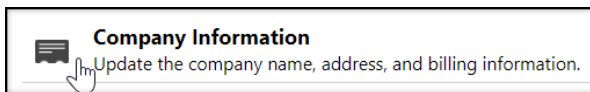
Enabling Custom Packages

You will need to enable Custom Packages from you Company Settings before you can begin using this feature. To do this, follow these instructions:
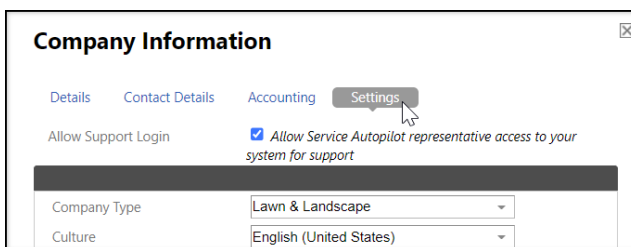
1. Access Service Autopilot.
2. Click the **Settings** gear icon.
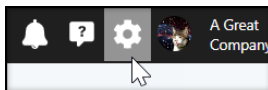
3. Select **Company Information** under the Company section. The Company Information overlay will appear.

4. Click on the **Settings** tab located on the upper-right area of the overlay.

5. **Enable Custom Package Services** by clicking on the checkbox next to it. This option will enable the ability to create custom package services by selecting the "Create Custom Package" check box on new waiting list services.
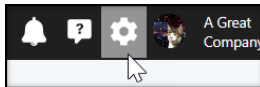
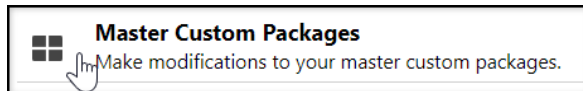6. Click **Save Changes** at the bottom of the overlay.

Accessing Custom Packages

1. Access Service Autopilot.
2. Click the Settings gear icon.

3. Click on Master Custom Packages.

4. Clicking on the custom package option will take the user to the Custom Package List Page.

Understanding the Custom Package List Screen

In addition to creating new custom packages, you may also manage existing packages via the Custom Packages Overlay. The custom packages overlay consists of the following:

- Custom Package List
  - Composed of three status tabs:
    - Active – Lists all active packages.
    - Inactive – Lists all inactive packages.
    - All – Lists both active and inactive packages.
  - Composed of information pertaining to individual custom packages:
    - Name – This is the name for the package.
    - Description – This is a description of the package.
    - Date Created – This will show the package date of creation.
    - Total – This is the sum of the line-item default rate.
    - Status – The current status for the package (Active or Inactive)
  - Composed of Actions Button
    - Add (**Creates New Package**)

ServiceAutopilot™

- Copy – This will create a copy of the selected custom package. Denoted by a note below the custom package name stating "Copy (Date & Time)."
- Delete – This will delete the selected custom package. Conversely, if the custom package that is attempted to be deleted is part of a customer's schedule, it will be prevented. In this case, the custom package will be deactivated.
- Make Active – This action will make all selected custom packages active again (option only available in Inactive and All tab).
- Make Inactive – This will mark the custom package as inactive and move it to the inactive tab. Note that this function will not erase the package.
- Add Package Action Button (**Creates New Package**)

Creating New Custom Packages

Creating new custom packages can be done in two different ways by **accessing the Custom Packages** (steps listed in Custom Packages section) list screen:

- **Actions** Button
- **Add Package** Action Button

Adding a New Custom Package

1. Access the **Custom Packages** (CP) list screen.
2. Hover over the **Actions** button on the custom package list and click on **Add**.
3. Or click on the **Add Package** button on the top-right of the CP list screen.

Add Package

4. The **Custom Package Editor** screen will appear.
5. Fill out the following (**bold** sections are required):
   a. **Name** of Custom Package (required)
   b. **Description** of Custom Package (optional)
   c. Click on **Add Service** and do the following for every other service you add to this package:
      i. Select Service from the downward arrow
      ii. Select Month from the downward arrow:
         1. 1st Month – 12th Month
      iii. Select Start day from the downward arrow – you may select a value for the day of the month that the service will be scheduled for. Select from the following options:
         1. 1-31 or Last
      iv. Select Duration from the downward arrow:
         1. ½ Month
         2. 1 Month
         3. 1 ½ Months

      4. 2 Months
      5. 2 ½ Months
    v. Type in Default B. Hrs (Business Hours) for the service.
    vi. Type in the Default Rate for the service. This rate defaults to the default rate for the service type that is selected.
    vii. Click on the Update notes icon (optional). The estimate and invoice notes default from the service type's default notes.
      1. Type in Estimate notes
      2. Type in Invoice notes
      3. Click **Save**.

Custom Package Editor

	Details	Estimates						

Name   a
Description   b

Delete

	Service	Month	Start	Duration	Default B. Hrs	Default Rate
☐	Select Service i	1st Month ii	1 iii	1 Month iv	v 0.00	vi 1.00 ☐ vii

Add Service   C

Save Changes   or   Cancel

6. Click on **Save Changes**.
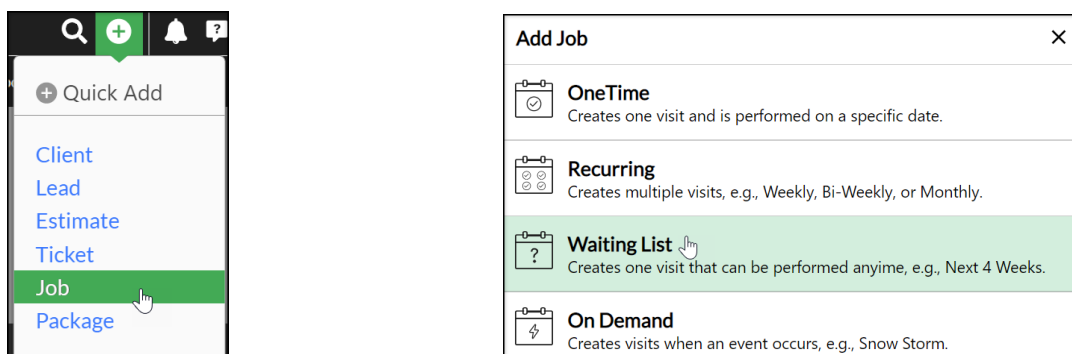
Save Changes

Scheduling a Custom Package

1. Access Service Autopilot.
2. Using the Quick Add button, select Add > Job > Waiting List.

⊕ Quick Add

Client
Lead
Estimate
Ticket
Job
Package

Add Job   ✕

OneTime
Creates one visit and is performed on a specific date.

Recurring
Creates multiple visits, e.g., Weekly, Bi-Weekly, or Monthly.

Waiting List
Creates one visit that can be performed anytime, e.g., Next 4 Weeks.

On Demand
Creates visits when an event occurs, e.g., Snow Storm.

3. The **New Waiting List Job** overlay will appear.

4. Select a **Client** from the drop-down list.
5. Select a Contract from the drop-down list (**optional**).
6. Select Yes or No if you want to create a Work Order. By default, this is set to Yes.
7. Click on the empty box next to the Create Custom Package section. This will enable the Custom Package feature.
8. Select a **custom package** from the drop-down list. This list will show all the active existing custom packages in your SA account.
9. Select a **Start Date** by clicking on the **calendar icon**. The start date is used to determine how to schedule the service's start dates and complete by dates. When updating the start date to a different month, it will update the service dates to start from the month selected.
10. Select a **Renew End Date** by clicking on the calendar icon. The renew end date determines when the renew button will display in the Master Job overlay.
11. Now review the service list associated to the selected custom package.
12. You may choose to deselect a specific round of service (only if a job is not complete) by clicking on the checkbox next to the line item to remove it from the schedule without erasing it.

13. Adjust the service information depending on the situation.
    a. Start Date
    b. Complete By Date
    c. Assigned To – This can be done by selecting a **resource** for the specific service using the drop-down arrow. This can be made at the time of dispatching from the Dispatch Board.

d. Quantity (Qty)
e. Rate
f. Budgeted Hours (B. Hrs)
g. Team Size
h. Days
i. Start – This refers to the start time for the appointment.
j. End – This refers to the end time for the appointment.
k. Optional settings:
i. Edit budgeted hours override
ii. Update notes
iii. Add product(s) to service
iv. Add/View Discount

Start Date	Complete by	Assigned To	Qty	Rate	B. Hrs	Team Size	Days	Start	End	
08/01/2022 **a**	09/01/2022 **b**	**c**	**d** 1	**e** 1.00	**f** 0	**g** 1	**h** 1	**i**	**j**	⊕ % ⚙

14. Click **Save**.

Save

Renewing Custom Packages

Custom Packages can be renewed through the Custom Package Editor. Renewal takes place on a client by client and package by package basis. If a custom package has reached an End Date for a particular client, a Renew button will appear next to the Renew End Date option of the editor. In addition, if services associated to the custom package are deleted or disabled, upon renewal they will reappear and will be highlighted in a green color as an alert to you or any other SA user.

Follow these steps to renew a custom package:

1. Access the **Custom Packages** (CP) list screen.
2. Select a custom package of choice.
3. Select a client from the **Client Assigned to this Package** section of the Custom Package Editor. Ensure you click under their address to access their custom package.
4. Click on the **Renew** button located next to the Renew End Date option of the editor.
5. All services associated to the custom package will reset to their original Master Custom Package settings. If any service was deleted or disabled, upon renewal these will reappear.
6. Make any desired changes to the services listed in the custom package.
7. Click **Save**.

Clients Assigned to this Package

Click here

| Active | Canceled |

Name	Address
Rose, Moira	720 White Oak St Allen, TX 75002

Start Date	08/16/2022 📅	
Renew End Date	05/01/2022 📅	**Renew**