

SA5 Program and Job Details

In depth review of the customer
program/job screens

SA5 Program and Job Details



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Agenda

- Program/Job Information
- Scheduling
- Program/Job Notes
- Service Details
- Estimate Details
- Sales Details
- Cancellation Details

Program/Job Details

Color coded based on status:

Estimates - yellow

Active - green

Canceled - red

Generalized information about the program or special job. Including year, billing type, source, routing information (route, day code, sequence), Purchase Order, last price increase date, last service date, and hold dates.

Hold applies to all services in that program or job. If specific rounds should be on hold, this can be done from service details.

i 9 - Active LC - Lawn Care		☰	
Status:	9 - Active	Completed:	<input type="checkbox"/>
Year:	2025	Call Ahead:	Select...
Billing Type:	Regular / Invoice	Source: *	DM - Direct Mail
Route:	02 - North Central	Temp Route:	02 - North Central
Day Code:	5	Temp Day Code:	5
Sequence:	90	Temp Sequence:	90
PO #:		Last Price Increase:	06/07/2024
Last Serviced:		Hold Reason:	Select...
Hold Start Date:		Hold End Date:	

Program/Job Details

The scheduling block is used to generate schedule dates on services.

The Max number can be edited with repeating special jobs. Max cannot be edited on programs. In this case it is set by the number of program rounds configured in program settings.

You can set the acceptable schedule days (days of the week). Repeats is how often (frequency) in which a new schedule date is generated.

Start dates define when to start scheduling. Scheduling will never go past the end on date.

The screenshot shows a 'Scheduling' configuration panel with the following fields:

- Max:** A text input field containing the number '6', followed by a 'Locked' checkbox which is currently unchecked.
- Days:** A dropdown menu showing 'M, W, F'.
- Repeats:** A dropdown menu showing 'Weekly'.
- Repeats Every:** A text input field containing '2', followed by the label 'Weeks'.
- Start On:** A date selection field with a calendar icon, currently empty.
- End On:** A date selection field with a calendar icon, containing the date '12/31/2025'.

Program/Job Details

Services Show All Details

Size: 1000 sq ft

Difficulty:

Service Price:

Gross Amount: \$263.00

Discount:

Total Amount: \$278.25

#	Description	Extra Descripti...	Status	Size	Renewal Si...	Price	Renewal Pri...	Discount	Production Val...	Scheduled Date	Scheduled Ti...	Start Aft...	End Befo...	Promis...	Done Da...	Call Ahead	Confirmed	Man Hour
1	L01 - EARLY SPRING APPLICATION		Y - Do every year	8.0000	8.0000	63.00	63.00	-No Discount-	63.00					<input type="checkbox"/>		Select...	<input type="checkbox"/>	

Invoice No.:

Assigned To:

Man Hours:

Pre-Conditions:

Service Technician Notes:

Posted:

Completed By:

Estimated Man Hours: 00:18

Associations:

Service Customer Notes:

Paid:

Prepaid:

Difference (Man Hours):

Reversed:

Full Charge		\$63.00
Invoice Charge	-	\$-1.26
Prepay Discount	-	\$3.21
Subtotal		\$61.05
Tax	+	\$3.66
Net Amount		\$64.71

Exp. Date:

Exp. Date:

2	L02 - LATE SPRING APPLICATION		Y - Do every year	8.0000	8.0000	50.00	50.00	-No Discount-	50.00					<input type="checkbox"/>		Select...	<input type="checkbox"/>	
3	L03 - EARLY SUMMER SLOW RELEASE		Y - Do every year	8.0000	8.0000	50.00	50.00	-No Discount-	50.00					<input type="checkbox"/>		Select...	<input type="checkbox"/>	
4	L04 - LATE SUMMER SLOW RELEASE		Y - Do every year	8.0000	8.0000	50.00	50.00	-No Discount-	50.00					<input type="checkbox"/>		Select...	<input type="checkbox"/>	
5	L05 - EARLY FALL FEEDING		Y - Do every year	8.0000	8.0000	50.00	50.00	-No Discount-	50.00					<input type="checkbox"/>		Select...	<input type="checkbox"/>	
6	L09 - TESTING		Y - Do every year	8.0000	8.0000			-No Discount-						<input type="checkbox"/>		Select...	<input type="checkbox"/>	

Service details will list each round that makes up the program. Information above the grid applies to all rounds. Information inside the grid applies to that specific round/visit. Each round in the program or special job can be edited inside the grid.

Program/Job Details

Estimate Details

Estimate Req Date: *	01/10/2025	Requested By:	Mr. Smith	Request Taken By:	HHH - Harry Houdini	Estimate Scheduled:	<input type="checkbox"/>
Printed:	01/15/2025	Printed By:		Assigned:		Assigned To:	BOB
Estimate Given Date:	01/15/2025	Estimate Given By:	BOB - Bob Mathews	Referred By:		Rejected Date:	
Reject Reason: *	Select...	Last Contact:					

The estimate details sections tracks and display data captured during the estimate process.

You can see the date the estimate came in (request date), who requested the estimate, who took the request, when was the estimate printed, who printed the estimate, who was it assigned to and on what date. If the customer said no (rejected) the estimate we can also capture and store when and why this happened. These dates can be manually entered or edited here, but they can also be provided during the quick estimate entry process.

Program/Job Details

Sales Details					
Sold Date: *	01/29/2025	Salesperson 1: *	HHH - Harry Houdini	Salesperson 2:	Select...
Confirmed By:	JOEMAC - Joe Mac	Confirmed:	01/29/2025	Payment Plan By:	Select...
Confirmation Letter:	<input checked="" type="checkbox"/>	Renewed:	<input type="checkbox"/>	Auto Renew:	<input checked="" type="checkbox"/>
				Renewal Date:	12/31/2025

Sales details will list information when and who sold a service. Sold date and sales person can be made required fields in settings for the program/job. You can have up to 2 sales people lists (if a split sales). You can set a confirmed by employee if there is a confirmation process. If the service is set to require a confirmation letter to be sent in setting, this box will be checked until that letter is generated. Once generated the check box will automatically be unchecked (since the letter has been set) and this can be reset during the renewal process. When the service has been renewed to a new season the renewed check box will automatically be marked. Auto renew settings can be changed on a per program/job basis

Program/Job Details

× Cancellation Details **^**

Cancel Date:  Cancel Reason: **▼** Cancelled By: **▼** Cancel ID:

When a customer cancels their service you can capture the date, reason and who took the cancel. These fields can be set as required and it is a best practice to do so when changing the program/job to a cancel status (status 5, 6, or 7). The cancel reason are configured in setting and this list can be edited, and added to.

Questions?