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BOSS[®]

Snow Settings & Event Management

Version 9.12.0

Created By
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1. Introduction

In addition to the green season, BOSS provides features to help you schedule, track, and invoice snow-related services.

This guide covers the operational side of a snow season including how to configure BOSS for a snow season and how to run a snow event. It does not go into the sales side of snow as this is covered in the "Snow – Catalog and Job Set up" Reference Guide. For more information on specific types of snow agreements and how to "sell" those in BOSS, please read that reference guide.

Once snow jobs are accepted, the work is managed through the 'Snow Portal'. Before an employee may access the snow portal, you must either assign them the Snow Zone Supervisor role or configure the portal so that it may be accessed by other roles.

2. Overview

The snow season contains several key concepts which will be described first:

Service Categories

In the 'green' season, typically the only Services that are added to a job are those that can be scheduled and delivered. If it is not to be delivered, it does not go on the job.

In the snow season, a job usually contains several overlapping Services to be delivered on an as-needed basis. For example, you may have a Service for plowing when there is 1 to 1.99 inches of snow, and additional Services for increasing amounts of snow. When creating the estimate, there is no way to know for sure which Services will be delivered or when.

With this in mind, it would be helpful if the system were set up to allow field crews to simply say which kind of Service they delivered (e.g., plowed lot, shoveled walk) and not worry about the specific Service that was worked.

To support this, we have implemented the concept of Service Categories in BOSS. These Service Categories are used at the onset of the snow event to record work performed.

BOSS is delivered with some pre-defined Service Categories however these can be modified, and new Categories can be set up. The pre-defined Categories include:

Drifting Work

Plow Lot

Salt Lot

Salt Walk

Shovel Walk

The field crews will record their work using these Service Categories. When the snow event or work has been completed, the work performed for the Service Categories will be linked to specific Services from the Job.

Service Categories are defined at the system level. Each Branch will use the same set of Service Categories.

Snow Event

When a snowstorm or other snow season event occurs, you track information about the weather and services delivered, in a 'Snow Event'.

Each branch has its own set of Snow Events. Each event is uniquely numbered when created, but this can be customized by the user.

Snow Season

Snow Events are organized into 'Snow Seasons' and each Snow Season has user-defined start and end dates. The first Snow Event in a season will start numbering with number 1 and will increment for each additional event.

When the next Snow Season starts, the event numbering for that season will start at 1. Each Branch has its own set of Snow Seasons.

Snow Zone

Before Snow Event resources can be scheduled and coordinated, Properties will need to be grouped into Snow Zones. Any number of zones may be created using geography, business type, or however else may be desired. Each Property can only be assigned to one specific Zone.

A Snow Zone may have a zone supervisor and may contain multiple properties.

Each Branch has its own set of Snow Zones. Therefore, only Properties for that Branch may be placed into its Snow Zones. A zone may not span multiple branches.

Zone Supervisor

The Zone Supervisor is the person who will be responsible for managing resources for a zone during a Snow Event. The supervisor will use the Snow Dashboard to assign resources and track progress.

The Zone Supervisor must be a BOSS user (meaning they have login access to the main BOSS site) – not just any employee. A user may be a supervisor for more than one zone.

Snow Dashboard

The snow dashboard will help you to coordinate and track crews delivering snow services. The dashboard is where Service Category work is assigned to the crews and is updated as work begins and is completed. Changes made on the dashboard are updated live in BOSS Mobile and vice versa.

The dashboard also provides a place to enter crew time manually, generate additional service category work and assign work performed to job tickets.

Snow Plan

It will become tedious and overly time-consuming to assign crews to your properties for every snow event. Snow plans let you assign crews ahead of time for various scenarios. For example, you could create plans for light, medium, and heavy snow. When a snow event is about to occur, you can then generate work for the event using the plan of your choice.

Weather

During the snow season, it can be useful to take and record various weather-related measurements, both for presenting to clients and for internal reporting use.

Your crews in the field may record weather data while on site from BOSS Mobile. You may also enter information collected from the weather services you already use. Once

the event is over, you can provide the consolidated set of weather information to your customer.

3. Snow Configuration & Season Preparation

There are several areas in BOSS that can help in managing the snow season. This section reviews the preparation and configuration settings that should be made in preparation for the snow season.

Service Categories

To allow snow services to be ticketed and invoiced, the services from the catalog must have a Service Category assigned. These categories will be used to assign work to crews and then generate the proper tickets. Once assigned, BOSS will look across your sold contracts and work orders to find services that are assigned to service categories so that it can generate the type of service category work that needs to be done.

The Service Categories module is used to manage the service categories and the Service Categories Assignment module is used to map services to service categories. Both are located on the Snow Settings tab of the Snow Portal.

Service Categories Module

Use the Service Categories module to manage the kinds of work that your snow crews perform. There are five default service categories:

Drifting Work

Plow Lot

Salt Lot

Salt Walk

Shovel Walk

+ Service Categories

i Please be careful when you change names. If you change the name of a service category, the new name will appear on work performed for past events. For example, if you rename Drifting Work to Brining then past drifting work would now appear to have been brining.



Service Category ^	Allow Material Allocation?	Allow Equipment Allocation?	System?		
Drifting Work	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Plow Lot	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Salt Lot	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Salt Walk	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
Shovel Walk	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		

5 total records

You may add new service categories and change the name of the default categories. However, note that you should carefully consider your name change. If you've already gone through a snow event and used the category to have your crews perform work, the new name will be used when displaying information about past work.

You may not delete the default categories and you may not delete categories for which time and materials have already been collected.

When setting up your Service Categories, note that you have the option to allow or disallow Material and Equipment Allocation for any Service Category.

Service Categories Assignment Module

The Snow Settings tab in the Snow portal is where the Service Category Assignments module is found. Using the Service Category drop down, you can filter your list by the categories or by services that do not have a category assigned.

Service Category Assignments ☰

? To see services not yet assigned a service category, choose (Services without a category).
To see services already assigned a category, choose (All service categories) or a specific category.

Service Category
Service Name

<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Service Category	Service	Service Active?
<input type="checkbox"/>	Plow Lot	Snow - Loader	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Plow Lot	Snow - Plowing	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Plow Lot	Snow - Plowing 0-3"	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Plow Lot	Snow - Plowing 12"+	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Plow Lot	Snow - Plowing 3.1-6"	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Plow Lot	Snow - Plowing 6.1-9"	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Plow Lot	Snow - Plowing 9.1-12"	<input checked="" type="checkbox"/>

7 total records

Assign selected items to

To Assign a Service to a Category

1. Use the drop-down filter and select the (*Services without a category*) option. (You may also use the service name field to further filter the list.)
2. Mark the checkboxes to the left of the grid to indicate which services you would like to assign to the category.
3. At the bottom of the module select the Service Category that you are assigning the services to and then click assign.

Service Category Assignments

i To see services not yet assigned a service category, choose (Services without a category).
To see services already assigned a category, choose (All service categories) or a specific category.

Service Category: (Services without a category) **Find**

Service Name: **Reset Filter**

<input type="checkbox"/>	Service Category	Service
<input type="checkbox"/>	(Unassigned)	Porter Service
<input type="checkbox"/>	(Unassigned)	Pruning - Spring
<input type="checkbox"/>	(Unassigned)	Remedial Intensive Cleaning
<input type="checkbox"/>	(Unassigned)	Shop Time
<input checked="" type="checkbox"/>	(Unassigned)	Snow - Plowing
<input checked="" type="checkbox"/>	(Unassigned)	Snow - Plowing 0-3"
<input type="checkbox"/>	(Unassigned)	Snow Site Check
<input type="checkbox"/>	(Unassigned)	Spring Clean up
<input type="checkbox"/>	(Unassigned)	Spring Flowers
<input type="checkbox"/>	(Unassigned)	Training
<input type="checkbox"/>	(Unassigned)	Tree Installation - 1"
<input type="checkbox"/>	(Unassigned)	Tree Installation - 2"
<input type="checkbox"/>	(Unassigned)	Tree Pruning - Over 10 Ft.
<input type="checkbox"/>	(Unassigned)	Turf - August
<input type="checkbox"/>	(Unassigned)	Turf - June

« < 1 2 > » 35 total records

Assign selected items to: Plow Lot **Assign**

To Modify a Service's Category

1. Use the drop-down filter and/or Service name field to find the service(s) and check the box to indicate which services you would like to modify.
2. At the bottom of the module select the Service Category that you would like to change the service(s) to and then click assign.

Service Category Assignments

i To see services not yet assigned a service category, choose (Services without a category).
To see services already assigned a category, choose (All service categories) or a specific category.

Service Category: Drifting Work **Find**

Service Name: **Reset Filter**

<input type="checkbox"/>	Service Category	Service	Service Active?
<input type="checkbox"/>	Drifting Work	Snow - Additional Snow Removal	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Drifting Work	Snow - Skidsteer	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Drifting Work	Snow - Truck w/Plow	<input checked="" type="checkbox"/>

3 total records

Assign selected items to: Plow Lot **Assign**

To Unassign a Service from a Category

1. Use the drop-down filter and/or Service name field to find the service(s) and check the box to indicate which services you would like to unassign.

- At the bottom of the module select the *(Remove from category)* option and then click assign.

Service Category Assignments

i To see services not yet assigned a service category, choose (Services without a category).
To see services already assigned a category, choose (All service categories) or a specific category.

Service Category:

Service Name:

<input checked="" type="checkbox"/>	Service Category	Service	Service Active?
<input checked="" type="checkbox"/>	Drifting Work	Snow - Additional Snow Removal	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Drifting Work	Snow - Skidsteer	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Drifting Work	Snow - Truck w/Plow	<input checked="" type="checkbox"/>

3 total records

Assign selected items to:

Note: If the service does not have a Service Category assigned it will not be found or used in the Snow modules and features.

Holidays and Hours of Operation

To prioritize delivery of services during an event, it is helpful to know when a property is occupied. BOSS provides a way to identify holidays observed and the hours of operation for each Property.

To learn more about using these features, please review the *BOSS Hours and Holidays* reference guide located on the Support website.

Snow Season

Each Branch will have their own Snow Seasons and each Snow Season has its own start and end dates. When a new snow season begins, snow event numbering will reset. This will allow you to track snow seasons that cross calendar years. Snow Seasons are managed in the Seasons module which is typically located on the Snow Events tab.

For a snow job to be considered as included in the current season, its dates must overlap with the season start and end dates. If you open a snow season, by clicking on the blue season name link, you are shown properties and jobs in that season's Branch that have a contract or work order with snow related services that overlap this season.

+ Seasons

Branch Find

Season Name Reset Filter

Branch	Season	Start Date	End Date
Arctic	Arctic - Snow Season 2022	11/01/2022	03/31/2023
Chesterfield	Chesterfield - Snow Season 2022	10/01/2022	04/30/2023
Chesterfield	Chesterfield - Snow Season 20-21	10/01/2020	05/01/2021

3 total records

Snow Season: Arctic - Snow Season 2022

General Information

Branch

Season Name

Season Start

Season End

Properties and Jobs

Use the following to see properties for each zone and the applicable jobs for the season. When you generate work for a snow event, the work for properties with jobs will appear on the Dashboard.

No work will be generated for properties without jobs.

Look For Find

Property	Zone	City	Zip	Job	Job Type	Description	Start	End	Job Status	Service Categories
Ameristar - (SN)	South Arctic Zone	St Charles	63301							
Ameristar - KC - (SN)	South Arctic Zone	Kansas City	64141							
Arctic - Internal Property - (SN)	North Arctic Zone	Springfield	65821							
Bass Pro - (SN)	South Arctic Zone	St Charles	63301							
Bowlero - (SN)	South Arctic Zone	Chesterfield	63017							
BrickHouse Tavern - (SN)	North Arctic Zone	Chesterfield	63005	1817	Contract	Per Push Snow Removal	11/01/2022	03/30/2023	AVAILABLE	Plow Lot, Salt Lot
Casino Queen - (SN)	South Arctic Zone	East St. Louis	62201							
Clancy Residence - (SN)	South Arctic Zone	Haines	99827	1835	Work Order	T&M Snow Residential	01/01/2022	12/31/2022	AVAILABLE	Plow Lot

Add Snow Season

1. Click the plus button at the top left corner of the Seasons module. The Add Season dialog will open.
 - Branch: Select the desired Branch from the list.
 - Season Name: Enter the name for the season.
 - Season Start: The date the snow season begins.
 - Season End: The date the snow season ends.
2. Click the Save button to save the season.

Note: It can be beneficial to enter the snow season start and end dates to run longer than the actual contract or work order dates. This will allow you to create events that may occur earlier or later than your typical snow season dates.

Edit Snow Season

To make changes to an existing Snow Season: Click the Season Name link in the Snow Season module. The Snow Season screen will open. Changes may be made to the season name and/or dates. Click Save at the bottom of the screen.

Delete Snow Season

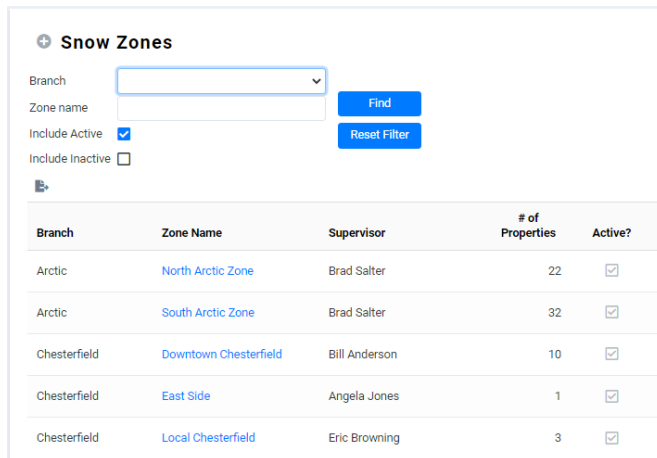
To delete an existing Snow Season: Click the Season Name link in the Snow Season module. The Snow Season screen will open. There is a delete button at the bottom of the screen.

Note: Once a Snow Event has been created for the Season, the delete button is no longer available and the Season is not able to be deleted.

Snow Zones

Properties are grouped into Snow Zones to facilitate the delivery of services. If a property is not assigned to a Snow Zone, regardless of job status, it will not be pulled into the snow functionality.

The Snow Zones module is used to add new zones and to display/modify any existing Snow Zones. This module is typically found on the Snow Zones tab in the Snow portal.



The screenshot shows the 'Snow Zones' module interface. At the top, there is a search filter with a 'Branch' dropdown menu, a 'Zone name' input field, and 'Find' and 'Reset Filter' buttons. Below the filter, there are checkboxes for 'Include Active' (checked) and 'Include Inactive' (unchecked). The main content is a table with the following data:

Branch	Zone Name	Supervisor	# of Properties	Active?
Arctic	North Arctic Zone	Brad Salter	22	<input checked="" type="checkbox"/>
Arctic	South Arctic Zone	Brad Salter	32	<input checked="" type="checkbox"/>
Chesterfield	Downtown Chesterfield	Bill Anderson	10	<input checked="" type="checkbox"/>
Chesterfield	East Side	Angela Jones	1	<input checked="" type="checkbox"/>
Chesterfield	Local Chesterfield	Eric Browning	3	<input checked="" type="checkbox"/>

Add Snow Zone

1. Click the plus button at the top left corner of the Snow Zones module. The Add Snow Zone screen will open.

New Zone

General Information

Branch	<input type="text" value="Chesterfield"/>	Zone Notes	<div style="border: 1px solid #ccc; height: 80px;"></div>
Zone Name	<input style="background-color: #f8d7da;" type="text"/>		
Zone Supervisor	<input type="text" value=""/> <input type="button" value="x"/> <input type="button" value="v"/>		
Active?	<input checked="" type="checkbox"/>		

Properties

Please save your zone before adding properties.

- Branch: Select the desired Branch from the list.
 - Zone Name: Enter the name for the zone. (Required.)
 - Zone Supervisor: Select an optional supervisor for the zone.
 - Active: Check this option to make the zone available.
 - Zone Notes: Enter any notes or other information regarding the zone.
2. Click the Save button to save the zone.

Edit Snow Zone

To make changes to an existing Snow Zone: Click the Zone Name link in the Snow Zones module. The Snow Zone screen will open for modification.

Add Properties to a Zone

Properties can be added to a Snow Zone through the Snow tab on the Property screen or in the Snow Zone module.

To add Properties in the Snow Zone module:

1. Click the Zone Name link in the Snow Zones module. The Snow Zone screen will open.

Zone: East Side

General Information

Branch: Chesterfield Zone Notes:

Zone Name: East Side

Zone Supervisor: 5 Angela Jones

Active?

Properties

The following list includes active properties only.

Property ^	Address	City	Zip	Customer	Account Owner
AT&T - Chesterfield	222 THF Blvd	Chesterfield	63005	ACME Management Company	Angela Jones

1 total records

- At the top right of the Properties section there are buttons for adding, moving, and removing properties. Click the Add Properties button and the Add Properties to Zone screen will open.

Add Properties to Zone

To add properties to a zone, use the **Look For** and **View** fields to choose the properties. When you click the **Add to Zone** button, they will be added to the zone. Properties already assigned to a zone will be ignored.

Look For:

View:

Branch	Property ^	Address	City	Zip	Customer	Account Owner	Current Zone
Chesterfield	Chesterfield Mall	145 Clarkson Rd.	Chesterfield	63005	ACME Management Company	Angela Jones	

1 total records

The Add Properties screen allows you to search for a set of properties and add multiple Properties to the zone with one action. The search functions on this screen are like those in the Property Manager module (search field and views).

Enter the desired search criteria and click the Find button to display matching Properties. After locating the desired Properties that should be in the zone, click the Add to Zone button. All properties listed in the results grid will be added to the Snow Zone.

Zone: East Side

General Information

Branch	Chesterfield	Zone Notes	
Zone Name	East Side		
Zone Supervisor	5 Angela Jones <input type="text" value="x"/>		
Active?	<input checked="" type="checkbox"/>		

Properties

The following list includes active properties only.



Property ^	Address	City	Zip	Customer	Account Owner
AT&T - Chesterfield	222 THF Blvd	Chesterfield	63005	ACME Management Company	Angela Jones
Chesterfield Mall	145 Clarkson Rd.	Chesterfield	63005	ACME Management Company	Angela Jones

2 total records

Key things to remember:

You may use the add operation multiple times to build up the set of properties in the zone.

Inactive properties are excluded from the search. But if a property is already in a zone, deactivating the property does not remove it from the zone.

If a property appears in your search results and it is already assigned to a zone, it will remain in that zone. It will not be moved to the new zone.

Remove Properties from a Zone

Properties can be removed from a Snow Zone through the Snow tab on the Property screen or through the Snow Zone module.

To remove Properties in the Snow Zone module:

1. Click the Zone Name link in the Snow Zones module. The Snow Zone screen will open.
2. At the top right of the Properties section there is a button to remove Properties from the zone.

Zone: East Side

General Information

Branch: Chesterfield
 Zone Name: East Side
 Zone Supervisor: 5 Angela Jones
 Active?:

Zone Notes

Properties

The following list includes active properties only.

Property ^	Address	City	Zip	Customer	Account Owner
AT&T - Chesterfield	222 THF Blvd	Chesterfield	63005	ACME Management Company	Angela Jones
Chesterfield Mall	145 Clarkson Rd.	Chesterfield	63005	ACME Management Company	Angela Jones

2 total records

Save Delete Cancel

- Click the Remove Properties from this Zone button and the Remove Properties screen will open. Enter search criteria as was done when adding Properties to select the Properties to remove. In this case, the search will only find matching Properties that are linked to the Snow Zone. Properties from other zones and Properties not yet assigned to a zone are not included in the search.

Remove Properties from Zone

To remove properties from a zone, use the **Look For** and **View** fields to choose the properties. When you click the **Remove from Zone** button, they will be removed from the zone.

Look For: Chesterfield Point
 View:

Find

Branch	Property ^	Address	City	Zip	Customer	Account Owner	Current Zone
Chesterfield	Chesterfield Point Condos	N. Outer 40	Chesterfield	63007	Chesterfield Point	Angela Jones	Downtown Chesterfield

1 total records

Remove from Zone Cancel

- Click the Remove from Zone button and the Properties are removed from the zone.

Move Properties to a Different Zone

Properties can be moved from one zone to another by:

Snow Zone module: Using the bulk move operation available from the Snow Zone screen. This option allows you to move multiple Properties at a time.

Property screen: Switching the zone on the property’s Snow tab. This option only moves the Snow Zone for a single Property at a time.

Using Snow Zone Module

To move Properties to another Snow Zone using the Snow Zone module:

1. Click the Zone Name link in the Snow Zones module. The Snow Zone screen will open. At the top right of the Properties section there is a button to move Properties to another zone.

Zone: East Side

General Information

Branch: Chesterfield
 Zone Name: East Side
 Zone Supervisor: 5 Angela Jones
 Active?

Zone Notes

Properties

The following list includes active properties only.

Property ^	Address	City	Zip	Customer	Account Owner
AT&T - Chesterfield	222 THF Blvd	Chesterfield	63005	ACME Management Company	Angela Jones
Chesterfield Mall	145 Clarkson Rd.	Chesterfield	63005	ACME Management Company	Angela Jones

2 total records

Save Delete Cancel

2. Click the Move button and the Move Properties screen will open. Enter search criteria as was done when adding and removing Properties to select the Properties to move. In this case, the search will only find matching Properties that are linked to the Snow Zone. Properties from other zones and Properties not yet assigned to a zone are not included in the search.

After locating the Properties to be moved, select the Destination Zone from the dropdown list of available zones. *NOTE: The dropdown list of options will only display other Snow Zones for the same Branch as the source zone.*

Move Properties to Another Zone

To move properties from this zone to another, use the Look For and View fields to choose the properties. Next, select the destination zone. When you click the Move to Zone button, they will be moved to the chosen zone.

Look For: Chesterfield Point
 View: [dropdown]
 Destination zone: East Side

Find

Branch	Property ^	Address	City	Zip	Customer	Account Owner	Current Zone
Chesterfield	Chesterfield Point Condos	N. Outer 40	Chesterfield	63007	Chesterfield Point	Angela Jones	Downtown Chesterfield

1 total records

Move to Zone Cancel

3. Click the Move button and the Properties are moved from the current zone to the new one.

Using Property Screen

To move a Property to another Snow Zone using the Property screen:

1. The settings for snow can be found by clicking the Snow tab on the Property screen.

Property: Enterprise Campus

General Details Documents Takeoffs Visits Issues Activities Marketing Campaign Hours **Snow** ACME Landscape Notes Sitefotos Photos

Snow Options

Snow report required Snow zone: Downtown Chesterfield

Property Notes

2. Select the new Snow Zone from the dropdown list of choices to move the Property to another zone.

Property: Enterprise Campus

General Details Documents Takeoffs Visits Issues Activities Marketing Campaign Hours **Snow** ACME Landscape Notes Sitefotos Photos

Snow Options

Snow report required Snow zone: Downtown Chesterfield

Property Notes

- Not assigned to a snow zone
- Downtown Chesterfield
- East Side
- Local Chesterfield

Delete a Zone

To delete a Snow Zone:

1. Click the Zone Name link in the Snow Zones module. The Snow Zone screen will open.
2. Move or Remove any Properties assigned to this Zone.
3. Click the Delete button at the bottom of the page.

NOTE: You may not delete a zone if an event has been created for the zone.

NOTE: If the Branch for the Property is changed to a different branch, the Property will no longer be assigned to a Snow Zone. The Property Snow Zone will need to be re-assigned to one of the Snow Zones for the new Branch.

Property Snow Configurations

There are several snow related configurations that can be made for the Property.

Property: 1200 Edison Office Park

Snow Options

Snow report required Snow zone: Not assigned to a snow zone

Property Notes

Approval Requirements

Service Category	Requirement	Approval Contact	Email	Mobile Phone	Business Phone	Home Phone	Notes
No approval is required							

Snow Service Notifications

Service Category	Milestone	Contact to Notify	Contact via	Email	Mobile Phone	Business Phone	Home Phone	Notes
Notifications are not required								

Update Cancel Apply

These options are set in three sections of the screen:

Snow Options: Set Snow Report requirements, Snow Zone and Property Notes.

Approval Requirements: Contact information for any needed Approvals before Services can be performed.

Snow Service Notifications: Contact information for who should be notified and when.

These options are configured through the Snow tab of the Property detail screen.

Snow Options

Options and settings available in this section include:

Snow Reports: If the Contact for the Property should receive a snow report for Services rendered, check the Snow Report Required option.

Snow Zones: Set or change the Snow Zone for the Property as needed.

Property Notes: If there are any special instructions for cleaning snow at the Property, these instructions or notes should be entered into the Property Notes field. **NOTE: These are the only property related notes that will show on the mobile device to the crew leader**

Approvals: Is approval required before Services can be performed.

Notifications: Who should be notified once Services are started or stopped.

Approval Requirements

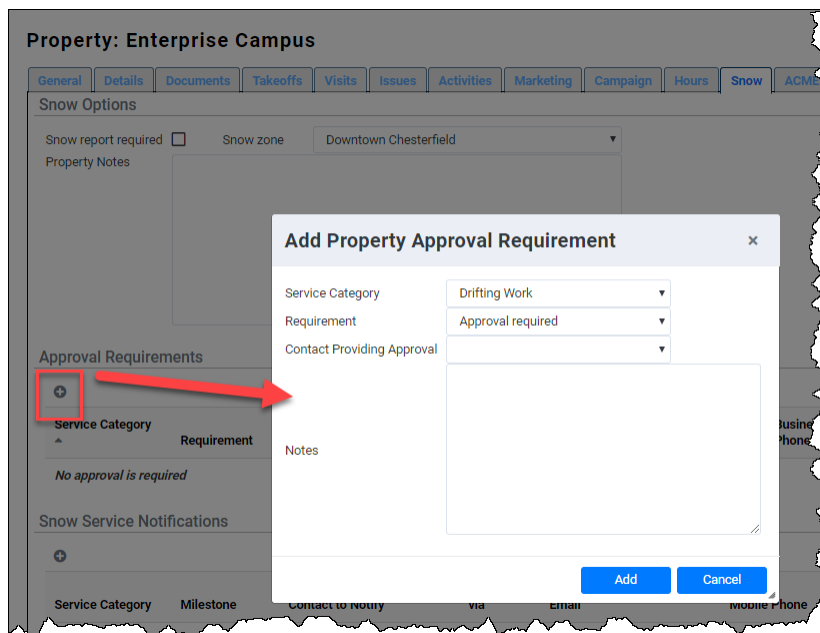
There may be some Customers and Properties that require approval before any work can be performed. The Approval Requirements section is used to record these requirements along with the needed contact information.

When a snow event occurs, BOSS will use this information to keep track of the approvals granted and those not yet received. Approval Requirements are specific to Service Categories and if there aren't any requirements for a Property or category, BOSS assumes that no approval is required.

Add Approval Requirement

To add an Approval Requirement:

1. Click the Add Requirement button at the upper left corner of the Approval Requirement section of the page. The Add Property Approval Requirement window appears.



Service Category: Select the Service Category that requires approval.

Requirement: Select the type of approval required.

Contact Providing Approval: Select the contact that will provide approval. You may choose from the primary contact or any of the secondary contacts for the Property.

Notes: Enter notes as needed.

2. Click the Add button and the requirement will be added.

Edit Approval Requirement

To make changes to an existing Approval Requirement:

1. Locate the desired Approval Requirement and click the Service Category link. The Edit Approval Requirement screen will open for modification.

Approval Requirements

Service Category	Requirement	Approval Contact	Email	Mobile Phone	Business Phone	Home Phone	Notes
Drifting Work	Approval required	Joanna Fredricks	customer@bosslm.com		314-555-1234		
Salt Walk	By request only	Daniel Jones	djones@bosslm.com				

Edit the information as needed and click the Update button to save changes.

Delete Approval Requirement

To delete an existing Approval Requirement:

1. Locate the desired Approval Requirement and click the Service Category link. The Edit Approval Requirement screen will open for modification.
2. Click the Delete button to remove the requirement.

Configure Service Notification Rules

Some Customers and Properties may require notifications before or after Services are performed. These notification rules can be entered into BOSS through the Snow Service Notification section of the Snow page of the Property screen.

Notifications can be configured for each Service Category.

1. To add a notification, click the Add button at the top left of the Snow Service Notifications list. The Add Service Notification dialog will open. To edit an existing notification, click the Service Category link.

Service Category: Select the Service Category that requires notification.

Milestone: Select when notifications should be made. This is a required field.

Contact to be Notified: Select the contact that should be notified.

How they are to be Notified: There are three options:

- Email: Notification should be done via email. This is a manual process and there is no mechanism in BOSS to automate or alert for this type of notification.
- Email/Text Template: This option will utilize the corresponding Email Template in BOSS to automate the notification. The template will dictate what the notification message will be and whether notification is via Text, Email, or Both. When you select this option, an additional drop-down menu of choices becomes visible. The Template drop-down is used to select which Email/Text Template should be used for the notification.
 - When this option is selected, the email and/or text notification will automatically be sent dependent on the Crew Leader clicking 'Start All' or 'Stop All' on their mobile device for the noted service category of work.
- Phone: Notification should be done via phone. This is a manual process and there is no mechanism in BOSS to automate or alert for this type of notification.

Notes: Enter any notes pertinent to the notification.

2. Click the Add button to save the notification.

Weather Setup







Before weather measurements and weather data can be recorded, a small amount of setup must be done to ensure that weather measurement sources are available for use, unit types have been associated with weather measurement categories, and that the list of weather conditions meets your company's needs.

All these settings are contained in three modules, all of which can be found on the "Snow Settings" tab in the "Snow" portal.

Weather Measurement Sources Module

When a weather measurement data set is created, a "weather measurement source" must be specified. These sources can indicate any means of weather recording, from a weather service's website to manual recording.

These sources can be created, modified, and deleted in the Weather Measurement Sources Module.

Weather Measurement Sources		
Measurement Source	Default?	
NWS	<input checked="" type="checkbox"/>	 
weather.com	<input type="checkbox"/>	 
AccuWeather	<input type="checkbox"/>	 

3 total records

To add a weather measurement source, click the plus button and enter the name of the new source. You may use the pencil icon to edit the name if you need to.

To delete a weather measurement source, click the X icon to the right of the Measurement Source in the list.

























Note: Weather measurement sources cannot be deleted if they are used in any weather measurement data sets. To delete the weather measurement source, those weather measurement data sets must be deleted first.

Weather Conditions Module

When creating a weather measurement data set, any number of weather conditions can be noted to help indicate with more clarity the exact conditions.

In addition, since weather measurement data sets can be created at the property, zone, or city level, comparison of noted weather conditions across a region can be used to predict conditions for crews heading out to do snow-related work.

A list of weather conditions is maintained in the Weather Conditions Module:

Weather Conditions			
Condition	Order	Active?	
Dry Snow	100	<input checked="" type="checkbox"/>	 
Wet Snow	200	<input checked="" type="checkbox"/>	 
Sleet	300	<input checked="" type="checkbox"/>	 
Freezing Rain	400	<input checked="" type="checkbox"/>	 
Drifting Snow	500	<input checked="" type="checkbox"/>	 
Black Ice	600	<input checked="" type="checkbox"/>	 
Drizzle	700	<input checked="" type="checkbox"/>	 
Rain	800	<input checked="" type="checkbox"/>	 
Windy	900	<input checked="" type="checkbox"/>	 
Calm	1000	<input checked="" type="checkbox"/>	 
Sunny	1100	<input checked="" type="checkbox"/>	 
Cloudy	1200	<input checked="" type="checkbox"/>	 

12 total records

The twelve conditions shown in the image above will exist in this module by default, though any may be modified or deleted. When adding or editing weather conditions, the following fields will be available:

- **Condition** – the name or description of the weather conditions
- **Order** – this order determines how weather conditions will appear in this module and on the weather measurement data set entry page
- **Active?** – if checked, this weather condition will be available for selection on the weather measurement data set entry page

To add a weather condition, click the plus button and enter the name of the new condition, order number and whether it should be active. You may use the pencil icon to edit the name, order number or whether the condition is active.

To delete a weather condition, click the X icon to the right of the Weather Condition in the list.

Note: You cannot delete a weather condition if that condition is referenced by any weather measurement data set. To delete the weather condition, those weather measurement data sets must be deleted first. If it will simply no longer be used, you can inactivate the condition using the pencil icon.


Weather Unit Types





Each weather measurement data set allows for the recording of the following eight pieces of information:

- Accumulation
- Accumulation Rate
- Initial Air Temperature
- Final Air Temperature
- Initial Pavement Temperature
- Final Pavement Temperature
- Wind Velocity
- Wind Direction

Except for Wind Direction, each of these measurements will need to be defined with a Unit Type. This can be done using the Weather Unit Types module. Each category of weather data will be set to an existing unit type found in the system.

Weather Unit Types

 The following unit types are used when entering weather data during a snow event.

Category Name	Unit Type	
Accumulation	in	
Accumulation Rate	Inch Per Hour	
Temperature	Fahrenheit	
Wind Velocity	Miles Per Hour	

4 total records

When editing a row in this module, you will not be able to change the Category Name field, but the Unit Type field will display a dropdown box that allows you to select from any unit types in the system. To set up system unit types, use the Material Unit Types Module typically found on the Services tab under Administration.

The unit types associated with measurement categories can be changed at any time. When a weather measurement data set is created, the units associated with each measurement at the time of creation will be saved alongside the set itself. This allows you to change unit type associations over time without affecting previous weather measurement data sets.

4. Event Preparation & Scheduling

As the snow begins to fall or in preparation for an impending snowstorm, you'll need to start by creating a new snow event. Snow events form the basis for the snow features in BOSS. Events have a start time and stop time and can span multiple days in BOSS. This way you are not tied to scheduling by a date, but rather on a per event basis. These events are numbered and are unique to the snow season.

Snow Events

The Snow Events module is where all Snow Events are created and modified.

Branch	Season	Event	Event Start	Event Stop	Closed?	Affected Zones
Arctic	Arctic - Snow Season	Demo Snow Event	06/01/23 02:20 AM		<input type="checkbox"/>	North Arctic Zone, South Arctic Zone
Arctic	Arctic - Snow Season	Snow Event 1	09/08/23 12:00 AM	09/08/23 06:00 AM	<input checked="" type="checkbox"/>	North Arctic Zone, South Arctic Zone
Chesterfield	Chesterfield - Snow Season 2023	Snow Event 2	06/01/23 02:20 AM		<input type="checkbox"/>	Downtown Chesterfield, East Side, Local Chesterfield
Chesterfield	Chesterfield - Snow Season 2023	Snow Event 1	02/01/23 06:00 AM	02/02/23 05:00 PM	<input checked="" type="checkbox"/>	Downtown Chesterfield, East Side, Local Chesterfield

Creating a New Event

1. Click the plus button at the top left corner of the Snow Events module. The Add Event dialog will open.

Add Event ✕

Branch Arctic ▼

Season [Redacted] ✕ ▼

Event Name [Redacted]

Event start date and time [Redacted] ✕ 📅

Branch: Select the desired Branch from the list.

Season: Select the desired Snow Season from the list.

Event Name: BOSS will automatically name and number each event beginning with 1. For example – 'Snow Event 1'. The user can edit or add to this naming convention to better describe each event. For example 'Snow Event 1 – Dec. 23 Sleet'.

Event Start date and Time: Enter the Start Date and Time of the event.

2. Click the Save button to save the event.

Updating/Modifying a Snow Event

After an event has been created, you must assign the event to the affected snow zones. To update this event or make changes to an existing Snow Event, click the Event Name link in the Snow Event module. The Snow Event screen will open.

Demo Snow Event

General Information

Branch: Arctic

Event Start: 11/15/2023 02:20 am

Event End: [] []

Event Closed:

(Close when all work is done and all tickets are created)

Description: Blizzard conditions expected all day. Use caution!

Affected Zones

Select All/None

North Arctic Zone South Arctic Zone

Weather Data

Use this section to record weather data for zones and cities. Use the Properties tab to record property-specific weather data.

Location	Source	Air Temp Start	Accumulation Rate	Accumulation	Air Temp End	Pavement Temp Start	Pavement Temp End	Wind Direction	Wind Velocity	Weather Conditions
No records found										

Update Cancel Apply Generate Work

Event Start: The Start Date and Time that the snow event began.

Event End: The End Date and Time that the snow event stopped. This information will be entered once the snow event is over.

Event Closed: This checkbox indicates whether the event is done (ticketed) and closed.

Description: This is a place to add notes about the event and record useful information about the snow event. This description will appear to all mobile users for that event.

Affected Zones: Select which Snow Zone(s) are affected by this Event. This will determine the properties for which work is generated and which zones will be available to work in the Snow Dashboard.

Note: Be sure to click the Save button after making any event changes.

Generating Work for an Event

After an event has been created and updated, you will need to generate the Service Category work for the event. The Generate Work button is located on the Event screen below all the details and affected zones.

When you click the Generate Work button, the Generate Work dialog opens.

By default, a snow plan will not be used to generate work. To learn more about generating work with a snow plan, please read the Snow Plans section.

If the event already contains service category work, you are given the option to remove pending work, which would be any service category work with a status of: awaiting approval, canceled, or pending. With this option checked work in those status' will be removed from the event but any work that is already in the 'in progress' or 'done' status will be untouched.

BOSS generates all the Service Category work based on the services that are found on jobs that are in place at the time of the event's start date. This work will be placed on the Snow Dashboard and will be ready for assigning to crews. If for some reason, the work does not need to be performed, it can be cancelled from the dashboard.

After you have generated work for an event, please keep the following in mind:

1. You may no longer delete the snow event.
2. If an included zone has service category work with recorded time and materials, you may not exclude the zone from the event.
3. If an included zone does have service category work but no recorded time or materials, you may exclude the zone from the event. If you do this by accident, you may re-include the zone and the work in the zone will re-appear on the dashboard.

Snow Crews

In preparation for a snow event, you'll want to be sure that your crews have been set up and any crew adjustments made during the last event have been reviewed and/or reset as necessary. These crews are independent of your "green season" crews and are used on the Snow Dashboard, BOSS Mobile, and Time Entry. Snow Crews are managed from the Crews Tab and Module that are found in the Snow portal.

Crews

Branch Crew Leader
 Crew Name Available for Work?

Branch	Crew	Crew Leader	Crew Count	Service Categories	Assigned Zones	Available for Work
Chesterfield	Jacob Johnson - Plow #22	Jacob Johnson	1	Drifting Work, Plow Lot	Downtown Chesterfield, East Side, Local Chesterfield	<input checked="" type="checkbox"/>
Chesterfield	Plow Truck #5	Brent Moore	1	Drifting Work, Plow Lot, Salt Lot	Downtown Chesterfield, Local Chesterfield	<input checked="" type="checkbox"/>
Chesterfield	Plow Truck #7	Sean Winters	1	Drifting Work, Plow Lot, Salt Lot	Downtown Chesterfield, Local Chesterfield	<input checked="" type="checkbox"/>
Chesterfield	Plow Truck #9	John Henry	1	Plow Lot, Salt Lot	Downtown Chesterfield, Local Chesterfield	<input checked="" type="checkbox"/>
Chesterfield	Shovel #1	Richard Cook	3	Salt Walk, Shovel Walk	Downtown Chesterfield, Local Chesterfield	<input checked="" type="checkbox"/>
Chesterfield	Shovel #2	Mark Taylor	2	Salt Walk, Shovel Walk	Downtown Chesterfield, Local Chesterfield	<input checked="" type="checkbox"/>
Chesterfield	Snow Loader #1	Tony Rodriguez	1	Drifting Work, Plow Lot	Downtown Chesterfield, Local Chesterfield	<input checked="" type="checkbox"/>

7 total records

Add a New Crew

1. Click the plus button in the top left corner of the Crews module. The Add Crew screen will open.

New Crew

General Information

Branch Crew Notes

Crew Lead

Crew Name

Crew Count

Available for work

Crew leader can create new work from field

Assigned Zones

Downtown Chesterfield East Side Local Chesterfield

Assigned Service Categories

Drifting Work Salt Lot Salt Walk Shovel Walk

Plow Lot

- Branch: Select the desired Branch from the list.
- Crew Lead: Select the crew leader for the crew.
Note: The BOSS Mobile snow features are only available to an employee who is assigned as a Snow Crew Leader.
- Crew Name: This field defaults to the Crew Lead name if a Crew Lead was chosen, however it can be changed. You could name the crew the driver's name, the vehicle number, the crew's branch and/or name.
- Crew Count: This is simply a reference number indicating the number of people who should be on the crew.
- Available for Work: This checkbox indicates if this crew can be assigned work on the snow dashboard.
- Crew leader can create new work from field: This checkbox indicates that the crew leader can create new (unassigned) work from mobile.
- Crew Notes: Enter any notes about this crew. These notes are internal only and do not appear on the mobile device.

- Assigned Zones: The zones available to be selected are zones that are a part of this crew's branch, and the selection will determine if they are available to be assigned to work in those zones on the Dashboard. One or more zones may be selected.
 - Assigned Service Categories: Select the type of work that this crew can provide. This will also determine which work they can be assigned on the Dashboard.
2. Click the Save button to save the crew.

Editing a Snow Crew

To make changes to an existing Snow Crew: Click the Crew Name link in the Snow Crew module. The Snow Crew screen will open for modification.

Deleting a Snow Crew

If the crew has never been used and there is no time information or work scheduled, you may delete a snow crew. To delete a Snow Crew:

1. Click the Crew Name link in the Crew module. The Crew screen will open.
2. Click the Delete button at the bottom of the page.

Note: if the criteria noted above are not all met, then the crew cannot be deleted, and a delete button will not be available.

Deactivating a Snow Crew

Once a snow crew has been used, you may no longer delete the crew. You can however deactivate the crew from future use. If you click the Deactivate button on the snow crew page, you will be warned before the crew is deactivated. Deactivating the crew means you will no longer be able to assign them work for a snow event. If you plan to use the crew later, you should uncheck the Available for Work option – this will allow you to use the crew again after they become available.

To re-activate a snow crew, go to the Crew tab, check the 'Include inactive' box and click Find. All crews both active and inactive will be displayed. Select the appropriate crew by clicking on the blue crew name link. Click the Activate button.

Scenarios when Deactivating/Activating or marking Unavailable/Available

Unavailable for work:

- **Event is created and in progress, crew is marked Unavailable**
 - Crew remains on the dashboard with assigned work
 - Work will need to be reassigned to another crew
 - Crew remains listed in Crew section of dashboard and can be made available for work by clicking link
- **Crew is marked Available while event is in progress**
 - Crew will NOT reappear on the dashboard
 - Manually assign them work to appear
 - Crew is listed in the Crew section of the dashboard
- **Crew is marked Unavailable, new Event is created using a snow plan**

- Crew will NOT appear on the dashboard
- Work assigned to that crew in the plan will now be listed in the Unassigned Work by Property section of the dashboard
- Crew remains listed in Crew section of dashboard and can be made available for work from here

Deactivated:

- **Event is created and in progress, crew is deactivated**
 - Crew drops off dashboard
 - Work moves to Unassigned Work by Property section
 - Crew is no longer listed in the crew section of the dashboard
 - Crew can only be reactivated via the Crew tab
- **Crew is Re-activated while event is in progress**
 - Crew does not appear on dashboard
 - Manually assign them work to appear
 - Crew is listed in the crew section of the dashboard
- **Crew is Deactivated, new event is created using a snow plan**
 - Crew does not appear on dash regardless of if they are in the snow plan
 - Work from plan moves to Unassigned Work by Property
 - Crew is no longer listed in the crew section of the dashboard
 - Crew can only be reactivated via the Crew tab.

Best practice would be to use Deactivate crews as a more permanent or long-term solution and use Available/Unavailable on an event-by-event basis

Hourly Subcontractors

The Hourly Subcontractor feature in BOSS allows subcontractors to assume a role close to that of employees. The feature offers the following capabilities:

- Basic subcontractor information storage (name, address, company, etc.)
- Custom subcontractor-only Pay Codes and rates
- Subcontractors that can become BOSS Main users
- Subcontractors that can become BOSS Mobile users
- Manual and automatic time entry and time approval for subcontractors
- Expanded Purchase Order system for managing and allocating subcontractor time
- Expanded reporting for analyzing subcontractor time

This functionality is useful when the subcontractors are used to supplement your existing labor, and they need to be handled like employees who log time hourly.

If you contract out entire jobs or job segments to a subcontracting vendor who manages their own crews and charges you a fixed price, the Hourly Subcontractor feature is likely not needed.

For full details of setting up hourly subcontractors please review the Hourly Subcontractors Reference Guide

Snow Dashboard

Once an event is created and work has been generated it is available to be assigned on the Snow Dashboard. The Snow Dashboard is the central location for managing and running a snowstorm. Here, on the Schedule tab, you will assign and manage crews and service category work. You'll also be able to see key property and job information like the Hours of Operation, Job Number, and brief Job Description. This is also where you can keep up with how the crews are progressing and make scheduling changes if necessary. When using BOSS Mobile, the work statuses are updated, and time tracking is automatically synced to the system, throughout the storm. There are several additional tabs on the dashboard itself:

The Collect tab holds the time entered on BOSS Mobile and is also where manual time entry is available.

The Ticket tab is where the snow time and snow materials that have been entered are assigned to tickets.

The Review tab is used to review the time and materials, so it is ready for payroll, job costing and invoicing.

Viewing Events and Zones

When first viewing the Snow Dashboard, you will need to choose the event that you wish to manage.

Click the Choose Event button and use the drop-down menus to select the Event and one or more Zones.

Choose Event ✕

Branch: Chesterfield ▼

Season: Chesterfield - Snow Seas ▼

Snow Event: Snow Event 2 ▼

Affected Zone:

- Downtown Chesterfield
- East Side
- Local Chesterfield

Update Dashboard
Cancel

Once the event and zone(s) have been selected and the dashboard is updated, you will see the event on the Schedule tab in the Snow Dashboard. For a new event, all work will be in the Unassigned Work by Property section and needs to be assigned to crews.

During a snow event you can use the Refresh Data button to update the information displayed. This is especially helpful when there are many crews using BOSS Mobile. To be sure you are looking at the most accurate progress update, click the Refresh Data button. This updates the information without having to refresh your browser session or leave the Dashboard module.

Assigning Service Category Work

After work has been generated it will reside in the Unassigned Work by Property section of the Dashboard. This not only shows critical job information like the Property Name, Hours of Operation, Job Number, Job Description, and Property Address, it also lists the service category work that is currently unassigned.

Unassigned Work by Property

Look for Property: Find View: Standard ▼

Property	Zone	Hours of Operation	Job	Job Description	Address	City	Zip	Unassigned Work
Clancy Residence - (SN)	South Arctic Zone		1835	T&M Snow Residential	8 Chiklat Lake Rd	Haines	99827	Plow Lot ☰
Courtyard - Chesterfield - (SN)	North Arctic Zone	5:00 AM - 8:00 PM	1798	T&M Snow Removal	17369 Chesterfield Airport Rd	Chesterfield	63005	Salt Lot, Salt Walk ☰
Gingham's Homestyle Restaurant - (SN)	South Arctic Zone	11:00 AM - 11:00 PM	1814	Per Push Snow Removal	1566 Country Club Plaza Dr	St Charles	63303	Salt Lot, Salt Walk ☰
Gordon Residence - (SN)	South Arctic Zone		1836	T&M Snow Residential	4500 E Stonewy Hollow Dr	Wasilla	99654	Plow Lot, Salt Lot, Salt Walk, Shovel Walk ☰
Howard Residence - (SN)	South Arctic Zone		1837	Seasonal Snow Removal	3611 Route 66	North Pole	99705	Plow Lot, Shovel Walk ☰

To assign the work to a crew,

1. Click the ticket icon to the right of the work categories. This will open the Assign Work to Crew dialog.

Assign Work to Crew ✕

Property: Corporate Square

Service Category	Status	Time/Cost Entered?	Crew
Plow Lot	Pending	<input type="checkbox"/>	[Unassigned] ▼
Salt Lot	Pending	<input type="checkbox"/>	[Unassigned] ▼

Assign
Cancel

2. Each unique Service Category will be listed along with it's current status.

- From the Crew drop down you can select the crew to which you would like to assign this work. Click Assign once your options have been selected.

The Crew drop down will show only the Crews that are:

Available for Work.

Assigned to this Snow Zone.

Assigned to Work the particular Service Category.

From this drop down you also have the ability to cancel this work if for some reason it does not need to be done for this event. A warning icon along with a hovering tool tip will appear on work that is canceled.

Property -	Zone	Hours of Operation	Job	Job Description	Address	City	Zip	Unassigned Work
Clancy Residence - (SN)	South Arctic Zone		1835	T&M Snow Residential	8 Chilkat Lake Rd	Haines	99827	Plow Lot
Courtyard - Chesterfield - (SN)	North Arctic Zone	5:00 AM - 8:00 PM	1798	T&M Snow Removal	17369 Chesterfield Airport Rd	Chesterfield	63005	Salt Lot, Salt Walk

Once work has been assigned to a Crew it will move to the top section of the Dashboard's Schedule. Now it is available to be worked both on BOSS Mobile or by updating the status manually.

Mass Crew Assignment

If you want to make multiple crew assignments at one time, you can change your view in the Unassigned Work by Property Section from Standard to Mass Crew Assignment.

This view displays each Service Category for each property on its own line, allowing you to select the appropriate crews in the Assign to Crew column and assign them all at once by selecting the Assign to Crews button. (Note that this view is also available in the Snow Plan module.)

Property -	Zone	Hours of Operation	Job	Job Description	Address	City	Zip	Unassigned Work
Annie Gunns	Downtown Chesterfield	11:00 AM - 11:00 PM	756	Per Push Snow Removal	16806 Chesterfield Airport Rd	Chesterfield	63005	Salt Walk
Cambridge Engineering	Downtown Chesterfield	10:00 AM - 10:30 PM	757	Per Push Snow Removal	760 Long Rd Crossing Dr	Chesterfield	63005	Plow Lot
Churchill Park	Downtown Chesterfield	5:00 AM - 8:00 PM	759	T&M Snow Removal	6510 Churchill Rd.	Chesterfield	63005	Salt Walk
Mid Rivers Mall	Downtown Chesterfield	Open 24 hours	762	Per Push Snow Removal	1600 Mid Rivers Mall Drive	Saint Peters	63376	Plow Lot
Mid Rivers Mall	Downtown Chesterfield	Open 24 hours	762	Per Push Snow Removal	1600 Mid Rivers Mall Drive	Saint Peters	63376	Salt Walk
Mid Rivers Mall	Downtown Chesterfield	Open 24 hours	762	Per Push Snow Removal	1600 Mid Rivers Mall Drive	Saint Peters	63376	Shovel Walk
Southland Plaza	Downtown Chesterfield	8:00 AM - 5:00 PM	763	Per Push Snow Removal	12000 Olive Blvd.	St. Louis	63046	Plow Lot
Southland Plaza	Downtown Chesterfield	8:00 AM - 5:00 PM	763	Per Push Snow Removal	12000 Olive Blvd.	St. Louis	63046	Salt Walk
Southland Plaza	Downtown Chesterfield	8:00 AM - 5:00 PM	763	Per Push Snow Removal	12000 Olive Blvd.	St. Louis	63046	Shovel Walk
Southland Plaza	Downtown Chesterfield	8:00 AM - 5:00 PM	764	Snow Removal T&M	12000 Olive Blvd.	St. Louis	63046	Shovel Walk

Snow Plans

With a snow plan, you can assign crews to properties ahead of time and use the plan to generate work for snow events. You may create as many plans as you wish for the scenarios that you typically encounter. Doing so will reduce the number of hours you spend preparing for an event.

Requirements

Before you may create a snow plan, you must do the following:

1. Define the snow zones for your branch.
2. Add properties to the snow zones.
3. Map services to service categories.

Overview

Snow plans are specific to a branch and apply to one or more zones, they may be active or inactive. They also have a published version and an editable version.

You may only use published versions of active plans to generate work for an event. If you need to change a plan, you place it into edit mode which creates a separate editable version of the plan.

If you have a snow plan that is almost, but not quite, what you need for a different scenario, you may save the plan as a new plan and change it to fit the scenario.

If you have already used the snow dashboard to handle a past snow event and you'd like to use those work assignments for future snow events, you may save the event as a new snow plan.

The Snow Plans module is used to add new plans and to display/modify any existing Snow Plans. This module is typically found on the Snow Plans tab in the Snow portal.

➕ Snow Plans
👤

Branch

Plan Name

Zone

Notes

Find

Reset Filter

Include Active
 Include Inactive

🔄

Branch	Plan	Included Zones	Active?	Last Published	Editor	Notes
Arctic	Blizzard 2	North Arctic Zone, South Arctic Zone	☑️	04/01/22 11:12 AM		
Arctic	Light Salting Event	North Arctic Zone, South Arctic Zone	☑️	09/08/22 09:14 AM		
Arctic	Normal Event	North Arctic Zone, South Arctic Zone	☑️	09/08/22 09:22 AM		
Chesterfield	Blizzard	Downtown Chesterfield, Local Chesterfield	☑️	03/28/22 04:30 PM		Forecasts over 16"
Chesterfield	Light Salting Event	Downtown Chesterfield, East Side, Local Chesterfield	☑️	01/16/22 11:03 AM		

You may search for plans using the following criteria:

Branch: Look for plans in a specific branch. If left blank, it looks for plans in all the branches to which you have access.

Plan Name: Search for text in plan names.

Zone Name: Search for plans that include zones having this text in their name.

Notes: Search for plans containing this text in their notes.

The columns in the results list are as follows:

Branch: Identifies the branch with which the plan is associated.

Plan: The name of the plan. Click the name to view the last published version of the plan.

Included Zones: This is a list of the zones covered by the plan.

Active: Indicates whether the plan may be used to generate work for a snow event.

Last Published: The date and time the plan was last published.

Editor: If a user is editing the plan, their name appears in this column.

Notes: Displays some of the notes entered for the plan.

Add a Snow Plan

1. Click the plus button at the top left corner of the Snow Plans module. The New Plan screen opens.

New Plan

Plan Name Notes

Branch

Active

The details for this plan have not yet been configured.

- Plan Name: Enter the name of the plan.
 - Branch: From the list, select the branch with which the plan is associated. *Note that once you save the plan, you may no longer change the branch.*
 - Active: Check this option when you are ready for the plan to be used for a snow event.
 - Notes: Use this field to communicate information about the plan for the people who may use it. The notes appear on the Snow Plan module.
4. Click the Save button to save the new plan and return to the Snow Plans module.
 5. Click the Cancel button to abort the new plan.
 6. Click the Apply button to save the new plan and continue to editing the plan.

To view the plan, locate the plan in the Snow Plans module and click its name. The snow plan detail page appears. In the following page, you see the new plan you just created.

Snow Plan: Icy

Plan Name Notes

Branch

Active

[Show history](#)

Included Zones
Included Service Categories
Last Published

This plan has never been published

[Edit Plan](#)

Properties by Crew

Look for Property [Find](#)

⌵ ⌶ ⌷

Zone	Property	Job	Job Description	Address	City	Zip	Service Categories
No records found							

Unassigned Work by Property

Look for Property [Find](#)

Zone	Property	Job	Job Description	Address	City	Zip	Service Categories
No records found							

[Save](#) [Delete](#) [Cancel](#) [Apply](#) [Save As...](#)

This page always shows the version of the plan that was last published. Because it has never been edited and published, there is no information other than the name, branch, and notes.

Below the Active checkbox is a link labeled Show History. Click it to see a summary of the changes that have been made. Since your plan is new, you see the date it was created. This list will grow as the plan changes over time.

When	User	Action
08/07/19 02:40 PM	Jeff Wilson	Plan created

1 total records

[Close](#)

Below the general information for the plan is a section containing the following:

Included Zones: Lists the zones to which this plan applies. Because your plan is new, there are not yet any zones.

Included Service Categories: Lists the service category work provided in this plan. Because your plan is new, none are listed.

Last Published: Indicates the person and date the plan was last published.

To add properties and service category work into the plan, click the Edit Plan button.

Edit a Snow Plan

After you have saved a snow plan, you must identify the affected zones, the service category work to be performed, and the properties to be serviced. To edit a plan, locate the plan on the Snow Plans module and click its name. The snow plan detail page opens. The detail page shows the last published version of the plan.

Only one person at a time may edit a plan. But if another person is editing the plan and you need to pick up where they left off, there’s a way you can assume control. We’ll describe that later in this section.

If no other person is editing the plan, then you will see the Edit Plan button. Click the button. The last published version of the plan is placed into edit mode and the Edit Plan page opens.

Edit Snow Plan: Icy

Plan Name: Icy Branch: Chesterfield Edit Notes: Initial Setup

(Please describe the reason for the change. These notes appear in the plan's history once you publish your changes.)

Included Service Categories

- Drifting Work
- Salt Walk
- Plow Lot
- Shovel Walk
- Salt Lot

Included Zones

- Downtown Chesterfield
- Local Chesterfield
- East Side

Buttons: Load Work, Reset to Plan, Remove All Work, Remove Expired Jobs

Properties by Crew

Look for Property: **Find**

Zone	Property	Job	Job Description	Address	City	Zip	Service Categories
No records found							

Unassigned Work by Property

Look for Property: **Find** View: Standard

Zone	Property	Job	Job Description	Address	City	Zip	Service Categories
No records found							

Crews

Crew	Available for work?	Crew Leader	Crew Count	Service Categories	Assigned Zones
No records found					

Buttons: Save, Apply, Publish, Delete, Cancel

Edit Notes: This is where you write a short description of what you are changing in this version of the plan. Notes are required. When you publish this version of the plan, the notes appear in the plan’s history.

Included Service Categories: Check the service category work included in the plan. For example, if you are creating a plan for a light snow event then you can exclude Drifting Work.

Included Zones: Check the zones for which this plan contains work.

You do not have to finish your changes in one session. If you are editing at the end of a workday and want to continue in the morning, you may save your changes and close the browser for the night. When you return in the morning, you will see the following on the snow plan detail page.

Snow Plan: Icy

Plan Name	<input type="text" value="Icy"/>	Notes	<div style="border: 1px solid #ccc; height: 50px;"></div>
Branch	Arctic		
Active	<input checked="" type="checkbox"/>		
Show history			

Included Zones	
Included Service Categories	
Last Published	This plan has never been published
Resume Editing	You are editing this plan. Your last change was made on 06/01/2023 03:05:09 pm.

Click the "Resume Editing" button to continue editing the plan. You retain ownership of the plan until you cancel editing or publish your changes.

If another person is editing the plan, you will see the following on the snow plan detail page.

Included Zones	
Included Service Categories	
Last Published	This plan has never been published
Become the Editor	Jeff Wilson is editing this plan. The last change was made on 06/01/2023 03:05:09 pm.

In cases where the owner is unavailable for an extended period and the edits need to be completed and published, you may take ownership of the edited version. The only requirement is that the last change must have been more than one hour in the past.

If the last change was more than one hour ago and you click the "Become the Editor" button, you will become the owner and may continue editing where the previous owner left off.

Setting Service Categories and Zones

Before you can load work into a plan, you must identify the service category work and zones to be included in the plan.

If you include a zone, properties within that zone are eligible to be included in the plan. If a zone is not included, those properties are ignored when loading work into the plan.

If you check a service category, jobs with services in that category will be included in the plan. Those that are not checked will be ignored. This is a way for you to quickly design plans for specific purposes without the hassle of removing unnecessary work.

Once you choose the zones and click the Apply button at page bottom, the crews in those zones will appear in the Crews section of this page. Before that point, the crews section is blank.

Loading Work

Once you've selected the service categories and zones, click the Load Work button. When you do so, the plan finds the properties in the included zones that are not on hold. If a property has a current job with service category work that is included in the

plan, it adds the property and service category work to the plan. The work appears in the Unassigned Work by Property section.

If a property has more than one job with applicable service category work, each of those jobs will be included in the plan.

The following screenshot shows a new set of work loaded into the plan.

Unassigned Work by Property								
Look for Property		<input type="text"/>	<input type="button" value="Find"/>	View	Standard			
Zone	Property	Job	Job Description	Address	City	Zip	Service Categories	
North Arctic Zone	Brickhouse Tavern - (SN)	1817	✓ Per Push Snow Removal	2 McBride & Son Center Dr	Chesterfield	63005	Plow Lot, Salt Lot	
South Arctic Zone	Clancy Residence - (SN)	1835	✓ T&M Snow Residential	8 Chilkat Lake Rd	Haines	99827	Plow Lot	
North Arctic Zone	Courtyard - Chesterfield - (SN)	1798	✓ T&M Snow Removal	17369 Chesterfield Airport Rd	Chesterfield	63005	Plow Lot, Salt Lot	
South Arctic Zone	Gingham's Homestyle Restaurant - (SN)	1814	✓ Per Push Snow Removal	1566 Country Club Plaza Dr	St Charles	63303	Plow Lot, Salt Lot	
South Arctic Zone	Gordon Residence - (SN)	1836	✓ T&M Snow Residential	4500 E Stoney Hollow Dr	Wasilla	99654	Plow Lot, Salt Lot	
South Arctic Zone	Howard Residence - (SN)	1837	✓ Seasonal Snow Removal	3611 Route 66	North Pole	99705	Plow Lot	
South Arctic Zone	Johnson Residence - (SN)	1839	✓ Per Push Snow Residential	1517 Tramon Ave	North Pole	99705	Plow Lot, Salt Lot	

Property: The name of the property that will be serviced during a snow event. Click the name of the property to go to the Property Details page.

Job: The job number that has applicable service category work.

Checkmark: If the job is current (i.e., it has not expired, the property is not on hold) then you will see a green checkmark.

Address, City, and Zip: The property's address.

Service Categories: Lists the service categories associated with the job services.

Assign Work to Crew button: Click the ticket button to assign the service categories to crews.

If you win new jobs during the snow season, you should edit each applicable plan and click the Load Work button. Any new work not yet in the plan will appear in the Unassigned Work by Property section.

But we've got you covered if you are not able to update the plans in time for a snowstorm. If you do not update the plans and you use a plan to generate work for an event, the new work will be automatically included in the event. It will appear in the Unassigned Work section, and you may then assign the work to crews.

Assign Work to Crews

Just like on the snow dashboard, you assign work to crews. In the Unassigned Work by Property section, each row has a ticket image. When you click the ticket image, the Assign Work to Crew dialog opens.

Assign Work to Crew
✕

Property Valley Center Mall

Service Category **Crew**

Plow Lot [Unassigned] ▾

Salt Lot [Unassigned] ▾

Assign
Cancel

For each service category, you may leave the work unassigned, assign it to a crew that handles that kind of work, cancel or delete the work. After you make your changes, click the Assign button.

If you assign the work to a crew, a row appears in the Properties by Crew section.

If you cancel the work, the work remains in the Unassigned Work by Property section, but it displays a warning image instead of a green checkmark.

Unassigned Work by Property

Look for Property Find View Standard ▾

Zone	Property	Job		Job Description	Address
Downtown Chesterfield	Annie Gunns	756	✓	Per Push Snow Removal	16806 Chesterfield Airport Rd
Downtown Chesterfield	Cambridge Engineering	757	⚠	Per Push Snow Removal	760 Long Rd Crossing Dr
Downtown Chesterfield	Chesterfield Point Condos	758	✓	Per Push Snow Removal	N. Outer 40

This means that you can change your mind and assign canceled work to a crew. If you use the plan to generate work for an event, the canceled work will be ignored. It will not be added to the event.

If you delete the work, the system will check to verify that there is at least one assignment for that service category still active within the plan. If you are trying to delete the only instance of that Service Category for the Property within the plan, the following dialog will appear.

Unable to Delete
✕

⚠
This work can only be cancelled because it is work that is to be performed.

OK

Note that, like on the snow dashboard, while creating or editing a Snow Plan, you can use the Mass Crew Assignment view to make multiple crew assignments at one time.

Unassigned Work by Property

Look for Property Find View Mass Crew Assignment

Zone	Property	Job	Job Description	Address	City	Zip	Service Categories	Assign to Crew
Downtown Chesterfield	Annie Gunns	756	✔ Per Push Snow Removal	16806 Chesterfield Airport Rd	Chesterfield	63005	Salt Lot	Plow Truck #5
Downtown Chesterfield	Annie Gunns	756	✔ Per Push Snow Removal	16806 Chesterfield Airport Rd	Chesterfield	63005	Salt Walk	Shovel #2
Downtown Chesterfield	Chesterfield Point Condos	758	✔ Per Push Snow Removal	N. Outer 40	Chesterfield	63007	Salt Lot	Plow Truck #5
Downtown Chesterfield	Churchill Park	759	✔ T&M Snow Removal	6510 Churchill Rd.	Chesterfield	63005	Salt Lot	[Unassigned]

Changing Crew Assignments and Order of Work

When you assign work to a crew, the work appears in the Property by Crew section. At the end of each row, you see a ticket icon and a calendar icon.

To re-assign the work to a different crew or cancel the work, click the ticket button. The Assign Work to Crew dialog opens. Make your changes and press the Assign button.

To change the order in which a crew performs their work (i.e., you want them to service a certain property before all others), click the Calendar button. The Change Order of Work dialog opens.

Change Order of Work

Crew: Plow Truck #5

Zone	Property	Job	Service Categories	
Downtown Chesterfield	Churchill Park	759	T&M Snow Removal	Plow Lot
Downtown Chesterfield	Annie Gunns	756	Per Push Snow Removal	Plow Lot
Downtown Chesterfield	Clock Tower Plazas	760	T&M Snow Removal	Plow Lot

3 total records

Close

Use the arrow buttons to shift the work up and down. Each change you make is saved to the database. Once you have finished, click the Close button. The plan page will update to reflect your changes.

Multiple Visits

Service Category work for a property can be added more than once to a Snow Plan if you would like to “route” the work in a looping fashion, where the crew would be scheduled to work Property A, Property B, and then back again to Property A. This can be helpful if you do Per Push type work.

For more information on this option, please reference the “Creating Additional Service Category Work” section of this reference guide.

Additional Actions

Our goal is to minimize the amount of work needed to maintain a plan. Service category work remains in a plan indefinitely. But as you know, every season new jobs are won, some jobs are lost, and others change. In year one, you may have snow plowing and salting on a property. But next year, they arrange to have you also perform drifting work when needed.

If a property is put on hold, a job expires, or a job service is no longer applicable then you will see a red exclamation icon instead of a green checkmark. Hover your mouse pointer over the warning icon to see a description of the problem.

Zone	Property	Job	Job Description	Address
▼ Crew: Plow Truck #5				
Downtown Chesterfield	Annie Gunns	756	✓ Per Push Snow Removal	16806 Chesterfield Airport Rd
Downtown Chesterfield	Mid Rivers Mall	762	✓ Per Push Snow Removal	1600 Mid Rivers Mall Drive
▼ Crew: Plow Truck #7				
Downtown Chesterfield	Churchill Park	759	! T&M Snow Removal	6510 Churchill Rd.
Downtown Chesterfield	Corporate Square	761	✓ Seasonal Snow Removal	1 Corporate Square

The snow plan edit page contains several buttons to help you manage changes to the plan:

Edit Snow Plan: Icy

Plan Name Icy Edit Notes
Branch Arctic

(Please describe the reason for the change. These notes appear in the plan's history once you publish your changes.)

Included Service Categories

- Drifting Work Salt Walk
 Plow Lot Shovel Walk
 Salt Lot

Included Zones

- North Arctic Zone South Arctic Zone
 Show Zone: All zones

[Update Renewed Jobs](#)

[Load Work](#)

[Reset to Plan](#)

[Remove All Work](#)

[Remove Expired Jobs](#)

Update Renewed Jobs: If your plan contains expired jobs, you can click this button and the system will search for current snow work to replace the expired work. When updating a snow plan year over year, this function should be performed multiple times throughout the selling season to replace renewed jobs.

Load Work: Click this to load work into the plan. Note that if work is already in the plan, it will remain in the plan and will not change. If new work has been sold since the plan was created, that work will be loaded into the plan.

Reset to Plan: If you make changes that you wish to abort, click this button to erase your changes and reset the edited version of the plan back to what was last published. This gives you a way to quickly start over from a known, good stopping point.

Remove All Work: Click this button if you want to remove all work from the edited version of the plan. You would then click Load Work to load in the latest jobs.

Remove Expired Jobs: If your plan contains expired jobs, jobs for on hold properties, or job services that are no longer valid, click this button to remove them. When updating a snow plan year over year, this button should not be utilized until most or all renewed jobs have been updated.

Additional buttons at the bottom of the snow plan edit page:

Save: Saves your latest changes and returns to the snow plan detail page.

Apply: Saves your latest changes and keeps you on the snow plan edit page.

Publish: Publishes your changes. This is described in the next section.

Delete: Deletes the edited version of your plan. Does not affect the last published version of the plan.

Cancel: Returns to the snow plan detail page. Note that when you load work, assign crews, or change the order of work then your changes are saved immediately. Clicking cancel does not reverse those changes. The cancel button is mainly for situations where you changed the included zones or included service categories and have not yet performed any other action on the page.

Publish a Snow Plan

You may make any changes you wish in the edited version of your plan, without affecting the published version. Once you have finished, enter a description of your changes into the Edit Notes field and click the Publish button.

The edited version of the plan is turned into the published version and the edited version is removed. Another person may make changes if they wish.

BOSS does not retain previous versions of a plan. If you publish and then realize you made a mistake, you cannot restore the previous version. Instead, you must edit the plan, make corrections, and re-publish.

Note: If you canceled work in the edited version of the plan, the work will still appear as canceled in the published version. When generating work for a snow event, the canceled items will populate in the Unassigned Work by Property section of the dashboard.

Generate Work from a Snow Plan

To generate work with a snow plan, go to the snow event's detail page and click the Generate Work button. The Generate Work dialog opens. On the dialog, choose a snow plan.

Generate Work for Snow Event ×

Snow Plan Light Salting Event ▼

Zones in Event	In Plan?	Note
North Arctic Zone	✔	
South Arctic Zone	✔	

2 total records

Generate Work
Cancel

When you click the Generate Work button, BOSS generates Service Category work based upon the services and crew assignments in the plan.

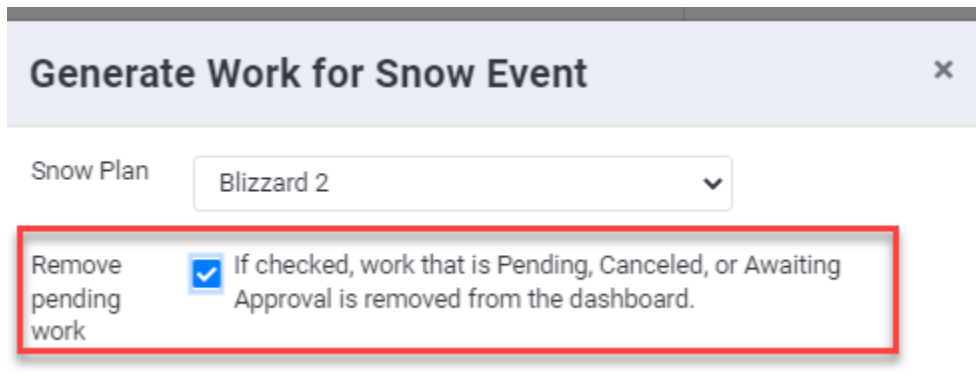
If the event does not yet contain any Service Category work (no work has been generated), then the plan is placed into the event as is.

If the event already contains Service Category work, BOSS is more particular about how it inserts work.

1. If the event contains work that is already in progress or done, then that work is left as is.
2. If the work is canceled in the event but is not canceled in the plan, the work is switched from canceled to pending. If the work is assigned to a crew in the plan, then it is switched to the same crew in the event.
3. Any other work in the event is assigned to the same crew as specified in the plan.
4. If the crew specified in the plan is unavailable or inactive, the service category work will appear in the Unassigned Work by Property section of the snow dashboard.

Upgrading from One Plan to Another

If you find yourself in the situation where you generated work for a light event and later discover if it will be a heavy snow event, you may re-generate the work. Go back to the snow event and select Generate work. On the Generate Work dialog, you have the option to select the appropriate snow plan and remove pending work.



Generate Work for Snow Event [X]

Snow Plan:

Remove pending work If checked, work that is Pending, Canceled, or Awaiting Approval is removed from the dashboard.

This removes all the pending light snow work from the plan and puts the heavy snow work into place.

If your crews have already completed some of the service category work, that work will remain in the event dashboard.

Combining Plans

It is also possible to generate work multiple times using different plans. For example, you could create one plan per zone and then generate work using the plan for each affected zone.

Or you could have one plan that contains plowing and another plan that contains salting. Generating work twice, once with each plan, will combine the work into the same event. However, you may need to adjust the order of the work in event.

Note: When generating work, any jobs not found in the first plan will be automatically added to the Unassigned Work by Property section of the snow dashboard. When you generate using the second plan, the unassigned work will be shifted to the crews specified in the second plan.

Save a Snow Plan as Another Plan

If you have a plan that you would like to use as a starting point for another plan, please do the following:

1. Open the plan's detail page and click the Save As button. The Save Plan As dialog opens.

2. Enter a name for the new plan.
3. By default, the dialog includes all zones that are part of the plan. If you want to exclude any zones from the new plan, uncheck them on the dialog.
4. Click the Save As Plan button.

The new plan is created. It is marked as inactive. If you specified the name of an existing plan, you are asked if you want to overwrite it.

Note: You may not overwrite a plan if it is being edited by another user.

Save a Snow Event as a Plan

If you would like to use the work in an existing snow event as a starting point for a plan or to update an existing plan, please do the following:

1. In the snow dashboard, switch to the event.
2. At the very bottom of the dashboard, click the Save As Plan button. The Save Event as Plan dialog opens.

3. Enter a name for the plan.

4. By default, the dialog includes all zones that are part of the snow event. If you want to exclude any zones from the new plan, uncheck them on the dialog.
5. Click the Save as Plan button.

The new plan is created, and it is inactive. If you specified the name of an existing plan, you are prompted to overwrite it.

Note: You may not overwrite a plan that is being edited.

5. Managing a Snow Event

The snow functionality in BOSS, not only helps you prepare for a snow event, but it will also help in managing the storm throughout the event. This includes tools built especially for BOSS Mobile and uses the functionality of the Snow Dashboard to organize and manage the snowstorm.

Snow Dashboard and Event Tracking

Once the Service Category work has been assigned on the Snow Dashboard, you are ready to begin tracking the crews against these properties and their categories.

Snow Dashboard Schedule Tab Features

The Snow Dashboard Schedule Tab is the main view utilized when actively managing a snow event.

Snow Dashboard

Current Event

Branch: Arctic Season: Arctic - Snow Season Demo Snow Event Zone(s) North Arctic Zone, South Arctic Zone

[Schedule](#) [Collect](#) [Ticket](#) [Review](#)

Properties by Crew

Look for Property Crew Work Category

<input type="checkbox"/>	Property	Zone	Hours of Operation	Job	Job Description	Work Completed	Work In Progress	Work Pending	Work On Hold
▼ Crew: Plow Truck #12									
<input type="checkbox"/>	Gingham's Homestyle Restaurant - (SN)	South Arctic Zone	11:00 AM - 11:00 PM	1814	Per Push Snow Removal			Plow Lot, Salt Lot	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	The Crossings at Chesterfield - (SN)	North Arctic Zone		1820	Per Push Snow Removal			Plow Lot	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
▼ Crew: Plow Truck #20									
<input type="checkbox"/>	Courtyard - Chesterfield - (SN)	North Arctic Zone	5:00 AM - 8:00 PM	1798	T&M Snow Removal			Plow Lot	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	BrickHouse Tavern - (SN)	North Arctic Zone	10:00 AM - 10:30 PM	1817	Per Push Snow Removal			Plow Lot, Salt Lot	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	Newco Office Complex - (SN)	North Arctic Zone	Open 24 hours	1834	Seasonal Snow Removal			Plow Lot, Salt Lot	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

The Properties by Crew section shows all assigned work organized by Crew. The columns in this view are:

- **Property:** the location where the work is to be performed.
- **Zone:** the assigned zone for the Property.
- **Hours of Operation:** the hours of operation for today.
- **Job:** the job number as a link to review job specifics as needed.
- **Job Description:** a short description of this job.
- **Work Completed:** service category work will move to this column when the crew leader marks the work 'Done' on the mobile device or when the status is manually set to 'Done'.
- **Work In Progress:** service category work will move to this column when the crew leader clicks the 'Start All' button on the mobile device or when the status is manually set to 'In Progress'.

- **Work Pending:** all service category work begins in this column when work is generated for the event. Work can also manually be set to 'Pending'.
- **Work On Hold:** service category work can individually or en mass be manually set to 'On Hold'. Work that is On Hold will not appear to the Crew leader on the mobile device.

The icon columns perform the following actions:

- **Ticket icon = Change crew:** work can be assigned to a different crew, cancelled, or moved to Unassigned Work by Property.
- **Edit Pencil Icon = Change Status:** service category work status can be manually updated to the following status'
 - Awaiting Approval
 - Pending
 - In Progress
 - Done
 - Cancelled
 - On Hold
- **Calendar icon = Change Order of Work:** work can be moved up or down in the listing as appropriate. The order of work on the Schedule tab will be the same order shown on the mobile device.

Schedule Tab Filters

There are several available filters to refine the view of the Properties by Crew section.

Snow Dashboard
Current Event

Branch: Arctic Season: Arctic - Snow Season Demo Snow Event Zone(s) North Arctic Zone, South Arctic Zone X Refresh Data Choose Event

Schedule Collect Ticket Review

Properties by Crew

Look for Property Crew Work Category Find Edit Work

Property	Zone	Hours of Operation	Job	Job Description	Work Completed	Work In Progress	Work Pending	Work On Hold
▼ Crew: Plow Truck #12								
<input type="checkbox"/> Gingham's Homestyle Restaurant - (SN)	South Arctic Zone	11:00 AM - 11:00 PM	1814	Per Push Snow Removal			Plow Lot, Salt Lot	
<input type="checkbox"/> The Crossings at Chesterfield - (SN)	North Arctic Zone		1820	Per Push Snow Removal			Plow Lot	
▼ Crew: Plow Truck #20								
<input type="checkbox"/> Courtyard - Chesterfield - (SN)	North Arctic Zone	5:00 AM - 8:00 PM	1798	T&M Snow Removal			Plow Lot	
<input type="checkbox"/> BrickHouse Tavern - (SN)	North Arctic Zone	10:00 AM - 10:30 PM	1817	Per Push Snow Removal			Plow Lot, Salt Lot	
<input type="checkbox"/> Newco Office Complex - (SN)	North Arctic Zone	Open 24 hours	1834	Seasonal Snow Removal			Plow Lot, Salt Lot	

- **Zone(s) Filter:** Select one or more zones to in this combo box filter to view that zone(s) properties by crew. If only one zone is selected, the results grid will eliminate the Zone column from the view.

Snow Dashboard

Current Event

Branch: Arctic Season: Arctic - Snow Season Demo Snow Event Zone(s)

Properties by Crew

Look for Property Crew

<input type="checkbox"/>	Property	Hours of Operation	Job	Job Description	Work Completed	Work In Progress
▼ Crew: Plow Truck #12						
<input type="checkbox"/>	Gingham's Homestyle Restaurant - (SN)	11:00 AM - 11:00 PM	1814	Per Push Snow Removal		
▼ Crew: Shovel Crew #2						
<input type="checkbox"/>	Gingham's Homestyle Restaurant - (SN)	11:00 AM - 11:00 PM	1814	Per Push Snow Removal		
<input type="checkbox"/>	Maserati of St Louis - (SN)	10:00 AM - 8:00 PM	1823	Per Push Snow Removal		
▼ Crew: Shovel Crew #4						
<input type="checkbox"/>	Gingham's Homestyle Restaurant - (SN)	11:00 AM - 11:00 PM	1814	Per Push Snow Removal		

4 total records

- Look for Property Filter: type in a single property name in this search field to reduce the dashboard view to only those crews that have assigned service category work for the selected property.

Properties by Crew

Look for Property Crew

<input type="checkbox"/>	Property	Zone	Hours of Operation	Job	Job Description	Work Completed	Work In Progress	Work Pending	Work On Hold
▼ Crew: Plow Truck #12									
<input type="checkbox"/>	Gingham's Homestyle Restaurant - (SN)	South Arctic Zone	11:00 AM - 11:00 PM	1814	Per Push Snow Removal			Plow Lot, Salt Lot	<input type="button" value="edit"/> <input type="button" value="delete"/>
▼ Crew: Shovel Crew #2									
<input type="checkbox"/>	Gingham's Homestyle Restaurant - (SN)	South Arctic Zone	11:00 AM - 11:00 PM	1814	Per Push Snow Removal			Shovel Walk	<input type="button" value="edit"/> <input type="button" value="delete"/>
▼ Crew: Shovel Crew #4									
<input type="checkbox"/>	Gingham's Homestyle Restaurant - (SN)	South Arctic Zone	11:00 AM - 11:00 PM	1814	Per Push Snow Removal			Shovel Walk	<input type="button" value="edit"/> <input type="button" value="delete"/>

3 total records

- Crew Filter: select one or more crews in this combo box to reduce the Properties by Crew view to only the chosen crew(s).

Schedule Collect Ticket Review

Properties by Crew

Look for Property Crew **Plow Truck #20** Work Category **Find** **Edit Work**

Property	Zone	Hours of Operation	Job	Job Description	Work Completed	Work In Progress	Work Pending	Work On Hold
- Crew: Plow Truck #20								
<input type="checkbox"/> Courtyard - Chesterfield - (SN)	North Arctic Zone	5:00 AM - 8:00 PM	1798	T&M Snow Removal			Plow Lot	
<input type="checkbox"/> BrickHouse Tavern - (SN)	North Arctic Zone	10:00 AM - 10:30 PM	1817	Per Push Snow Removal			Plow Lot, Salt Lot	
<input type="checkbox"/> Newco Office Complex - (SN)	North Arctic Zone	Open 24 hours	1834	Seasonal Snow Removal			Plow Lot, Salt Lot	
<input type="checkbox"/> Southland Plaza - (SN)	North Arctic Zone	9:00 AM - 5:00 PM	1801	T&M Snow Removal			Plow Lot	

4 total records

- **Work Category Filter:** select one or more service categories of work in this combo box filter to reduce the Properties by Crew view to only the selected work category.

Schedule Collect Ticket Review

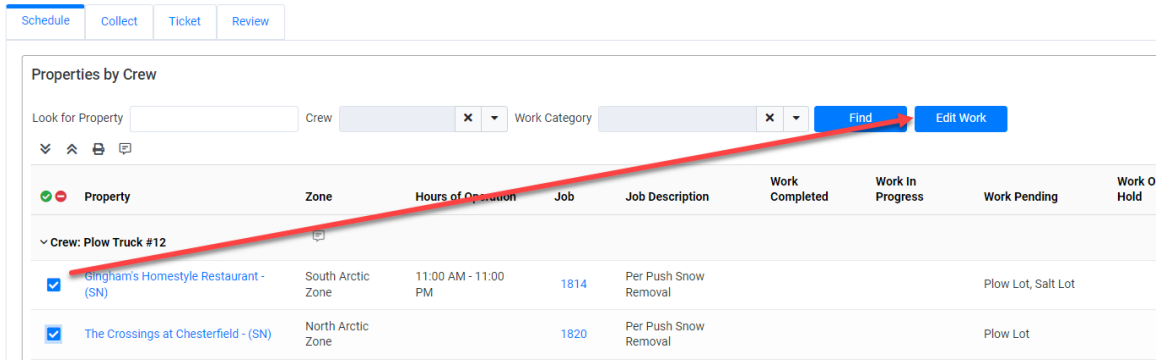
Properties by Crew

Look for Property Crew Work Category **Plow Lot** **Find** **Edit Work**

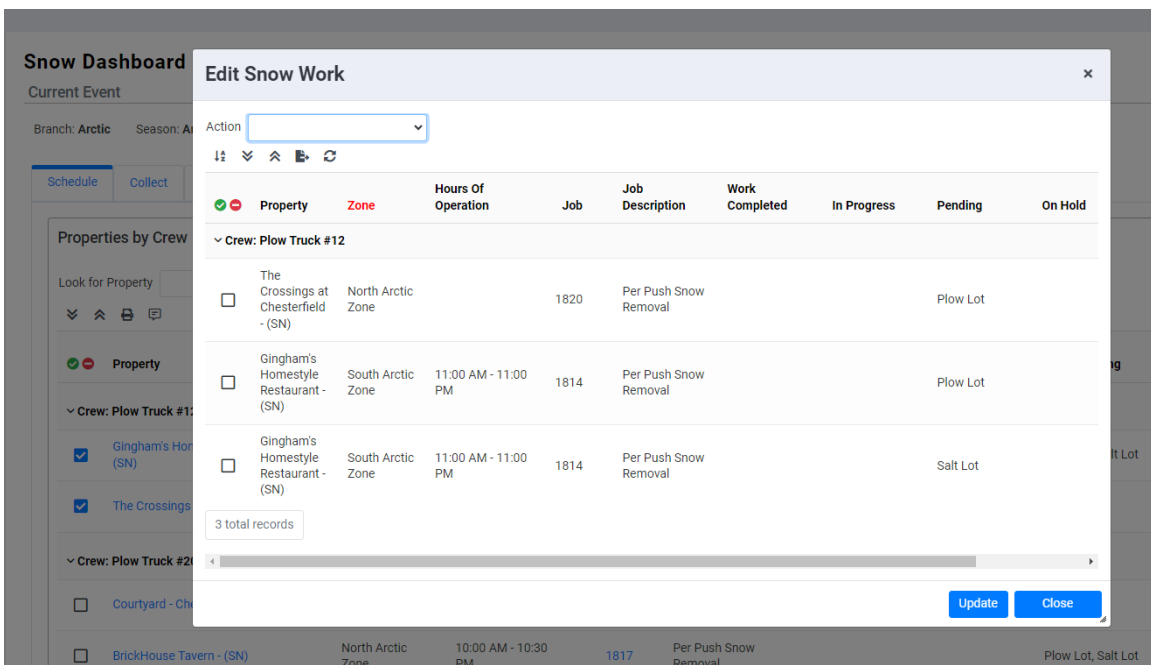
Property	Zone	Hours of Operation	Job	Job Description	Work Completed	Work In Progress	Work Pending	Work On Hold
- Crew: Plow Truck #12								
<input type="checkbox"/> Gingham's Homestyle Restaurant - (SN)	South Arctic Zone	11:00 AM - 11:00 PM	1814	Per Push Snow Removal			Plow Lot	
<input type="checkbox"/> The Crossings at Chesterfield - (SN)	North Arctic Zone		1820	Per Push Snow Removal			Plow Lot	
- Crew: Plow Truck #20								
<input type="checkbox"/> Courtyard - Chesterfield - (SN)	North Arctic Zone	5:00 AM - 8:00 PM	1798	T&M Snow Removal			Plow Lot	
<input type="checkbox"/> BrickHouse Tavern - (SN)	North Arctic Zone	10:00 AM - 10:30 PM	1817	Per Push Snow Removal			Plow Lot	
<input type="checkbox"/> Newco Office Complex - (SN)	North Arctic Zone	Open 24 hours	1834	Seasonal Snow Removal			Plow Lot	
<input type="checkbox"/> Southland Plaza - (SN)	North Arctic Zone	9:00 AM - 5:00 PM	1801	T&M Snow Removal			Plow Lot	

Schedule Tab Edit Work

When items/checkboxes have been selected to update and the Edit Work button is clicked, a screen will open to allow choices for how the information should be updated. The Properties and Work Categories displayed on this screen will be dependent on the checkboxes selected on the dashboard as well as any Work Category restrictions. For example – if a Property has Salt and Plow work, but the Work Category filter is set to display Plow work only – the Plow work will appear in the Edit Work Screen and the Salt work will not.



When the Edit Snow Work screen first opens, the 'Action' drop-down selection will be blank and the data grid will list the Properties / Work that were selected in the previous screen. As this display is being generated, any rows that contain multiple types of work (Salt, Plow) will be separated into individual rows – one for each type of work. Each row has a checkbox along the left side to select the records to update. When first displayed, all checkboxes will be de-selected.



Edit Options

Options available for update will include:

- Change Crew
- Change Status
- Delete Work
- Duplicate Work
- Duplicate and Move Work

Change Crew

This option is used to change the assigned crew for the work. In addition to options for each available crew, additional options are available for Cancel and Unassign.

NOTE: only Pending or On Hold work is available for this option.

When the Change Crew option is selected, the screen will update:

1. To include a drop-down above the data display to select a crew to update all selected work (checkboxes). Selecting a crew and clicking the Down Arrow will set the selected rows to the selected Crew in the Set Crew drop-down.
2. To add a new column to the data display that shows the currently assigned Crew. Any individual row can be set to a Crew using the drop-down for that row.
3. Any rows where the selected Action would be invalid will have the checkbox and crew dropdown disabled.

Edit Snow Work
✕

Action

Change Crew

** You can only Change Crews for Properties / Work that are Pending or On Hold **

Set Crew

[unassigned]

▼

🔍 🔄 📄 🗑️ 🔄

	Property	Zone	Hours Of Operation	Job	Job Description	Work Completed	In Progress	Pending	On Hold	Crew
▼ Crew: Plow Truck #12										
<input type="checkbox"/>	The Crossings at Chesterfield - (SN)	North Arctic Zone		1820	Per Push Snow Removal			Plow Lot		Plow Truck #12
<input type="checkbox"/>	Gingham's Homestyle Restaurant - (SN)	South Arctic Zone	11:00 AM - 11:00 PM	1814	Per Push Snow Removal		Plow Lot			Plow Truck #12
<input type="checkbox"/>	Gingham's Homestyle Restaurant - (SN)	South Arctic Zone	11:00 AM - 11:00 PM	1814	Per Push Snow Removal			Salt Lot		Plow Truck #12

3 total records

Update

Close

Change Status

This option will change the Status for the work.

When the Change Status option is selected, the screen will update:

1. To include a drop-down above the data display to select a crew to update all selected work (checkboxes). Selecting a crew and clicking the Down Arrow will set the selected rows to the Status selected in the Set Status drop-down.
2. To add a new column to the data display that shows the currently assigned Status. Any individual row can be set to a Status using the drop-down for that row.

Edit Snow Work

Action: Change Status Set Status: Done

Property	Zone	Hours Of Operation	Job	Job Description	Work Completed	In Progress	Pending	On Hold	Work Status
Crew: Plow Truck #16									
<input type="checkbox"/>	BrickHouse Tavern - (SN)	North Arctic Zone	10:00 AM - 10:30 PM	2944	Per Push Snow Removal		Plow Lot		Pending
Crew: Plow Truck #20									
<input type="checkbox"/>	BrickHouse Tavern - (SN)	North Arctic Zone	10:00 AM - 10:30 PM	2944	Per Push Snow Removal		Plow Lot		In Progress
<input type="checkbox"/>	BrickHouse Tavern - (SN)	North Arctic Zone	10:00 AM - 10:30 PM	2944	Per Push Snow Removal		Salt Lot		Pending

3 total records

Update Close

A new status of On Hold has been added as an option. This option will move the selected Work to a new column labeled On Hold and will remove it from view on the Mobile device. When the Work is moved back to Pending status, it will reappear on the mobile device. *NOTE that only Pending work is available for this option.*

Delete Work

This option will delete the selected Work from the current event and remove it from the Snow Dashboard. *NOTE that only Pending or On Hold work is available for this option.*

Edit Snow Work

Action: Delete Work

Hover tip

Property	Zone	Hours Of Operation	Job	Job Description	Work Completed	In Progress	Pending	On Hold	
<input type="checkbox"/>	BrickHouse Tavern - (SN)	North Arctic Zone	10:00 AM - 10:30 PM	2944	Per Push Snow Removal		Plow Lot		
Crew: Plow Truck #20									
<input type="checkbox"/>	BrickHouse Tavern - (SN)	North Arctic Zone	10:00 AM - 10:30 PM	2944	Per Push Snow Removal		Plow Lot		
<input type="checkbox"/>	BrickHouse Tavern - (SN)	North Arctic Zone	10:00 AM - 10:30 PM	2944	Per Push Snow Removal		Salt Lot		

3 total records

Update Close

When the Update button is clicked, the selected Work will be deleted from the Snow Dashboard and deleted from the current Event.

Any rows where the selected Action would be invalid will have the checkbox disabled and a hover tip will indicate the reason.

Duplicate Work

This option will create duplicates of the selected Work. With this option, the duplicated Work will remain linked to the source Property.

×
Edit Snow Work

Action Duplicate Work

⌵ ⌶ ⌴ ⌵ ↺

	Property	Zone	Hours Of Operation	Job	Job Description	Work Completed	In Progress	Pending	On Hold
▼ Crew: Plow Truck #20									
<input type="checkbox"/>	Top Golf - (SN)	North Arctic Zone	11:00 AM - 10:00 PM	2945	T&M Snow Removal			Plow Lot	
▼ Crew: Shovel Crew #2									
<input type="checkbox"/>	Top Golf - (SN)	North Arctic Zone	11:00 AM - 10:00 PM	2945	T&M Snow Removal			Shovel Walk	
<input type="checkbox"/>	Top Golf - (SN)	North Arctic Zone	11:00 AM - 10:00 PM	2945	T&M Snow Removal			Salt Walk	

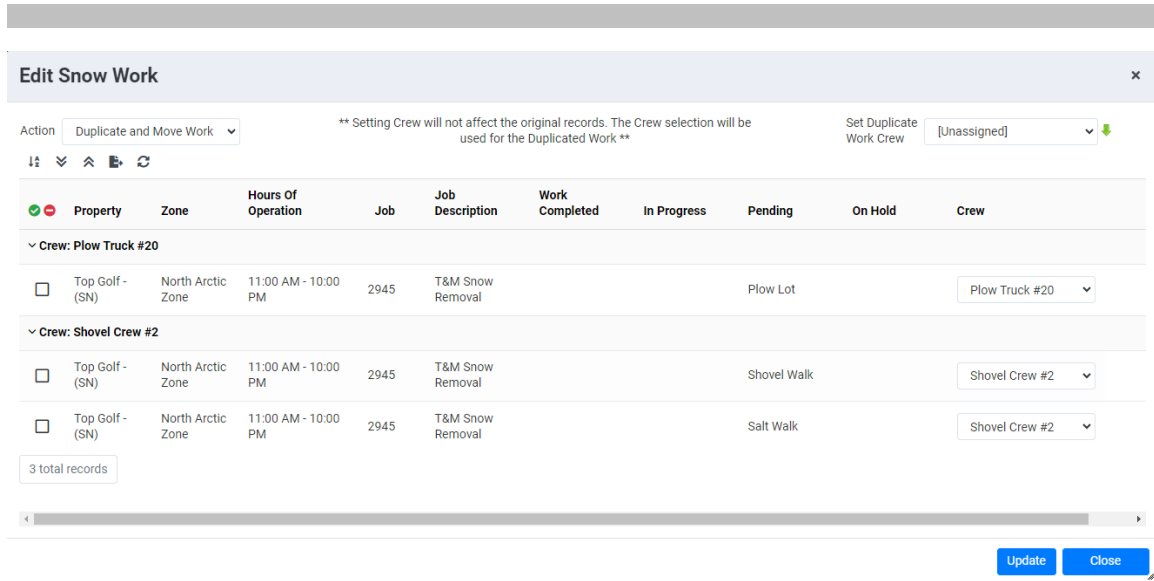
3 total records

Update
Close

When the Duplicated Work option is selected and the Update button is clicked, the selected Work will be duplicated. The duplicated work will be set to Pending Status and the new rows will be set to the Source Property – at the end of the list of work for the Property.

Duplicate And Move Work

This option will create duplicates of the selected Work. With this option, the duplicated Work will remain linked to the source Property but the assigned Crew can be changed.



When the Duplicate and Move Work option is selected, the screen will update:

1. To include a drop-down above the data display to select a Crew for the selected work (checkboxes). Selecting a Crew and clicking the Down Arrow will set the selected rows to the Crew selected in the drop-downs.

NOTE: This will not set the Crew for the selected records – it will set the Crew for the soon to be duplicated records.

2. To add a new column to the data display that shows the currently assigned Crew. Any individual row can be set to a Crew using the drop-down for that row.

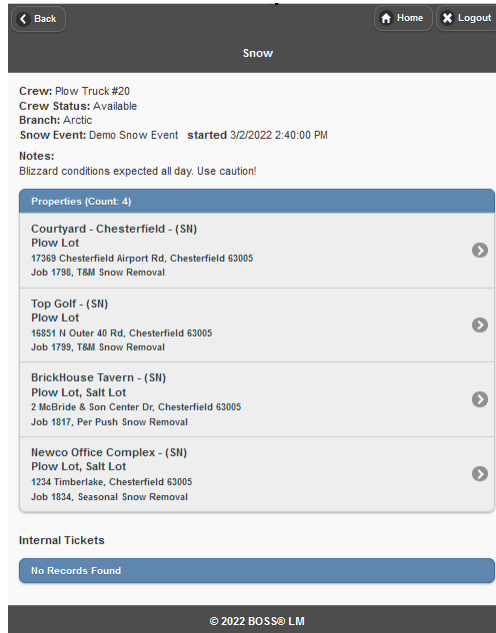
3. When the Duplicated and Move Work option is selected, and the Update button is clicked, the selected Work will be duplicated and moved. The duplicated work will be set to Pending Status and the new rows will be moved to the Crew for that row – at the end of the list of work for the Property.

BOSS Mobile

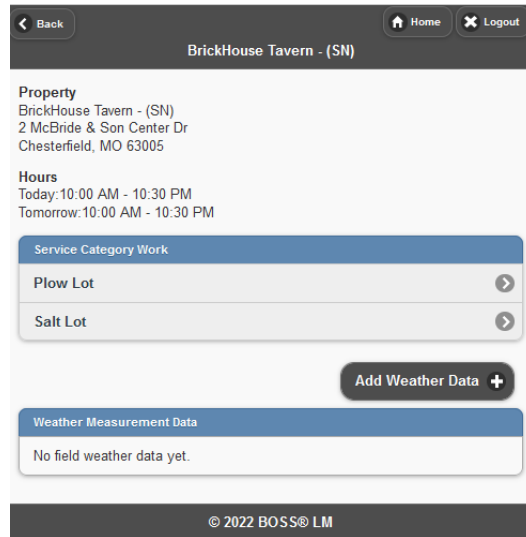
For any employee that has a mobile user code and has been assigned as a snow crew leader, there is a Snow Option on the main menu of BOSS Mobile for each open, current event the crew leader is assigned to as long as the event is for a valid Snow Season.



After tapping an event, a list of Properties assigned to that crew leader are displayed.



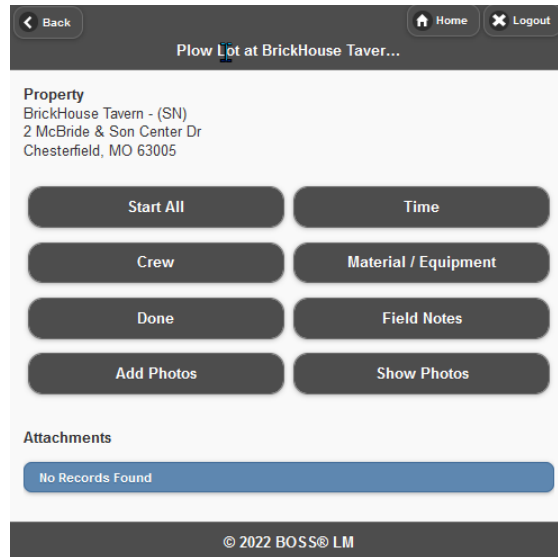
Tapping on one property will show the address and hours of operation for today and tomorrow. Below this is the Service Category Work that has been assigned.



To begin working on this property tap the appropriate work category. On the next screen the crew leader can tap Start All to begin tracking time to the service category. The button will change to Stop All (which you would then tap when leaving the property or finish this category of work). The Crew, Done and Time buttons function the same as green season.

Material and/or Equipment can be allocated by tapping the Material/Equipment button.

The crew leader can add field notes to the different work categories. This can be very helpful in keeping track of specifics about the work that they are doing or the conditions at the site. These notes will appear on the snow dashboard.



Photos specific to the service category of work can be added using the Add Photos button. These will be date and time stamped and have the option of adding a description to the photo. The crew leader can confirm the photos that have been loaded by tapping the Show Photos button.


When the crew begins working at a property the category is updated to 'In Progress' on the Dashboard. And finally when the work is noted as 'Done', it will then change to 'Completed' status on the Dashboard.

New Snow Work from Mobile

Snow crew leaders can create new snow work from their mobile device, allowing them to perform snow work that is not assigned to them (like the mobile New Ticket option available during green season.) The ability to create new snow work is assigned when setting up your snow crews.

Crew: Plow Truck #5

General Information

Branch	Chesterfield	Crew Notes	
Crew Lead	Brent Moore		
Crew Name	Plow Truck #5		
Crew Count	1		
Available for work	<input checked="" type="checkbox"/>		
Crew leader can create new work from field	<input checked="" type="checkbox"/>		

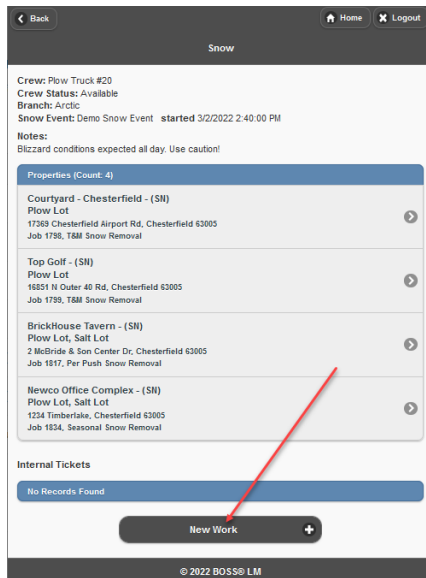
Assigned Zones

Downtown Chesterfield East Side Local Chesterfield

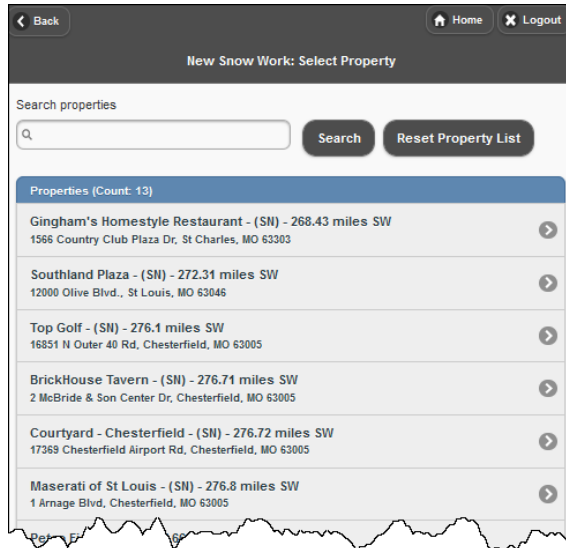
Assigned Service Categories

Drifting Work Salt Lot Salt Walk Shovel Walk
 Plow Lot

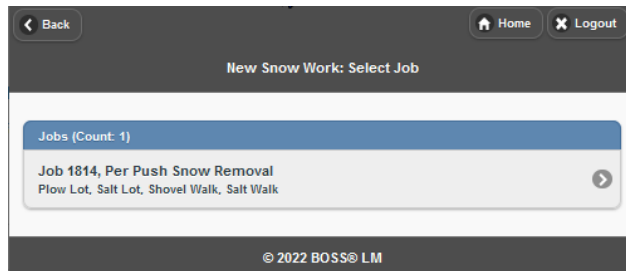
If this the crew leader has been given the option to create new work from the field, a 'New Work' button appears below their assigned work while working a snow event.



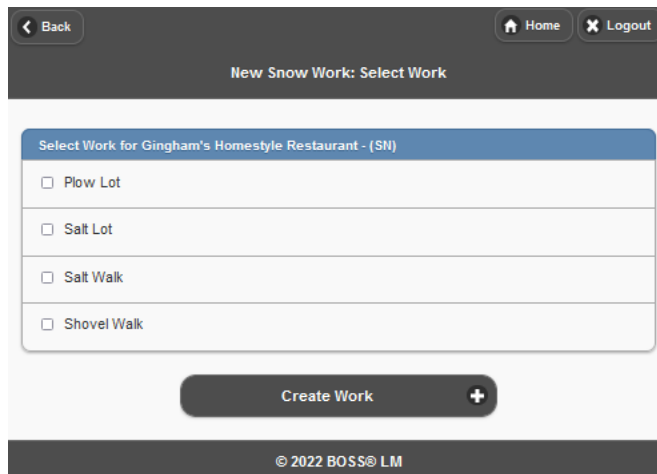
When the crew leader selects the New Work button, they can search for, and select, snow work for properties not assigned to them on the snow dashboard.



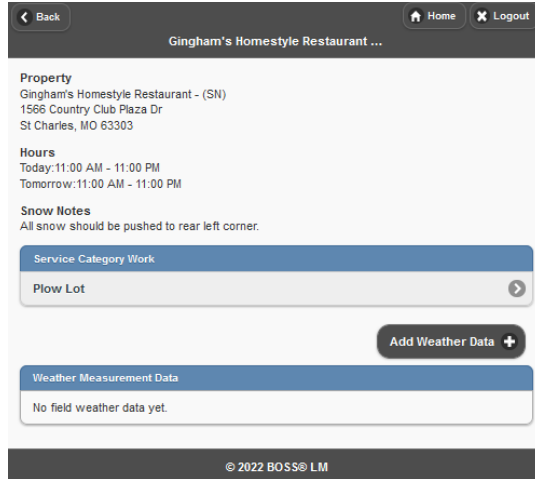
After selecting a property, a list of active snow jobs will be provided.



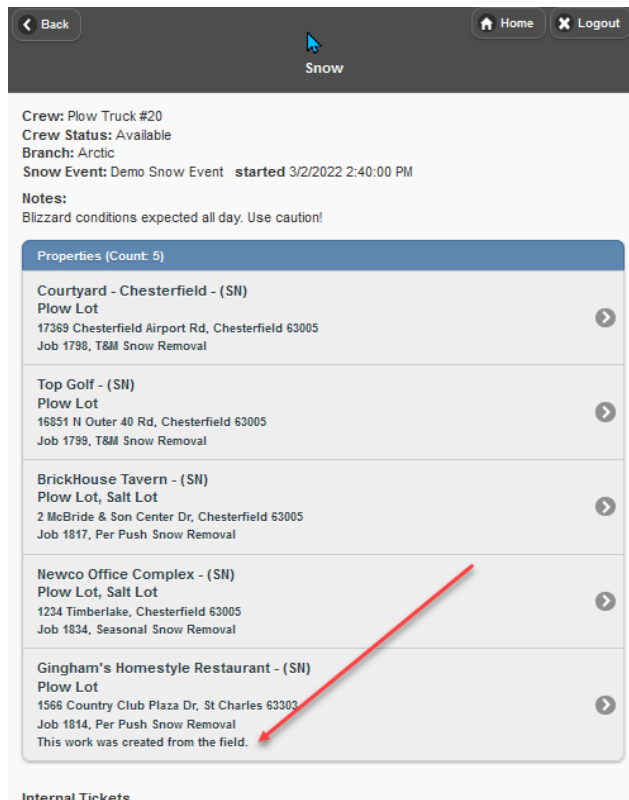
Once the job is selected, the crew leader can select the appropriate service category of work from a list of available service categories for that job and click Create Work.



The crew leader then sees all the same property information as they normally would.



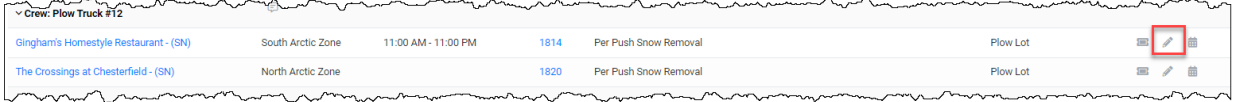
On the mobile device, the new work will appear at the bottom of their scheduled work with the notation 'This work was created from the field'. A special icon will populate the snow dashboard to indicate work that was created from the field.





No further special steps are required when new work is created from the field. The time and material will be tracked to the Collect Tab, this can be reviewed and edited as needed and can then be assigned to the appropriate Service through the Ticket Tab.

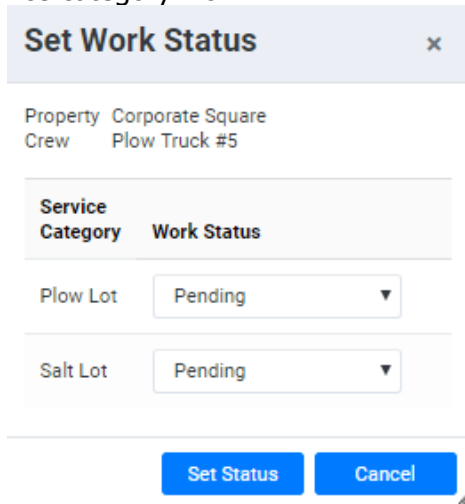
Manual Status Tracking

If the crew does not have BOSS Mobile, status updates can still take place, but it must be done manually. On the Schedule section of the Dashboard, the Change Status pencil icon can be used to do this.



Crew: Plow Truck #12						
Gingham's Homestyle Restaurant - (SN)	South Arctic Zone	11:00 AM - 11:00 PM	1814	Per Push Snow Removal	Plow Lot	
The Crossings at Chesterfield - (SN)	North Arctic Zone		1820	Per Push Snow Removal	Plow Lot	

In the Set Work Status dialog, a drop down is available to set the status manually for the service category work.



Set Work Status [Close]

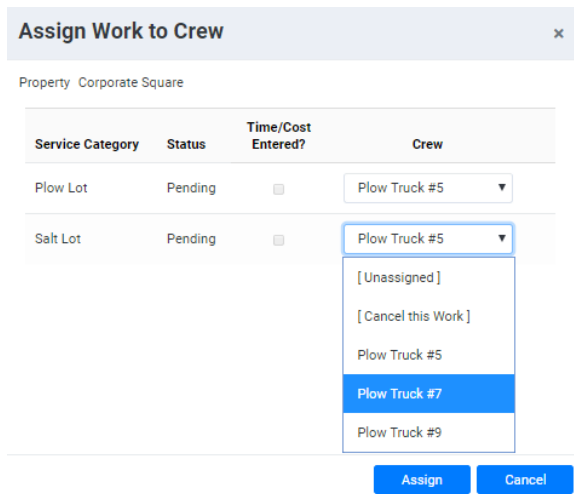
Property Corporate Square
Crew Plow Truck #5

Service Category	Work Status
Plow Lot	Pending
Salt Lot	Pending

[Set Status] [Cancel]

Reassigning Crews

The Schedule portion of the Snow Dashboard gives you the ability to reassign the work to a different crew. As an event goes on, crews can get ahead or behind and may be redeployed to a property that was originally assigned to someone else. The ticket icon on the row can be used to change the work to a different crew.



Assign Work to Crew [Close]

Property Corporate Square

Service Category	Status	Time/Cost Entered?	Crew
Plow Lot	Pending	<input type="checkbox"/>	Plow Truck #5
Salt Lot	Pending	<input type="checkbox"/>	Plow Truck #5

[Unassigned]
[Cancel this Work]
Plow Truck #5
Plow Truck #7
Plow Truck #9

[Assign] [Cancel]

The Assign Work to Crew dialog works the same as previously described. Here you can change to a different crew (that can work the same category) or this work could be unassigned or canceled. Unassigning the work will return it to the Unassigned section. Cancelling this Work will move it to the Unassigned section with a warning icon included. When hovering over the icon, a message will display 'This work is cancelled'.

Unassigned Work by Property

Look for Property Find View: Standard

Property	Zone	Hours of Operation	Job	Job Description	Address	City	Zip	Unassigned Work
Clancy Residence - (SN)	South Arctic Zone		1835	T&M Snow Residential	8 Chikkat Lake Rd	Haines	99827	Plow Lot
Courtyard - Chesterfield - (SN)	North Arctic Zone	5:00 AM - 8:00 PM	1798	T&M Snow Removal	17369 Chesterfield Airport Rd	Chesterfield	63005	Plow Lot
Courtyard - Chesterfield - (SN)	North Arctic Zone	5:00 AM - 8:00 PM	1798	T&M Snow Removal	17369 Chesterfield Airport Rd	Chesterfield	63005	Salt Lot, Salt Walk
Gingham's Homestyle Restaurant - (SN)	South Arctic Zone	11:00 AM - 11:00 PM	1814	Per Push Snow Removal	1566 Country Club Plaza Dr	St Charles	63303	Plow Lot
Gingham's Homestyle Restaurant - (SN)	South Arctic Zone	11:00 AM - 11:00 PM	1814	Per Push Snow Removal	1566 Country Club Plaza Dr	St Charles	63303	Salt Lot, Salt Walk, Shovel Walk

Reviewing Time

Throughout a storm as time data is entered, you can monitor and view the time that has been entered. The Collect tab contains all time and materials entered via BOSS Mobile and time entered manually. (Once they have been assigned to tickets however, this data will no longer be on the Collect tab.)

Snow Dashboard

Current Event

Branch: Chesterfield Season: Chesterfield - Snow Season 2019 Snow Event 2 Zone(s) Downtown Chesterfield, Ea: × Refresh Data Choose Event

Schedule Collect Ticket Review

This tab shows time and materials entered via BOSS Mobile. Time and materials disappear from this tab as you assign them to job tickets on the Tickets tab.

Crew: Jacob Johnson - Plow #: ▼

Time

Use this section to review and edit mobile time. You may also add paper time here if you wish.

Zone	Service Category	Status	Start	Stop	Hours
▼ Annie Gunns					
Downtown Chesterfield	Plow Lot	Done	08/09/19 08:05 AM	08/09/19 08:07 AM	0.03
Downtown Chesterfield	Plow Lot	Pending			
▼ Chesterfield Point Condos					
Downtown Chesterfield	Plow Lot	In Progress	08/09/19 08:08 AM		
Downtown Chesterfield	Plow Lot	Pending			

To view the details of the time that has been tracked, you can click on the Service Category name link. This opens the Time screen.

Enter Time ×

Crew: Jacob Johnson - Plow #22 Property: Annie Gunns Service Category: Plow Lot

Date Worked: 08/09/2019 × 📅 Apply to Crew

If you change time entered via BOSS mobile, the time will no longer be associated with the device from which it was entered.

ID	Employee Name	Source	Start Time	End Time	Hours Worked	Pay Code
4	Jacob Johnson		08:05 am	08:07 am	0.03	▼

× ▼

Select a name above to add a temporary crew member to the crew for time reporting.

Update Cancel

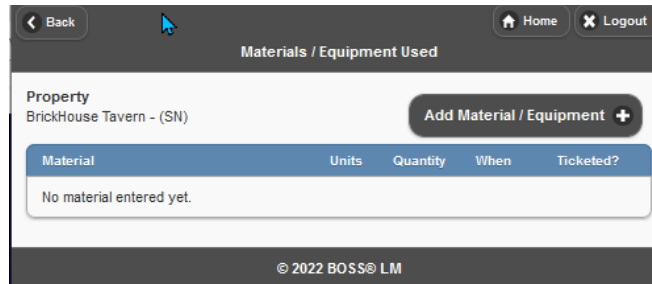
This screen shows the time that has been tracked up to this point. If the mobile user is still clocked into this property it will show the End Time as a red field. The screen also displays a Pay Code dropdown from which you could select a Pay Code to override the employee's normal paycode.

Manual Time Entry

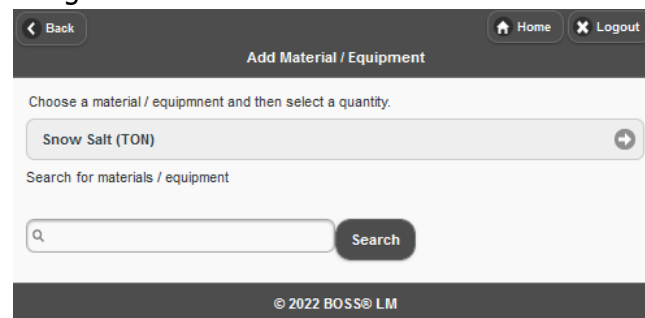
In the case where you need to track time manually, you can also use the above time screen to enter time. If you have used other manual time entry screens in BOSS, this screen will look familiar. It works in a similar fashion.

Materials in BOSS Mobile

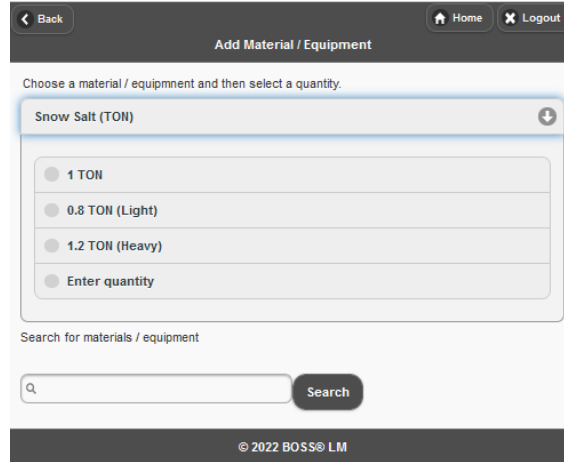
In addition to time, materials can also be tracked in BOSS Mobile. After selecting the Material/Equipment option on the item's screen, you can see the list of materials that you have already entered as well as the Add Material button.



To add materials, tap the Add Material/Equipment button and you will be prompted with the option to select from a list of materials found on that job or search for other materials in your catalog.



Select the material that you wish to enter. If the material was not estimated on the job, you will be prompted to enter the quantity desired. However, if the material was estimated on the job, then you will have some additional options.



The first option is the quantity that was estimated to be used. The second option is a lighter application which is calculated at 80% of the estimated quantity. The third option is a heavier application which is calculated at 120% of the estimated quantity. These options are meant to help the crew easily enter the material they used. Many times, it is hard to get an accurate measurement of snow materials applied so we have introduced the calculated options to help get better usage from the crews. Lastly, they always have the option to manually enter the quantity as well.

Once the materials have been entered into BOSS Mobile, they will now be shown on the Collect tab of the Dashboard.

Properties Tab

The Snow Properties module functions like the Dashboard but is “read-only” and is intended to show how work is progressing. As crews in BOSS Mobile (or manually via the Dashboard) begin work and complete work, the status of each category will be updated. It also lists all the pertinent property information like the address and Hours of Operation.

Property	Address	City	Zip	Hours of Operation	Work Completed	Work in Progress	Work Pending
BrickHouse Tavern - (SN)	2 McBride & Son Center Dr	Chesterfield	63005	10:00 AM - 10:30 PM	Plow Lot	Salt Lot	
Courtyard - Chesterfield - (SN)	17369 Chesterfield Airport Rd	Chesterfield	63005	5:00 AM - 8:00 PM			Salt Lot, Salt Walk, Shovel Walk
Newco Office Complex - (SN)	1234 Timberlake	Chesterfield	63005	Open 24 hours	Shovel Walk		Plow Lot, Salt Lot, Salt Walk
Petco Field - (SN)	714 Sprint 40 Park Dr.	Chesterfield	63005	6:00 AM - 6:00 PM			Plow Lot, Salt Lot, Salt Walk, Shovel Walk
Southland Plaza - (SN)	12000 Olive Blvd.	St Louis	63046	8:00 AM - 5:00 PM			Plow Lot, Plow Lot, Salt Lot, Salt Lot, Salt Walk, Shovel Walk, Shovel Walk

You can click on a Property name to see more information. The Property’s snow notes also appear and can be updated in this screen.

Property: BrickHouse Tavern - (SN)

General Weather

General Information

Address 2 McBride & Son Center Dr
Chesterfield, MO 63005 Snow Notes

Customer Adam Reynolds, LLC

Hours of Operation Today: 10:00 AM - 10:30 PM
Tomorrow: 10:00 AM - 10:30 PM

Service Category Work

The following information is from time reported via BOSS Mobile or entered into the dashboard Collect tab. It does not show time from job tickets.

Job	Job Description	Service Category	Crew	Status	Start	Stop	
1817	Per Push Snow Removal	Salt Lot	Plow Truck #20	Done	05/31/22 09:32 PM	05/31/22 09:33 PM	■ ■■
1817	Per Push Snow Removal	Plow Lot	Plow Truck #20	Done	05/31/22 09:31 PM	05/31/22 09:32 PM	■ ■■

2 total records

Update Cancel

The Service Category Work section of the screen shows all the work for this Property. The Job number(s) and their Description are shown along with the Service Category work for each job. If a crew assignment has been made already, then it will be listed along with the status and any start/stop times and field notes from BOSS Mobile.

If you are trying to get an update on how a Property is progressing or if the customer calls in and asks for a status update, you have all of the information at your fingertips in real time.

Creating Additional Service Category Work

During a Snow Event

Often times during the course of a snow event, you will need to return to a Property. If this is just a continuation of the original Service Category work, you can always resume working the category work or click the 'Not Done' button on mobile, if it had already been marked 'Done'. In some cases, though, you will want to charge an additional amount (create an additional ticket) for this additional visit. This can be done by creating an additional service category work item. Another scenario that would require an additional service category work item would be when two crews do the same task at the same property.

From the Property's snow details screen (shown above) you can add additional service category work. This screen can be accessed from the Snow Properties tab or directly from the Dashboard by clicking on the Property's name.

To Create an Additional Service Category Work:

1. Click the Add (+) button at the top of the section, above the Job number.

2. From the Add Work dialog, choose the Job and Service Category that you wish to create.
3. Optionally, at the time you create the work you can directly assign the Crew and update the Status from this dialog as well.

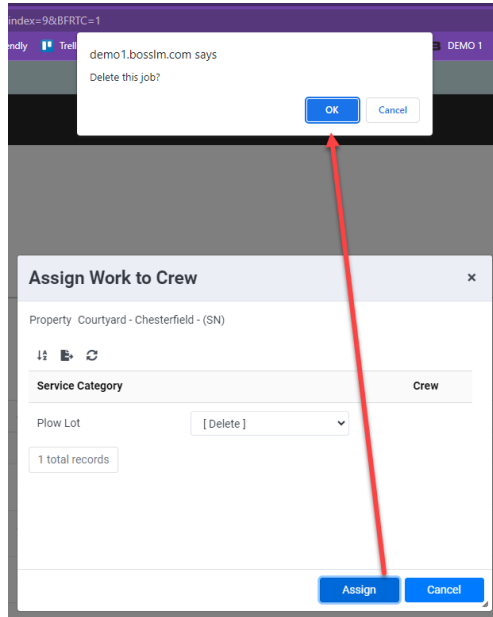
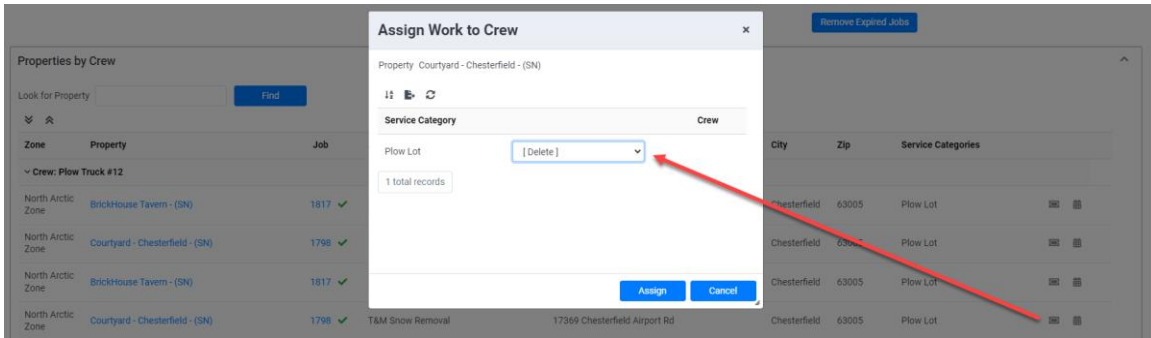
Setting up your Snow Plan with Multiple Visits

You may want to include multiple visits as part of your Snow Plan for Per Push type work, allowing you to route the work in a looping fashion (visits to Property A, Property B and then back to Property A.)

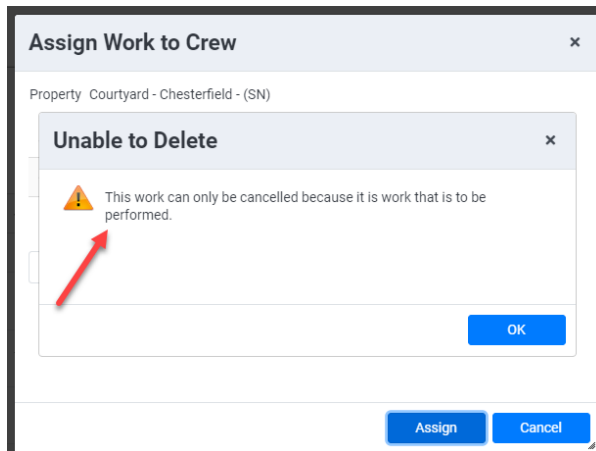
This can be accomplished in the same manner as creating Additional Service Category Work during a snow event, detailed above, except you will access the Property details page by clicking on the Property name in the Properties by Crew module on the Snow Plan.

Zone	Property	Job	Job Description	Address	City	Zip	Service Categories
North Arctic Zone	BrickHouse Tavern - (SN)	1817 ✓	Per Push Snow Removal	2 McBride & Son Center Dr	Chesterfield	63005	Plow Lot
North Arctic Zone	Courtyard - Chesterfield - (SN)	1798 ✓	T&M Snow Removal	17369 Chesterfield Airport Rd	Chesterfield	63005	Plow Lot
North Arctic Zone	BrickHouse Tavern - (SN)	1817 ✓	Per Push Snow Removal	2 McBride & Son Center Dr	Chesterfield	63005	Plow Lot
North Arctic Zone	Courtyard - Chesterfield - (SN)	1798 ✓	T&M Snow Removal	17369 Chesterfield Airport Rd	Chesterfield	63005	Plow Lot

As you are updating the plan and adding service category work, you may find that too many service categories were added to a crew. These can be deleted, by assigning that work to the 'Delete' option. BOSS will verify that you want to Delete this work.



When using the Delete option, BOSS will not allow you to delete ALL the service category work and will provide the following message. This will prevent work that should be performed, from mistakenly being deleted.



Capturing Weather Measurements

Weather measurements and conditions can be created, edited, and deleted in BOSS at the city, zone, and property levels. In addition, they can also be created and edited from the field using BOSS Mobile. With all the data being captured, you will “finalize” weather data for specific properties during specific snow events based on measurements collected at all levels so that they are available for reporting and internal use.

City- and Zone-Level Capture

The Snow Event Page

To add a weather measurement data set at the city or zone level, navigate to a specific snow event and open it from the Snow Events module.

At the bottom of this page is a new section called “Weather Data” that lists all city- and zone-level weather measurement data sets for the snow event.

Weather Data

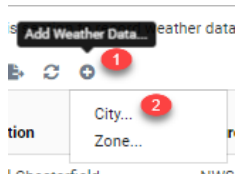
Use this section to record weather data for zones and cities. Use the Properties tab to record property-specific weather data.

Location	Source	Air Temp Start	Accumulation Rate	Accumulation	Air Temp End	Pavement Temp Start	Pavement Temp End	Wind Direction	Wind Velocity	Weather Conditions
Local Chesterfield	NWS	30.00 Fahrenheit		4.50 in	28.00 Fahrenheit	34.00 Fahrenheit	33.00 Fahrenheit	E	2.00 Miles Per Hour	* ✎ ✕

1 total records

Update Cancel Apply Generate Work

To create a new measurement set, click the plus sign on the right side of this section. You will see a list that gives you two options – City and Zone:



Both options take you to the same page, however, selecting “City...” will show a dropdown with all city-state combinations affected by the snow event (based on the addresses of properties located in zones affected by the event), whereas selecting “Zone...” will show a dropdown with all zones affected by the snow event.

Only one weather measurement data set can be created for each snow event and each city-state combination or zone. For example, note that the city-state combination “Chesterfield, MO” appears in the grid below; when creating a another city-level weather measurement data set for the same snow event, “Chesterfield, MO” will not be available in the location dropdown.

Demo Snow Event

General Information

Branch: Arctic
 Event Start: 10/12/2019 02:40 pm
 Event End: []
 Event Closed:
(Close when all work is done and all tickets are created)

Description (Appears in BOSS Mobile): Blizzard conditions expected all day. Use caution!

Affected Zones: North Arctic Zone South Arctic Zone

Weather Data

Use this section to record weather data for zones and cities. Use the Properties tab to record property-specific weather data.

Location	Source	Air Temp Start	Accumulation Rate	Accumulation	Air Temp End	Pavement Temp Start	Pavement Temp End	Wind Direction	Wind Velocity	Weather Conditions
North Arctic Zone	NWS	27.00 Fahrenheit	1.00 Inch Per Hour	16.00 in	32.00 Fahrenheit	25.00 Fahrenheit	25.00 Fahrenheit	NW	15.00 Miles Per Hour	☁
South Arctic Zone	NWS	35.00 Fahrenheit	0.50 Inch Per Hour	8.00 in	35.00 Fahrenheit	40.00 Fahrenheit	40.00 Fahrenheit	NW	5.00 Miles Per Hour	☁
Chesterfield, MO	NWS	20.00 Fahrenheit	0.50 Inch Per Hour	2.00 in	22.00 Fahrenheit	15.00 Fahrenheit	15.00 Fahrenheit	SW	30.00 Miles Per Hour	☁

3 total records

Update Cancel Apply Generate Work

In addition, new weather measurement data sets can only be created/edited for open snow events. If a snow event is marked as "Closed," it cannot have new weather measurement data sets created at any level (including the property level).

The Weather Measurement Data Set Page

Chesterfield - Snow Season 2019, Snow Event 2: Edit Weather Data

General Information

Source: NWS
 Zone: Local Chesterfield
 Event start: 08/09/2019 02:20 AM
 Event end: []

Customer Weather Description/Notes: []
 Internal Weather Description/Notes: []

Weather Details

Accumulation: 4.50 in
 Accumulation Rate: [] Inch Per Hour
 Air Temp Start: 30.00 Fahrenheit
 Air Temp End: 28.00 Fahrenheit
 Pavement Temp Start: 34.00 Fahrenheit
 Pavement Temp End: 33.00 Fahrenheit
 Wind Velocity: 2.00 Miles Per Hour
 Approx. Wind Direction: E

Weather Condition(s):
 Dry Snow Wet Snow
 Sleet Freezing Rain
 Drifting Snow Black Ice
 Drizzle Rain
 Windy Calm
 Sunny Cloudy

Update Delete Cancel Apply

Each weather measurement data set keeps track of several editable pieces of data:

- **Source:** a dropdown of all sources specified in the Weather Measurement Sources Module
- **Location:** a dropdown for either "City/State" or "Zone"
- **Customer Notes:** notes that will appear on the Snow Report
- **Internal Notes:** notes for internal use only
- **Measurements:** as listed in the previous section: accumulation, temperature, and wind data

- **Conditions:** a list of all conditions defined in the Weather Conditions Module

As mentioned above, weather data can only be recorded/edited for open snow events. Once closed, the page will still be accessible by clicking the “edit” button on the grid at the bottom of the Snow Event Page, but it will be loaded in read-only mode.

All fields other than the source and location are optional. You are not required to add notes, measurements, or any weather conditions each time you record the weather data.

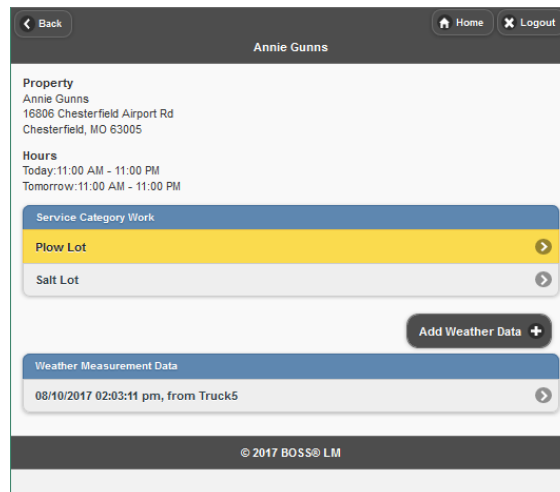
Any weather conditions selected on this page can be viewed from the Snow Event Page by hovering over the snowflake icon in the “Weather Conditions” column of the list of weather measurement data sets in the “Weather Data” section at the bottom of the page. If there is no snowflake icon for a given set, it means that no weather conditions were selected for that set.

Property-Level Capture

From BOSS Mobile

Snow crew leaders can create and edit property-level weather measurement data sets in BOSS Mobile by selecting an open snow event from the Main Menu and then selecting a property that falls under that event.

Once on the Snow Event Property Page, a crew leader can either add a new weather data measurement set or edit previous mobile sets that he/she has created. For clarification: crew leaders cannot use BOSS Mobile to edit any weather measurement data set created in BOSS Main, nor can they use BOSS Mobile to edit any other user’s weather measurement data sets.



The BOSS Mobile page for adding or editing weather measurement data sets is essentially a reorganized version of its BOSS Main site counterpart:

The same measurement fields, unit types, weather conditions, and notes fields are all present. There is, however, no "Source" field: when using BOSS Mobile to create a weather measurement data set, the source is automatically set to "Mobile," a system-level source in the "Weather Measurement Sources Module".

From BOSS Main

Before property-level weather measurement data sets can be created, modified, or deleted from BOSS, an active snow event must be chosen in the Snow Dashboard or Snow Properties module. Once an event is chosen, you can click on one of the properties listed to open the Snow Property Page. On that page is a tab labeled "Weather."

At the bottom of the Weather tab is a section labeled "Field Weather Data." Like the "Weather Data" section on the Snow Event Page, this section displays a list of all property-level weather measurement data sets, including those created from BOSS Mobile. Note that the list now displays extra information for mobile data sets - the snow crew leader who entered the data set and the name of the device that was used.

Field Weather Data +

Use this section to record property-specific weather data. Use the Snow Events tab to record zone or city weather data.

Crew Leader	Source	Device	Air Temp Start	Accumulation Rate	Accumulation	Air Temp End	Pavement Temp Start	Pavement Temp End	Wind Direction	Wind Velocity	Weather Conditions
Jacob Johnson	Mobile	Droid	21.00 Fahrenheit	2.00 Inch Per Hour	4.00 in	16.00 Fahrenheit					* ✎ ✕

1 total records

Update Cancel

To create a new property-level weather measurement data set, click the green plus icon at the far right of the "Field Weather Data" section. Creating and editing property-level sets from BOSS is basically identical to creating sets at the city and zone levels; the only difference is that instead of either a "City/State" or a "Zone" dropdown, there will simply be an indication of the name of the property to which the set belongs.

Property-level weather measurement data sets are subject to the same restriction that city- and zone-level sets are in that they cannot be created or updated once the snow event they fall under is closed; however, there is *no limit* to the number of property-level measurement sets that can be created for a single snow event. This allows you to monitor conditions throughout the storm if desired.

The Snow Properties Module

A visual indication is located on the Snow Properties Module (by default on the "Properties" tab in the "Snow" portal) to show when a property affected by the current snow event has had property-level weather measurement data sets added, and whether any of those sets were entered from BOSS Mobile.

<input type="checkbox"/>	Property -	Address	City	Zip	Hours of Operation	Work Completed	Work In Progress	Work Pending	
▼ Zone: Downtown Chesterfield									
<input type="checkbox"/>	Annie Gunns	16806 Chesterfield Airport Rd	Chesterfield	63005	11:00 AM - 11:00 PM	Plow Lot		Plow Lot, Salt Lot, Salt Lot, Salt Walk, Salt Walk, Shovel Walk, Shovel Walk	"A"
<input type="checkbox"/>	Cambridge Engineering	760 Long Rd Crossing Dr	Chesterfield	63005	10:00 AM - 10:30 PM			Plow Lot, Salt Lot	⚙️
<input type="checkbox"/>	Chesterfield Point Condos	N. Outer 40	Chesterfield	63007		Plow Lot		Plow Lot, Salt Lot, Salt Lot	

If the snowflake icon is present, it means that at least one property-level weather measurement data set exists for the current snow event-property combination; if the radio tower icon is present, it means that at least one of those data sets was added from the field via BOSS Mobile. This is useful for determining at a glance if any of the properties under the current snow event have had field weather data entered.

6. Finishing a Snow Event

Now that the snow has stopped falling and time/materials have been entered, it's time to get the event's work finalized for invoicing. In order to invoice in BOSS, job tickets need to be created and/or updated, and the time/materials posted to those tickets. Through this process we will also review the time and materials that were tracked throughout the event for payroll and job costing.

Assigning Time to Tickets

Time that was entered on BOSS Mobile or entered manually on the Snow Dashboard's Collect tab will need to be assigned to tickets. This is done on the Ticket tab of the Snow Dashboard.

Snow Dashboard ☰

Current Event

Branch: Chesterfield Season: Chesterfield - Snow Season 2019 Snow Event 2 Zone(s): Downtown Chesterfield, Ea:

This tab shows how time and materials are assigned to specific jobs and tickets. It also lets you link new season event jobs created from the field to existing jobs, if needed.

Assign Time to Tickets

Look for Property Crew Job # Include Ticketed

Service Category	Crew	Job	Job Description	Service	Ticket #	Assigned	Unassigned
▼ Annie Gunns							
Plow Lot	Jacob Johnson - Plow #22	756	Per Push Snow Removal	Snow - Plowing 0-3"	5645 [Run]	0.5	📄
Shovel Walk	Shovel #1	756	Per Push Snow Removal	Snow - Shoveling 0-3"	5650 [Run]	0.75	📄
▼ Clock Tower Plazas							
Shovel Walk	Shovel #2	760	T&M Snow Removal	Snow - Shoveling		0.02	📄 🗑️

3 total records

Assign Material to Tickets and POs

Look for Property Crew Job # Include Ticketed

Service Category	Crew	Job	Job Description	Item	Service	Ticket #	Date Used	PO	Assigned	Unassigned
▼ Annie Gunns										
Plow Lot	Jacob Johnson - Plow #22	756	Per Push Snow Removal	Snow Salt	Snow - Plowis	5645 [Run]	08/09/2015 📅	Snow Salt (PO: 40, Receipt: 50) 🗑️	1.2	📄

1 total records

The Assign Time to Tickets section shows by property each service category item, the crew that worked it, the job it was originally created under and that job's description. Each line also now displays a drop-down list of Services for that job and service category, and a Ticket drop down which defaults to the lowest numbered ticket that is not in Completed, Approved or Billed status. On the far right, you will see the unassigned time and the ticket icon.

Assign Time to Multiple Tickets

To assign time to multiple tickets at once, select the appropriate services and tickets on the Ticketing tab, and click the Save Time button. (Note that you can filter the grid by Property, Crew or Job #, and whether to include already ticketed rows.)

Snow Dashboard
Current Event

Branch: Chesterfield Season: Chesterfield - Snow Season 2019 Snow Event 3 Zone(s) Downtown Chesterfield, Ea X Refresh Data Choose Event

Schedule Collect **Ticket** Review

This tab shows how time and materials are assigned to specific jobs and tickets. It also lets you link new season event jobs created from the field to existing jobs, if needed.


Assign Time to Tickets

Look for Property Crew Shovel #1 Job # Include Ticketed Find Reset

Service Category	Crew	Job	Job Description	Service	Ticket #	Assigned	Unassigned
~ Annie Gunns							
Shovel Walk	Shovel #1	756	Per Push Snow Removal	Snow - Shoveling 0-3"	5650 [Run]		1
~ Churchill Park							
Shovel Walk	Shovel #1	759	T&M Snow Removal	Snow - Shoveling	5589 [Run]		2
~ Clock Tower Plazas							
Salt Walk	Shovel #1	760	T&M Snow Removal	Snow - Ice Melting	5595 [Run]		2
~ Corporate Square							
Salt Walk	Shovel #1	761	Seasonal Snow Removal	Snow - Ice Melting	5638 [Run]		2

4 total records

Save Time



To assign time to an individual ticket, view the details of the time entry, or create a new ticket (See Variable Occurrence Contracts section below), click on the Set Tickets button on the right side of the row.

Snow Dashboard
Current Event

Branch: Chesterfield Season: Chesterfield - Snow Season 2019 Snow Event 3 Zone(s) Downtown Chesterfield, Ea X Refresh Data Choose Event


Schedule Collect **Ticket** Review

This tab shows how time and materials are assigned to specific jobs and tickets. It also lets you link new season event jobs created from the field to existing jobs, if needed.

Assign Time to Tickets

Look for Property Crew Plow Truck #5 Job # Include Ticketed Find Reset

Service Category	Crew	Job	Job Description	Service	Ticket #	Assigned	Unassigned
~ Annie Gunns							
Plow Lot	Plow Truck #5	756	Per Push Snow Removal	Snow - Plowing 0-3"	5645 [Run]		0.13
~ Churchill Park							
Plow Lot	Plow Truck #5	759	T&M Snow Removal	Snow - Loader	5592 [Run]		0.02
~ Clock Tower Plazas							



This will bring you to the Assign Tickets window, specific to that row.

Assign Tickets: Plow Lot at Clock Tower Plazas

To assign time to a ticket, check the time rows in the grid. Next, choose a job, job service, and ticket, then click the Assign Ticket button. For variable occurrence services, you may create a new ticket.

	Crew Member	Start	Stop	Job #	Job	Service	Assigned Hours	Unassigned Hours	Ticket #
<input type="checkbox"/>	Brent Moore	08/20/19 07:57 AM	08/20/19 07:59 AM					0.03	

1 total records

Job 760, T&M Snow Removal Snow - Plowing X Assign to ticket

Done

Edit Ticket Assignments

Once time on a row has been saved, that row is no longer editable, as it is considered ticketed. However, if changes are needed after time has been assigned, there is an

option to revert the ticket assignment. To find the row, apply the Include Ticketed filter, and click the "Undo the ticket assignment" arrow.

The screenshot shows the 'Assign Time to Tickets' screen. At the top, there are tabs for 'Schedule', 'Collect', 'Ticket', and 'Review'. Below the tabs, there is a search bar with 'Look for Property' and a dropdown for 'Crew' set to 'Shovel #1'. There is also a 'Job #' field and a checked 'Include Ticketed' checkbox. 'Find' and 'Reset' buttons are present. The main table has the following data:

Service Category	Crew	Job	Job Description	Service	Ticket #	Assigned	Unassigned
▼ Annie Gunns							
Shovel Walk	Shovel #1	756	Per Push Snow Removal	Snow - Shoveling 0-3"	5650 [Run]	1	Undo ticket assignment
▼ Churchill Park							
Shovel Walk	Shovel #1	759	T&M Snow Removal	Snow - Shoveling	5589 [Run]	2	
▼ Clock Tower Plazas							
Salt Walk	Shovel #1	760	T&M Snow Removal	Snow - Ice Melting	5595 [Run]	2	
▼ Corporate Square							

Seasonal Contracts & Work Orders

For both a seasonal snow contract and snow work order, the ticket would have already been created in the normal ticket process. After forecasting, the ticket would be generated and available to work, however, it does not need to be placed on the Schedule. For seasonal contracts, there is usually one ticket per month for each service you provide, and these would be created/closed on a monthly basis. Both seasonal contract tickets and work orders that are in the Run or Worked status are available to be selected.

Once you are on the Assign Ticket screen, you can select the time rows that you wish to assign to the ticket and then from the dropdown options, select the job, service and ticket that this time is being assigned to. Then click the "Assign to Ticket" button. This has now taken the time you selected and entered it on the ticket automatically.

Variable Occurrence Contracts

For contracts that are set up as variable occurrence contracts, there is no limit to the number of tickets you can create, and since you do not know the severity of the storm before it occurs, you would not have created the ticket(s) ahead of time.

In the Ticketing process for snow work, you have the option to "Create Ticket" right from the Assign Ticket screen for variable occurrence contracts. This way you do not have to leave the Snow Dashboard or the Assign Ticket screen for each new ticket needed for your variable occurrence contracts.

To create new tickets from the Tickets tab, click the Set Tickets icon on the appropriate row.

Schedule Collect **Ticket** Review

This tab shows how time and materials are assigned to specific jobs and tickets. It also lets you link new season event jobs created from the field to existing jobs, if needed.

Assign Time to Tickets

Look for Property Crew Job # Include Ticketed

Service Category	Crew	Job	Job Description	Service	Ticket #	Assigned	Unassigned
Annie Gunns							
Salt Lot	Plow Truck #5	756	Per Push Snow Removal	Snow - Salting	5643 [Run]		0.02
Churchill Park							
Salt Lot	Plow Truck #5	759	T&M Snow Removal	Snow - Salting	5590 [Run]		0.05

2 total records

Then click the Create Ticket button to create a new ticket.

Assign Tickets: Salt Lot at Annie Gunns

To assign time to a ticket, check the time rows in the grid. Next, choose a job, job service, and ticket, then click the **Assign Ticket** button. For variable occurrence services, you may create a new ticket.

<input type="checkbox"/>	Crew Member	Start	Stop	Job #	Job	Service	Assigned Hours	Unassigned Hours	Ticket #
<input type="checkbox"/>	Brent Moore	08/27/19 11:00 PM	08/27/19 11:01 PM					0.02	

1 total records

Job 756, Per Push Snow Removal | Snow - Salting |

Just like tickets that are already created, you would need to choose the job and service, and if the ticket was already created and in Run or Worked status then it could also be chosen. If not, then once the job and service are selected, click the "Create Ticket" button and a ticket will be created for that job and service, and will now be available in the dropdown. Choose the ticket and then click "Assign to Ticket".

Assigning Materials to Tickets

Also, on the Ticket tab is the "Assign Material to Tickets and POs" area. This is where you can take the materials that were entered on BOSS Mobile and assign them to tickets. Since a PO is not chosen from BOSS Mobile, in addition to assigning to a ticket, you must allocate the material to a PO as well.

Select the appropriate Service, Ticket and PO for each line and click the Save Materials button to assign multiple tickets at one time.

Assign Material to Tickets and POs

Look for Property Crew Job # Include Ticketed

Service Category	Crew	Job	Job Description	Item	Service	Ticket #	Date Used	PO	Assigned	Unassigned
Annie Gunns										
Salt Lot	Plow Truck #5	756	Per Push Snow Removal	Snow Salt	Snow - Saltin	5643 [Run]	08/27/2015	Snow Salt (PO: 40, Receipt: 50)		1.2
Churchill Park										
Salt Lot	Plow Truck #5	759	T&M Snow Removal	Snow Salt	Snow - Saltin	5590 [Run]	08/27/2015	Snow Salt (PO: 40, Receipt: 50)		1

2 total records

Or click the shovel icon on the far-right side of individual lines to open the assignment screen.

Assign Material: Salt Walk at Corporate Square

Material: Snow Salt

Unassigned

		Crew	Quantity	Used	PO
<input type="checkbox"/>		Shovel #1	0.25	08/12/2019	
		Job 761, Seasonal Snow Removal	Snow - Ice Melting		

If the material has already been assigned, then it will indicate it in the assigned section and the screen is read-only. If not, then you will have the option to assign the material to a ticket and allocate from a PO.

To assign, first select which applications of the material that you wish to assign by using the checkboxes on the far left. Next, choose a purchase order that the material is being allocated from the PO dropdown. You also have the option to change the Used Date of the material.

Lastly, from the dropdown options, choose the job, service and ticket that this material is be assigned to. If the job is a variable occurrence contract and the ticket has not already been created, you can use the Create Ticket option to generate a new ticket for that job and service. Once you have selected the ticket, click the "Assign to Ticket" button to assign the material.

Review

Once time and materials have been assigned, they will no longer be located or available for review in the Collect tab. However, they are now available on the Review tab of the Snow Dashboard. The Review tab shows a summary of what was reported by each crew.

From the dropdown menu, select which crew you wish to review. In the grid below, you will see a summary, by day, of the hours that were worked by each crew member.

Snow Dashboard

Current Event

Branch: Chesterfield Season: Chesterfield - Snow Season 2019 Snow Event 2 Zone(s) Downtown Chesterfield, Ea: X Refresh Date Choose Event

Schedule Collect Ticket Review

This tab shows a summary of the time reported by each crew after it has been assigned to tickets. The number shown in the grid below includes only the time allocated from this snow event. To view the full picture and entirety of the employee's day, click the Clock icon to open the timesheet. The timesheet will include all time for the day whether regular, snow or internal. This includes snow time across all snow zones and snow crews.

Time		Monday 08/12	Tuesday 08/13	Wednesday 08/14	Thursday 08/15	Friday 08/16	Saturday 08/17	Sunday 08/18
ID	Name							
	Jacob Johnson - Plow #22							
4	Jacob Johnson	0.40						
	Shovel #1							
4	Jacob Johnson	0.10						

The clock icon below each day can be clicked to open the Job Ticket/Clock Timesheet.

Daily Timesheet

Crew Leader: Jacob Johnson Work Date: 08/12/2019 On Foreman's Device

Time In	Time Out	Hours	Lunch	Pay Code	Complete	
						4 Jacob Johnson
	02:51 pm	04:39 pm	1.80	0.50		1.30
Total Clock Time						1.30
Job Time/Cost						
	03:00 pm	03:06 pm	0.10			0.10
	02:30 pm	02:54 pm	0.40			0.40
			0.00			0.00
			0.00			0.00
Total Job Time						0.50
Overhead Time						
Ticket #5531 : ACME Chesterfield : Contract #750 : Trai						

Here you will see the time laid out in the familiar timesheet screen which functions in the same way as it does when reviewing mobile time during the green season.

The Clock time will be shown as recorded from BOSS Mobile or can be entered from paper. Each ticket and time row will be entered from BOSS Mobile or manually on the Collect tab. From here you can add time to Overhead tickets and also Distribute any remaining time. Lastly, by checking the option to "Show Job Cost for Work Date" you also can see and review any materials that were entered.

Once you have completed your review, the time is ready for payroll, ready for invoicing, and reviewed for job costing. The materials have also been reviewed for job costing. And ultimately, the ticket is now ready to be invoiced.

Finalizing Property Weather Measurements

In BOSS LM Main on the Snow Property Page (the same page from which property-level weather measurement data sets are created) under the “Weather” tab, there is a section labeled “Final Weather Data”:

Property: Annie Gunns

Final Weather Data

If you wish to override the Zone/City default value, uncheck the checkbox and input a property-specific value.
If there are is no weather data recorded for the Zone/City in which this property is located, you will have to enter all values manually.

Use Zone/City Default	Field	Value	Unit	Use Zone/City Default	Notes
<input checked="" type="checkbox"/>	Accumulation	5.00	in	<input type="checkbox"/>	Customer Weather Description/Notes
<input checked="" type="checkbox"/>	Accumulation Rate	1.00	Inch Per Hour	<input type="checkbox"/>	Internal Weather Description/Notes
<input checked="" type="checkbox"/>	Approx. Air Temp Start of Event	31.00	Farenheit	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Approx. Air Temp End of Event	30.00	Farenheit	<input type="checkbox"/>	
<input type="checkbox"/>	Approx. Pavement Temp Start of Event		Farenheit		
<input type="checkbox"/>	Approx. Pavement Temp End of Event		Farenheit		
<input type="checkbox"/>	Wind Velocity		Miles Per Hour		
<input type="checkbox"/>	Approx. Wind Direction				
<input checked="" type="checkbox"/>	Weather Condition(s)	<input type="checkbox"/> Dry Snow <input checked="" type="checkbox"/> Wet Snow <input checked="" type="checkbox"/> Sleet <input type="checkbox"/> Freezing <input type="checkbox"/> Drifting <input type="checkbox"/> Rain <input type="checkbox"/> Snow <input type="checkbox"/> Black Ice <input checked="" type="checkbox"/> Drizzle <input type="checkbox"/> Rain <input type="checkbox"/> Windy <input type="checkbox"/> Calm <input type="checkbox"/> Sunny <input type="checkbox"/> Cloudy			

Field Weather Data

This area of the Snow Property Page allows weather data for a property to be “finalized” for both a quick reference for weather conditions at a property during a specific event, and for use in the Snow Report. Once again, note the eight measurement fields, the list of weather conditions, and the customer and internal notes fields, but also note that to the left of each field is a “Use Zone/City Default” checkbox.

1. If a “Use Zone/City Default” checkbox is checked, its associated field will be disabled, and the value inside of that field will be pulled from the city-level weather measurement data set for the current snow event. If no city-level set exists for the property’s city, or if that set has no value for the field/measurement, the value will be pulled from the zone-level set, instead.
2. If no set exists at either the city *or* zone level, or if that set has no value for the field/measurement, the “Use Zone/City Default” checkbox will be disabled, instead, and the field will be open for input.
3. Unchecking a “Use Zone/City Default” checkbox will open the associated field for input. Checking a “Use Zone/City Default” checkbox will disable the associated field and set its value to the city- or zone-level value as appropriate.

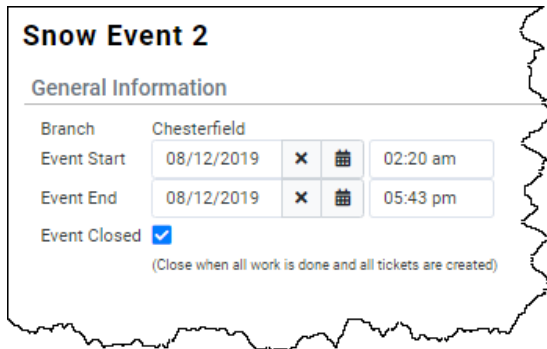
Clicking “Update” at the bottom of the page will save any values in the “Final Weather Data” section that have been overridden. The list of property-level weather measurement data sets in the “Field Weather Data” section at the bottom allows you to easily compare the city- and zone-level default data against data that has been reported from the field.

7. Completing a Snow Event & Invoicing

Now it's time to finish and close out the snow event!

Completing the Event

In the Events module, first be sure to enter the End Date and Time of the event. Work time can be entered after an event is over so this would be considered the meteorological end to the event.



Snow Event 2

General Information

Branch	Chesterfield			
Event Start	08/12/2019	✕	📅	02:20 am
Event End	08/12/2019	✕	📅	05:43 pm
Event Closed	<input checked="" type="checkbox"/>			

(Close when all work is done and all tickets are created)

When an Event has been closed with the Event Closed checkbox, you may no longer change the status, order or crew assignment of the work in the Snow Dashboard. This also closes the event's start and end date as well.

Invoicing

For seasonal snow contracts, the invoices are fixed amounts and the work completed does not affect invoicing.

For variable occurrence contracts and regular work orders, the invoice will be generated with all the approved tickets that have not yet been billed. Snow job tickets can be completed in the same manner as the green season. From the Ticket screen, the Complete button is available to those with the appropriate action security. You can also choose to complete multiple tickets at once from the Daily Timesheet.

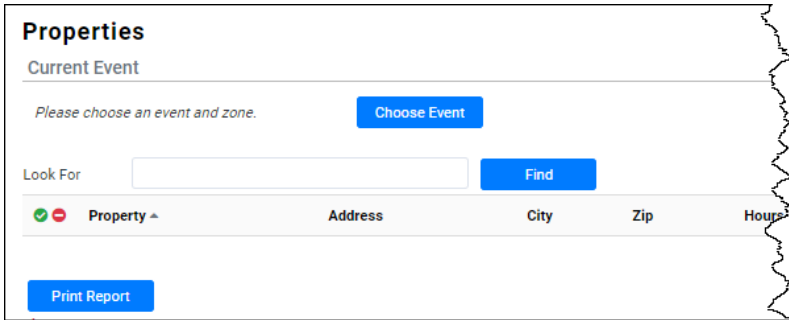
For T&M work orders, the invoices will contain all the time and materials that were assigned to the tickets. If they are not progress-billed T&M work orders, then the tickets would also need to be completed/approved.

8. Snow Reporting

Client Snow Report

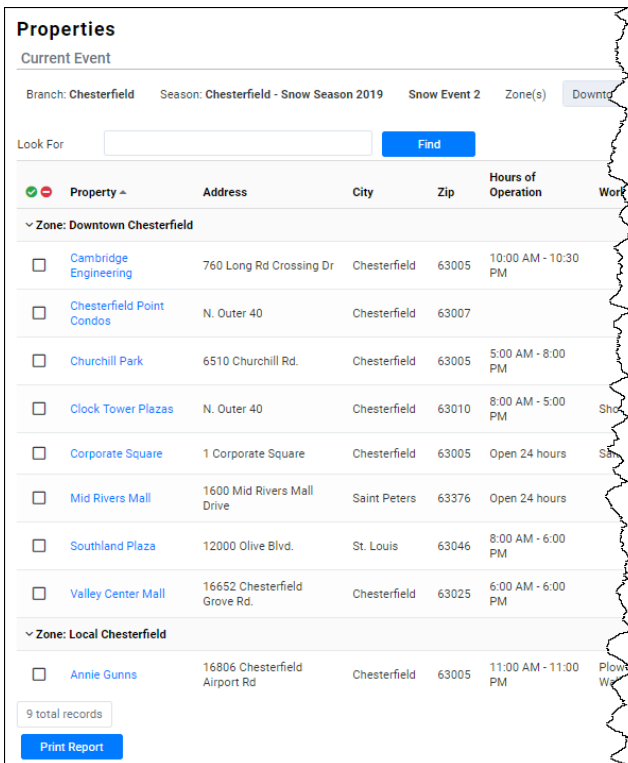
BOSS provides the capability to create after-the-event snow reports for your clients which contain details about the event, weather, and services performed. You can generate these reports from the Properties module in the Snow Dashboard.

You must first choose an Event if it has not yet been selected.




Then Find the properties you would like to generate the report(s) for and mark the checkbox for each property that you would like to generate the report(s) for.

Next, click Print Report.



The default layout will include the following details:

- Company Logo and Address
- Property Information
- Event Start and End Date and Time
- Weather Details
- Weather Notes
- Ticketed Snow Services with Start/End Times



ACME LANDSCAPE
714 Spirit 40 Park Dr.
Suite 150
Chesterfield, MO 63005

Property
Courtyard - Chesterfield - (SN)
17369 Chesterfield Airport Rd
Chesterfield, MO 63005

Snow Report

Event Start: 09/08/23 12:00 AM

Event End:

Event Description:
Heavy snow falling over 24 hours.

<u>Weather Details</u>	<u>Measurement</u>	
Air Temp Start	35.00	Fahrenheit
Air Temp End	32.00	Fahrenheit
Pavement Temp Start	25.00	Fahrenheit
Pavement Temp End	25.00	Fahrenheit
Accumulation	10.00	in
Accumulation Rate	2.00	Inch Per Hour
Wind Velocity	2.00	Miles Per Hour
Wind Direction	NE	

Notes
Custom weather notes can be added here

Weather Conditions

Wet Snow
Sleet
Calm
Cloudy

Services Performed

Job Number	Service	Start	End
1798	Snow - Ice Melting	9/8/2022 08:55 AM	9/8/2022 09:30 AM
1798	Snow - Loader	9/8/2022 04:35 AM	9/8/2022 06:50 AM
1798	Snow - Salting	9/8/2021 07:38 AM	9/8/2021 11:55 AM
1798	Snow - Salting	9/8/2022 06:51 AM	9/8/2022 07:00 AM
1798	Snow - Shoveling	9/8/2022 07:05 AM	9/8/2022 08:45 AM

The Snow Report is available for customization in the BOSS Report Designer.

Snow Job Costing Report

The Snow Job Cost pivot table report is available on the Report Manager module. This report provides job costing information specific to snow events. Several layouts are provided by default.

Report Manager

Mode

Pivot Layouts

Name	Description	
[Default]	This is the default BOSS LM layout.	✘
Snow Job Cost by Employee	Groups the cost of snow jobs by crew and individual employee.	✘
Snow Job Cost by Property	Groups the cost of snow jobs by branch and property.	✘
Snow Job Cost by Service Category	Groups the cost of snow jobs by branch and service category.	✘
Snow Job Cost by Snow Event	Groups the cost of snow jobs by snow event.	✘

Please note that time and material must be ticketed before they will appear on this report.

Snow Services Provided (Summary and Detail)

These are two static reports (non-pivot) with select filtering capabilities. In general these reports show the labor and non-labor costs and amounts for snow related activity. Further information on both reports can be found in the Reports Reference Guide.

Snow Services Provided (Summary)
01/01/2022 through 09/04/2023

Service	Job Ticket	Labor Cost Est / Act	Labor Price	Other Cost Est / Act	Other Price	Total Cost Est / Act	Total Price	Gross Profit	Gross Margin			
ACME Management Company : Ameristar - KC (Work Order, Bid #277) - 3200 North Ameristar Drives, Kansas City, MO												
Snow - Ice Melting	5247	\$49.40	\$54.34	\$125.00	\$150.00	\$187.50	\$199.40	\$204.34	\$312.50	\$108.16	35%	
Action Management : Gingham's Homestyle Restaurant - (SN) (Contract, Contract #1814) - 1566 Country Club Plaza Dr, St Charles, MO												
Snow - Plowing 0-3"	7446	\$45.00	\$62.50	\$107.99	\$0.00	\$0.00	\$0.00	\$45.00	\$62.50	\$107.99	\$45.49	42%
Adam Reynolds, LLC : BrickHouse Tavern - (SN) (Contract, Contract #1817) - 2 McBride & Son Center Dr, Chesterfield, MO												
Snow - Plowing 0-3"	7445	\$33.12	\$16.56	\$36.00	\$0.00	\$0.00	\$0.00	\$33.12	\$16.56	\$36.00	\$19.44	54%
Adam Reynolds, LLC : Courtyard - Chesterfield - (SN) (Work Order, T&M #1798) - 17369 Chesterfield Airport Rd, Chesterfield, MO												
Snow - Salting	6431		\$77.04	\$256.80	\$0.00	\$0.00		\$77.04	\$256.80	\$179.76	70%	
Grand Totals (**Excludes Budget)			\$210.44	\$525.79	\$150.00	\$187.50	\$360.44	\$713.29		\$352.85		

* Ticket is Priced at Minimum Price
Executed: 09/04/2023 01:28 PM

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Snow Services Provided (Detail)
01/01/2022 through 09/04/2023

Service	Job Ticket	Labor Cost Est / Act	Labor Price	Other Cost Est / Act	Other Price	Total Cost Est / Act	Total Price	Gross Profit	Gross Margin			
ACME Management Company : Ameristar - KC (Work Order, Bid #277) - 3200 North Ameristar Drives, Kansas City, MO												
Snow - Ice Melting	5247	\$49.40	\$54.34	\$125.00	\$150.00	\$187.50	\$199.40	\$204.34	\$312.50	\$108.16	35%	
01/02/2022	Julie Kelly			07:47 AM	10:15 AM		2.47 HRS	\$54.34				
09/01/2023	Snow Calcium			5.00	BAG			\$150.00				
Action Management : Gingham's Homestyle Restaurant - (SN) (Contract, Contract #1814) - 1566 Country Club Plaza Dr, St Charles, MO												
Snow - Plowing 0-3"	7446	\$45.00	\$62.50	\$107.99	\$0.00	\$0.00	\$0.00	\$45.00	\$62.50	\$107.99	\$45.49	42%
09/08/2023	Plow Truck 67 (sub)			08:00 AM	09:15 AM		1.25 HRS	\$62.50				
Adam Reynolds, LLC : BrickHouse Tavern - (SN) (Contract, Contract #1817) - 2 McBride & Son Center Dr, Chesterfield, MO												
Snow - Plowing 0-3"	7445	\$33.12	\$16.56	\$36.00	\$0.00	\$0.00	\$0.00	\$33.12	\$16.56	\$36.00	\$19.44	54%
09/08/2023	Freddie Rodriguez			09:45 AM	10:40 AM		.92 HRS	\$16.56				
Adam Reynolds, LLC : Courtyard - Chesterfield - (SN) (Work Order, T&M #1798) - 17369 Chesterfield Airport Rd, Chesterfield, MO												
Snow - Salting	6431		\$77.04	\$256.80	\$0.00	\$0.00		\$77.04	\$256.80	\$179.76	70%	
09/08/2022	Freddie Rodriguez			07:38 AM	11:55 AM		4.28 HRS	\$77.04				
Grand Totals (**Excludes Budget)			\$210.44	\$525.79	\$150.00	\$187.50	\$360.44	\$713.29		\$352.85		

* Ticket is Priced at Minimum Price
Executed: 09/04/2023 01:28 PM

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