



Mastering RealGreen Mobile 201

All the fun stuff!

Presenters



David Cimbalnik
Product Owner



Shah Buyuk
Sr. Product Designer

Agenda

- Live Truck Tracking
- Call Logs
- Modify Route
- Balance Timers
- Customer Search
- Create Customer
- Add Program/Special Job
- Produce a Job
- Service Search
- Customer Details
- Processing Payment
- Reschedule Service in a Job
- Associate Service
- Daily Overview Report

Live Truck Tracking

Service Assistant > Tech Tracking > Live Truck Tracking

Map Options

Date: 09/30/2024

Employee	Prod. \$	Miles
ABO	\$1,205.50	14.03
AWE	\$1,602.00	19.36
BBE	\$1,049.00	24.62
BS1	\$0.00	0.00
DPA	\$697.00	23.12
DSA	\$1,281.00	0.00

Production \$: \$5,834.50
Completed \$: \$5,834.50
Incomplete \$: \$0.00
of Vehicles: 6
Miles Driven: 81.12

Sequence By: Completion

- Show Completed Stops (104 Stops)
- Show Future Routes
- Show if Idle for more than: (104 Points) 5 Minutes
- Show Speeds over: (1 Points) 55 MPH
- Automatic Refresh:

Truck Tracking

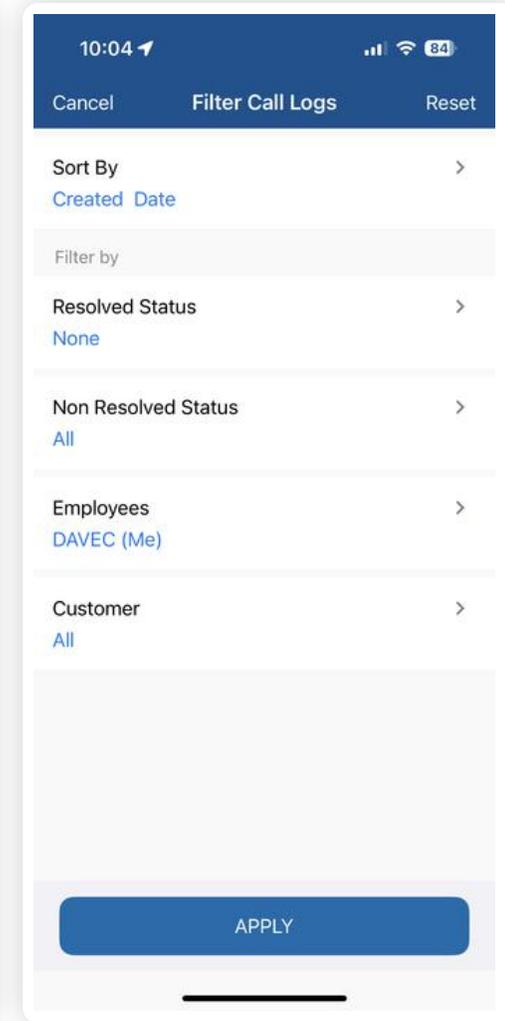
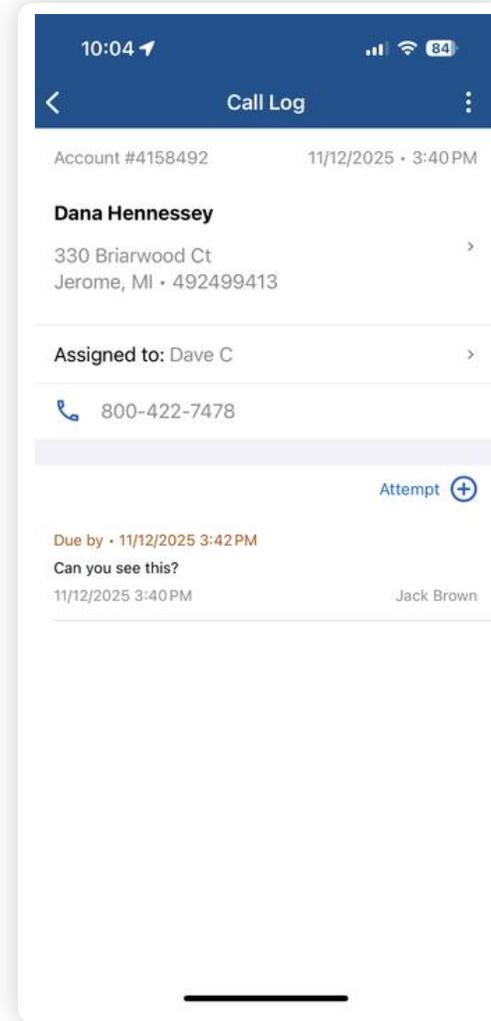
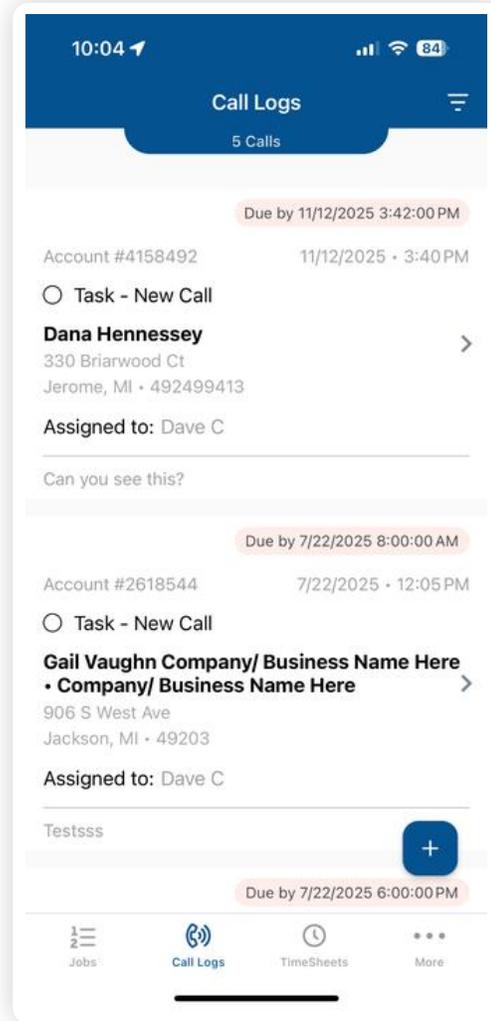
Live Truck tracking provides real-time tracking of a technician's location on a map.

Call Logs

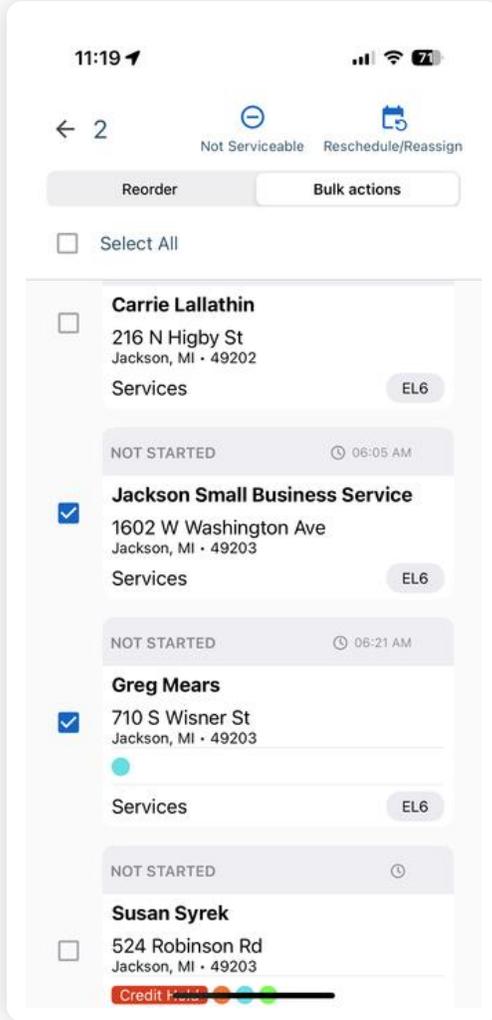
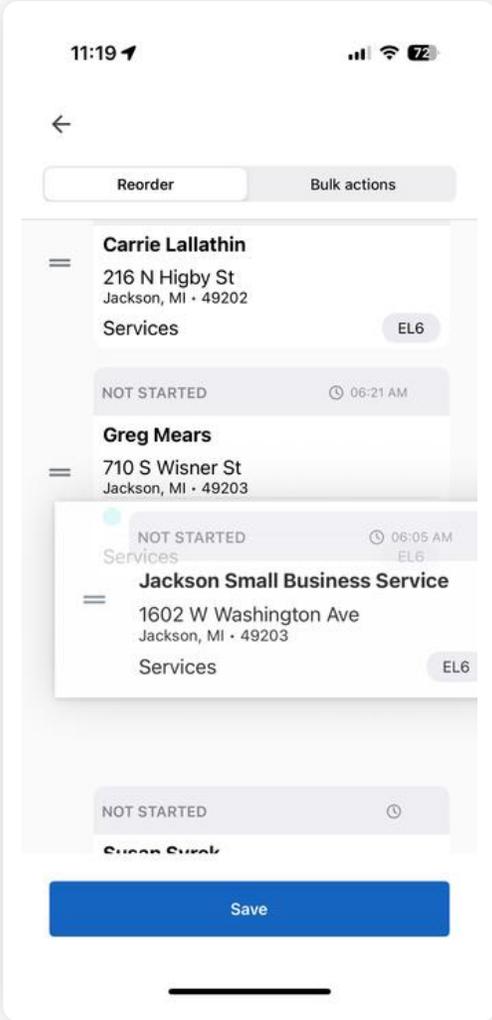
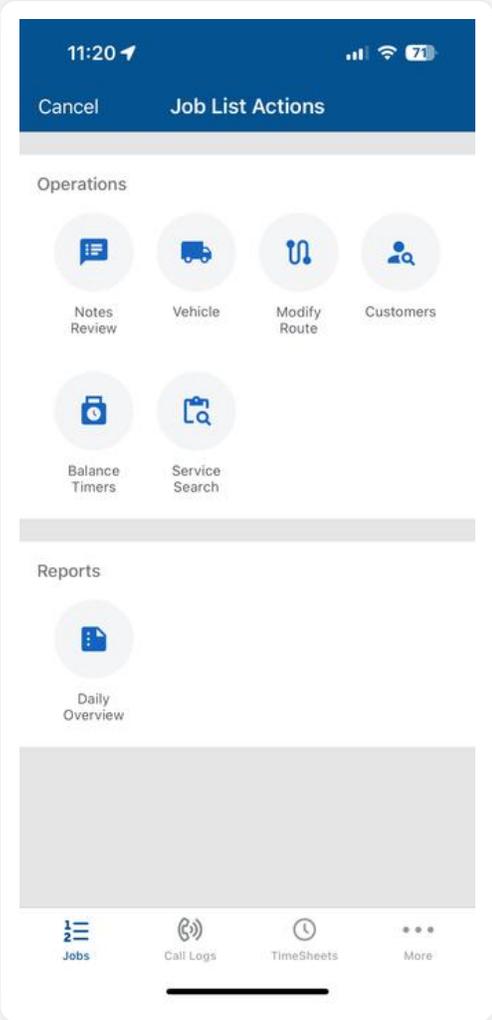
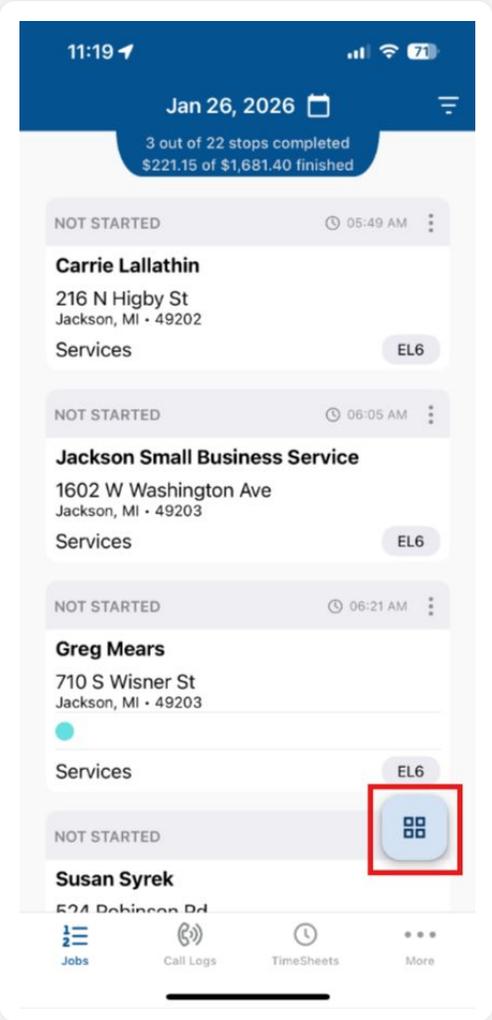
RealGreen Mobile 34m ago
 You have Call Log Alerts
 Open

Upcoming Enhancements:

- Setting to auto create call log upon payment taken
- “Assigned to” on new call log defaults to signed in user
- Filter to Hide Call Due X hours in the future



Modify Route



Modify Route - Continued

11:23 📶 🔋 70

Cancel Modify 2 Jobs

ℹ️ Reassigning a job to someone else will remove it from your jobs list

Assign to
Assign to >

Scheduled date
[Select date](#)

Scheduled time
[Select time](#)

Time window

From To

Promised

Confirmed

MODIFY

11:27 📶 🔋 70

Cancel Modify 2 Jobs

ℹ️ Reassigning a job to someone else will remove it from your jobs list

Assign to
Caleb Dease >

Scheduled date
1/26/2026

Scheduled time
11:30 AM

Time window

From To

Promised

Confirmed

MODIFY

11:24 📶 🔋 70

←

Reorder Bulk actions

NOT STARTED 🕒 06:21 AM

Greg Mears

710 S Wisner St
Jackson, MI • 49203

Services EL6

NOT STARTED 🕒

Susan Syrek

524 Robinson Rd
Jackson, MI • 49203

Credit Hold 🟠 🟡 🟢

Ser... AOF AOF FA +4

NOT STARTED 🕒

Barb Meyers

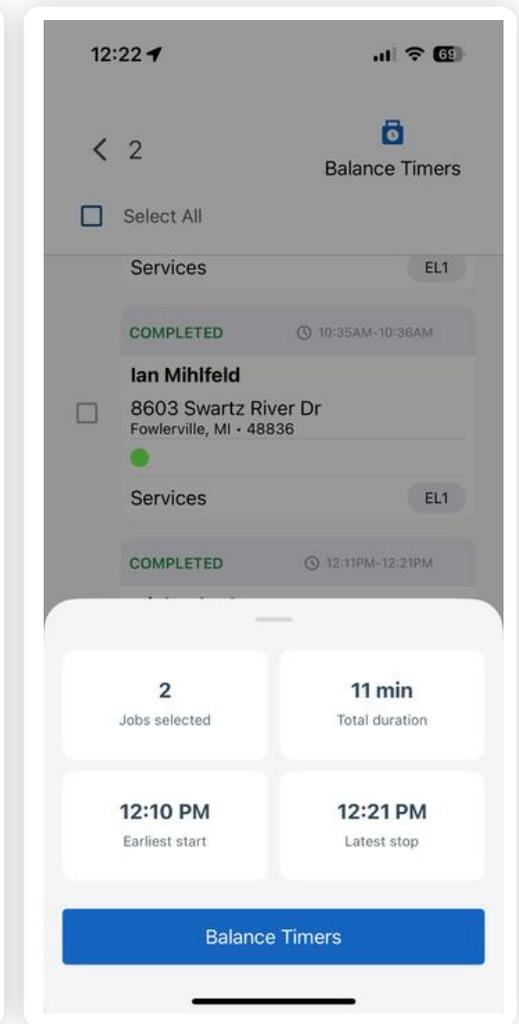
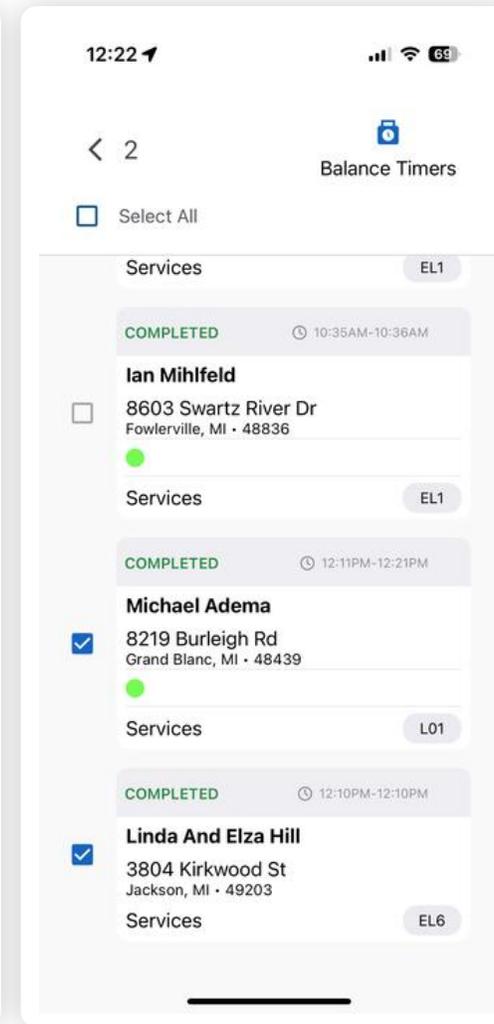
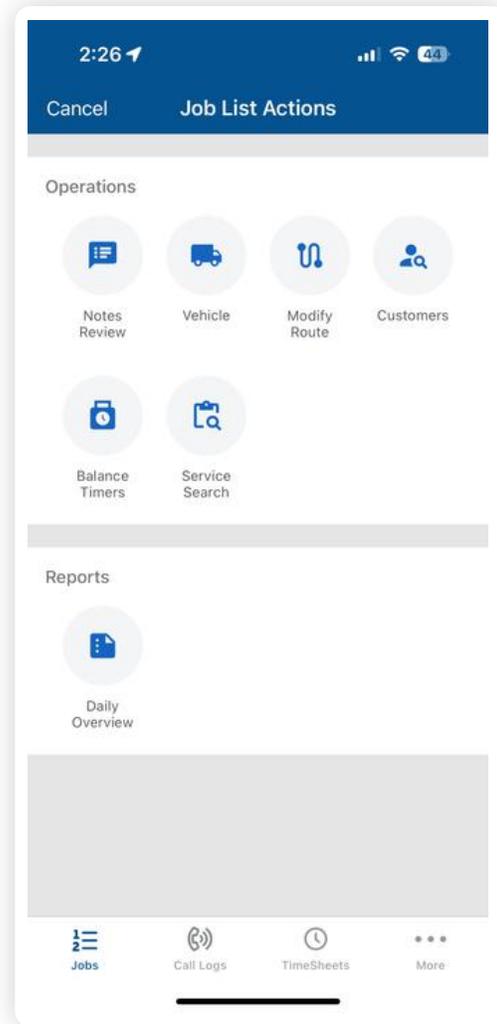
2514 Maplewood Ave
Lansing, MI • 48910

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2 Job(s) Updated

Balance Timers

Note: Timers or balanced based on Job Size



Balance Timers - Continued

Before Balancing Timers on Left

After Balancing Timers on Right

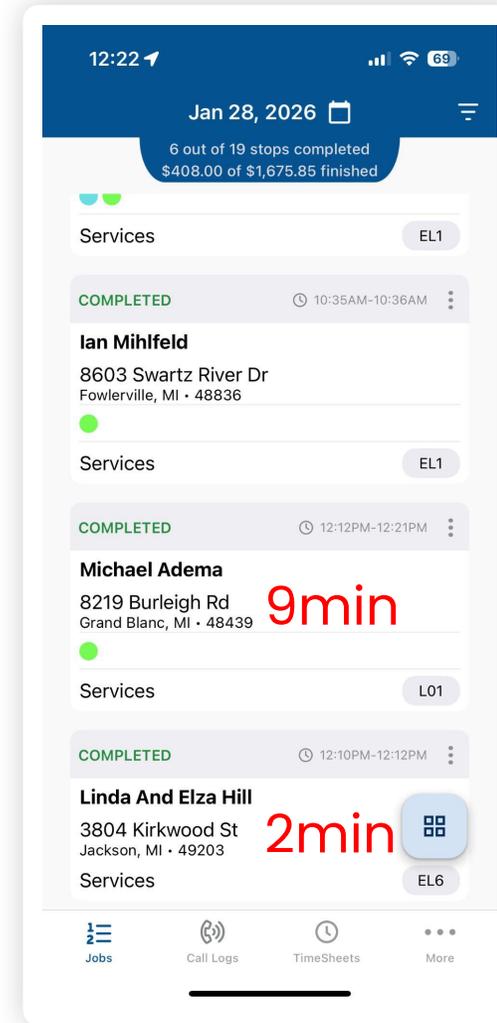
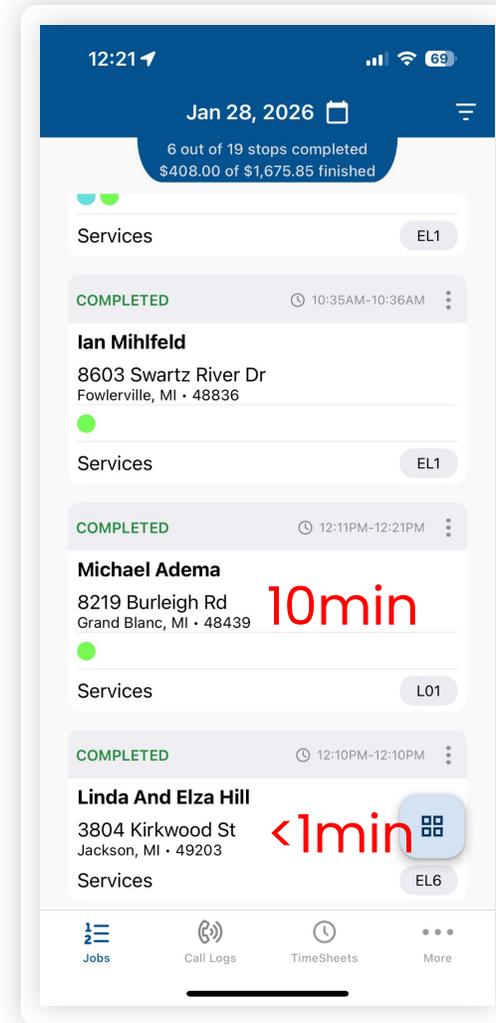
Michael Adema job size = 36k Sqft

Linda And Elsa Hill job size = 8k Sqft

Total Size = 44k Sqft

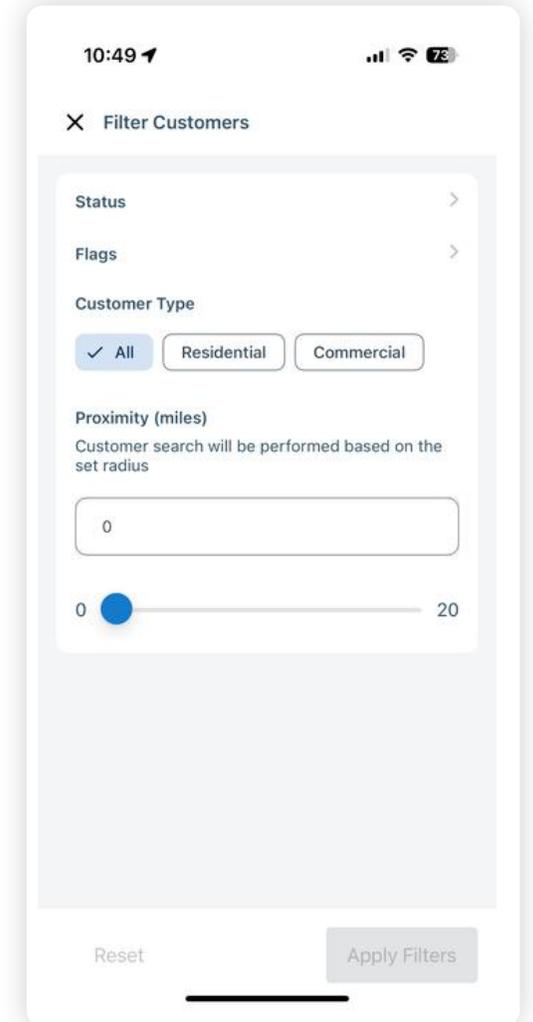
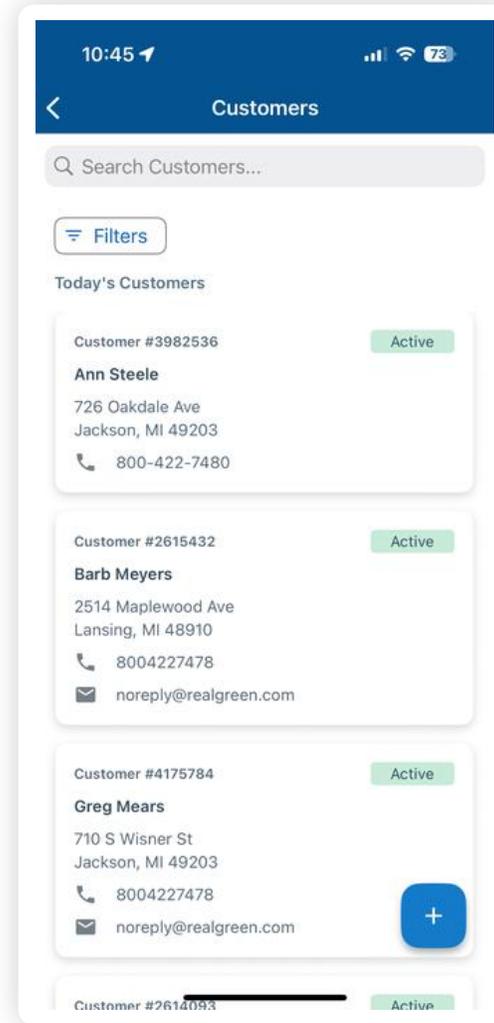
Total Time = 11min

Every 4kSqft = 1min

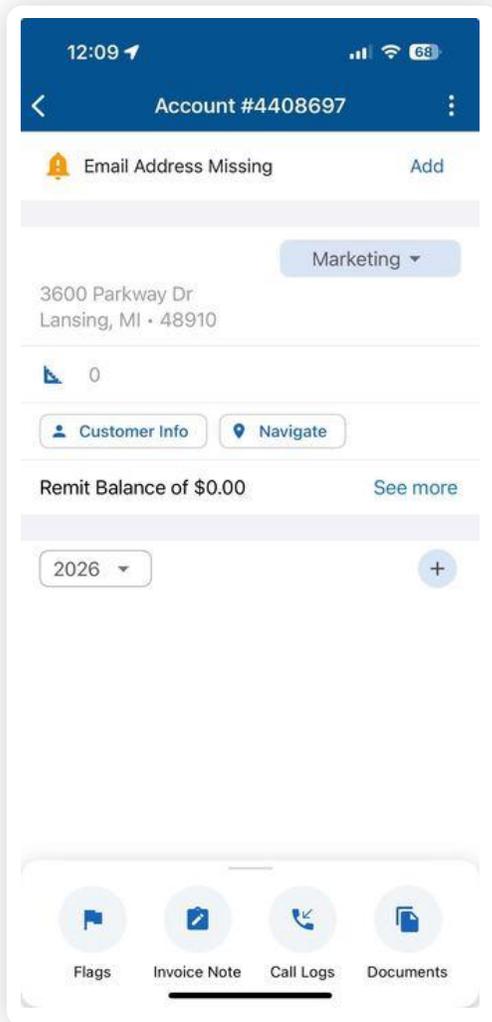
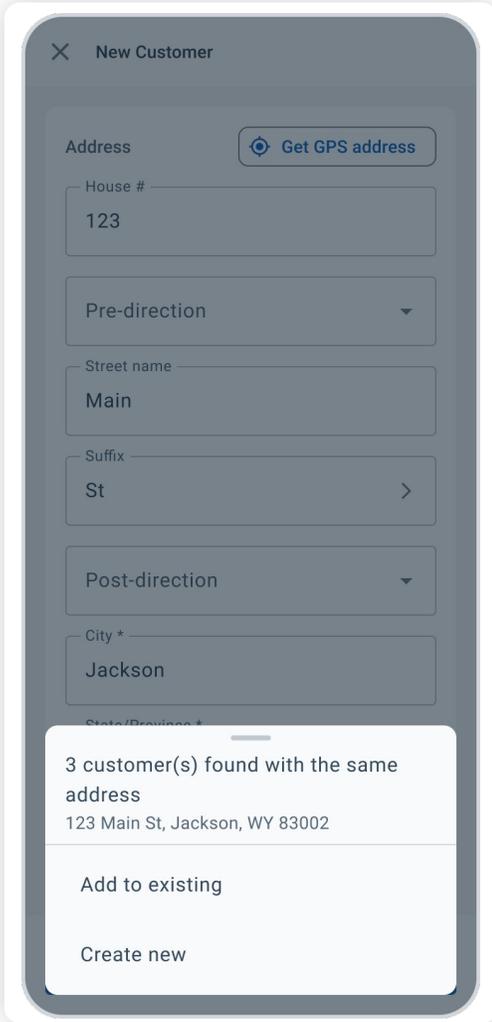
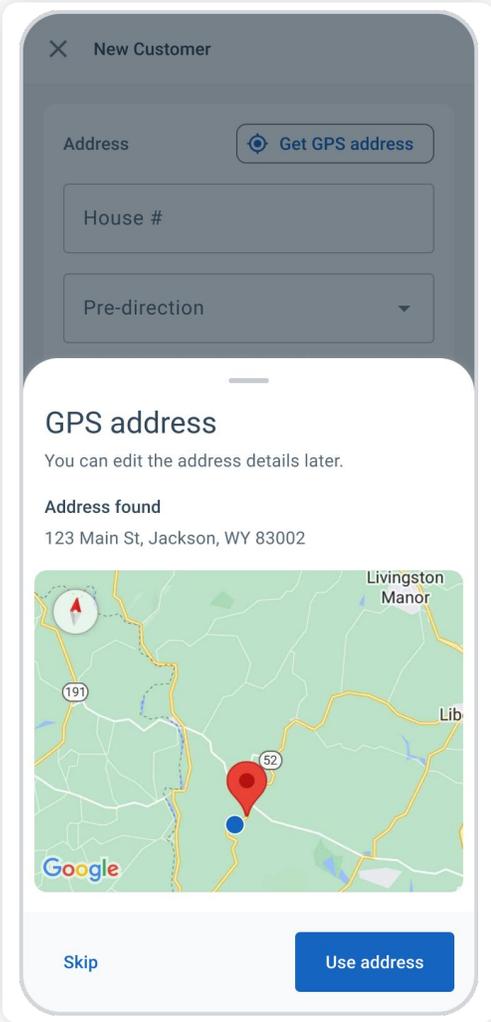
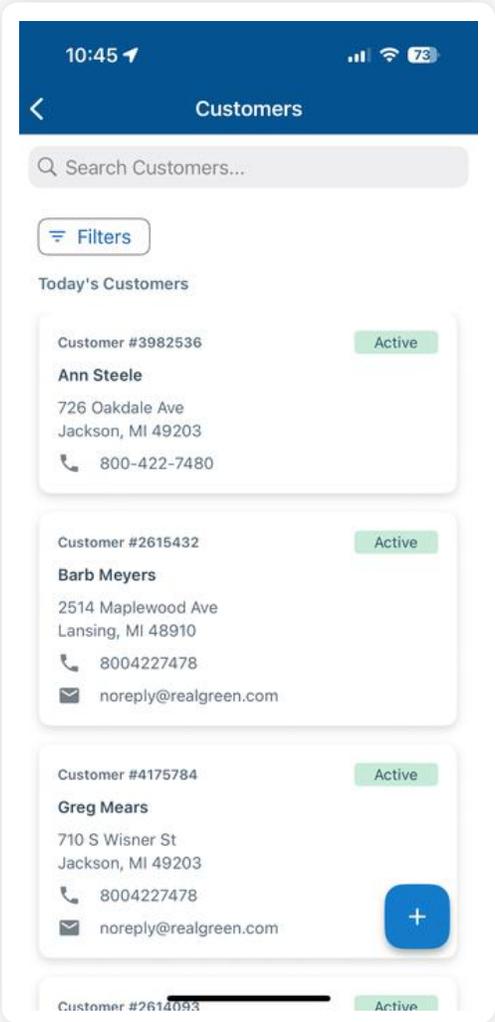


Customer Search

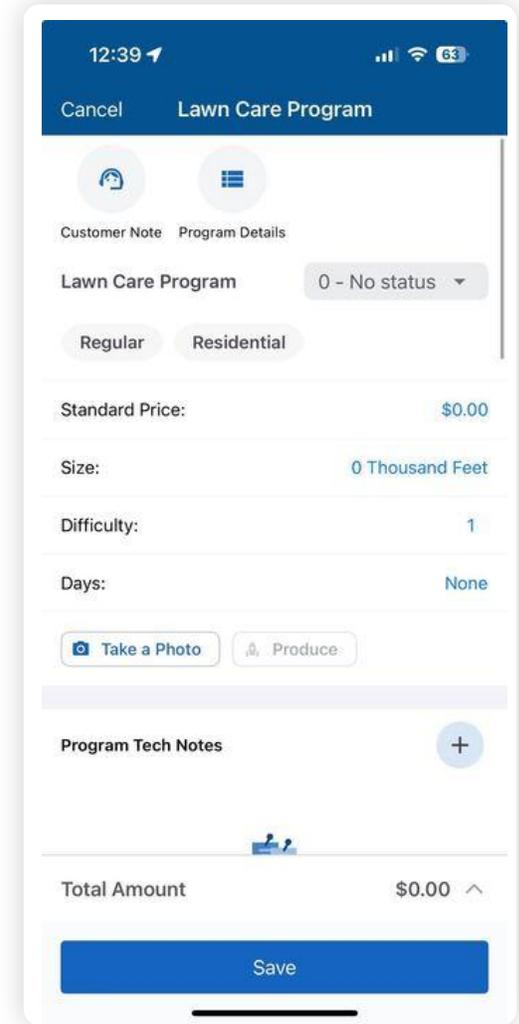
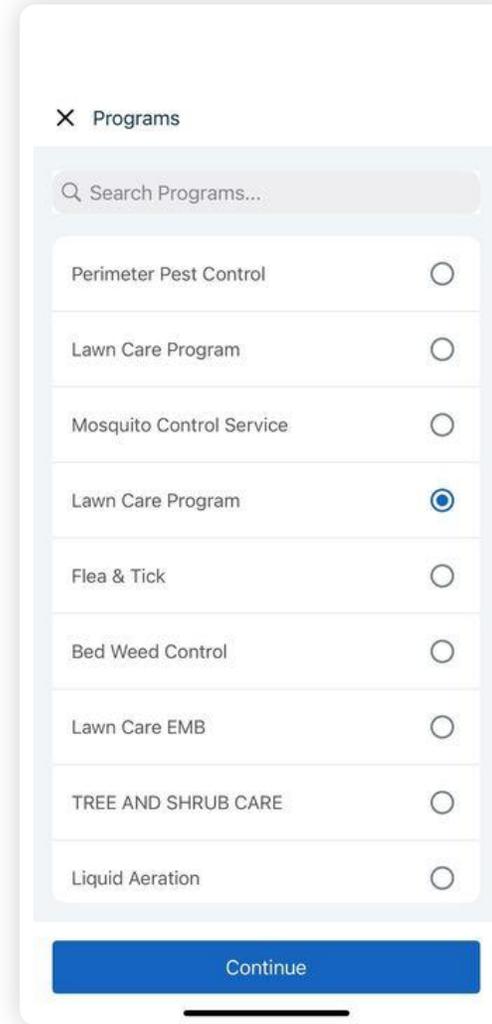
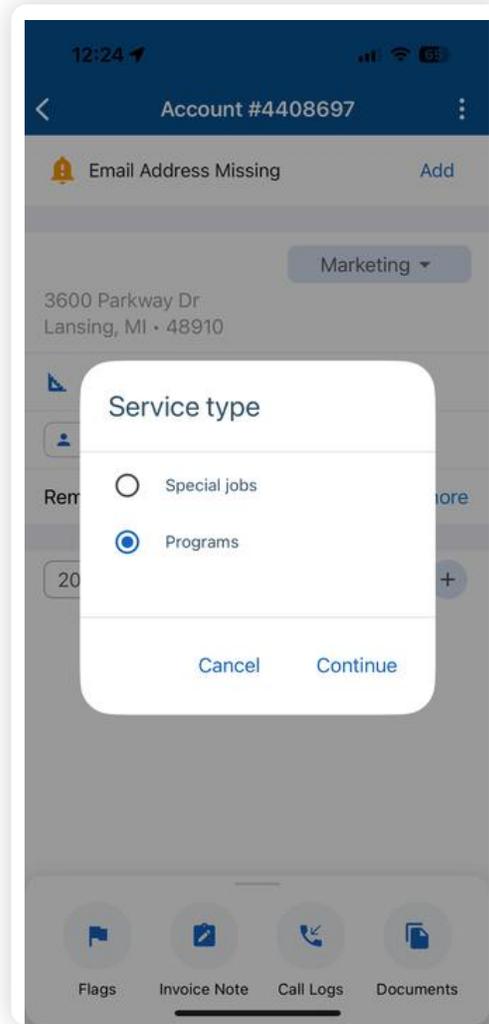
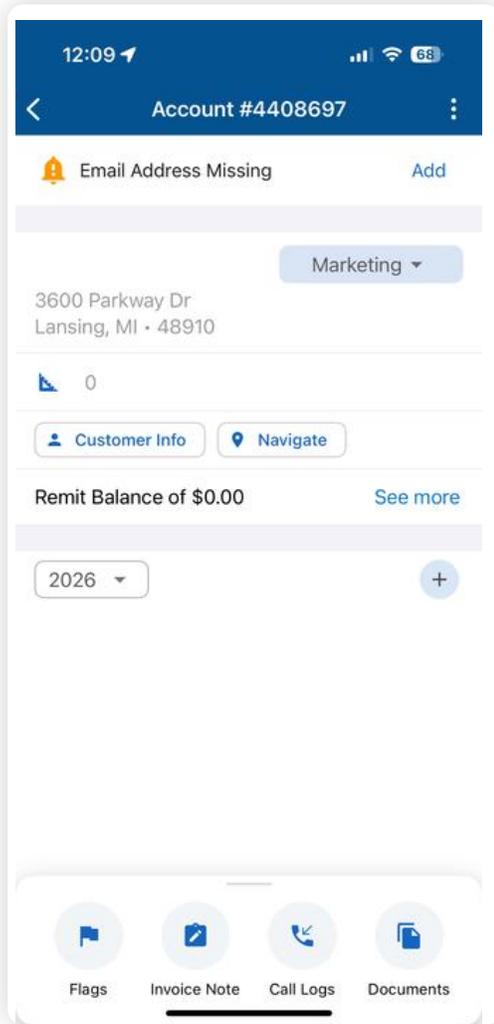
- Global text search field
- Various filters exist today, more to come!
- Let us know how YOU use customer search today



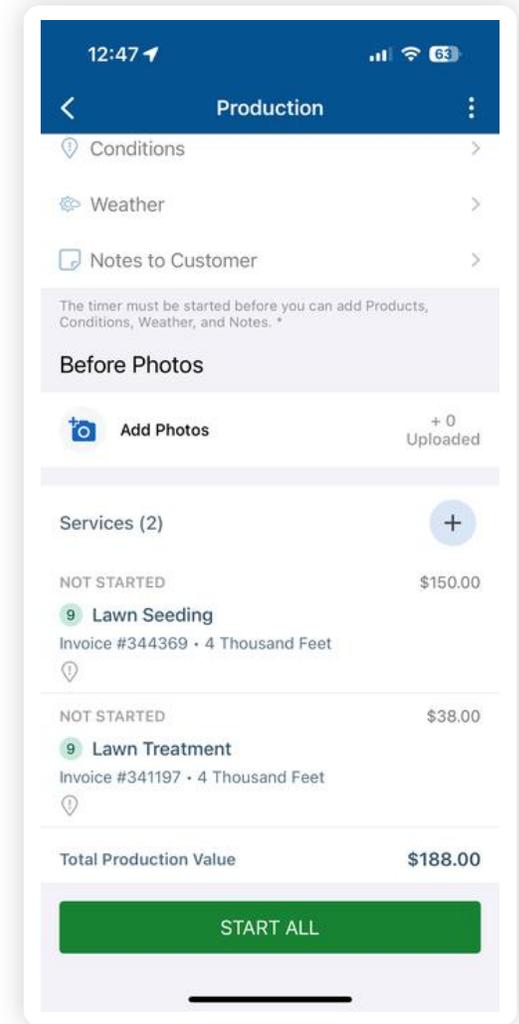
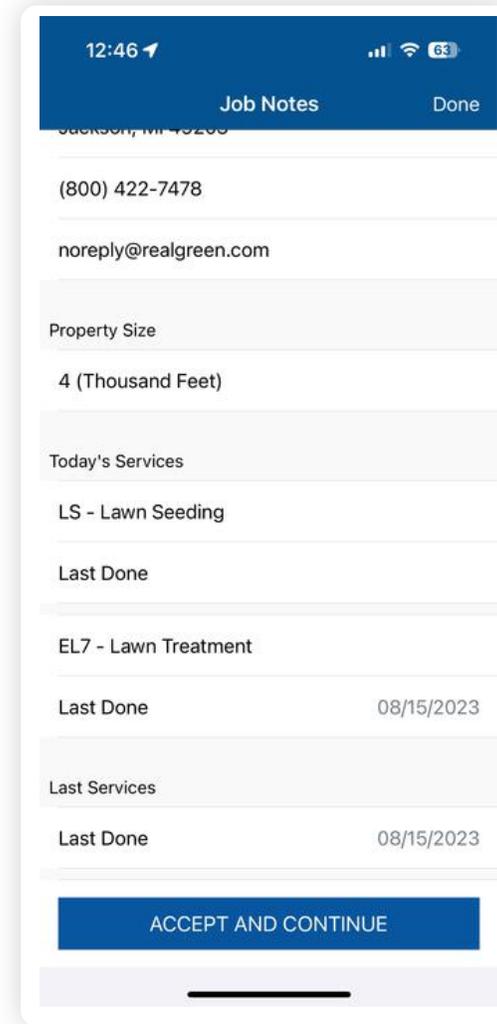
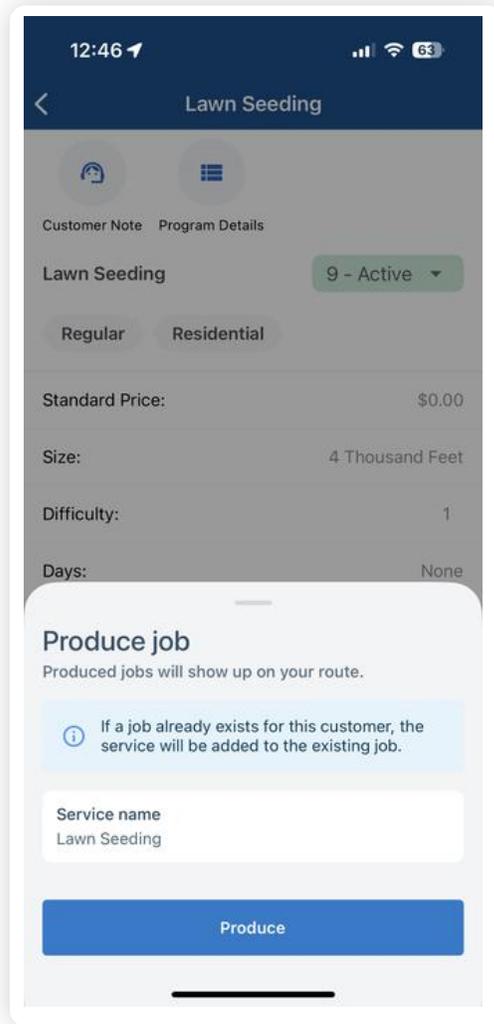
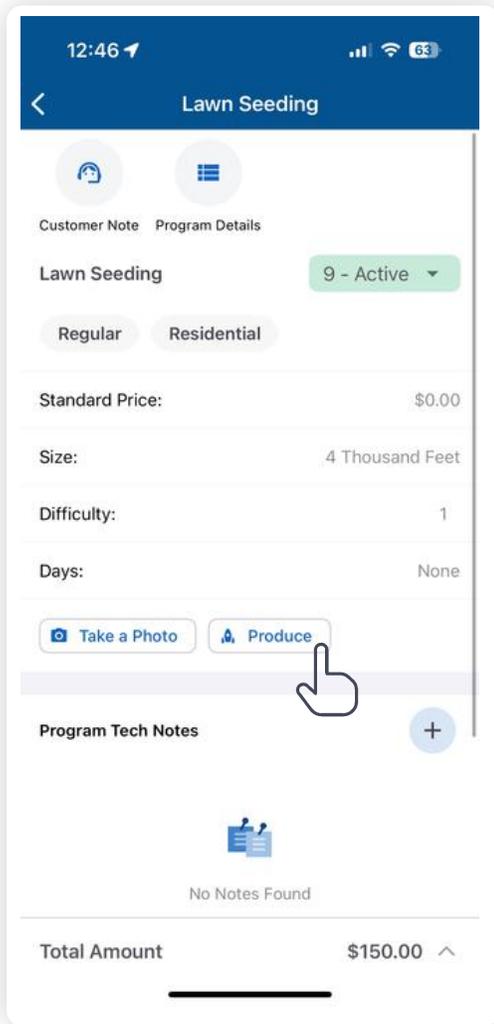
Create Customer



Add a Program or Special Job



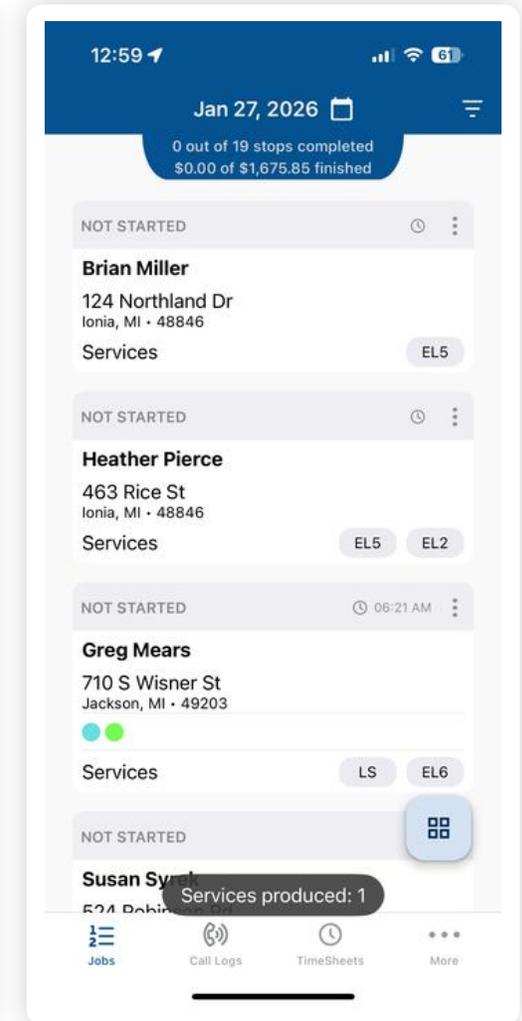
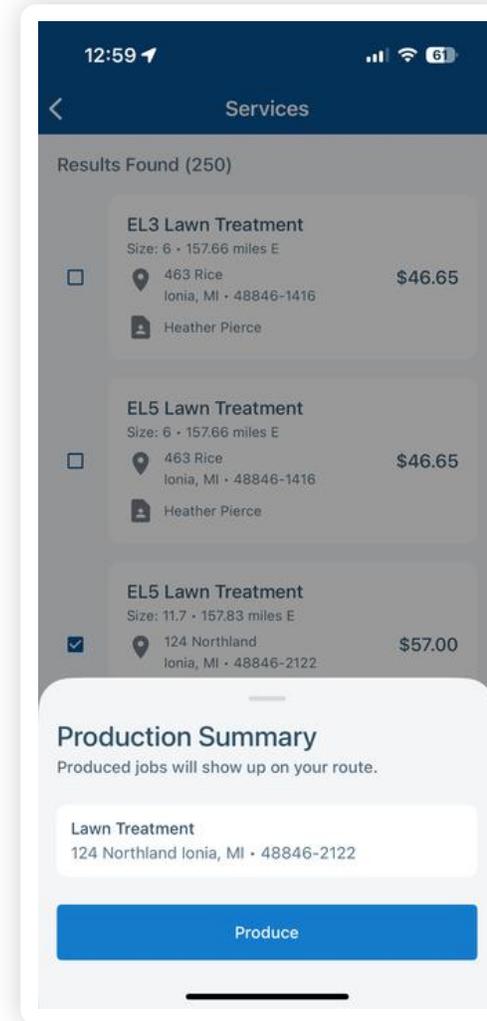
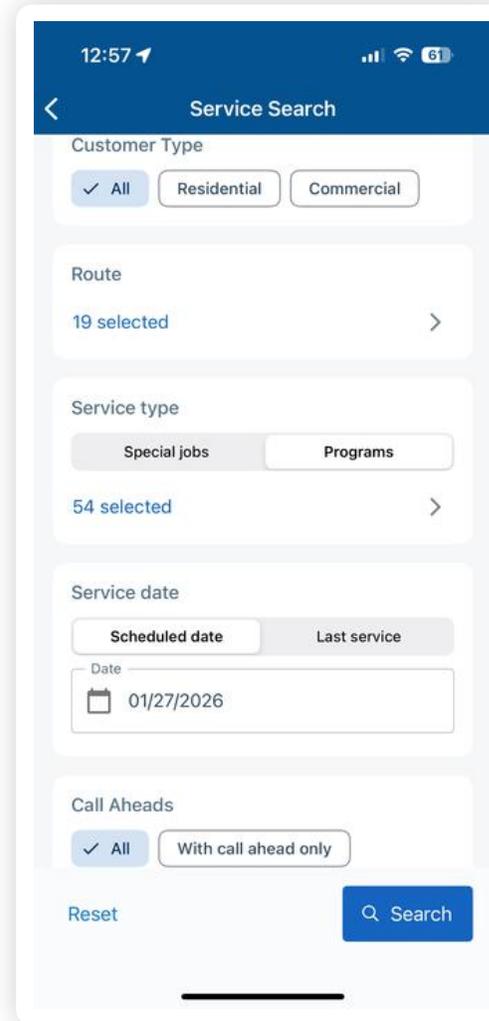
Produce Job



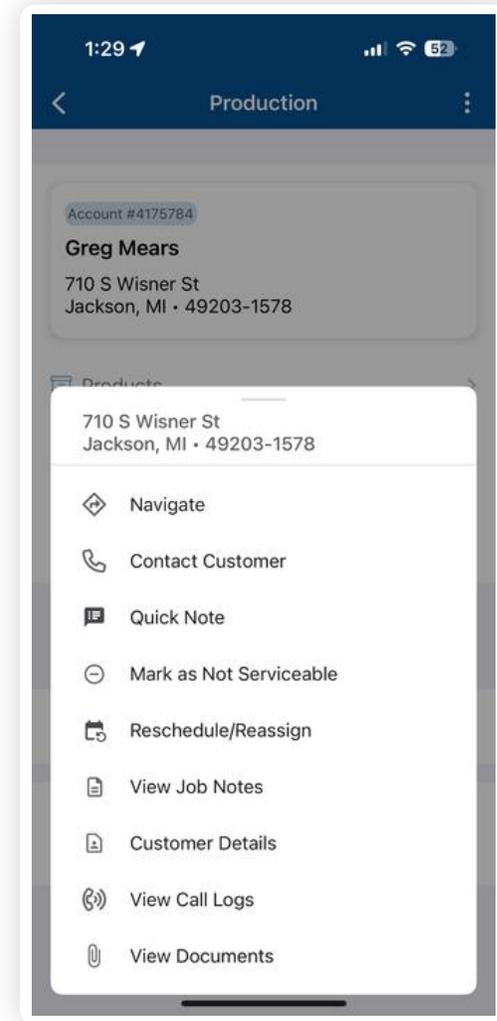
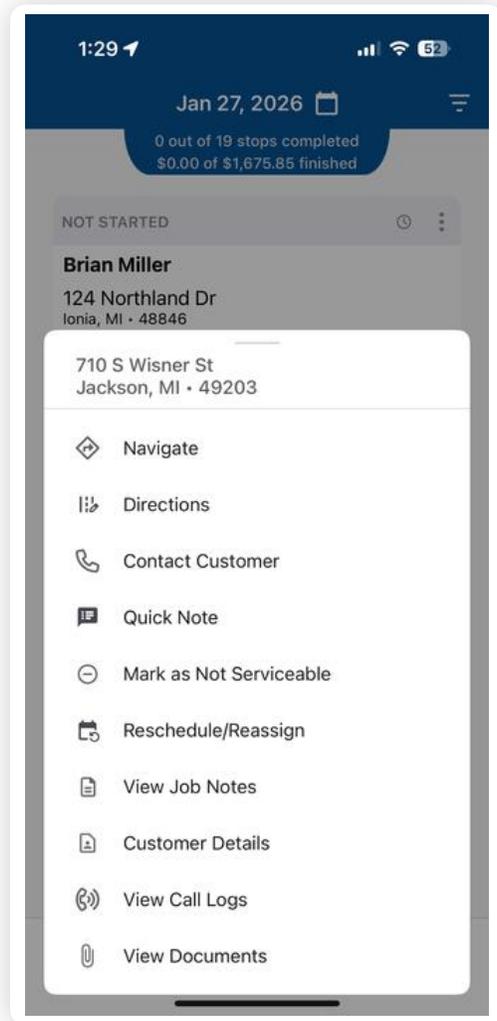
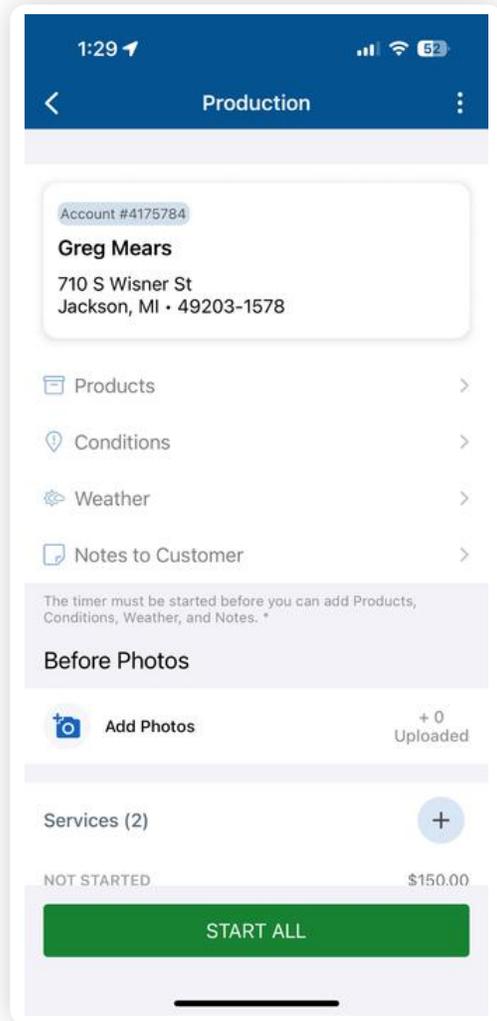
Service Search

- Search for available Services to Produce
- Add work on the spot to finish out your day!

Note: One of the few Online Only features



Accessing Customer Details

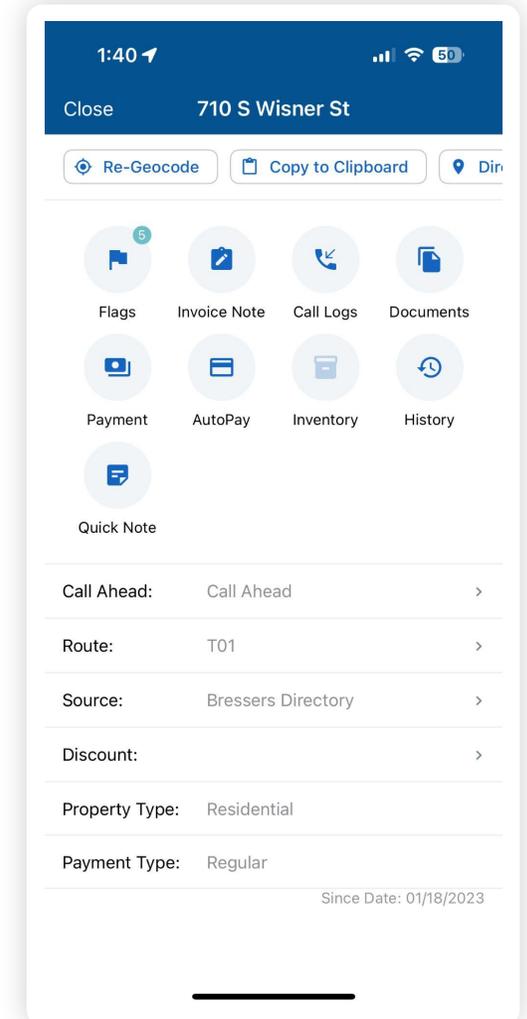
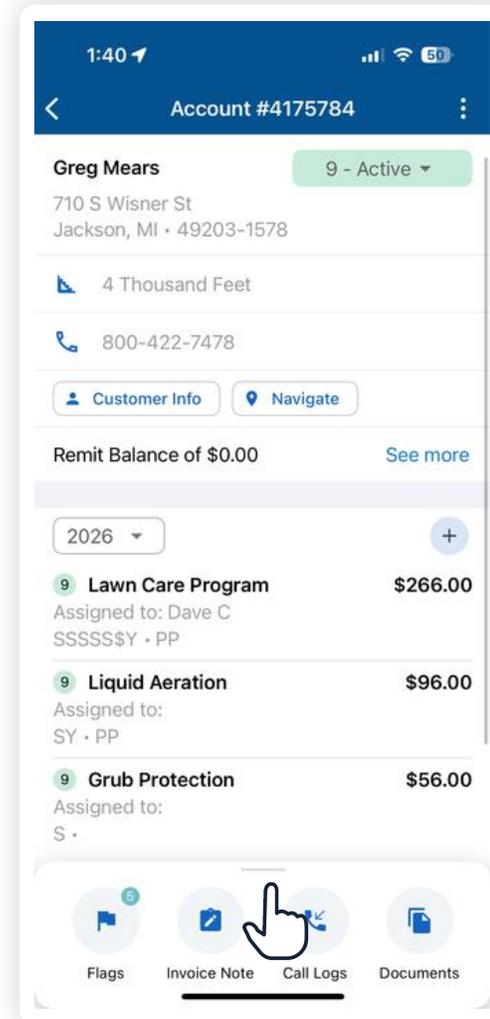


Customer Details – Continued

Your Place to Manage the Customer:

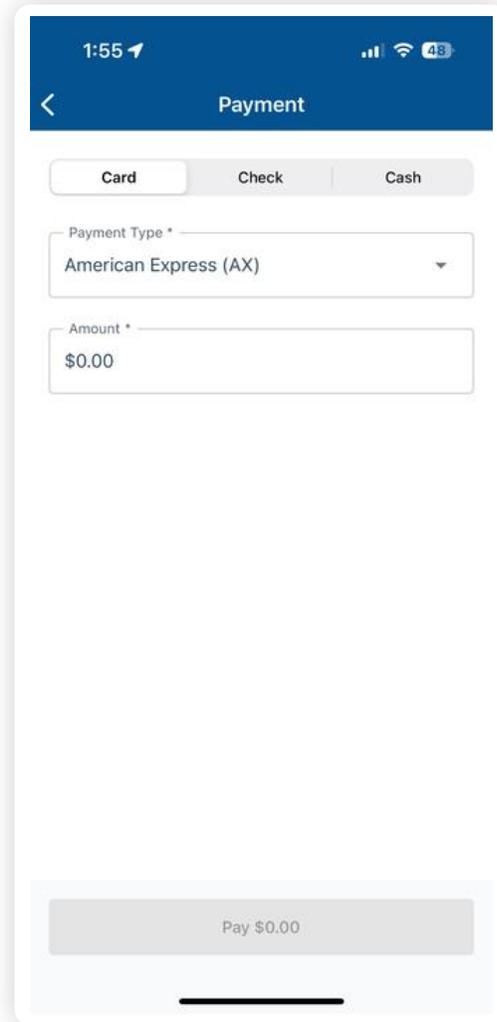
- Update Customer Information
- Review/Modify/Add Services
- Produce Services
- Review Documents/History

Note: Bottom sheet expands UP!



Processing Payments

- Card
- Check
- Cash



1:55 48

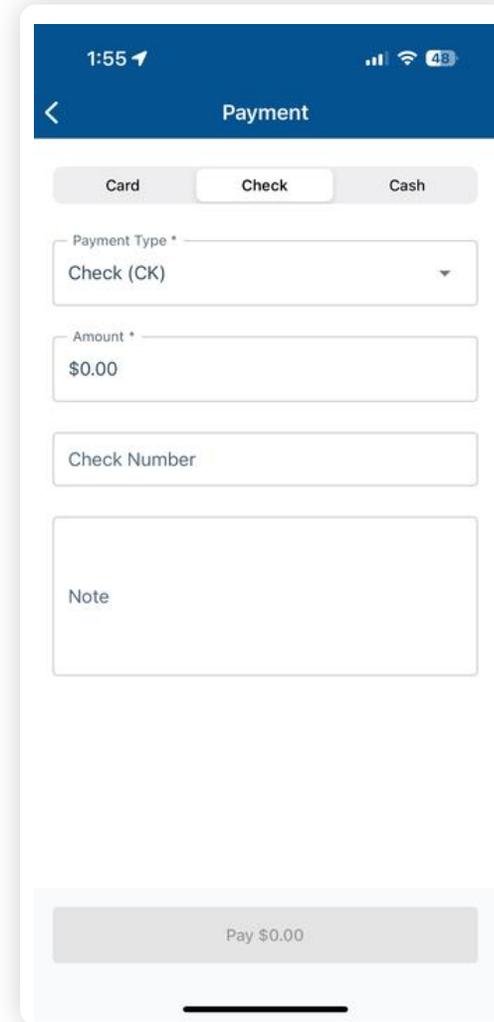
Payment

Card Check Cash

Payment Type *
American Express (AX)

Amount *
\$0.00

Pay \$0.00



1:55 48

Payment

Card Check Cash

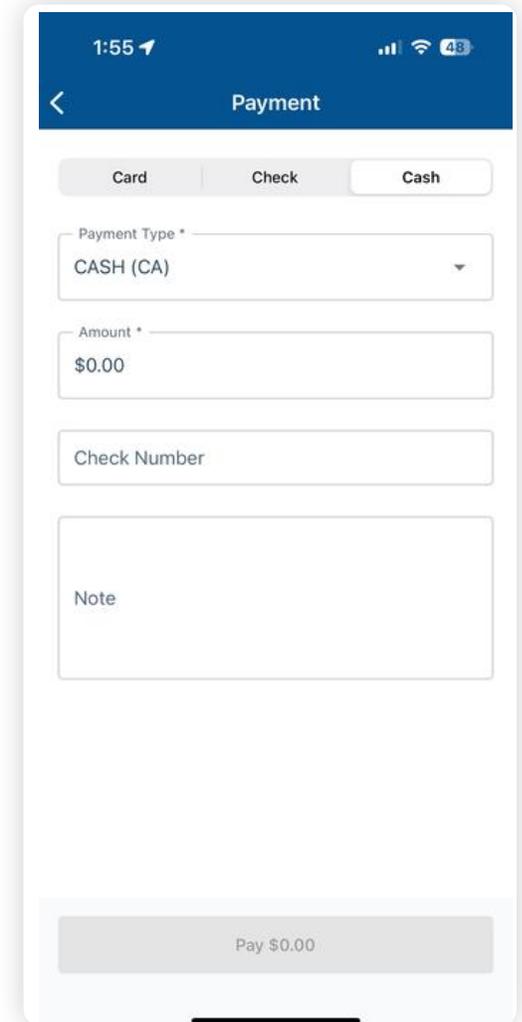
Payment Type *
Check (CK)

Amount *
\$0.00

Check Number

Note

Pay \$0.00



1:55 48

Payment

Card Check Cash

Payment Type *
CASH (CA)

Amount *
\$0.00

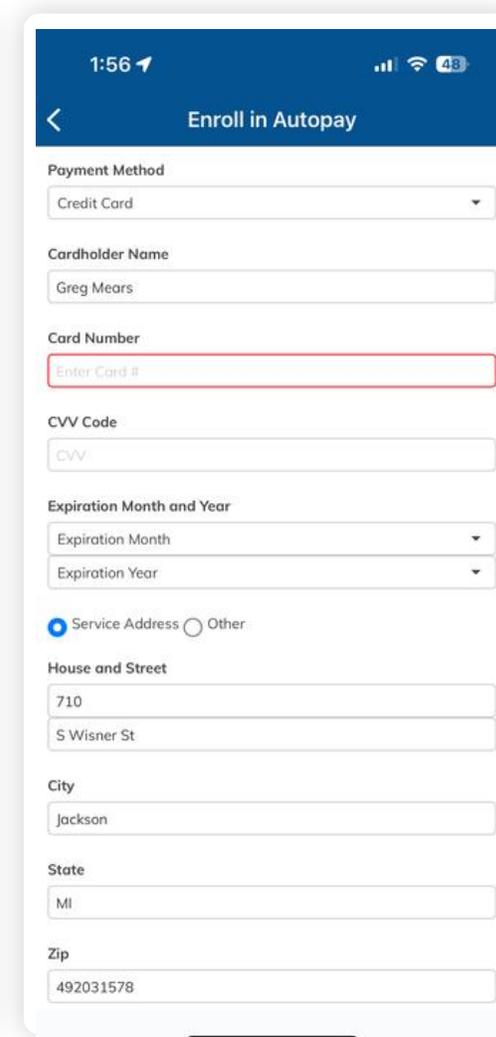
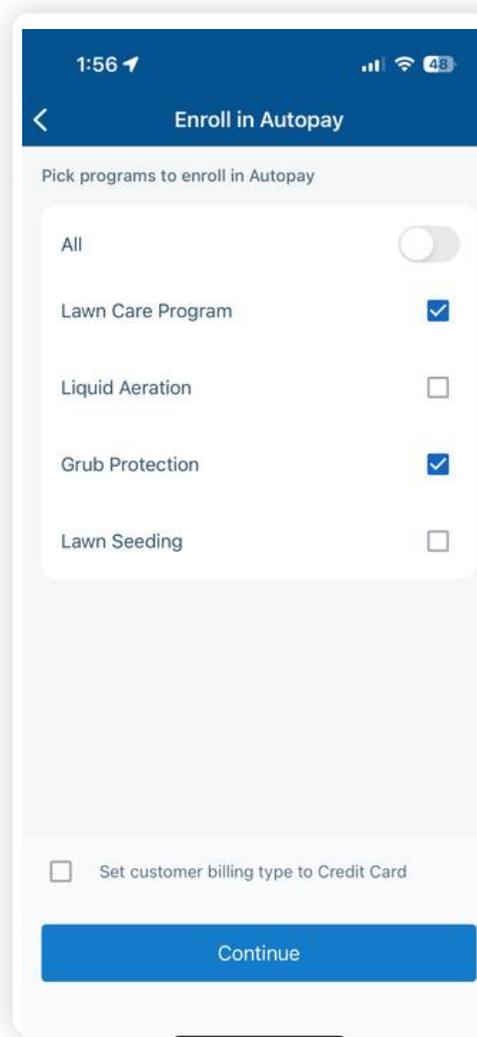
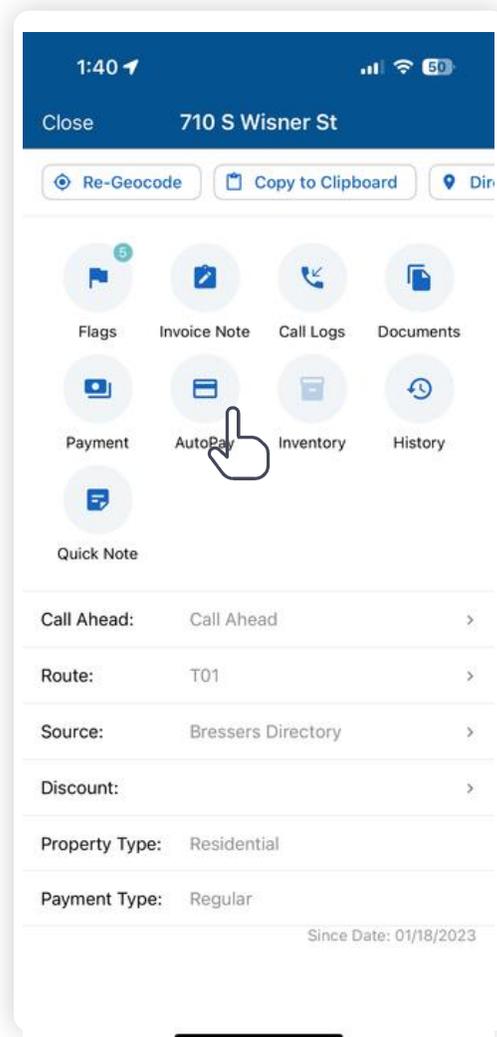
Check Number

Note

Pay \$0.00

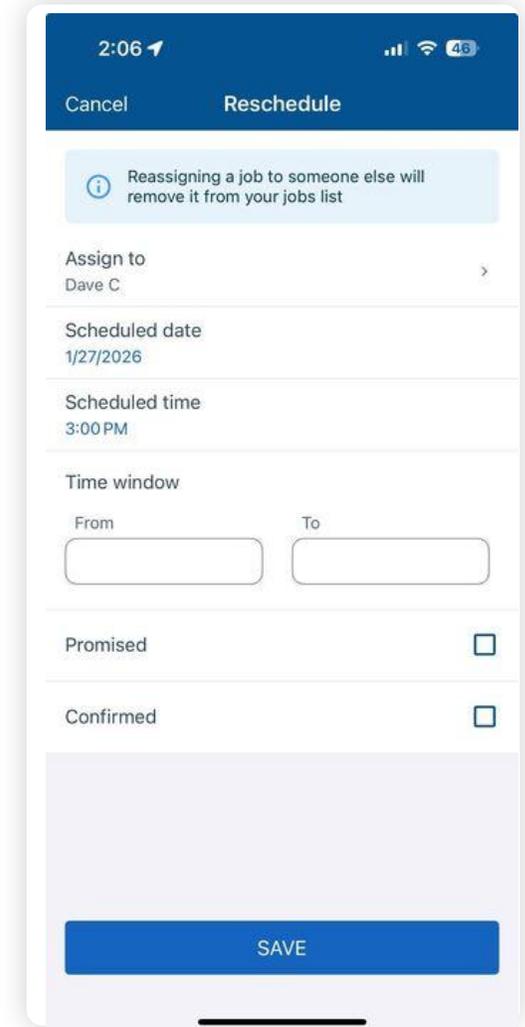
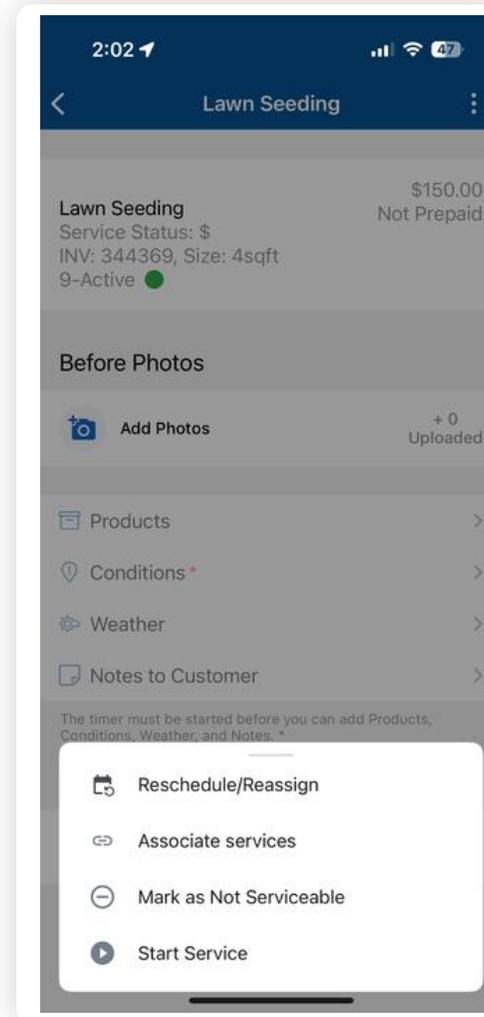
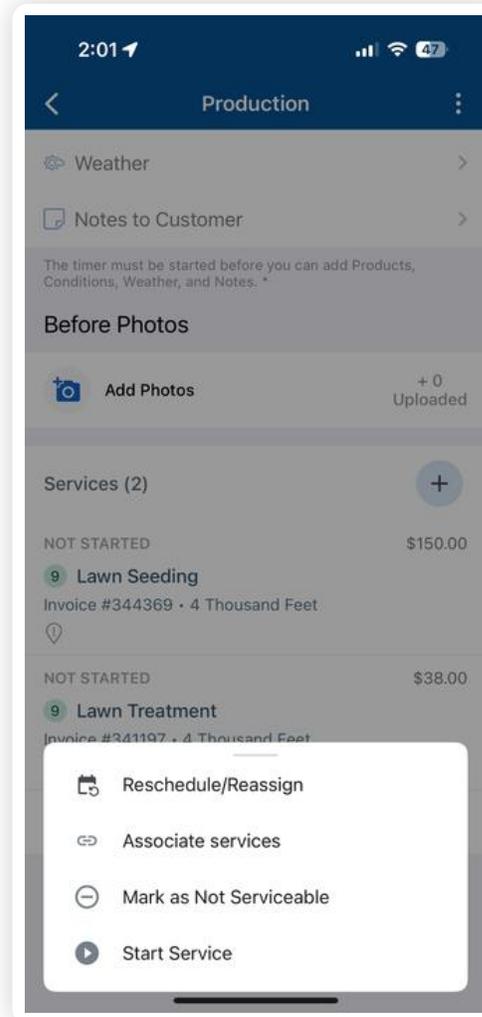
Set up AutoPay

- User can select which service(s) are set up for AutoPay
- Reusing the existing iFrame that users saw in Mobile Live

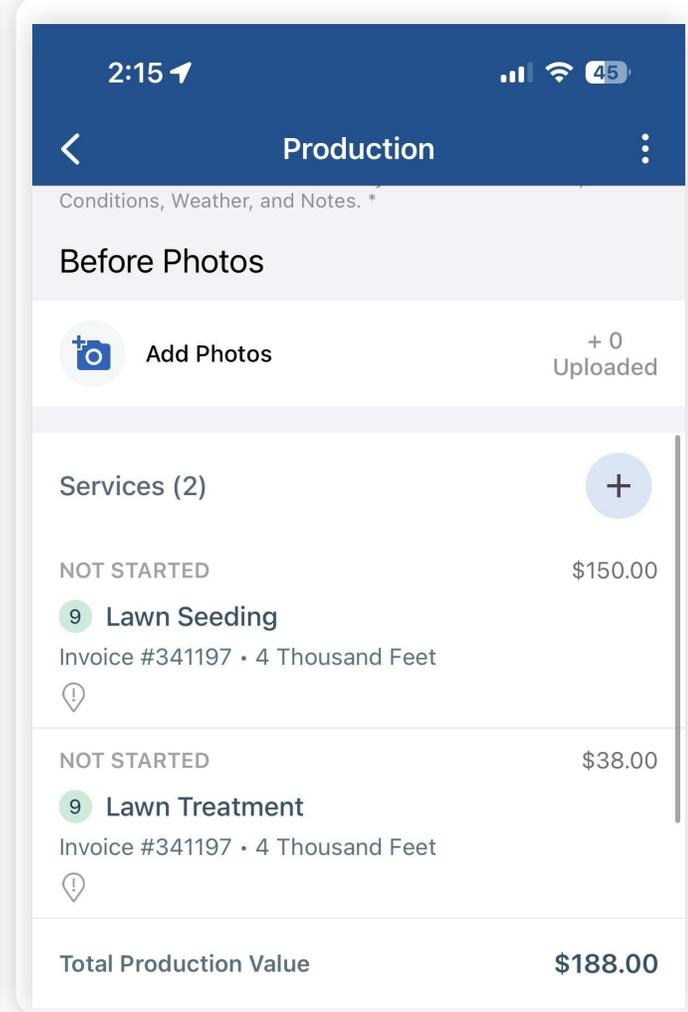
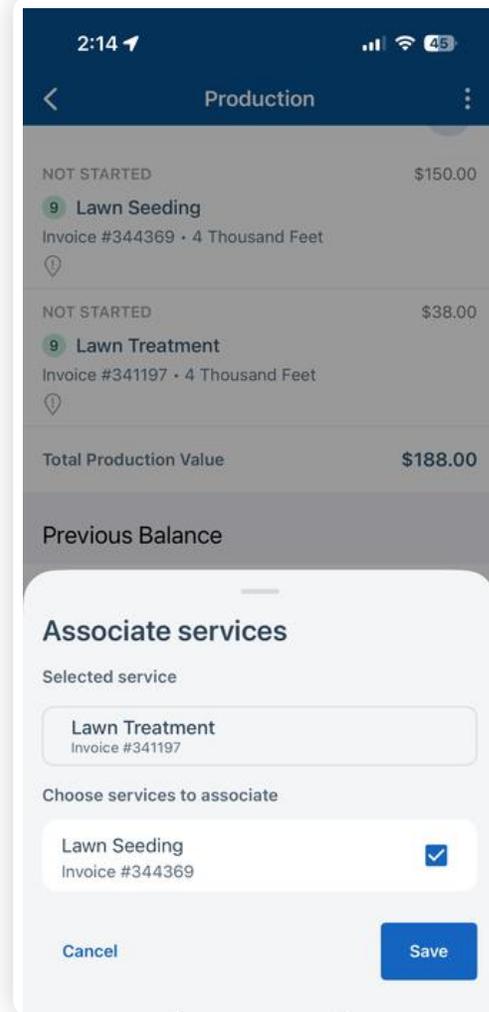
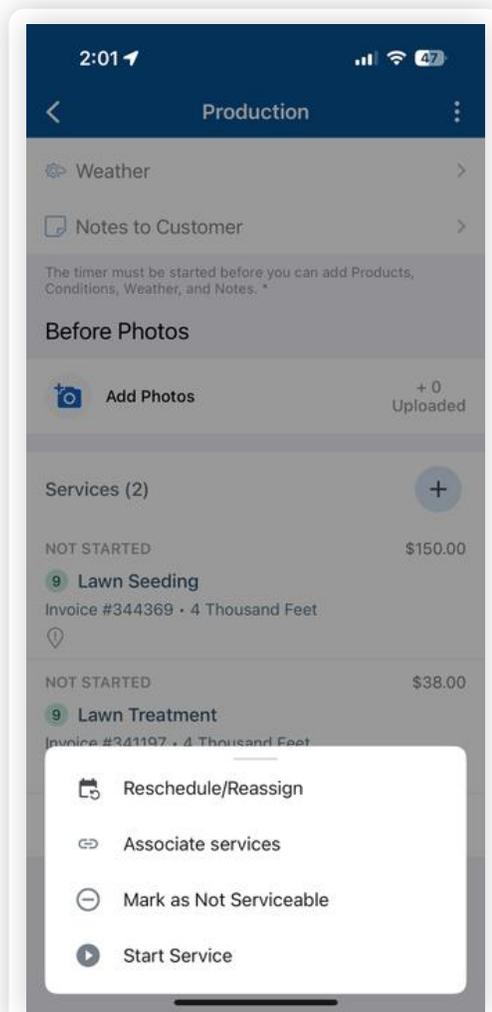
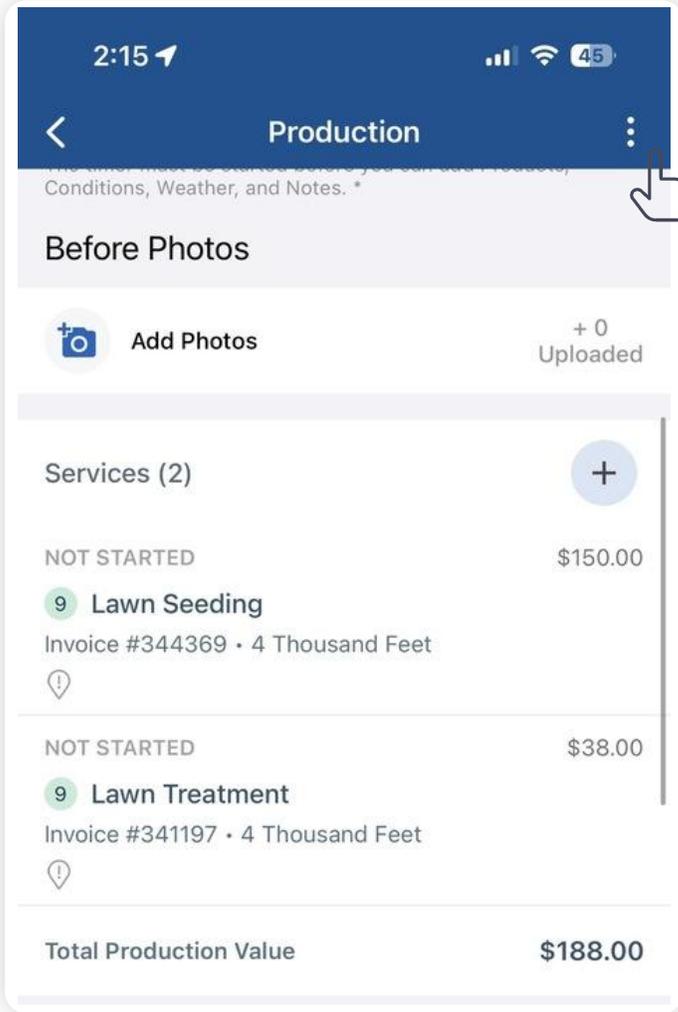


Reschedule a Service within a Job

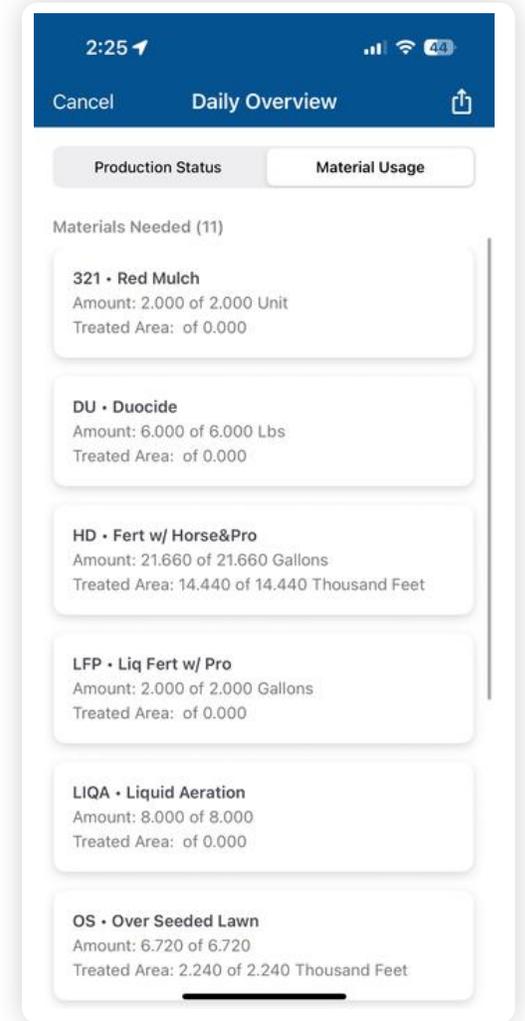
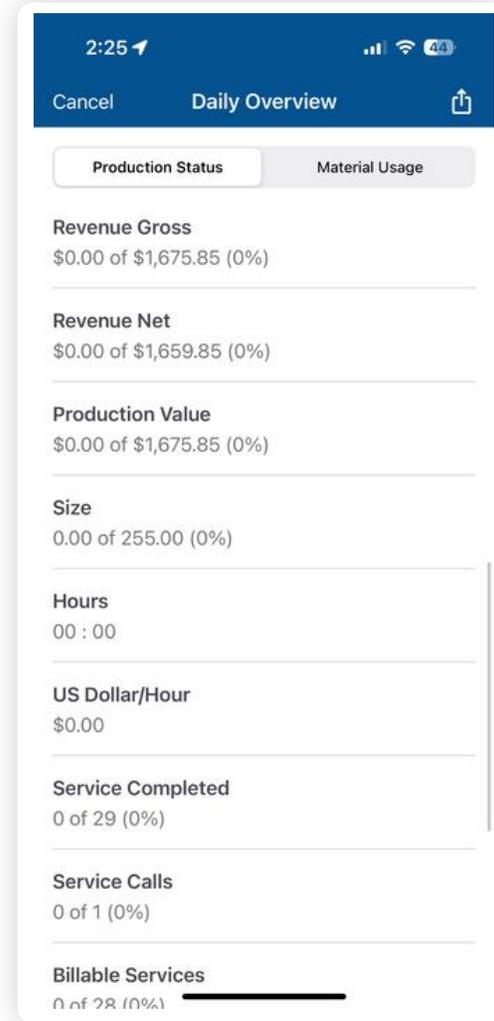
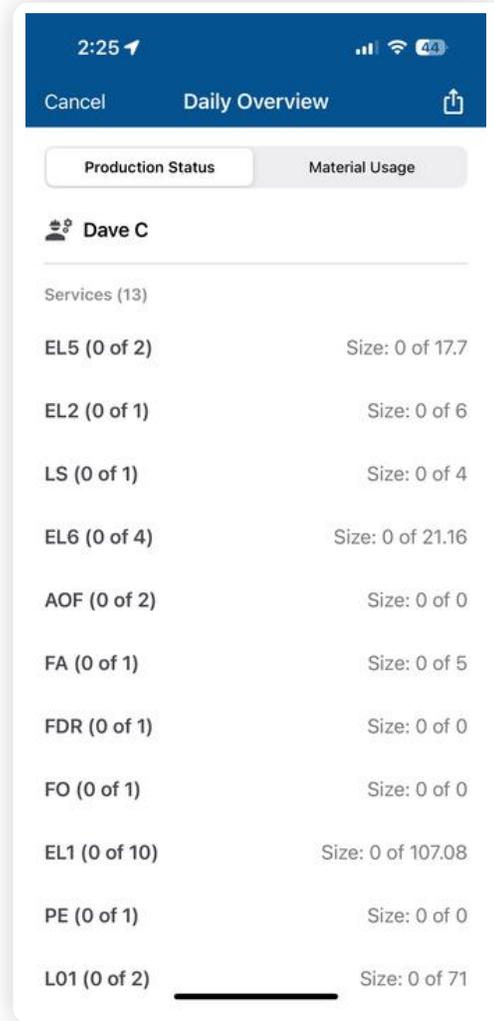
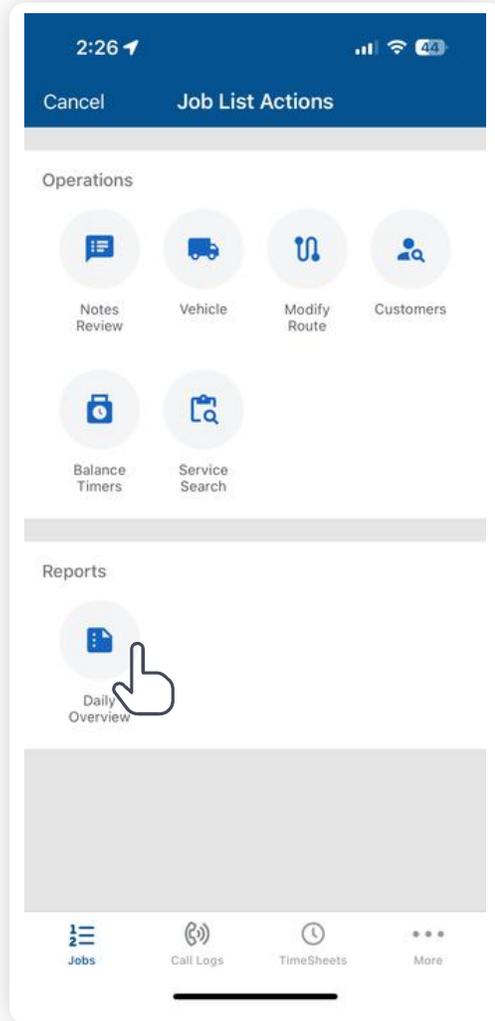
Users must have the “Reschedule and Re-assign services to route/techs” permission enabled to access Reschedule/Reassign”



Associating Services



Daily Overview Report



Session Feedback

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

Join the WorkWave Mobile Inner Circle



Scan to explore prototypes, provide feedback, & shape the future

Questions?