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

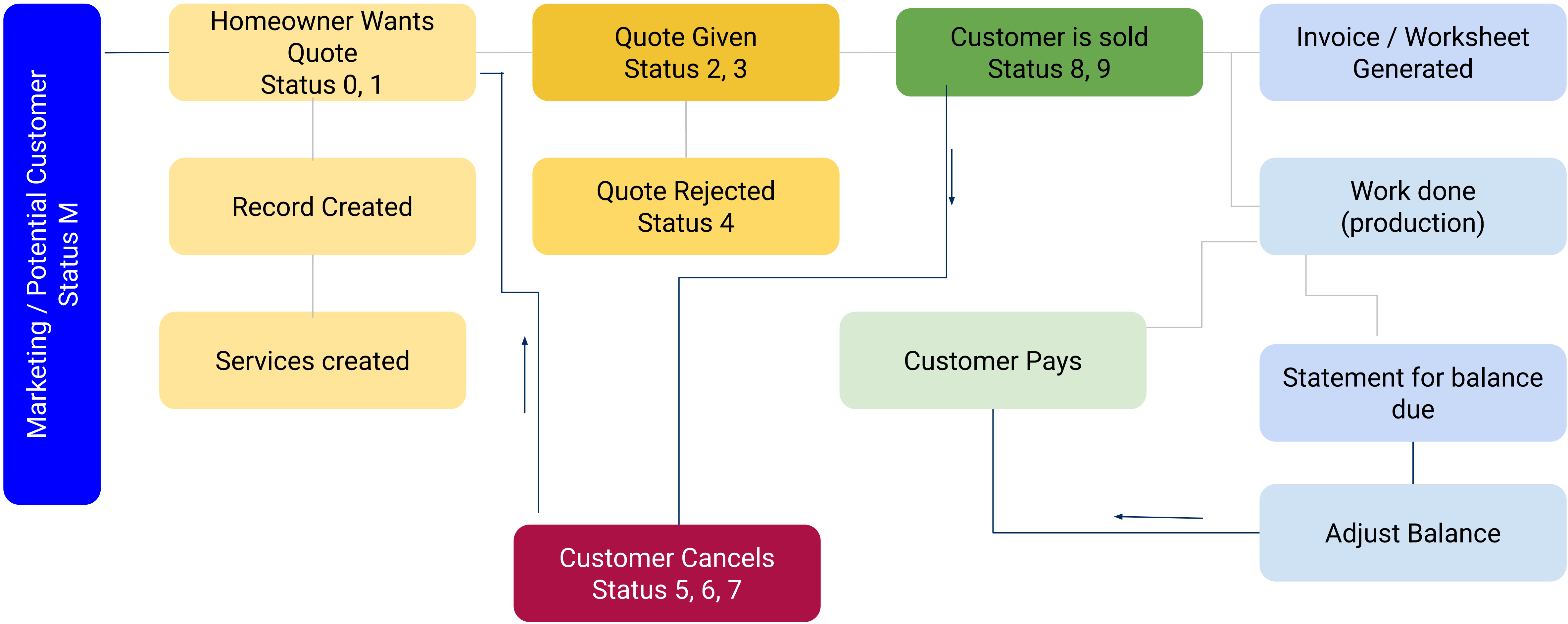
Introductions

Elizabeth Hlavaty (Ebeth)
Thom Boersma
Matthew Gifford

House Keeping

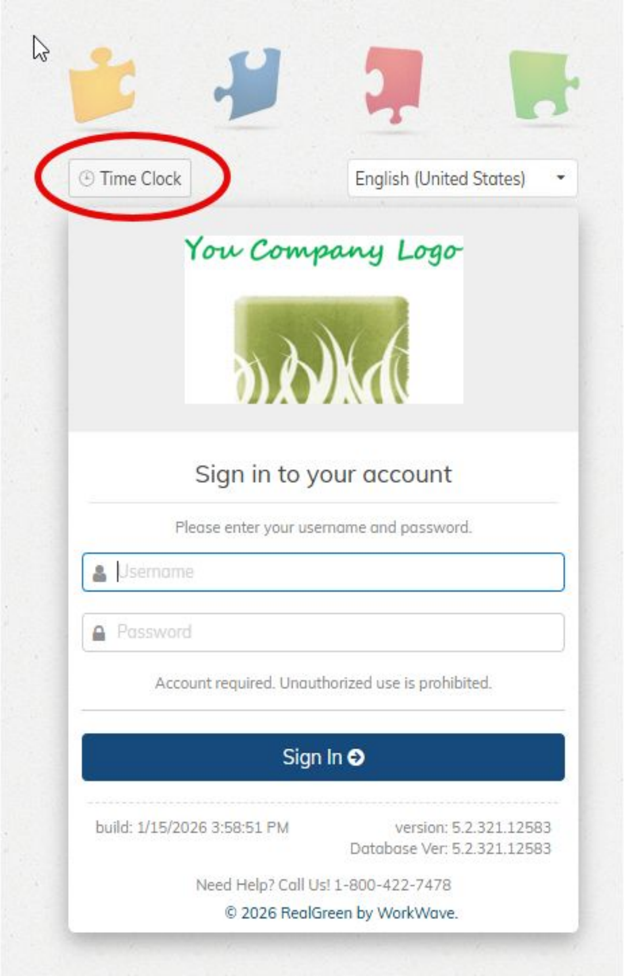
- This is a lecture room, sound carries!
- Please silence your cell
- We will have at least 10 minute break between sections to talk to neighbors or presenters.
- Please keep questions relative to the topic at hand.

Customer Life Cycle

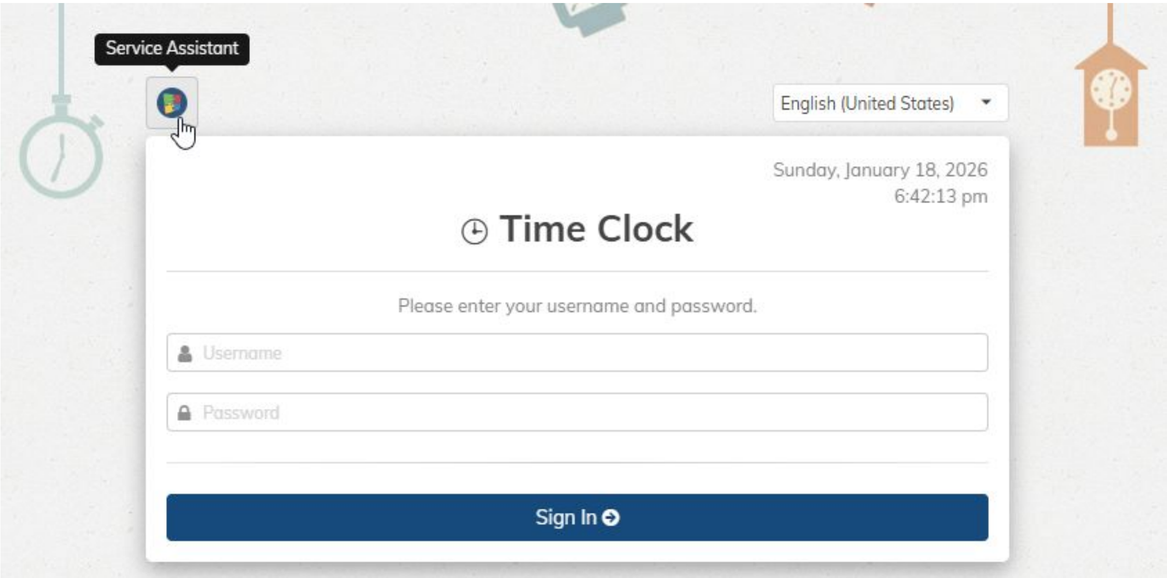


Login & Navigation

Login & Navigation



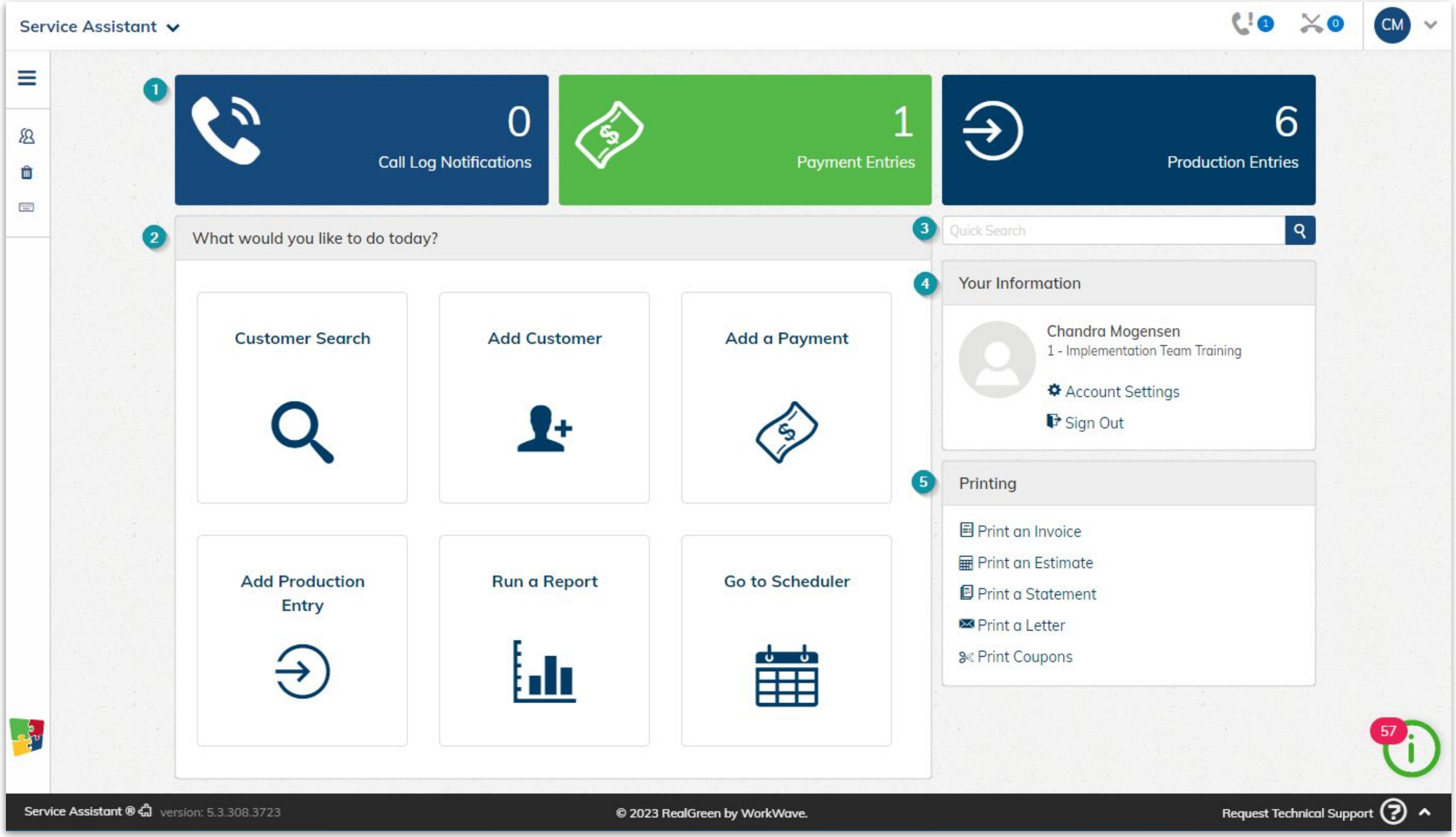
If you login to the time clock first, you will still need to log into SA5.



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

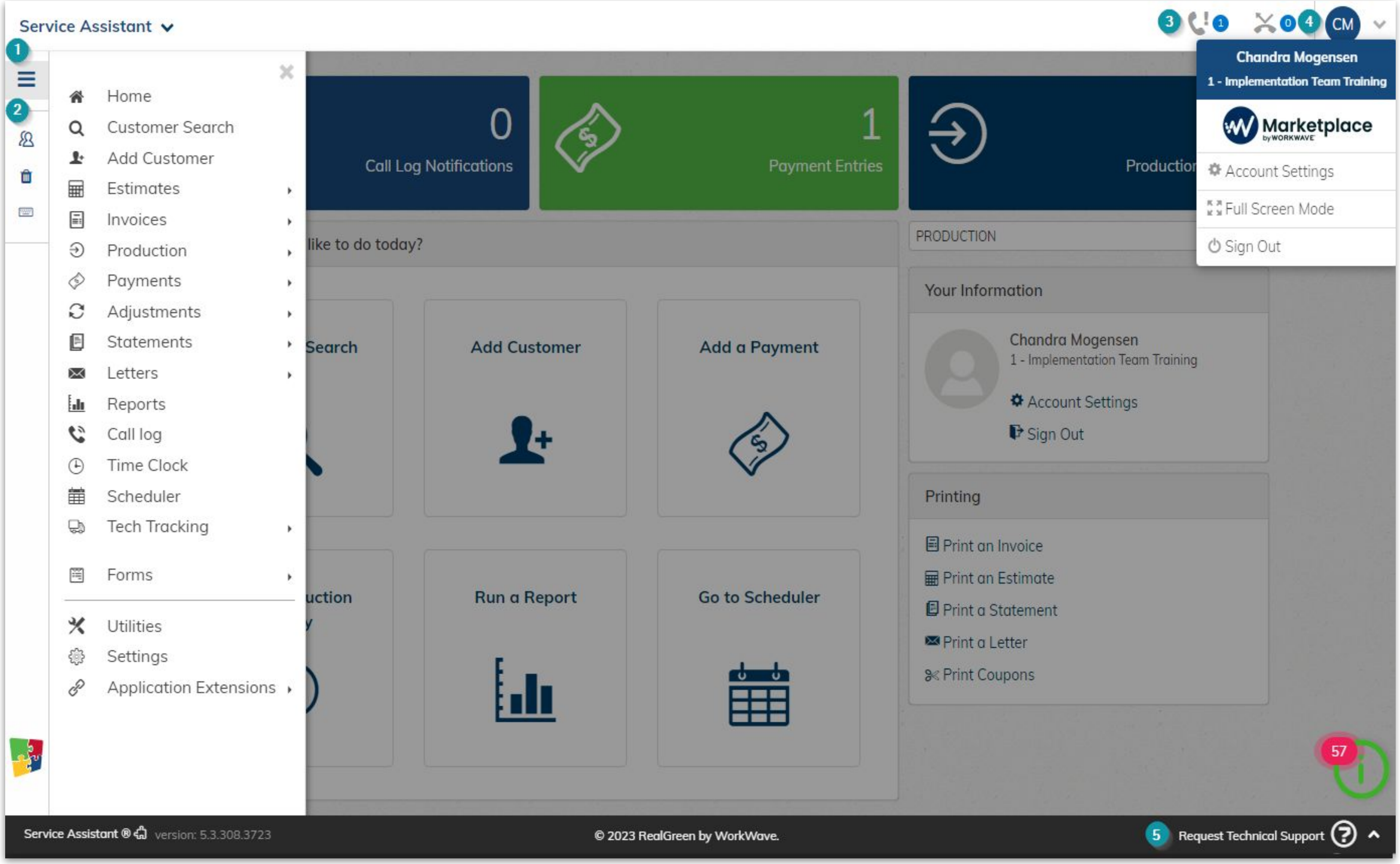
Home Screen

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.



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.

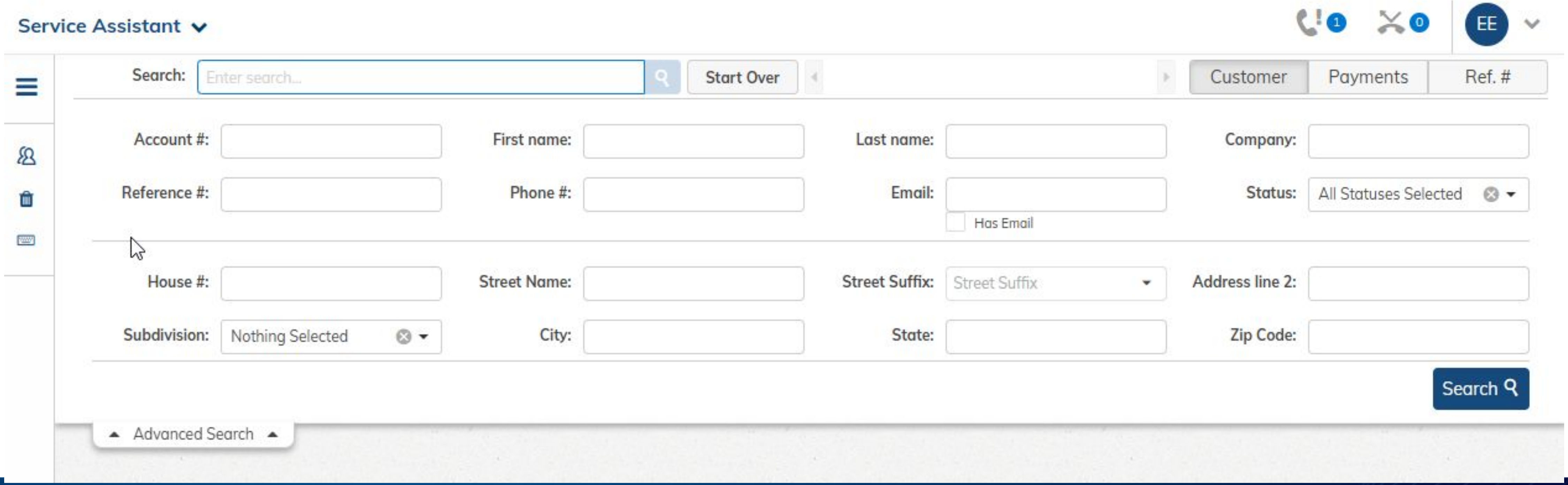


Search

Customer Search

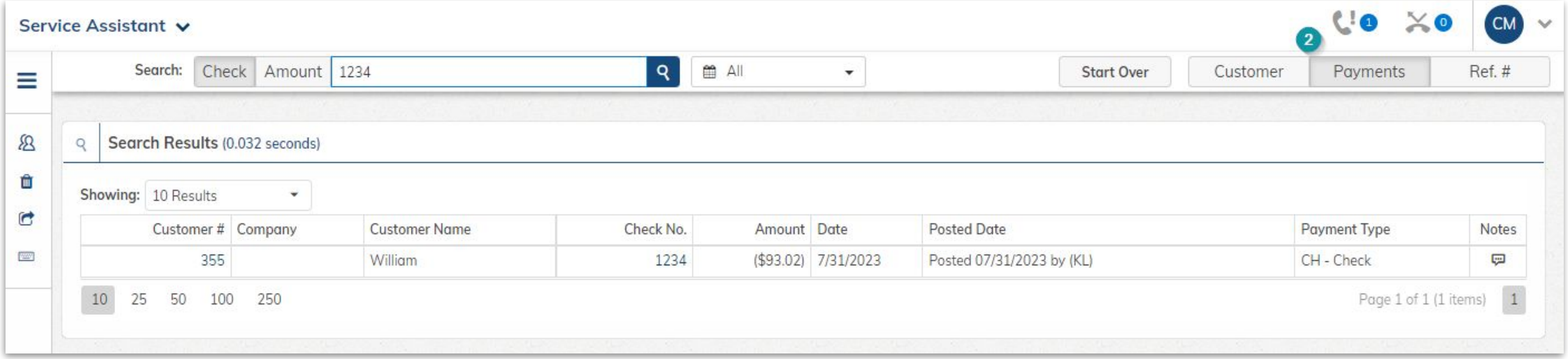
The open search bar will look for any matches found in the customer fields.

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

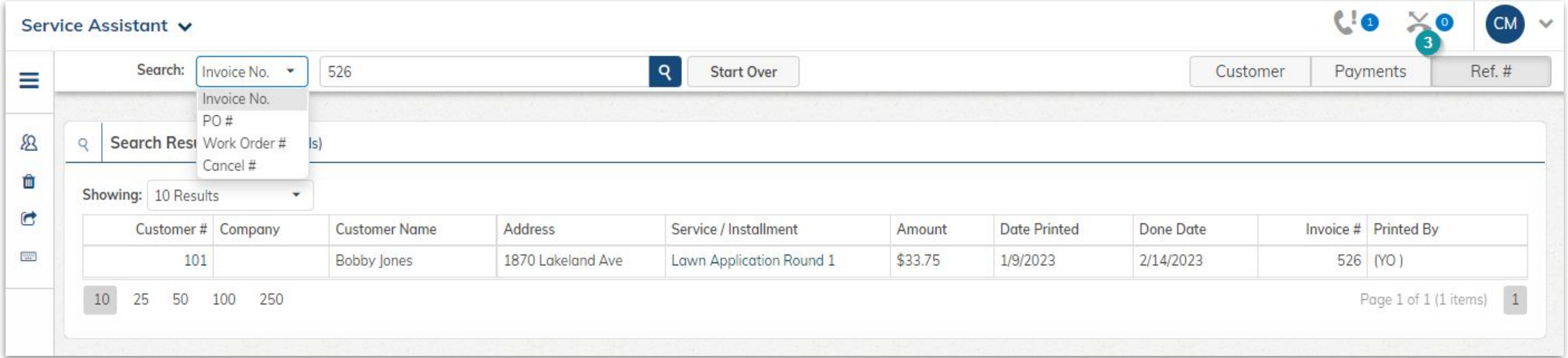


Payment & Reference Search

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

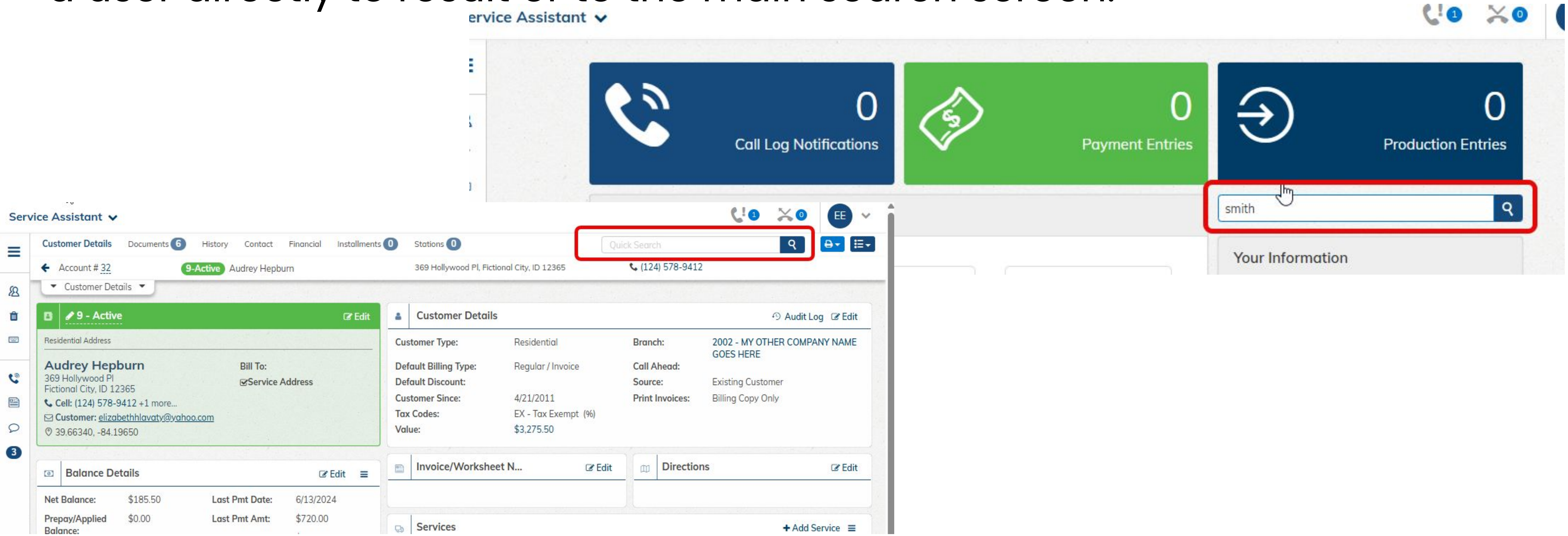


Reference field can be invoice, PO, work order or cancel number

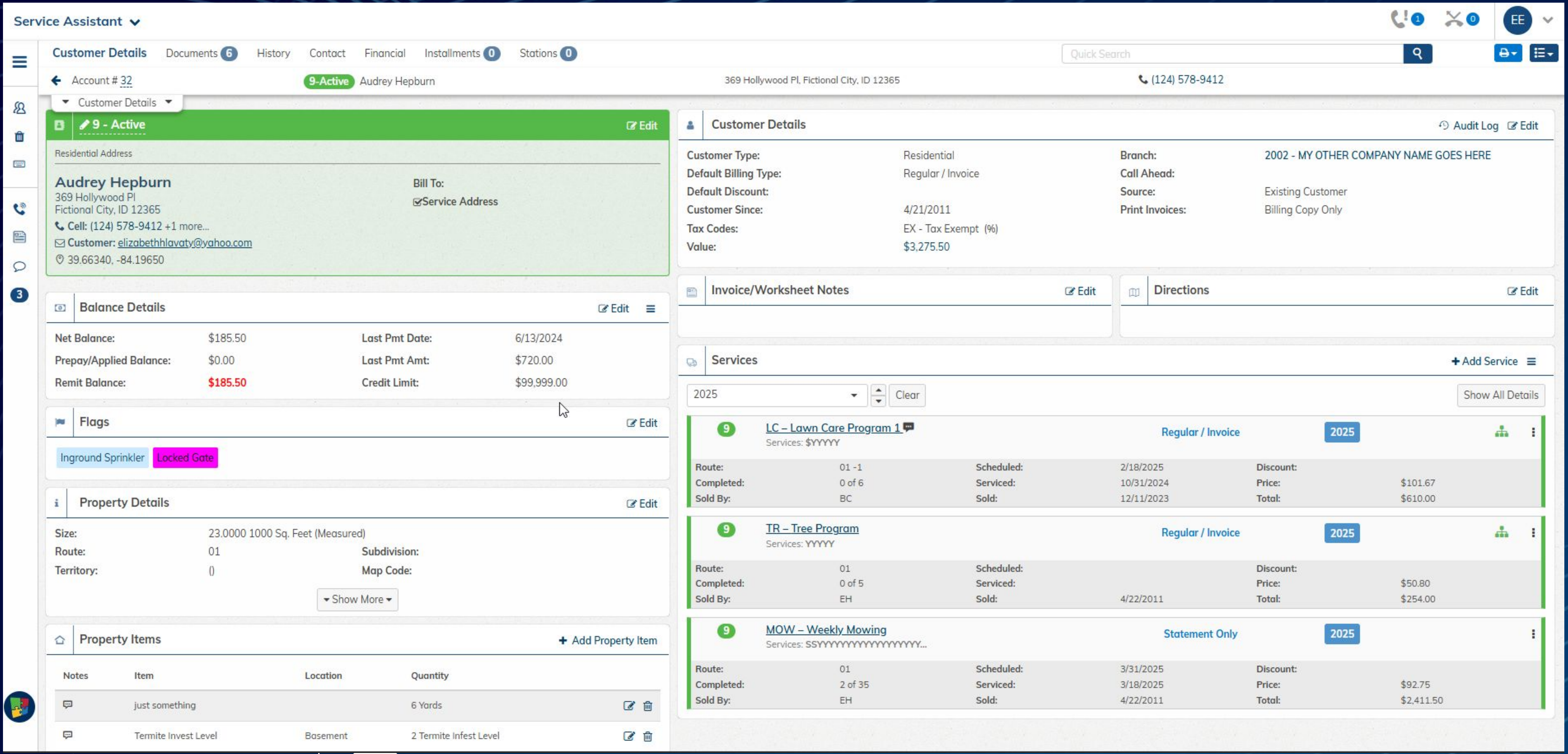


Quick Search

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.



Customer Details

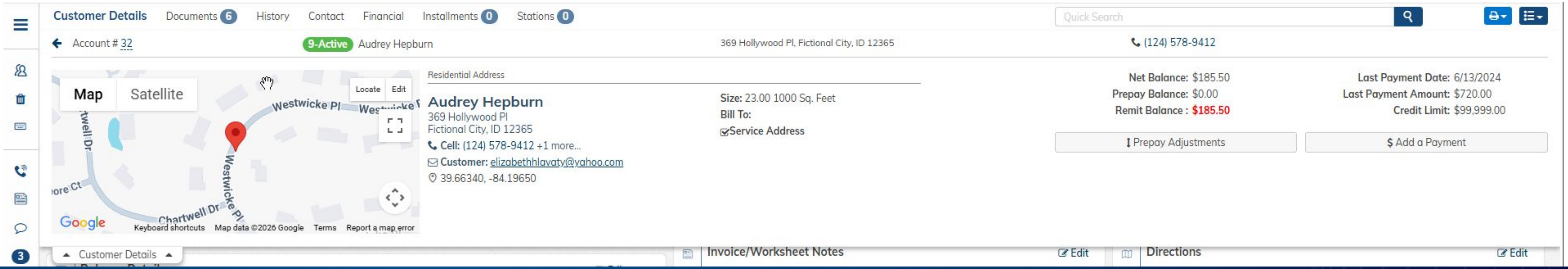


Customer Screen –Window shade details

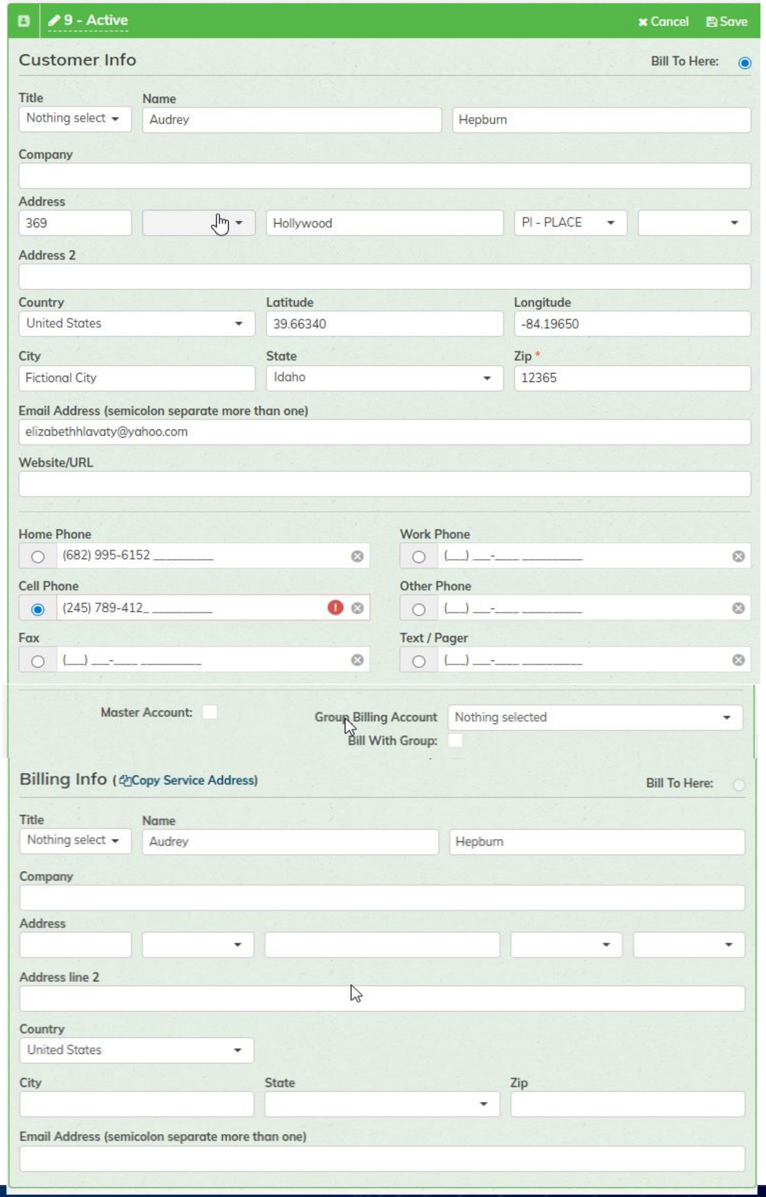
The customer screen itself was designed to allow someone to answer most all questions about an account directly from here without having to go into other screens

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.



Customer Screen – basic information

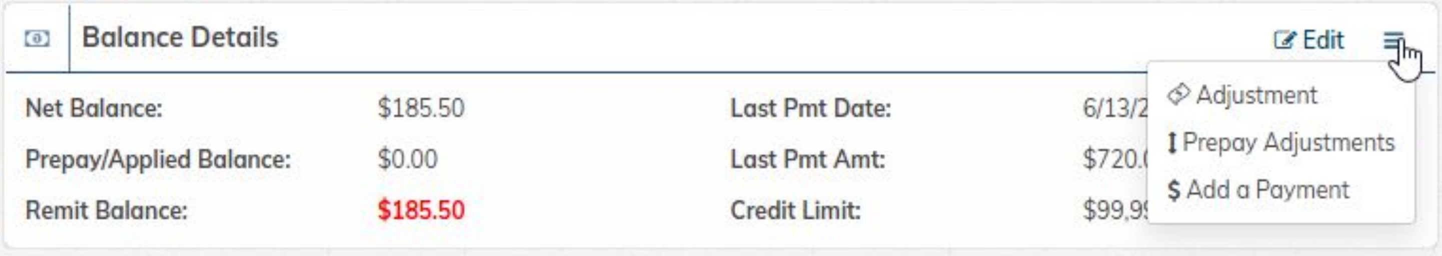


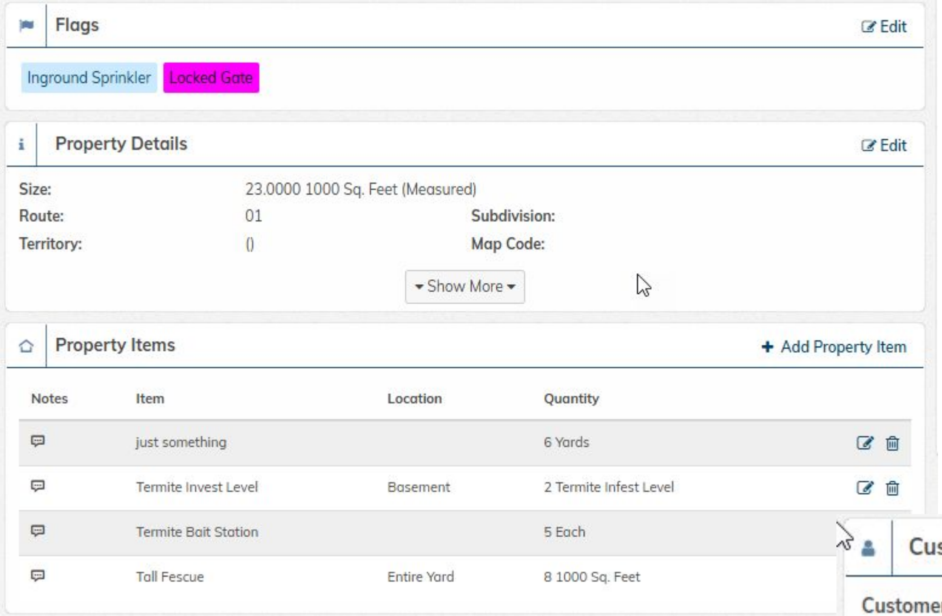
The color of the customer name and address box represent the status colors.

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

Customer Screen- Balance and Property Details

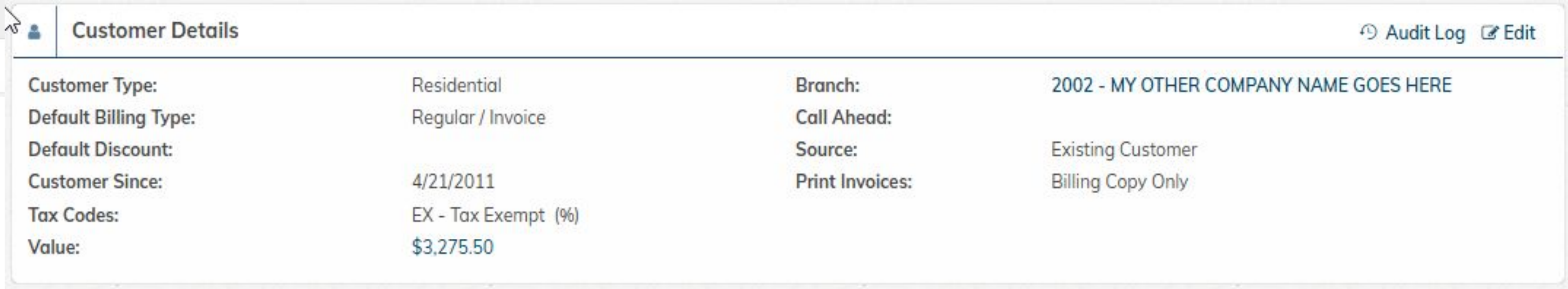
Balance Details also includes shortcuts to adjust a customers balance or apply a payment





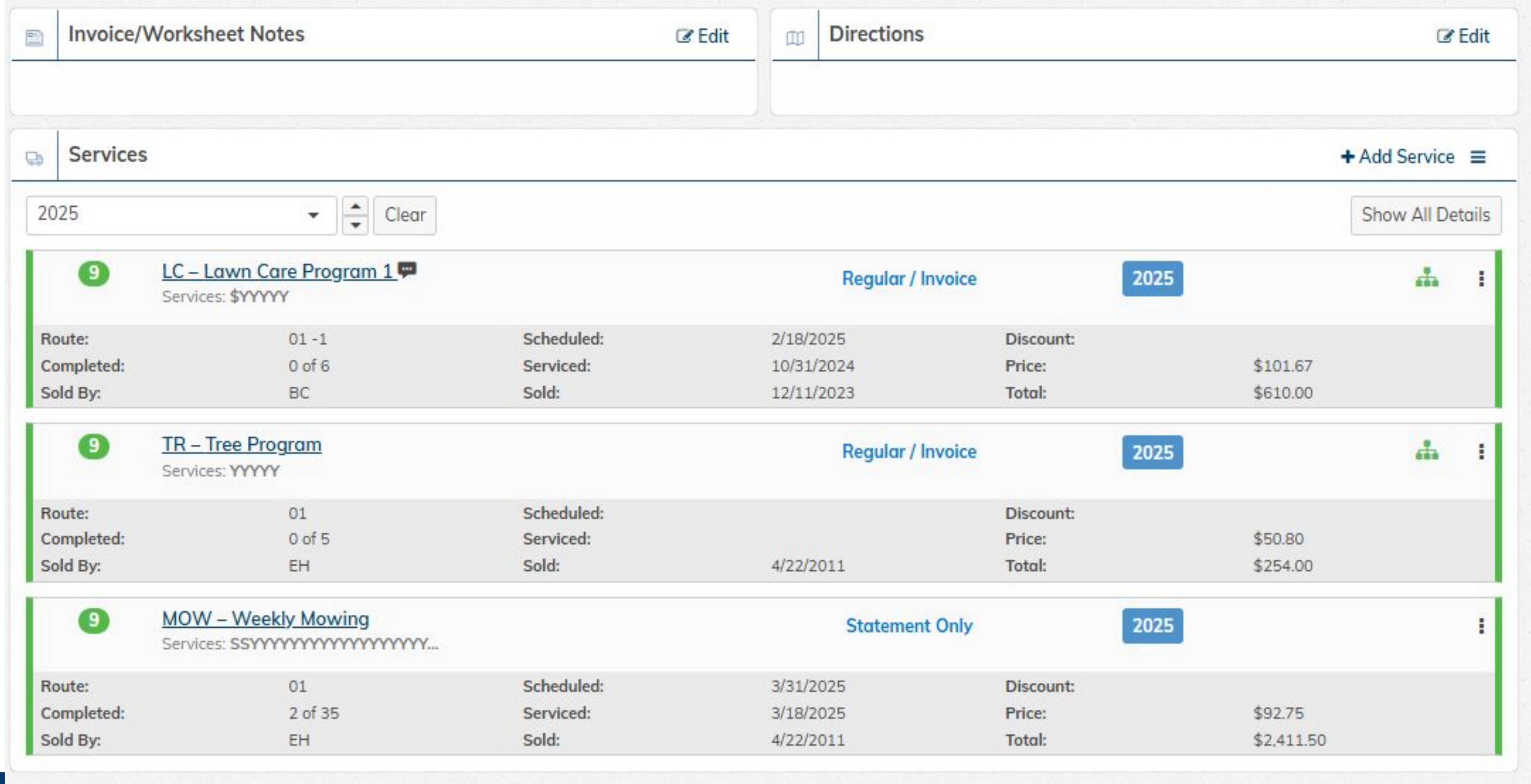
- Flag codes can be created for any purpose to identify a property, a customer or specific records.
- Property details include the size, route and also property inventory items that help to track additional sizes used for different service lines

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



Customer 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.



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

Customer Utilities and Shortcuts

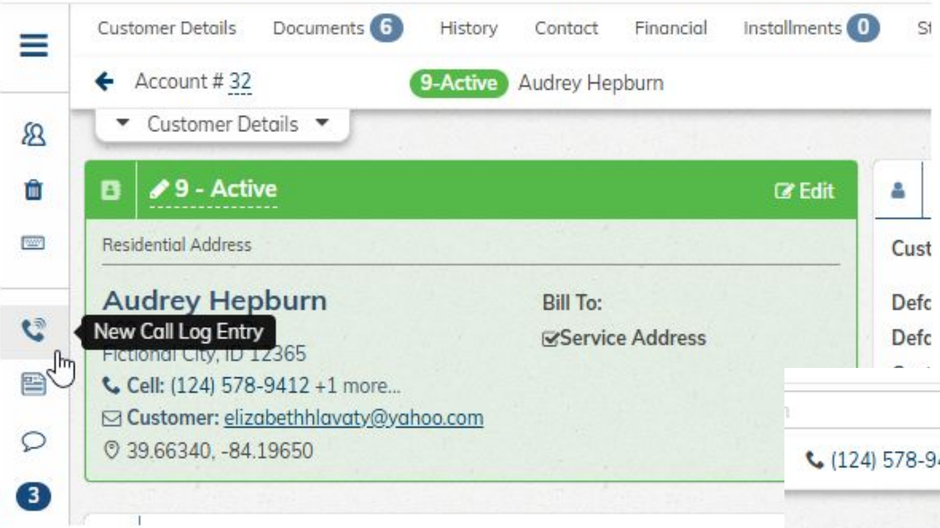
Customer Utilities and Shortcuts

Add Call Log

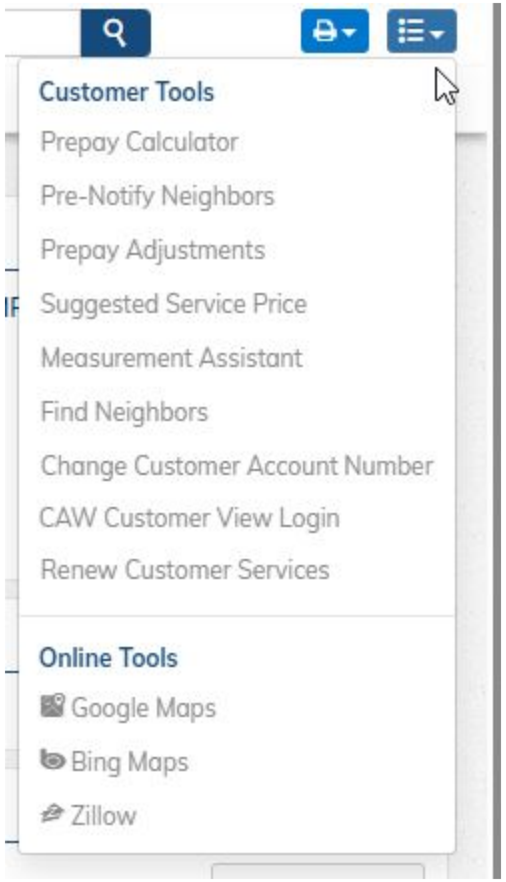
Add New Note
(resolved call log)

Text Employee

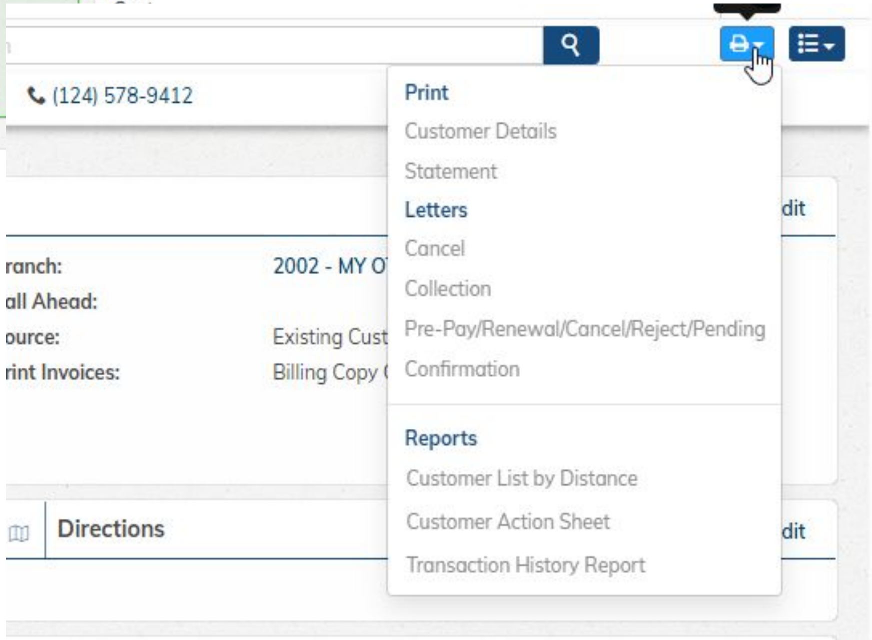
Unresolved call logs & summary of calls



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



Top right corner has shortcut to print customer specific forms.

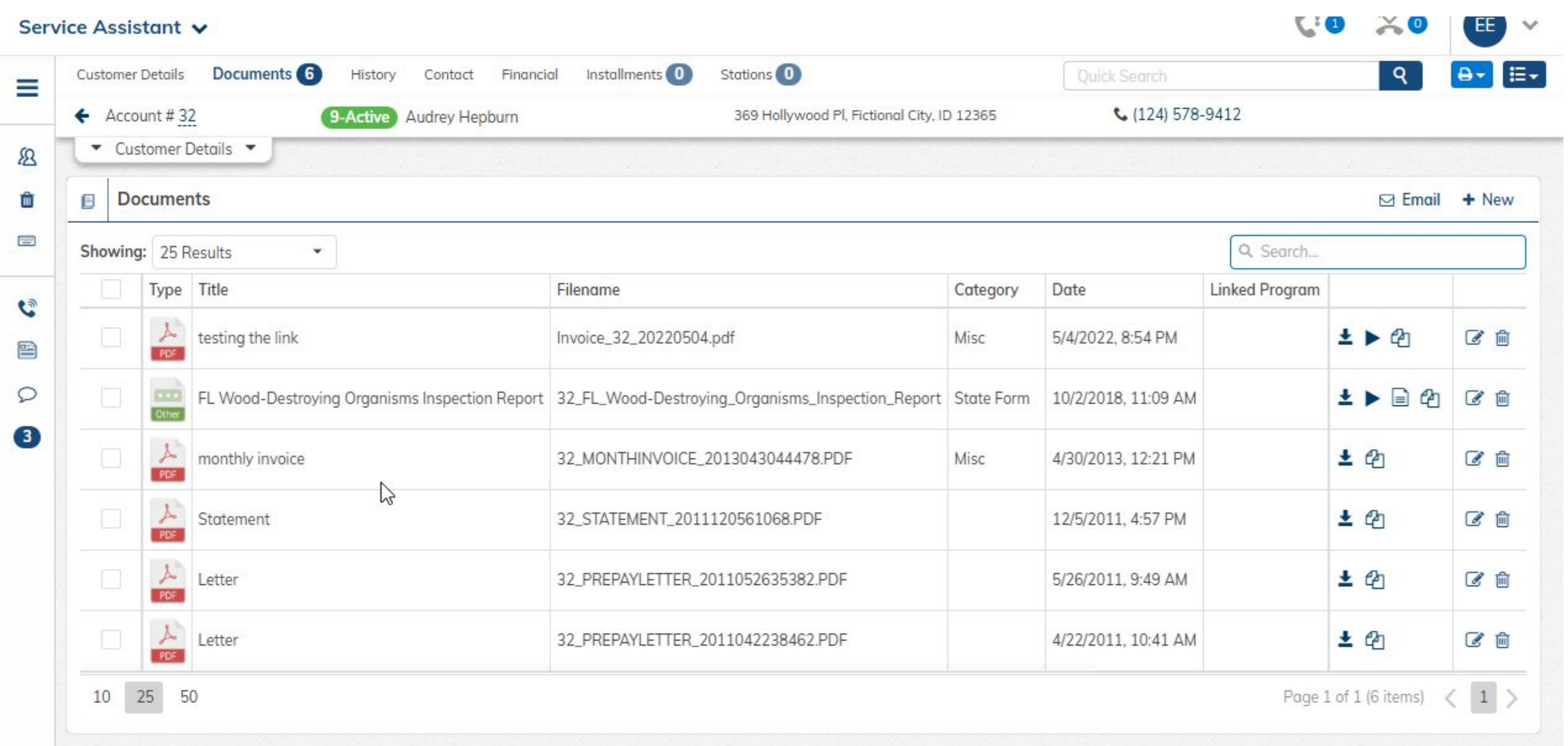


Other Customer Screens

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**.



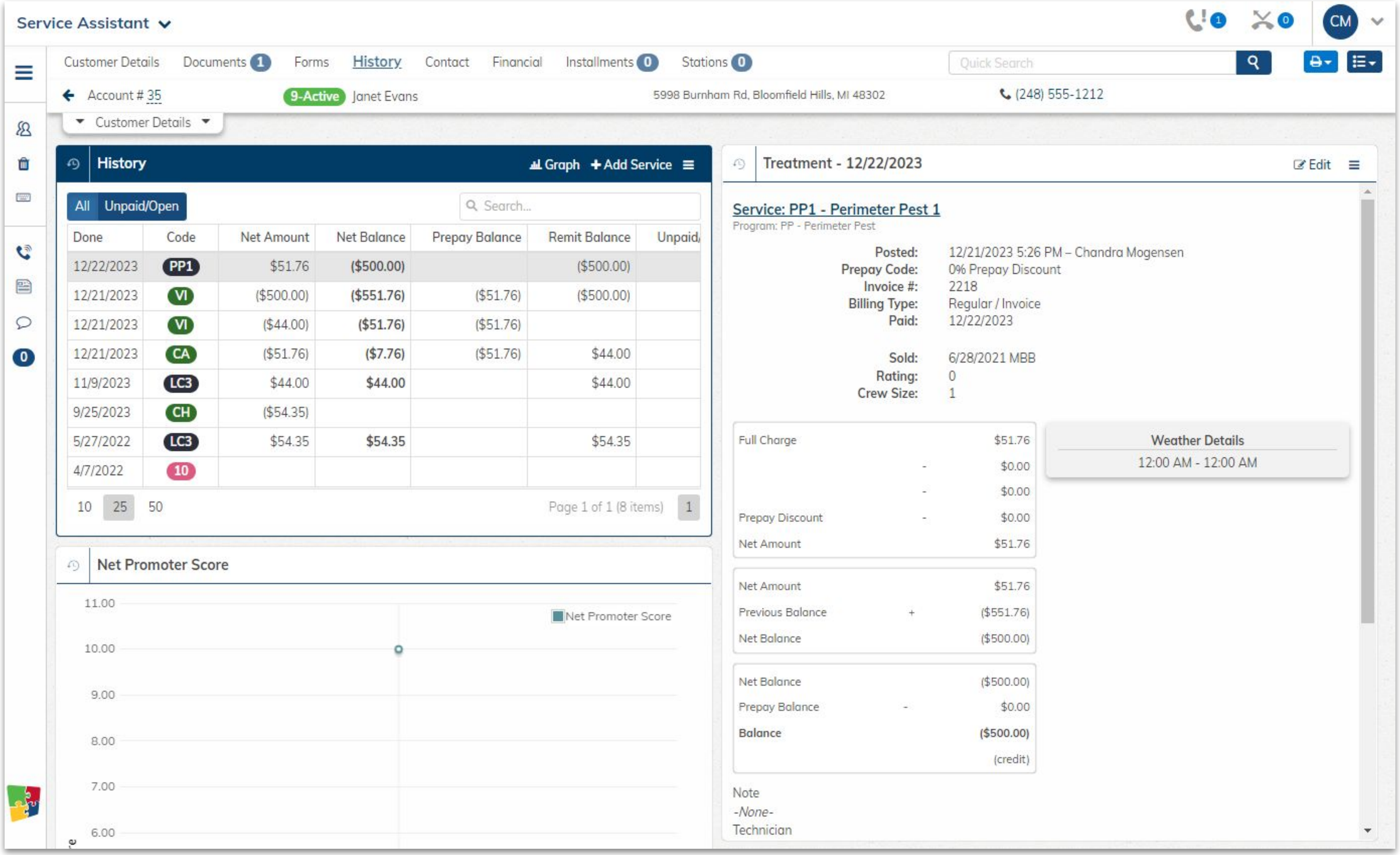
History

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.

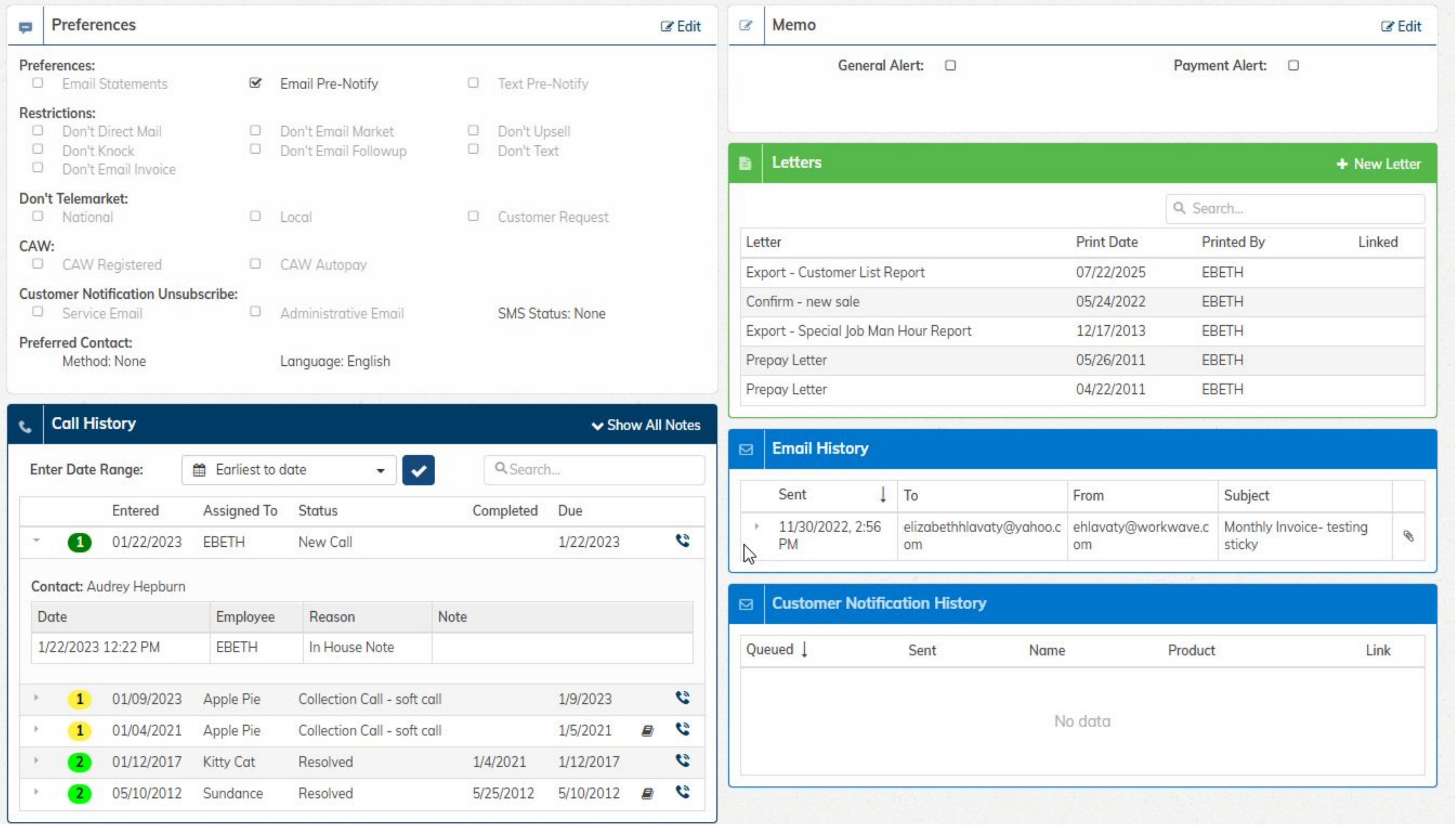
When you click on a transaction, it will open the detailed view on the right side.

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



Contact

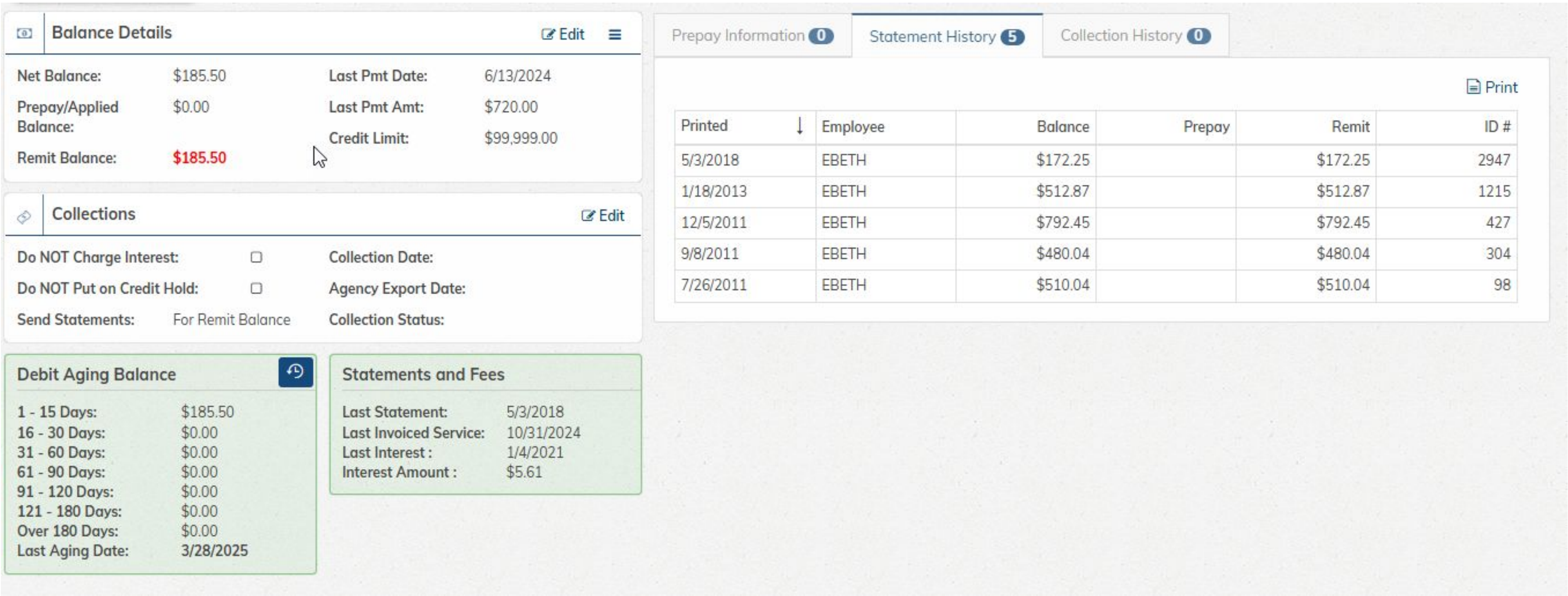
The Contact Tab houses all of the contact history that has occurred with the customer. From Call Logs and Notes to Letters and Emails sent through Service Assistant, Automated Marketing Assistant and Customer Notification Assistant. This area is your one place to look back to see what communication this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



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.

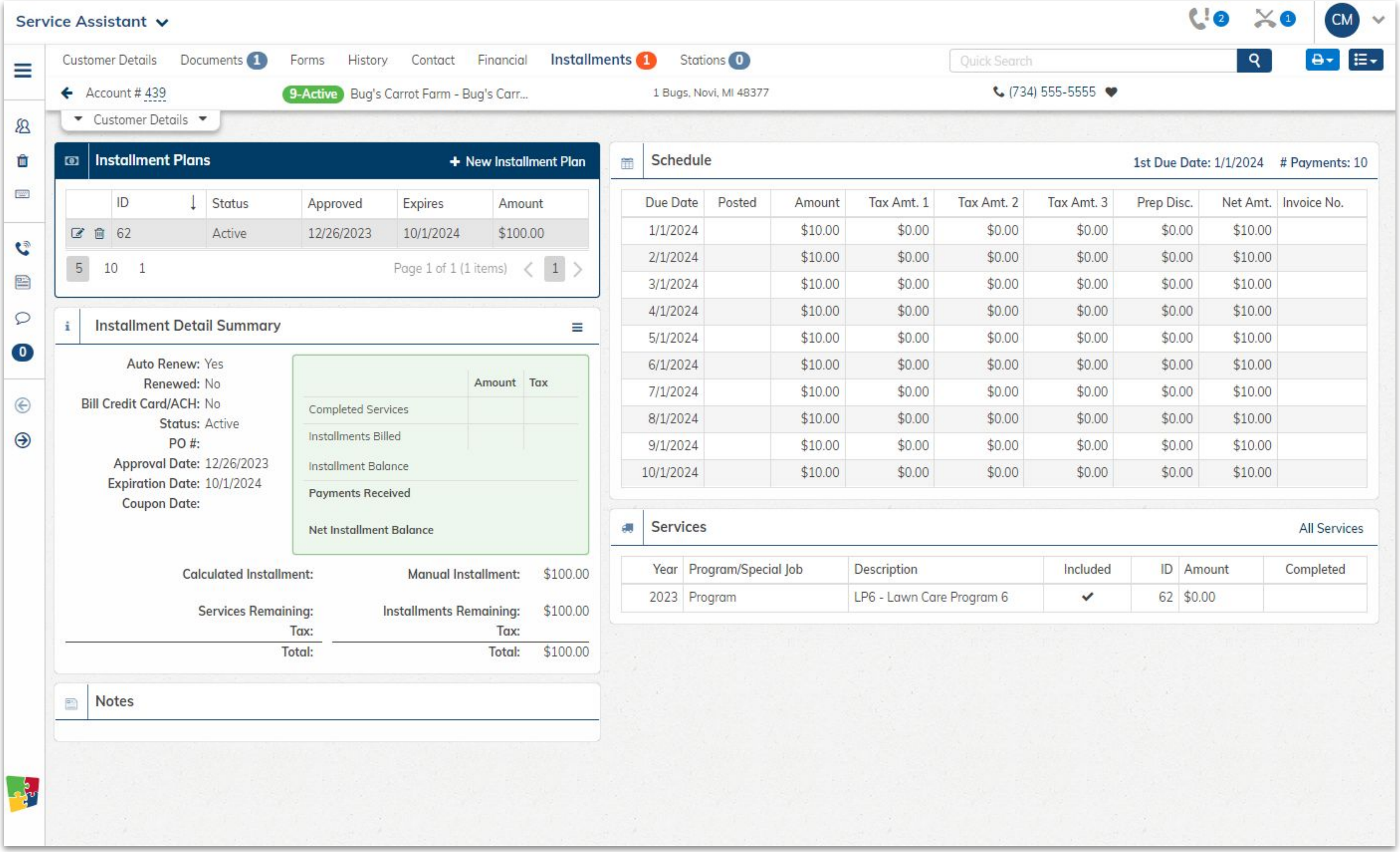


Installments

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

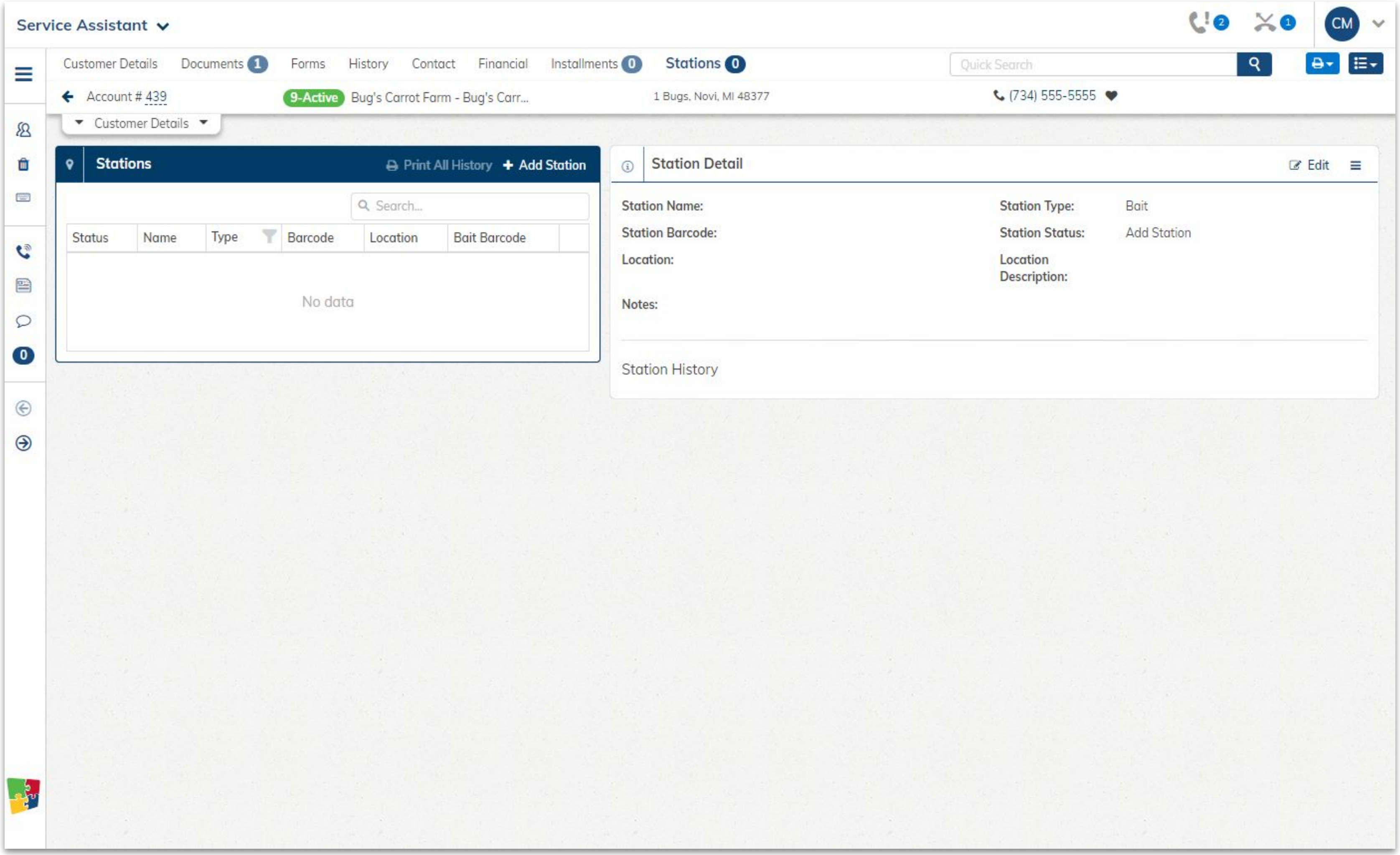


Stations

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 ar no station types created in setup.

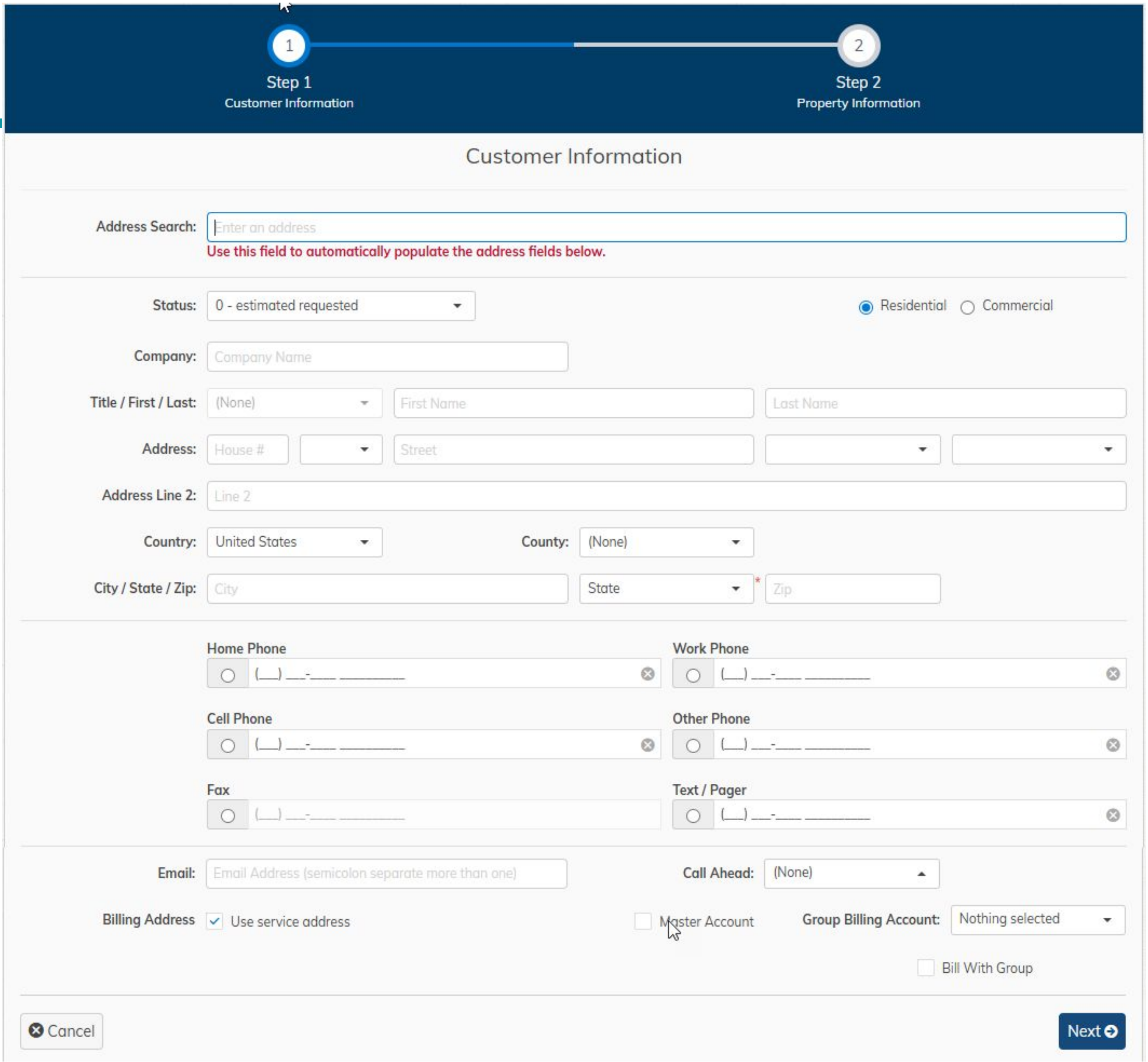


Add Customer

Add Customer – Step 1

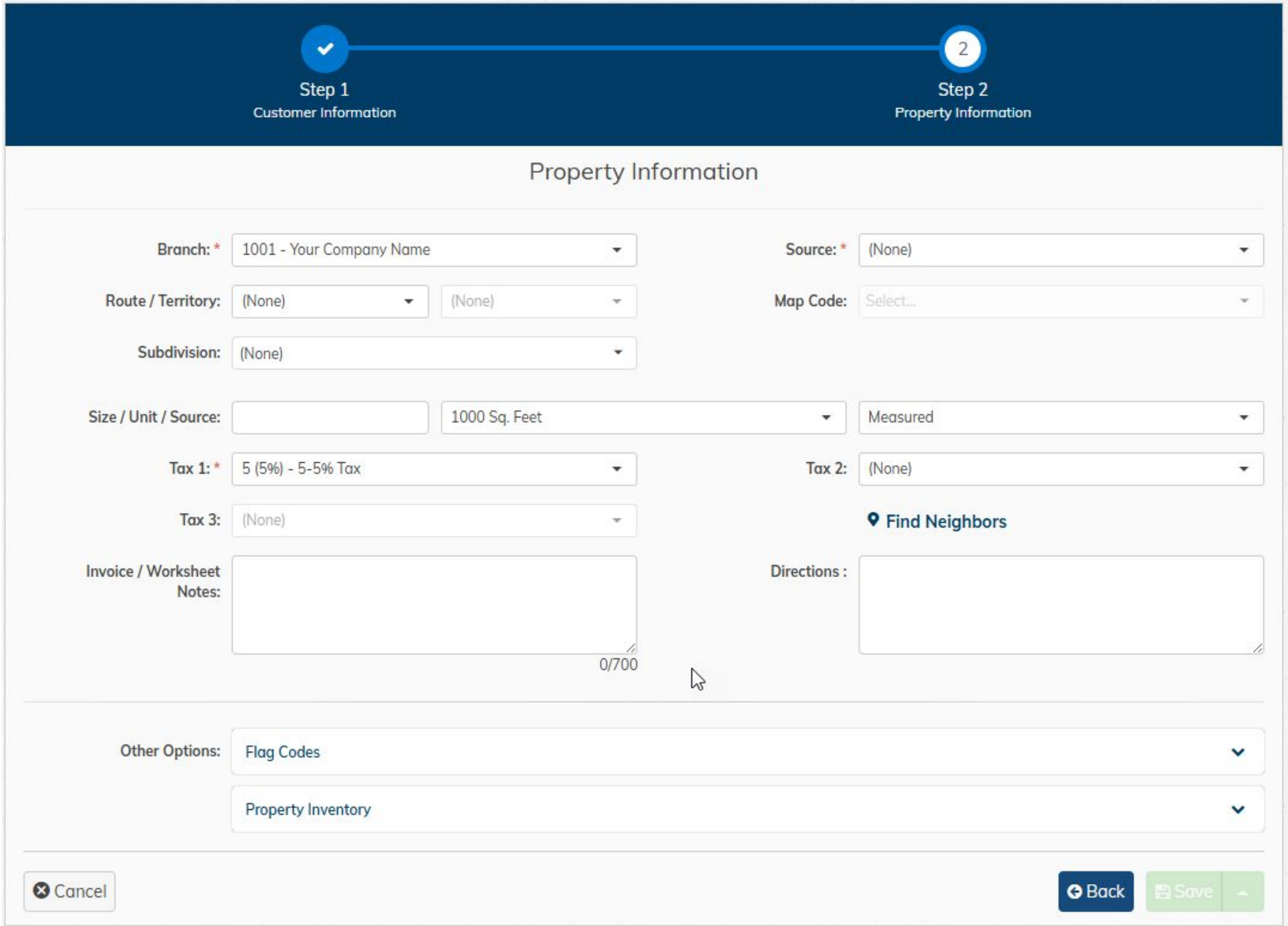
The address search will look for internet address matches based on your location. If you select a result, it will fill in the specific fields for you.

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

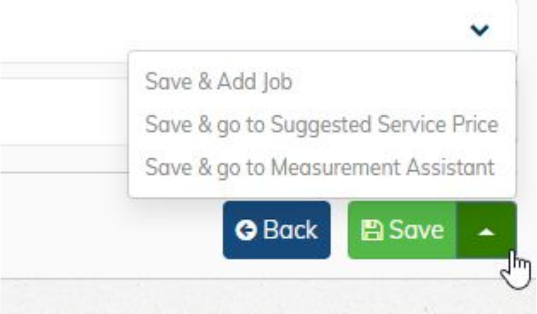


Add Customer – Step 2

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.



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.



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

RealGreen by WORKWAVE

TEAM Software by WORKWAVE

PestPac by WORKWAVE