



Bootcamps Getting Started with SA5

Navigation, Terminology, Adding a Customer, Customer Review

Getting Started with SA5



Elizabeth Hlavaty

SA5 Product Owner, RealGreen by WorkWave

Agenda

Overview

- What is bootcamp
 - Today's agenda
- Introductions
- Housekeeping

Getting Started

- Navigation
- Customer Details
- Adding Customer

Overview – Schedule

Bootcamp is a very basic overview of SA5. New users or anyone that's had the software for a year but wants a refresher on basic functionality.

Getting started 9 – 10

Services 10 – 11

Estimates & Proposals 11 – 12

LUNCH

Routing, Production Entry, Payment Entry 1 – 2

Billing, Prepayments, Statements, Adjustments 2 – 3

Reports / Review 3 – 4

Introductions

Elizabeth Hlavaty (Ebeth)

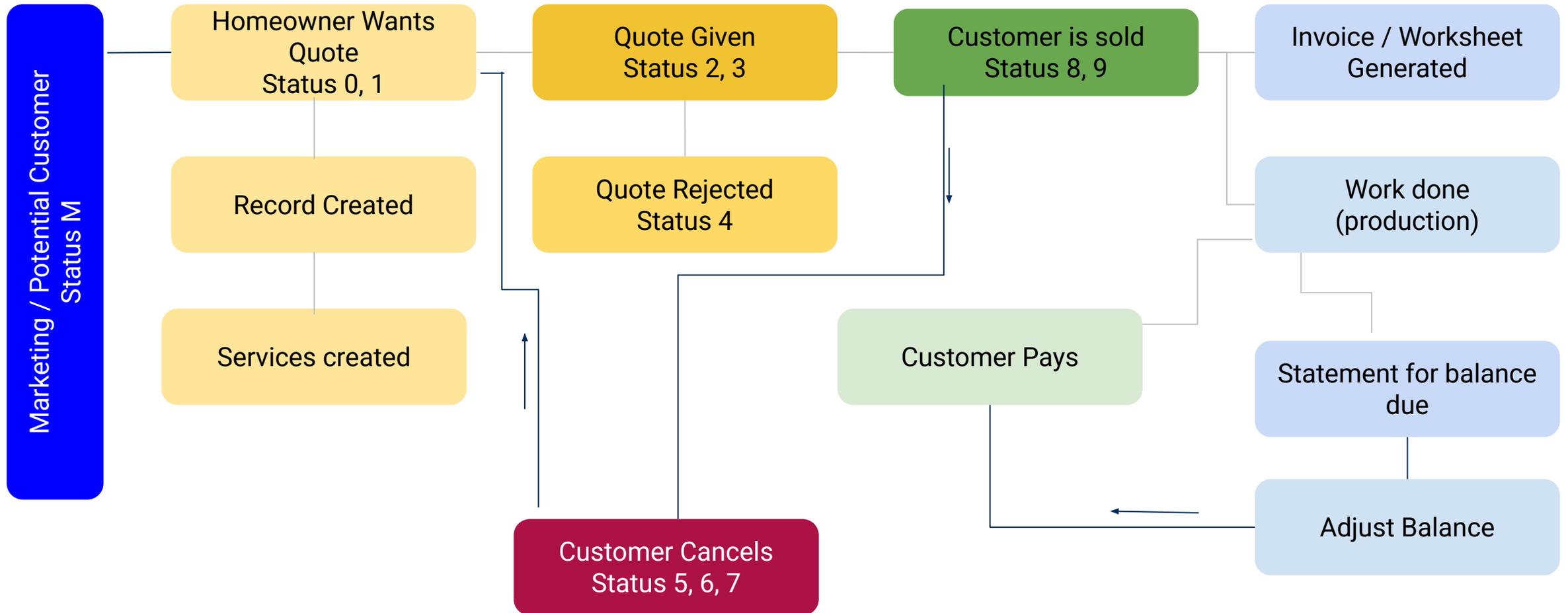
Thom Boersma

Matthew Gifford

House Keeping

- This is a lecture room, sound carries!
- Please silence your cell
- We will have at least 10 minute break between sections to talk to neighbors or presenters.
- Please keep questions relative to the topic at hand.

Customer Life Cycle

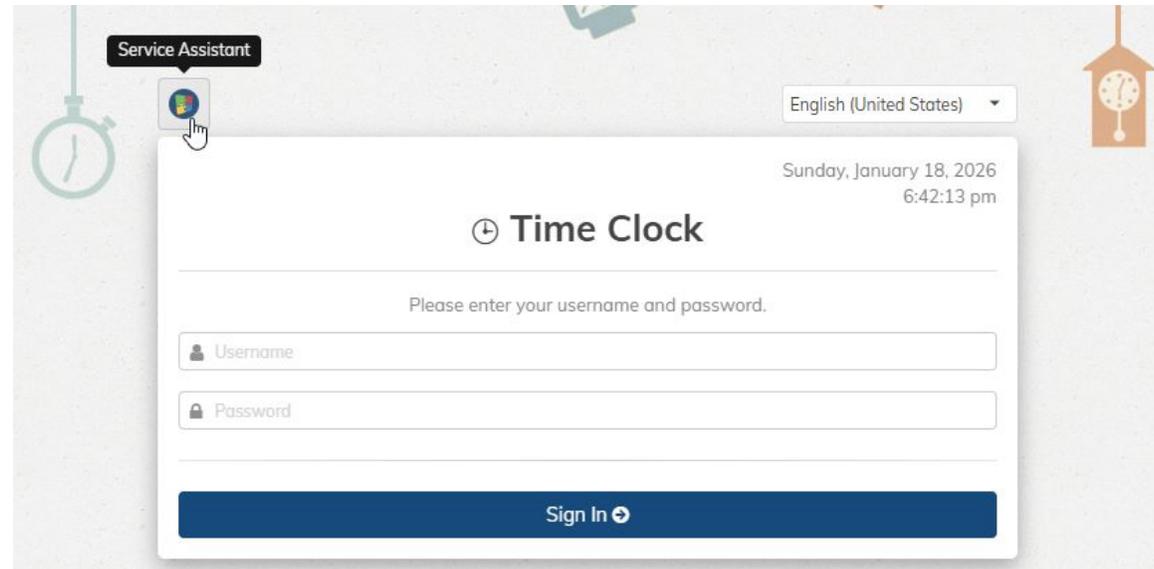
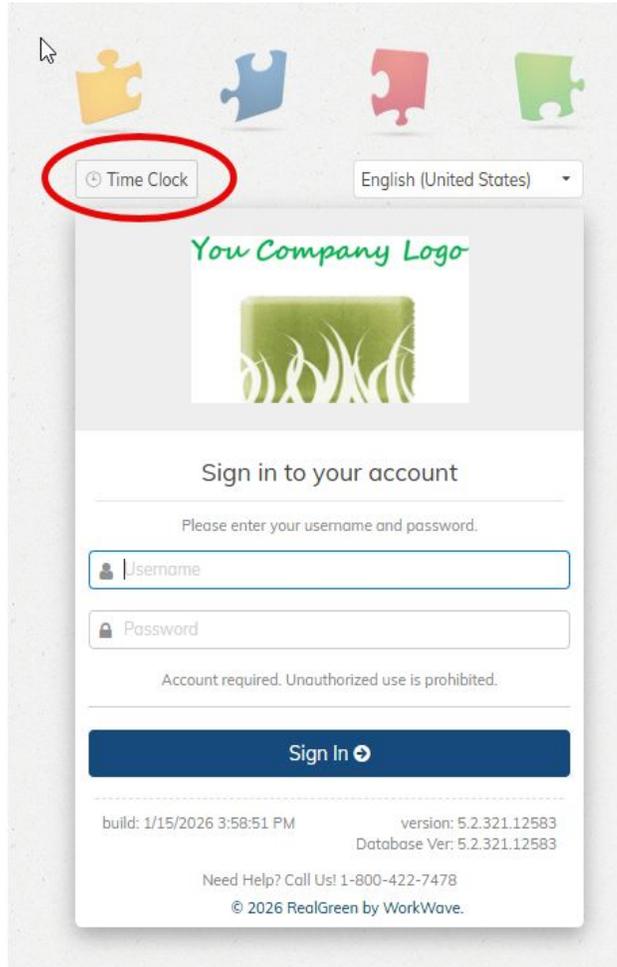


Login & Navigation

Login & Navigation

If you login to the time clock first, you will still need to log into SA5.

You will need to enter your username and password and select enter or 'sign in' to access SA5.



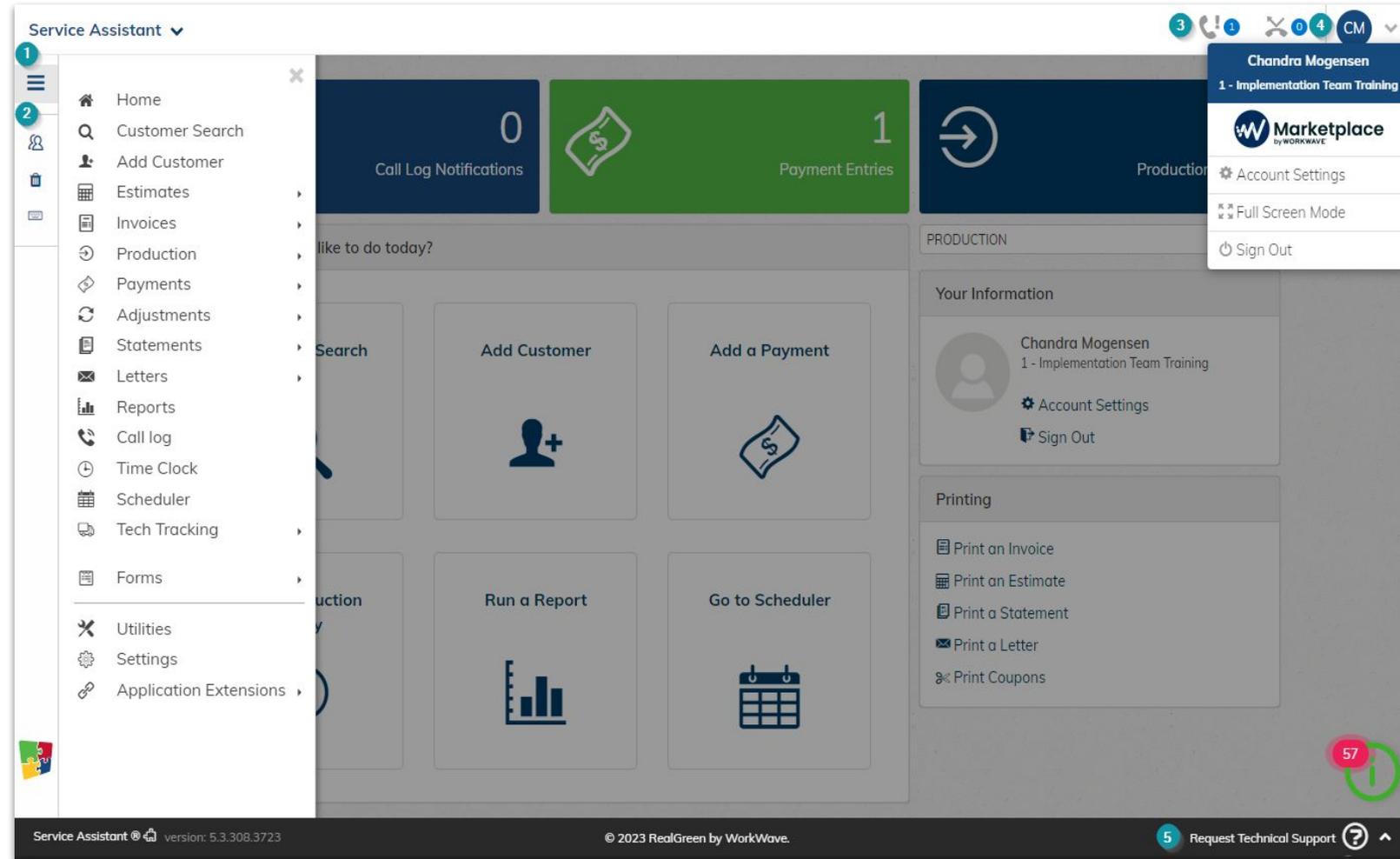
Home Screen

1. Click these **Notification** boxes to view new Call Logs, Payments if they are sitting in the Payment Journal, and Production if there is work waiting to be posted in the Production Journal.
2. Find **Shortcuts** to easily access common areas in the software.
3. Do a Customer **Quick Search**.
4. Update your **Account Settings** and **Sign Out**.
5. This shortcut will give the access needed to quickly **Print** Invoices, Estimates, Statements, Letters, and Coupons.

The screenshot displays the 'Service Assistant' home screen. At the top, there are three notification boxes: 'Call Log Notifications' with 0 items, 'Payment Entries' with 1 item, and 'Production Entries' with 6 items. Below these is a central area titled 'What would you like to do today?' containing six shortcut tiles: 'Customer Search', 'Add Customer', 'Add a Payment', 'Add Production Entry', 'Run a Report', and 'Go to Scheduler'. On the right side, there is a 'Quick Search' bar, a 'Your Information' section for Chandra Mogensen, and a 'Printing' section with options like 'Print an Invoice', 'Print an Estimate', 'Print a Statement', 'Print a Letter', and 'Print Coupons'. The footer contains the text 'Service Assistant @ version: 5.3.308.3723', '© 2023 RealGreen by WorkWave', and 'Request Technical Support'.

Home Screen - Navigation

1. The **Main Menu** on the left side provides the navigation to all parts of the software. This menu will be present on any screen in the software.
2. These **three side buttons** will give the ability to view the most recent customer list, clear sticky settings, and keyboard shortcuts.
3. View **Unresolved** and **Unread Calls**.
4. Under the **User's Initials**, you will find your Account Settings, and the ability to Sign Out.
5. If additional support is needed you can click on **Request Technical Support** to contact Support, and the **Question Mark** to find our Knowledge Base.



Search

Customer Search

The open search bar will look for any matches found in the customer fields.

Or use the advanced search to enter information into specific fields and define filters for email, status, or subdivision

The screenshot shows the 'Service Assistant' interface. At the top left, there is a 'Service Assistant' dropdown menu. On the right, there are notification icons (a bell with '1' and a close icon with '0') and a user profile icon labeled 'EE'. Below these is a search bar with the placeholder text 'Enter search...' and a magnifying glass icon. To the right of the search bar is a 'Start Over' button. Further right are three tabs: 'Customer', 'Payments', and 'Ref. #'. The main search area contains several input fields arranged in a grid:

- Account #:
- First name:
- Last name:
- Company:
- Reference #:
- Phone #:
- Email:
- Status: All Statuses Selected (with a dropdown arrow and a close icon)
- Has Email:
- House #:
- Street Name:
- Street Suffix: Street Suffix (with a dropdown arrow)
- Address line 2:
- Subdivision: Nothing Selected (with a dropdown arrow and a close icon)
- City:
- State:
- Zip Code:

At the bottom right of the search area is a blue 'Search' button with a magnifying glass icon. Below the search area is a toggle for 'Advanced Search'.

Payment & Reference Search

Payment search can be made on a check number or amount and date range

The screenshot shows the Service Assistant interface with a search bar set to 'Check' and 'Amount' with the value '1234'. The search results table displays one entry for a check.

Customer #	Company	Customer Name	Check No.	Amount	Date	Posted Date	Payment Type	Notes
355		William	1234	(\$93.02)	7/31/2023	Posted 07/31/2023 by (KL)	CH - Check	

Reference field can be invoice, PO, work order or cancel number

The screenshot shows the Service Assistant interface with a search bar set to 'Invoice No.' and the value '526'. A dropdown menu is open showing options: Invoice No., PO #, Work Order #, and Cancel #. The search results table displays one entry for an invoice.

Customer #	Company	Customer Name	Address	Service / Installment	Amount	Date Printed	Done Date	Invoice #	Printed By
101		Bobby Jones	1870 Lakeland Ave	Lawn Application Round 1	\$33.75	1/9/2023	2/14/2023	526	(YO)

Quick Search

Quick Search found on the home screen and within the customer screens. This search is a quick search for name or address and will take a user directly to result or to the main search screen.

The screenshot displays the WorkWave Service Assistant interface. At the top, there are three main action buttons: 'Call Log Notifications' (blue), 'Payment Entries' (green), and 'Production Entries' (dark blue). Below these is a navigation bar with a 'Quick Search' input field, which is highlighted with a red box. The search bar contains the text 'smith'. To the right of the search bar is a magnifying glass icon. Below the navigation bar, the main content area shows customer details for 'Audrey Hepburn'. The 'Customer Details' section includes fields for Residential Address, Customer Type, Default Billing Type, Default Discount, Customer Since, Tax Codes, Value, Branch, Call Ahead, Source, and Print Invoices. The 'Balance Details' section shows a Net Balance of \$185.50 and a Last Payment Date of 6/13/2024. The 'Invoice/Worksheet N...' and 'Directions' sections are also visible. The interface is branded with 'Service Assistant' and 'EE' in the top right corner.

Customer Details

Service Assistant
EE

Customer Details Documents 6 History Contact Financial Installments 0 Stations 0
Quick Search

Account # 32
9-Active Audrey Hepburn
369 Hollywood Pl, Fictional City, ID 12365
(124) 578-9412

9 - Active Edit

Residential Address

Audrey Hepburn
 369 Hollywood Pl
 Fictional City, ID 12365
 Cell: (124) 578-9412 +1 more...
 Customer: elizabethhlavaty@yahoo.com
 39.66340, -84.19650

Bill To:
 Service Address

Balance Details Edit

Net Balance:	\$185.50	Last Pmt Date:	6/13/2024
Prepay/Applied Balance:	\$0.00	Last Pmt Amt:	\$720.00
Remit Balance:	\$185.50	Credit Limit:	\$99,999.00

Flags Edit

Inground Sprinkler Locked Gate

Property Details Edit

Size: 23.0000 1000 Sq. Feet (Measured)
 Route: 01 Subdivision:
 Territory: () Map Code:
Show More

Property Items Add Property Item

Notes	Item	Location	Quantity
	just something		6 Yards
	Termite Invest Level	Basement	2 Termite Infest Level

Customer Details Audit Log Edit

Customer Type:	Residential	Branch:	2002 - MY OTHER COMPANY NAME GOES HERE
Default Billing Type:	Regular / Invoice	Call Ahead:	
Default Discount:		Source:	Existing Customer
Customer Since:	4/21/2011	Print Invoices:	Billing Copy Only
Tax Codes:	EX - Tax Exempt (%)		
Value:	\$3,275.50		

Invoice/Worksheet Notes Edit

Directions Edit

Services Add Service

2025 Clear Show All Details

9 LC - Lawn Care Program 1 Regular / Invoice 2025

Services: \$YYYYY

Route:	01 - 1	Scheduled:	2/18/2025	Discount:	
Completed:	0 of 6	Serviced:	10/31/2024	Price:	\$101.67
Sold By:	BC	Sold:	12/11/2023	Total:	\$610.00

9 TR - Tree Program Regular / Invoice 2025

Services: YYYYY

Route:	01	Scheduled:		Discount:	
Completed:	0 of 5	Serviced:		Price:	\$50.80
Sold By:	EH	Sold:	4/22/2011	Total:	\$254.00

9 MOW - Weekly Mowing Statement Only 2025

Services: SSYYYYYYYYYYYYYYYY...

Route:	01	Scheduled:	3/31/2025	Discount:	
Completed:	2 of 35	Serviced:	3/18/2025	Price:	\$92.75
Sold By:	EH	Sold:	4/22/2011	Total:	\$2,411.50

Customer Screen – Window shade details

The customer screen itself was designed to allow someone to answer most all questions about an account directly from here without having to go into other screens

There is a window shade accessible from every customer screen tab. This is a quick reference so users don't have to leave a page their on.

This is also a quick place to review the location of a property.

The screenshot displays a software interface for customer management. At the top, there are navigation tabs: Customer Details, Documents (6), History, Contact, Financial, Installments (0), and Stations (0). A search bar is located on the right. The main content area shows details for 'Account # 32', 'Audrey Hepburn', and '369 Hollywood Pl, Fictional City, ID 12365'. A map on the left shows the property location. Financial information includes: Net Balance: \$185.50, Prepay Balance: \$0.00, Remit Balance: \$185.50, Last Payment Date: 6/13/2024, Last Payment Amount: \$720.00, and Credit Limit: \$99,999.00. Buttons for 'Prepay Adjustments' and 'Add a Payment' are visible.

Customer Screen - basic information

The color of the customer name and address box represent the status colors.

If you go into edit mode, you can set up additional contact information and separate bill to address and email.

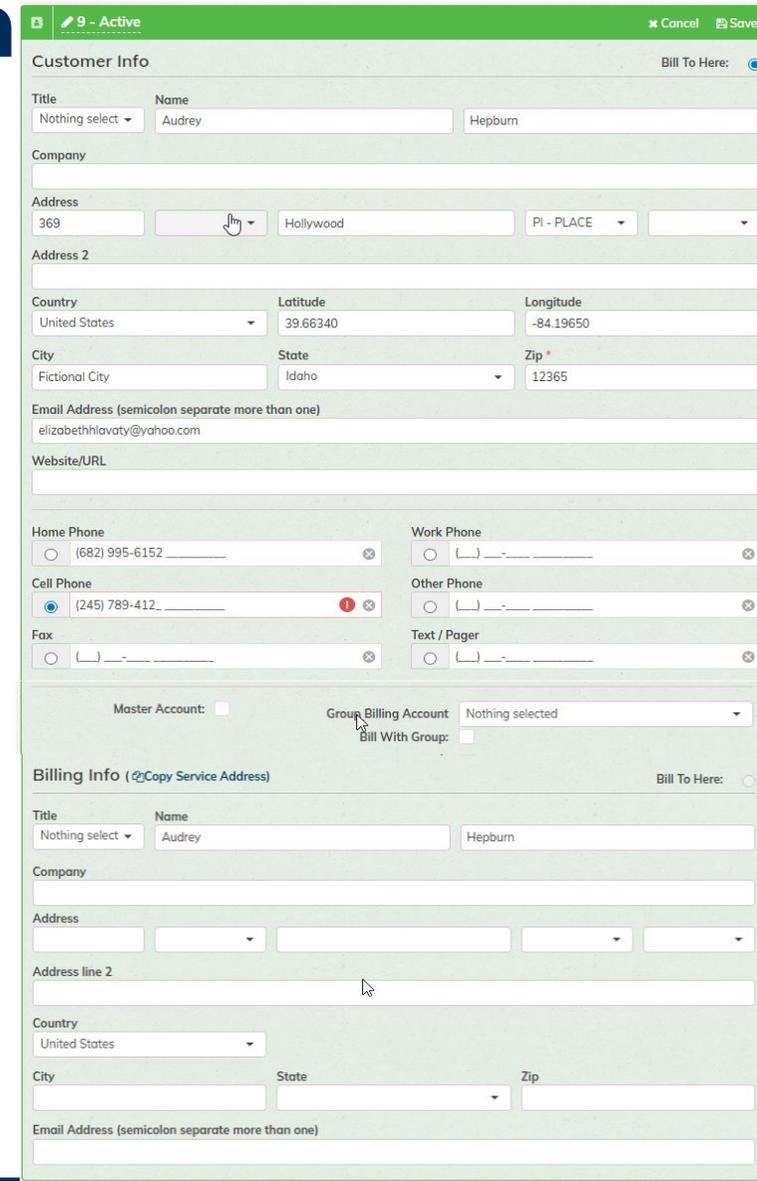


9 - Active Edit

Residential Address

Audrey Hepburn
369 Hollywood Pl
Fictional City, ID 12365
Cell: (124) 578-9412 +1 more...
Customer: elizabethhlavaty@yahoo.com
39.66340, -84.19650

Bill To:
 Service Address



9 - Active Cancel Save

Customer Info Bill To Here:

Title: Nothing select Name: Audrey Hepburn

Company:

Address: 369 Hollywood PI - PLACE

Address 2:

Country: United States Latitude: 39.66340 Longitude: -84.19650

City: Fictional City State: Idaho Zip: 12365

Email Address (semicolon separate more than one): elizabethhlavaty@yahoo.com

Website/URL:

Home Phone: (682) 995-6152 Work Phone:

Cell Phone: (245) 789-412 Other Phone:

Fax: Text / Pager:

Master Account: Group Billing Account: Nothing selected Bill With Group:

Billing Info (Copy Service Address) Bill To Here:

Title: Nothing select Name: Audrey Hepburn

Company:

Address:

Address line 2:

Country: United States

City: State: Zip:

Email Address (semicolon separate more than one):

Customer Screen- Balance and Property Details

Balance Details also includes shortcuts to adjust a customers balance or apply a payment

Flags Edit

Inground Sprinkler Locked Gate

Property Details Edit

Size: 23.0000 1000 Sq. Feet (Measured)
 Route: 01 Subdivision:
 Territory: () Map Code:
Show More

Property Items Add Property Item

Notes	Item	Location	Quantity
	just something		6 Yards
	Termite Invest Level	Basement	2 Termite Infest Level
	Termite Bait Station		5 Each
	Tall Fescue	Entire Yard	8 1000 Sq. Feet

Balance Details Edit

Net Balance:	\$185.50	Last Pmt Date:	6/13/2
Prepay/Applied Balance:	\$0.00	Last Pmt Amt:	\$720.0
Remit Balance:	\$185.50	Credit Limit:	\$99.9

Edit

- Adjustment
- Prepay Adjustments
- Add a Payment

- Flag codes can be created for any purpose to identify a property, a customer or specific records.
- Property details include the size, route and also property inventory items that help to track additional sizes used for different service lines

Customer Details section holds all the basic account information: Default billing, residential, commercial, source code, tax rates etc.

Customer Details Audit Log Edit

Customer Type:	Residential	Branch:	2002 - MY OTHER COMPANY NAME GOES HERE
Default Billing Type:	Regular / Invoice	Call Ahead:	
Default Discount:		Source:	Existing Customer
Customer Since:	4/21/2011	Print Invoices:	Billing Copy Only
Tax Codes:	EX - Tax Exempt (%)		
Value:	\$3,275.50		

Customer Screen's Service Notes and Summary

Invoice/Worksheet Notes & Directions would apply and show up on all technician forms when servicing any jobs they have scheduled.

The screenshot displays a software interface with three main sections: 'Invoice/Worksheet Notes', 'Directions', and 'Services'. The 'Services' section is active, showing a list of services for the year 2025. Each service entry includes a status icon, a name, a type, and a year. Below each entry is a table of key metrics.

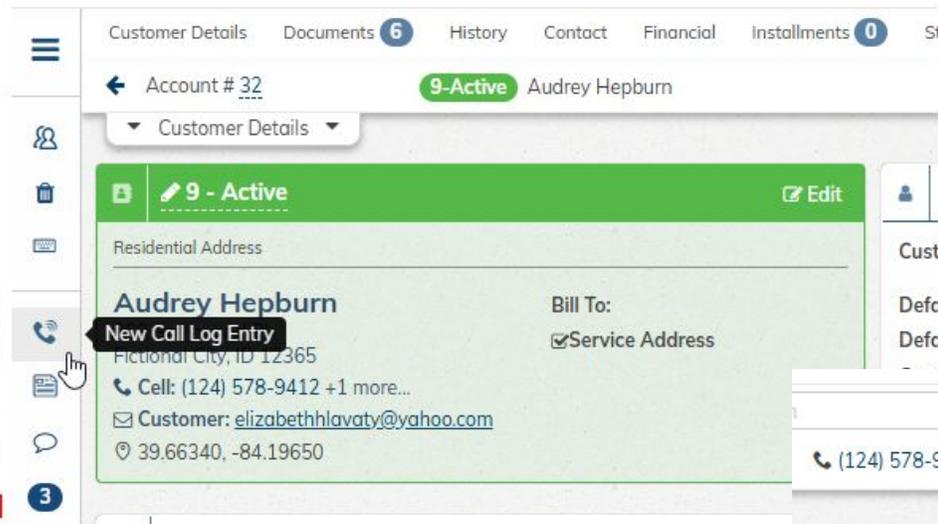
Service Name	Type	Year
LC - Lawn Care Program 1	Regular / Invoice	2025
TR - Tree Program	Regular / Invoice	2025
MOW - Weekly Mowing	Statement Only	2025

Service	Route	Scheduled	Discount	Price	Total
LC - Lawn Care Program 1	01 -1	2/18/2025		\$101.67	\$610.00
TR - Tree Program	01			\$50.80	\$254.00
MOW - Weekly Mowing	01	3/31/2025		\$92.75	\$2,411.50

Service summary will list all status programs and jobs for each season with basic information viewable.

Customer Utilities and Shortcuts

Customer Utilities and Shortcuts



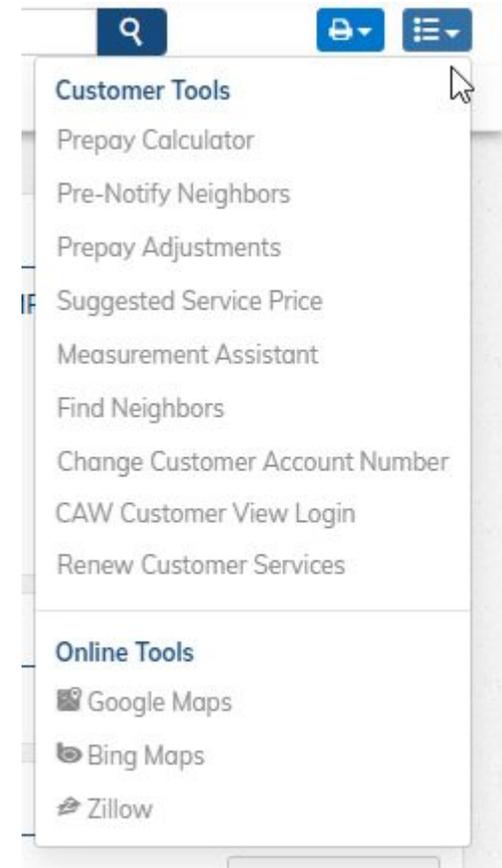
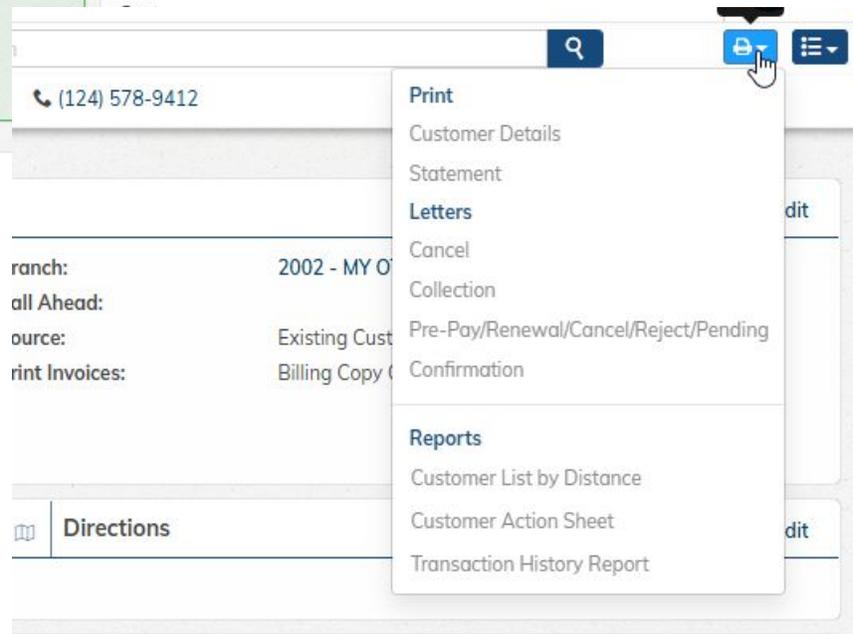
Add Call Log

Add New Note
(resolved call log)

Text Employee

Unresolved call
logs & summary
of calls

Customer tools have helpful features for payment, sells and customer specific utilities



Top right corner has shortcut to print customer specific forms.

Other Customer Screens

Documents

The Documents Tab will house all linked documents that are created within the Service Assistant platform or manually added from your computer. This could include Statements, Prepay Letters, and images from Measurement Assistant and Mobile Live.

If you are looking to create a Master Document from a template you created in Settings > Document Template Setup, you will do so here under **+ New**.

The screenshot shows the 'Documents' tab in the Service Assistant interface for Account # 32. The interface includes a navigation bar with tabs for Customer Details, Documents (6), History, Contact, Financial, Installments (0), and Stations (0). A search bar is present with the text 'Quick Search'. Below the navigation bar, the account information is displayed: Account # 32, 9-Active Audrey Hepburn, 369 Hollywood Pl, Fictional City, ID 12365, and phone number (124) 578-9412. The main content area shows a list of documents with columns for Type, Title, Filename, Category, Date, and Linked Program. The list contains six items, including 'testing the link', 'FL Wood-Destroying Organisms Inspection Report', 'monthly invoice', 'Statement', 'Letter', and another 'Letter'. Each item has a checkbox, a PDF icon, and a set of action icons (download, play, share, edit, delete). The interface also shows 'Showing: 25 Results' and a search bar within the list area. At the bottom, there are pagination controls showing 'Page 1 of 1 (6 items)' and a page number '1'.

Type	Title	Filename	Category	Date	Linked Program
PDF	testing the link	Invoice_32_20220504.pdf	Misc	5/4/2022, 8:54 PM	
Other	FL Wood-Destroying Organisms Inspection Report	32_FL_Wood-Destroying_Organisms_Inspection_Report	State Form	10/2/2018, 11:09 AM	
PDF	monthly invoice	32_MONTHINVOICE_2013043044478.PDF	Misc	4/30/2013, 12:21 PM	
PDF	Statement	32_STATEMENT_2011120561068.PDF		12/5/2011, 4:57 PM	
PDF	Letter	32_PREPAYLETTER_2011052635382.PDF		5/26/2011, 9:49 AM	
PDF	Letter	32_PREPAYLETTER_2011042238462.PDF		4/22/2011, 10:41 AM	

History

The History Tab is where you will find Services that have been posted and paid against, in addition to Financial Adjustments relating to the account.

There are some additional options available on this screen: 1) the ability to turn the list view into a graph view, 2) add a service, and 3) show all transactions or just unpaid/open transactions.

When you click on a transaction, it will open the detailed view on the right side.

If you need to make a refund or send a service summary, click the three lines on the right side of the screen.

The screenshot displays the 'Service Assistant' interface. At the top, there are navigation tabs: Customer Details, Documents (1), Forms, History (selected), Contact, Financial, Installments (0), and Stations (0). The account information for 'Account # 35' is shown, including the name 'Janet Evans' and address '5998 Burnham Rd, Bloomfield Hills, MI 48302'. The 'History' tab is active, showing a table of transactions with columns for Date, Code, Net Amount, Net Balance, Prepay Balance, Remit Balance, and Unpaid. Below the table is a 'Net Promoter Score' graph. On the right, the detailed view for 'Service: PP1 - Perimeter Pest 1' is shown, including posting information, billing details, and a financial summary.

Done	Code	Net Amount	Net Balance	Prepay Balance	Remit Balance	Unpaid
12/22/2023	PP1	\$51.76	(\$500.00)		(\$500.00)	
12/21/2023	VI	(\$500.00)	(\$551.76)	(\$51.76)	(\$500.00)	
12/21/2023	VI	(\$44.00)	(\$51.76)	(\$51.76)		
12/21/2023	CA	(\$51.76)	(\$7.76)	(\$51.76)	\$44.00	
11/9/2023	LC3	\$44.00	\$44.00		\$44.00	
9/25/2023	CH	(\$54.35)				
5/27/2022	LC3	\$54.35	\$54.35		\$54.35	
4/7/2022	10					

Net Promoter Score graph showing a score of 10.00.

Service: PP1 - Perimeter Pest 1
Program: PP - Perimeter Pest

Posted: 12/21/2023 5:26 PM - Chandra Mogensen
Prepay Code: 0% Prepay Discount
Invoice #: 2218
Billing Type: Regular / Invoice
Paid: 12/22/2023

Sold: 6/28/2021 MBB
Rating: 0
Crew Size: 1

Full Charge	\$51.76
	\$0.00
	\$0.00
Prepay Discount	\$0.00
Net Amount	\$51.76

Weather Details: 12:00 AM - 12:00 AM

Net Amount	\$51.76	
Previous Balance	+	(\$551.76)
Net Balance	(\$500.00)	

Net Balance	(\$500.00)	
Prepay Balance	-	\$0.00
Balance	(\$500.00)	
	(credit)	

Note: -None- Technician

Contact

The Contact Tab houses all of the contact history that has occurred with the customer. From Call Logs and Notes to Letters and Emails sent through Service Assistant, Automated Marketing Assistant and Customer Notification Assistant. This area is your one place to look back to see what communication this customer has received.

Preferences ✎ Edit

Preferences:

Email Statements Email Pre-Notify Text Pre-Notify

Restrictions:

Don't Direct Mail Don't Email Market Don't Upsell
 Don't Knock Don't Email Followup Don't Text
 Don't Email Invoice

Don't Telemarket:

National Local Customer Request

CAW:

CAW Registered CAW Autopay

Customer Notification Unsubscribe:

Service Email Administrative Email SMS Status: None

Preferred Contact:
Method: None Language: English

Memo ✎ Edit

General Alert: Payment Alert:

Letters + New Letter

🔍 Search...

Letter	Print Date	Printed By	Linked
Export - Customer List Report	07/22/2025	EBETH	
Confirm - new sale	05/24/2022	EBETH	
Export - Special Job Man Hour Report	12/17/2013	EBETH	
Prepay Letter	05/26/2011	EBETH	
Prepay Letter	04/22/2011	EBETH	

Call History ▼ Show All Notes

Enter Date Range: 📅 Earliest to date 🔍 Search...

Entered	Assigned To	Status	Completed	Due
1 01/22/2023	EBETH	New Call		1/22/2023

Contact: Audrey Hepburn

Date	Employee	Reason	Note
1/22/2023 12:22 PM	EBETH	In House Note	

Entered	Assigned To	Status	Completed	Due
1 01/09/2023	Apple Pie	Collection Call - soft call		1/9/2023
1 01/04/2021	Apple Pie	Collection Call - soft call		1/5/2021
2 01/12/2017	Kitty Cat	Resolved	1/4/2021	1/12/2017
2 05/10/2012	Sundance	Resolved	5/25/2012	5/10/2012

Email History

Sent	To	From	Subject
11/30/2022, 2:56 PM	elizabethhlavaty@yahoo.com	ehlavaty@workwave.com	Monthly Invoice- testing sticky

Customer Notification History

Queued	Sent	Name	Product	Link
No data				

Financial

The Financial Tab will hold Balance Details, Collection information, Aging, Prepay, and Statements.

Under Statements, you can select to print a statement just for this customer, after running the Aging Utility by clicking on the reverse clock symbol next to Debit Aging Balance.

The screenshot displays the Financial tab interface with the following sections:

- Balance Details:** Net Balance: \$185.50, Last Pmt Date: 6/13/2024, Prepay/Applied Balance: \$0.00, Last Pmt Amt: \$720.00, Remit Balance: **\$185.50**, Credit Limit: \$99,999.00.
- Collections:** Do NOT Charge Interest: , Collection Date: , Do NOT Put on Credit Hold: , Agency Export Date: , Send Statements: For Remit Balance, Collection Status: .
- Debit Aging Balance:** 1 - 15 Days: \$185.50, 16 - 30 Days: \$0.00, 31 - 60 Days: \$0.00, 61 - 90 Days: \$0.00, 91 - 120 Days: \$0.00, 121 - 180 Days: \$0.00, Over 180 Days: \$0.00, Last Aging Date: 3/28/2025.
- Statements and Fees:** Last Statement: 5/3/2018, Last Invoiced Service: 10/31/2024, Last Interest: 1/4/2021, Interest Amount: \$5.61.
- Prepay Information:** Statement History (5), Collection History (0).
- Printed Table:** A table with columns: Printed, Employee, Balance, Prepay, Remit, ID #. Data rows include dates like 5/3/2018, 1/18/2013, 12/5/2011, 9/8/2011, and 7/26/2011, all for employee EBETH.

Installments

If a customer will be setup or has installments this tab will give all information regarding the Installments.

Click on New Installment Plan to begin setting up an installment plan for your customer.

Note: This tab could be disabled from general setup - financial

Service Assistant | Account # 439 | 9-Active Bug's Carrot Farm - Bug's Carr... | 1 Bugs, Novi, MI 48377 | (734) 555-5555

Installment Plans | + New Installment Plan

ID	Status	Approved	Expires	Amount
62	Active	12/26/2023	10/1/2024	\$100.00

Page 1 of 1 (1 items)

Installation Detail Summary

Auto Renew: Yes
Renewed: No
Bill Credit Card/ACH: No
Status: Active
PO #:
Approval Date: 12/26/2023
Expiration Date: 10/1/2024
Coupon Date:

	Amount	Tax
Completed Services		
Installments Billed		
Installation Balance		
Payments Received		
Net Installation Balance		

Calculated Installment: Manual Installment: \$100.00
Services Remaining: Installments Remaining: \$100.00
Tax: Tax:
Total: Total: \$100.00

Schedule | 1st Due Date: 1/1/2024 | # Payments: 10

Due Date	Posted	Amount	Tax Amt. 1	Tax Amt. 2	Tax Amt. 3	Prep Disc.	Net Amt.	Invoice No.
1/1/2024		\$10.00	\$0.00	\$0.00	\$0.00	\$0.00	\$10.00	
2/1/2024		\$10.00	\$0.00	\$0.00	\$0.00	\$0.00	\$10.00	
3/1/2024		\$10.00	\$0.00	\$0.00	\$0.00	\$0.00	\$10.00	
4/1/2024		\$10.00	\$0.00	\$0.00	\$0.00	\$0.00	\$10.00	
5/1/2024		\$10.00	\$0.00	\$0.00	\$0.00	\$0.00	\$10.00	
6/1/2024		\$10.00	\$0.00	\$0.00	\$0.00	\$0.00	\$10.00	
7/1/2024		\$10.00	\$0.00	\$0.00	\$0.00	\$0.00	\$10.00	
8/1/2024		\$10.00	\$0.00	\$0.00	\$0.00	\$0.00	\$10.00	
9/1/2024		\$10.00	\$0.00	\$0.00	\$0.00	\$0.00	\$10.00	
10/1/2024		\$10.00	\$0.00	\$0.00	\$0.00	\$0.00	\$10.00	

Services | All Services

Year	Program/Special Job	Description	Included	ID	Amount	Completed
2023	Program	LP6 - Lawn Care Program 6	✓	62	\$0.00	

Notes

Stations

If using Stations this tab will give all information regarding those Stations.

This is generally used with, but not limited to, indoor pest applications.

Note: This tab could be disabled if there are no station types created in setup.

The screenshot displays the WorkWave Service Assistant interface. At the top, the user is identified as 'Service Assistant'. The navigation bar includes tabs for Customer Details, Documents (1), Forms, History, Contact, Financial, Installments (0), and Stations (0). A search bar is present on the right. The main content area is divided into two sections: 'Stations' and 'Station Detail'. The 'Stations' section features a table with columns for Status, Name, Type, Barcode, Location, and Bait Barcode. The table is currently empty, displaying 'No data'. The 'Station Detail' section provides fields for Station Name, Station Barcode, Location, Notes, Station Type (set to 'Bait'), Station Status (set to 'Add Station'), and Location Description. A 'Station History' section is also visible at the bottom of the detail view.

Add Customer

Add Customer - Step 1

The address search will look for internet address matches based on your location. If you select a result, it will fill in the specific fields for you.

However you need to select status, residential commercial and add the company name, customer name and contact information.

1 Step 1 Customer Information

2 Step 2 Property Information

Customer Information

Address Search:
Use this field to automatically populate the address fields below.

Status: 0 - estimated requested Residential Commercial

Company:

Title / First / Last: (None) First Name Last Name

Address: House # Street

Address Line 2:

Country: United States County: (None)

City / State / Zip: City State Zip

Home Phone () - - - - -

Work Phone () - - - - -

Cell Phone () - - - - -

Other Phone () - - - - -

Fax () - - - - -

Text / Pager () - - - - -

Email:

Call Ahead: (None)

Billing Address Use service address Master Account Group Billing Account: Nothing selected

Bill With Group

Add Customer - Step 2

Some information will default based on parameter setup. You will want to select source (how did you hear about us) Any other information that you can gather to create the account.

Property Information

Branch: * 1001 - Your Company Name Source: * (None)

Route / Territory: (None) (None) Map Code: Select...

Subdivision: (None)

Size / Unit / Source: 1000 Sq. Feet Measured

Tax 1: * 5 (5%) - 5-5% Tax Tax 2: (None)

Tax 3: (None) Find Neighbors

Invoice / Worksheet Notes: 0/700 Directions :

Other Options: Flag Codes Property Inventory

Cancel Back Save

When ready to save, you have options, you can save and then go to the customer record, go directly to add a job to perform an estimate, measure the property or if you know measurements go to our sales quoting tool.

Save & Add Job

Save & go to Suggested Service Price

Save & go to Measurement Assistant

Back Save

Questions?

Session Feedback

- Login to the Event Mobile App
- Add this session to your schedule
- Click Survey
- Give it a rating 1-5 stars

**Sign up on 2/4
and receive 20%
off your ticket!**

 **BEYOND SERVICE**
CUSTOMER CONFERENCE '27

**SEE YOU IN
NEW ORLEANS!**

Sunday, January 31, through
Wednesday, February 3, 2027

Hilton New Orleans Riverside

