# SA5 Program and Job Details

In depth review of the customer program/job screens

BEYOND SERVICE CUSTOMER CONFERENCE '26

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# SA5 Program and Job Details

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CSM, RealGreen by WORKWAVE


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# Agenda

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


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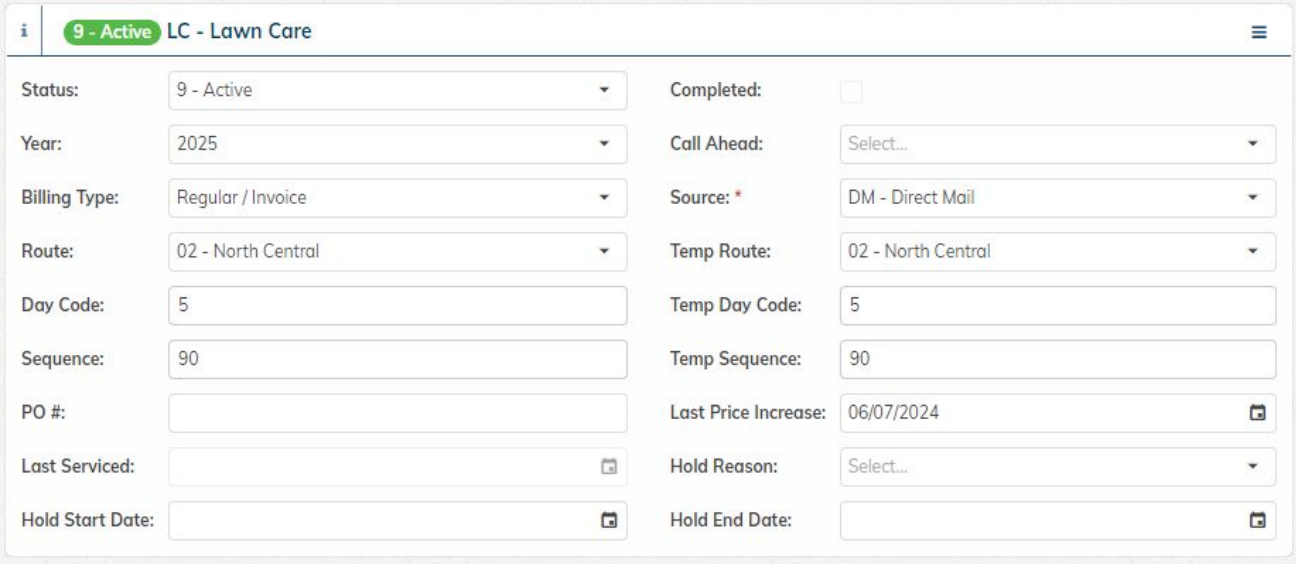
# Program/Job Details




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.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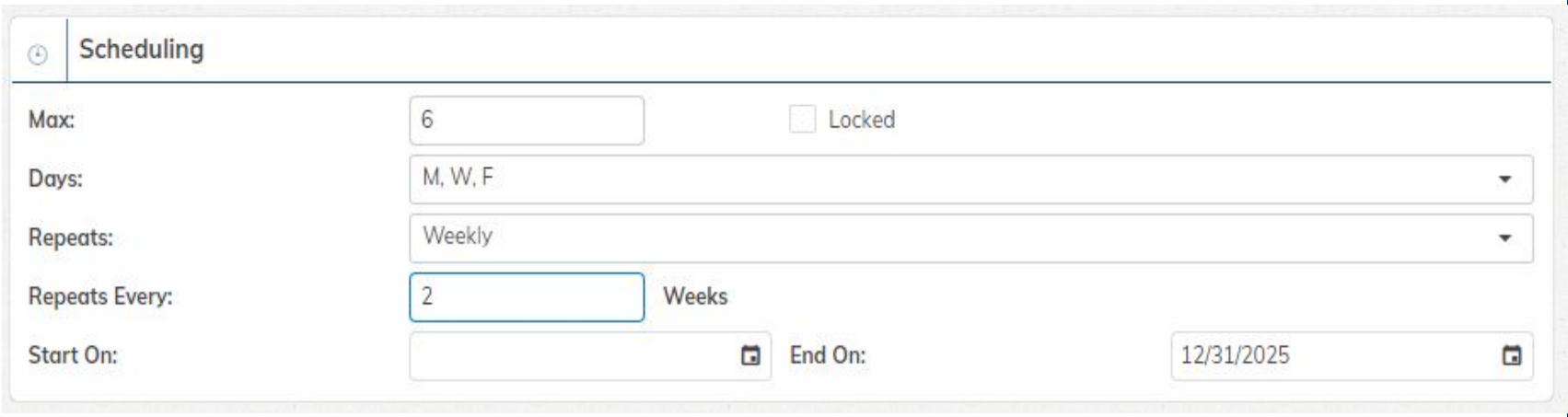
# Program/Job Details

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.





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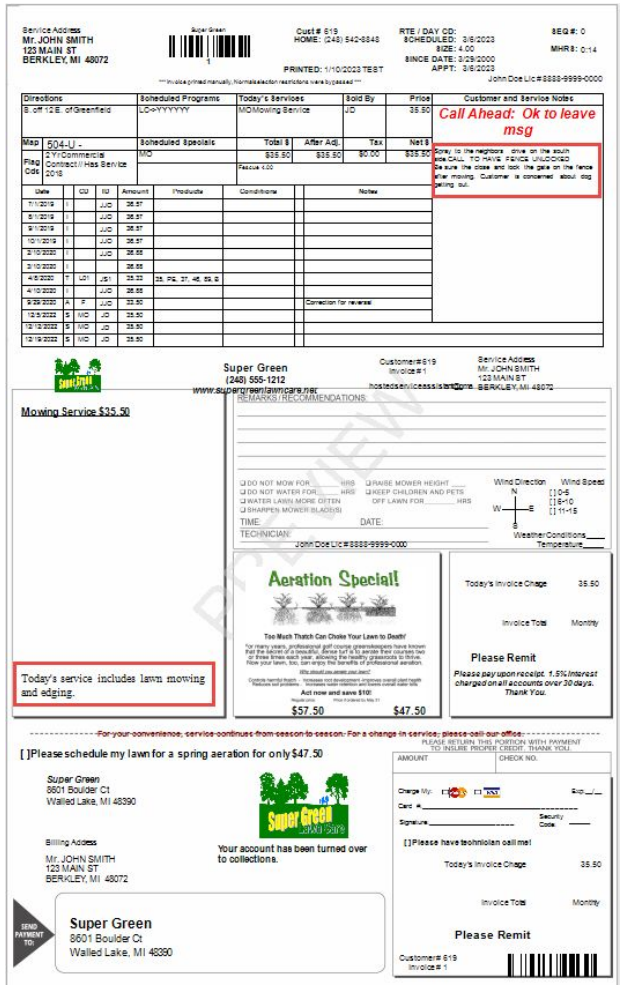

Program notes apply to all services included in the program. Round specific notes can added in the service detail page.

Notes to customer print on the technician portion of the invoice (upper portion)

Customer notes print in the customer portion of the invoice (middle portion)

If an expiration date is set, notes will not print after that date. When renewing if the notes are past their expiration date they will not move to the new season.


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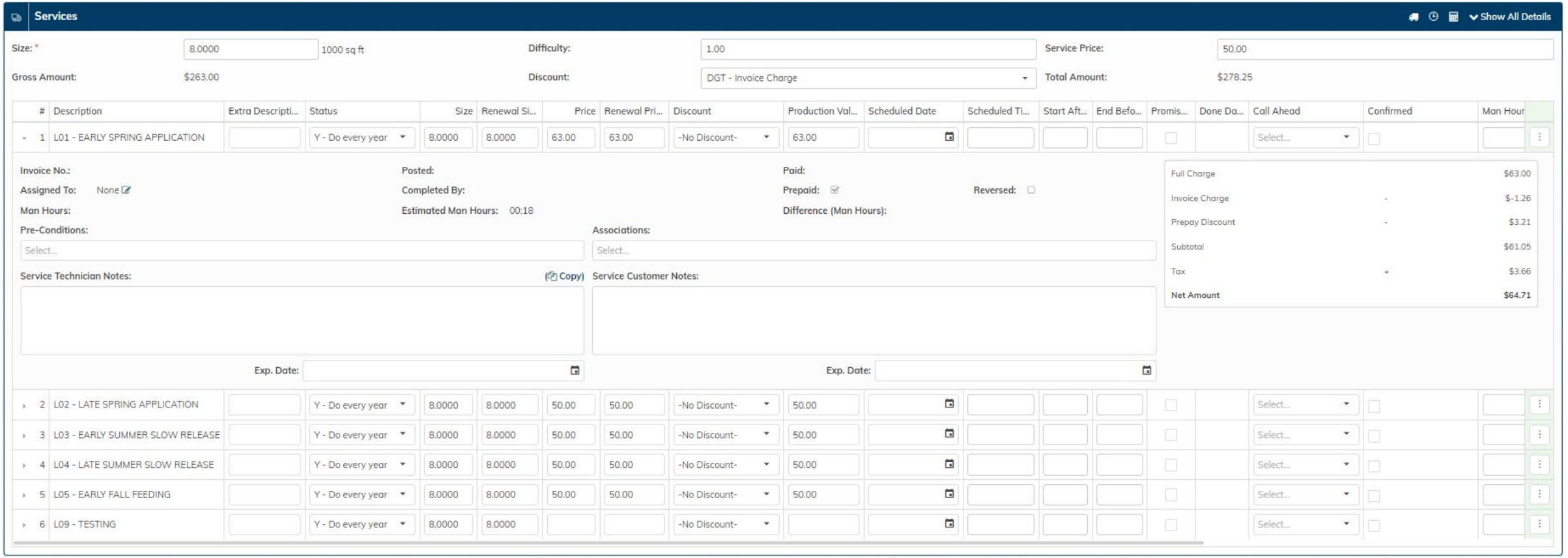


Service details will list each round that makes up the program. Information above the grid applies to all rounds. Information inside the grid applies to that specific round/visit. Each round in the program or special job can be edited inside the grid.


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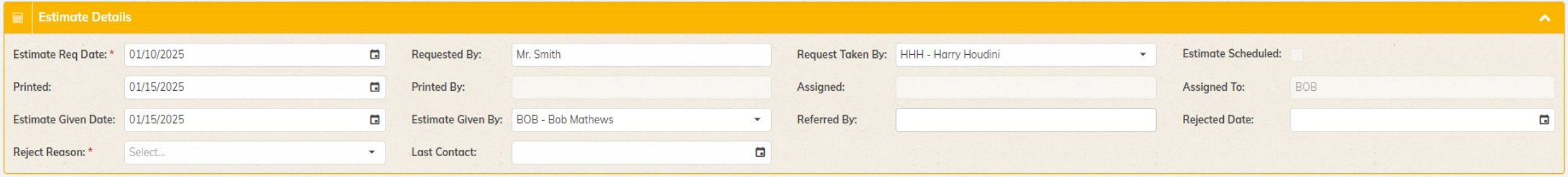


The estimate details sections tracks and display data captured during the estimate process.

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.


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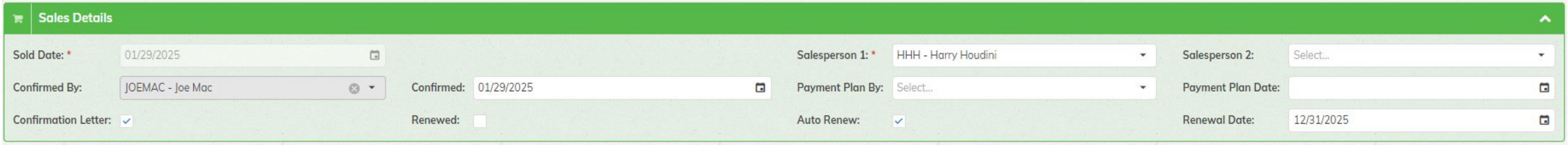


Sales details will list information when and who sold a service. Sold date and sales person can be made required fields in settings for the program/job. You can have up to 2 sales people listes (if a split sales). You can set a confirmed by employee if there is a confirmation process. If the service 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


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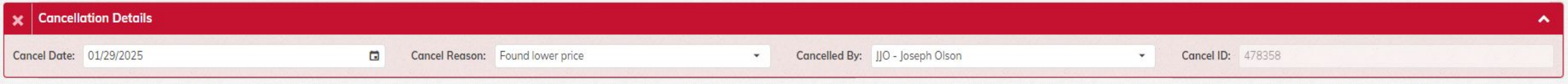


When a customer cancels their service you can capture the date, reason and who took the cancel. These fields can be set as required and it is a best practice to do so when changing the program/job to a cancel status (status 5, 6, or 7). The cancel reason are configured in setting and this list can be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


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# Questions?



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