



SA5 Estimate to Proposal

Bootcamp

SA5 Estimate to Proposal



Matthew Gifford
Technical Consultant, RealGreen

Agenda

SETUP & UNDERSTANDING

 Understanding what 'Estimate' is in SA5
(There are 2 main types and it's important to understand the processes for both)

 Estimate Form Setup

 Estimate Service Setup

EXECUTION & PRINTING

 Adding to customers / prospects

 Estimate Printing

 'Running' an estimate

UPDATING & OUTCOMES

 Updating the records

- » From Customer
- » From Quick Estimate Entry

 Proposal Form

 Reject

 Sales

Estimate vs. Estimate Service

Estimate

- Any program or job with an 'Estimate Status'.
-  **Status 0:** estimate requested
-  **Status 1:** estimate printed
-  **Status 2 AND 3:** estimate given
-  **Status 4:** estimate given/not sold (reject)

Estimate Service

- A special service created and attached to program/jobs.
-  Jobs show up on the Scheduler.
-  Can be 'measured' using mobile live.
-  Shown as 'round 0' in SA program summary.
-  Setup from within the program/job.
-  Marked completed via Quick Estimate Entry or Mobile app.
-  Show in history when completed, cannot be deleted.

Estimate Status vs. Estimate Service

There are many options that should be considered and these options are handled the same way regardless of which way estimates are tracked.



Is something going to be left behind? - You will need an Estimate Form



Are estimates (proposals) going to be emailed - will need “Master doc”/Proposal or Prepay Letter or AMA or WorkWave Forms



Do you want call logs automatically created for the employee to contact the homeowner - you will need to update the estimate data through quick estimate entry.

Essentially, estimate service process has additional setup and handling that’s needed, but everything else is done the same.

Estimate Service Setup

Service Assistant > Settings > Service Setup

Service: EST - estimate service

Service Setup

Service Information

Service Code: * EST Description: estimate service

Available: Branches: * All 5 items selected

Type: **i** * L - Lawn

Start Date: Don't fill in Schedule Date

Service can be: * Round / Cycle Estimate Service Special Work Order Service Call

Note: Checking "Estimate Service" means that this service is never to be charged and will not appear on invoices.

Messaging and Notes

Invoice Description: **i** estimate service

Invoice Message:

Product Usage

Code - Description

Code	Description
------	-------------

Production Entry

Product Amounts
 Wind Speed & Direction
 Start Time
 End Time

An estimate service has to first be created as a special job.

It simply needs to be classified as an estimate service - the job itself could have any name.

Estimate Service Setup Continued

Service Setup and Program Setup have a field to select an Estimate Service to be used for that program/job.

Service Assistant > Settings > Program Setup

Program Code: LC - Lawn Care Program 1

Program Setup

Program Code: LC Type: L - Lawn English Description: Lawn Care Program 1

Available: Branch: All All Branches Selected French Description:

Min Rounds for CAW Prepay: 4 Min Rounds for Full Program: 4 Spanish Description:

Defaults and Required Fields

Required Information	Default Information	Estimate Service: EST - estimate service	Scheduling
<input checked="" type="checkbox"/> Date Sold	<input type="checkbox"/> Non-Service Year	Initial Service: Nothing selected	<input type="checkbox"/> Lock Schedule by Default
<input checked="" type="checkbox"/> Salesperson	<input checked="" type="checkbox"/> Don't Print Invoice if Previous Not Done	Default Billing Type: Regular / Invoice	Days: Nothing selected
<input checked="" type="checkbox"/> Source	<input checked="" type="checkbox"/> Automatic Renew	Units: 1000 Sq. Feet	Repeats: None
<input type="checkbox"/> Size	<input checked="" type="checkbox"/> Automatic Renew Date	Service Category: Core	
<input checked="" type="checkbox"/> Route	<input checked="" type="checkbox"/> Send Confirmation Letter	Text Color: <input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> Cancel Date	<input type="checkbox"/> Internet Available	Background Color: <input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> Cancel Reason	<input type="checkbox"/> Mobile Device		
<input checked="" type="checkbox"/> Reject Reason	<input type="checkbox"/> Lock Sold / Cancel Dates		
<input type="checkbox"/> Estimated By	<input type="checkbox"/> Lock Schedule Default		

Service Assistant > Settings > **Service Setup**

Accounts

Residential Account

Standard: Nothing selected

Prepay: Nothing selected

Discount: Nothing selected

Surcharge: Nothing selected

Nothing selected

Man Hour Rate: 50

Est. Minutes:

Defaults and Required Fields

Required Information	Default Information	Estimate Service: EST - estimate service	Scheduling
<input checked="" type="checkbox"/> Date Sold	<input type="checkbox"/> Non-Service Year	Initial Service: Nothing selected	Days: Nothing selected
<input checked="" type="checkbox"/> Salesperson	<input checked="" type="checkbox"/> Don't Print Invoice if Previous Not Done	Default Billing Type: Nothing selected	Repeats: None
<input checked="" type="checkbox"/> Source	<input type="checkbox"/> Automatic Renew	Program Type: T - Tree	Max: 1
<input checked="" type="checkbox"/> Size	<input checked="" type="checkbox"/> Automatic Renew Date	Units: Nothing selected	
<input checked="" type="checkbox"/> Route	<input type="checkbox"/> Send Confirmation Letter	Min for Full: 1	
<input checked="" type="checkbox"/> Cancel Date	<input type="checkbox"/> Internet Available	Service Category: Core	
<input checked="" type="checkbox"/> Cancel Reason	<input type="checkbox"/> Mobile Device	Text Color: <input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> Reject Reason	<input type="checkbox"/> Lock Sold / Cancel Dates	Background Color: <input checked="" type="checkbox"/>	
<input type="checkbox"/> Estimated By	<input type="checkbox"/> Lock Schedule Default	Quick Fit Time Window: None	

Adding Estimates

Add whatever service or program that you want with a status of 0 or 1.
(If you plan on printing an estimate form then use status 0)



Program Details

Account # 339131689 9-Active Blanche Barker 178 Main St, Fictional City, IN 12365

Customer Details

0 - estimated requested LC - Lawn Care Program 1

Status: 0 - estimated requ... Completed:

Year: 2023 Call Ahead: Select...

Billing Type: Regular / Invoice Source: * Gra - Graffiti

Route: * RR4 - Rail Road R... Temp Route: * RR4 - Rail Roa...

Day Code: 1 Temp Day Code: 1

Sequence: 0 Temp Sequence: 0

PO #: Last Price Increase: 01/03/2023

Last Served: Hold Reason: Select...

Hold Start Date: Hold End Date:

Scheduling

Max: 6 Locked

Days: Nothing selected

Repeats: None

Start On: 06/28/2022 End On: 12/31/2022

Program Notes

Tech. Notes: Cust. Notes:

Exp. Date: Exp. Date:

Services

Size: 0.0000 1000 Sq. Feet Difficulty: 1.00 Service Price: 0.00

Gross Amount: \$0.00 Discount: Select Discount... Total Amount: \$0.00

#	Description	Scheduled TI...	Extra Descripti...	Status	Size	Renewal Si...	Price	Renewal Pri...	Discount	F
1	L1 - Lawn Fert Rd 1			Y - Do every year	0.0000	0.0000	0.00	0.00	-No Discount-	
2	L2 - Lawn Fert 2			Y - Do every year	0.0000	0.0000	0.00	0.00	-No Discount-	
3	TE3 - test schedule date			Y - Do every year	0.0000	0.0000	0.00	0.00	-No Discount-	
5	L5 - Lawn Fert Rd 5			Y - Do every year	0.0000	0.0000	0.00	0.00	-No Discount-	

Select Service

Type: Program

Service: LC - Lawn Care Program 1 (L)

Status: 0 - estimated requested

Year: 2022

Next

New Service Wizard, Quick Program or Service Setup, Suggested Service Price or Mass Service Assignment can all add jobs to a customer.

If your form has pricing options for multiple service or program types, you only need to add 1 job with status 0.

Adding an Estimate Service To Customer

Once a job is added to a homeowner with an estimate status - you can add an estimate service by scheduling it to be done.

Schedule an Estimate : LC - Lawn Care Program 1

Schedule Date: 11/08/2021

Schedule Time: [Clock Icon]

Time Window: [Clock Icon]

Note: [Text Area]

Cancel Schedule Send to Scheduler

Program Details Documents 0

Account # 223 0-estimated requested Mrs. Santa Rosa 4809 Western Dr, M

Customer Details

0 - estimated requested LC - Lawn Care Program 1

Status: 0 - estimated requested Completed:

Year: 2021 Call Ahead: Select...

Billing Type: Regular / Invoice Source: * MKT - Marketing List

Route: * R2 - Route 2 Temp Route: * R2 - Route 2

Day Code: 1 Temp Day Code: 1

- Schedule Estimate
- Audit Log
- Renew
- Delete
- Print Estimate

Estimate Details

Estimate Req Date: * 11/08/2021 Requested By: Request Taken By: EH - EBETH Estimate Scheduled: 11/8/2021 01:00:00 PM

Printed: Printed By: Assigned: Assigned To:

Estimate Given Date: Estimate Given By: Select... Referred By: Rejected Date:

Reject Reason: * Select...

Completing Estimate Services

The screenshot displays the 'Quick Estimate Entry' form in the WorkWave software. The form includes fields for 'Enter an Estimate or Customer Number' (with '223' entered), 'Program/Job Status' (set to '2-Give Estimate'), 'Estimate Given' (11/08/2021), 'Given By' (none), 'Size' (6, 1000 Sq. Feet), 'Round Price' (54), and 'Total Price' (270). Other fields include 'Call Ahead' (none), 'Lawn Rating' (0), 'Technician Notes', 'Customer Notes', and 'Estimate Notes' (Customer wants quote for front only vs. entire, front = 2.7, entire is 6.0). Condition Codes include 'Brown Spots', 'Course Fescue', and 'Insect Damage'. Flag Codes are also present.

A detailed view of the 'History' and 'Treatment' sections is shown below the main form. The 'History' table shows a record for '11/8/2021' with code 'EST'. The 'Treatment' section for '11/8/2021' shows 'Service: EST - estimate service' with 'Posted: 11/8/2021', 'Invoice #: 73411', and 'Billing Type: Regular / Invoice'. It also displays a 'Full Charge' of \$0.00, 'Prepay Discount' of \$0.00, and 'Net Amount' of \$0.00. A 'Weather Details' section shows 'Target/Conditions' for 'BS - Brown Spots', 'CF - Course Fescue', and 'ID - Insect Damage'. A note at the bottom states: 'Customer wants quote for front only vs. entire, front = 2.7, entire is 6.0'.

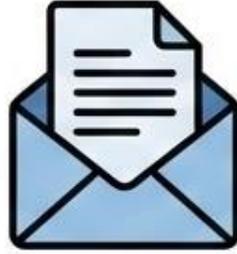
Estimate Services are 'completed' when the estimate is done and updated through quick estimate entry. These will then show in history as record of the estimate being given.

Estimates – Form Types in relation to Service



Estimate Forms (Printed)

- Routed and printed for physical property evaluation.
- One copy left with homeowner, one brought back to office.
- Other versions can be simple information lists.



Proposal Forms (Emailed)

Printed after customer records are updated, typically emailed.



Estimate Service (Mobile)

Created with a service, unrelated to printed/mailed forms (Mobile must have these).

Estimate Form Setup - Templates

Under Document Templates, you can create your own form by modifying one of the templates that has been created.

Service Assistant > Settings > Document Templates

77 68 EE

Document Templates (168)

estimate

Show System Templates

Showing: 25 Results

Description	Template Type	Category	Available	Branches	System Template	
Custom Lawn Est	Estimate		✓	All		✎ 🔄 🗑️
CustomLawn Estimate	Estimate		✓	All		✎ 🔄 🗑️
Estimate Form 7	Estimate		✓	All		✎ 🔄 🗑️
estimate form using an sa4 image	Estimate		✓	All		✎ 🔄 🗑️
My 1 part Estimate with neighbors	Estimate		✓	All		✎ 🔄 🗑️
My big Red Estimate	Estimate		✓	All		✎ 🔄 🗑️
My new blue estimate	Estimate		✓	All		✎ 🔄 🗑️
RGS_Est_Legal_1_Part_FullNeighbors_V1	Estimate		✓	All	✓	🔍 🔄
RGS_Est_Legal_1_Part_FullNeighbors_V2	Estimate		✓	All	✓	🔍 🔄
RGS_Est_Legal_1_Part_Neighbors_V1	Estimate		✓	All	✓	🔍 🔄
RGS_Est_Legal_1_Part_Neighbors_V2	Estimate		✓	All	✓	🔍 🔄
RGS_Est_Legal_1_Part_No_Neighbors_V1	Estimate		✓	All	✓	🔍 🔄
RGS_Est_Legal_No_Header_Blue_Style2_V1	Estimate		✓	All	✓	🔍 🔄
RGS_Est_Legal_No_Header_Blue_V1	Estimate		✓	All	✓	🔍 🔄
RGS_Est_Legal_No_Header_Green_Style2_V1	Estimate		✓	All	✓	🔍 🔄
RGS_Est_Legal_No_Header_Green_V1	Estimate		✓	All	✓	🔍 🔄
RGS_Est_Legal_No_Header_Red_Style2_V1	Estimate		✓	All	✓	🔍 🔄

Estimate Form RG Templates

Several templates have been created for use

- Those listed as '1 part' have specific form paper that is used.
- Those with 'no header' means no data fields have been added and will require setup.
- There is letter and legal size options
- There are two main versions of each in each color

Fozzi Bear  

1132 Opera Dr
Fictional City IN 12365

318

blah blah blah

Lawn Care Estimate

Lawn Considerations		
Types of Turf	Soil	Weeds Present
<input type="checkbox"/> Tall Fescue	<input type="checkbox"/> Grass Color: _____	<input type="checkbox"/> Red Sorrel
<input type="checkbox"/> Kentucky Bluegrass	<input type="checkbox"/> Turf Density: _____	<input type="checkbox"/> Sandweed
<input type="checkbox"/> Rye	Thatch Depth	<input type="checkbox"/> Black Medic
<input type="checkbox"/> Fine Fescue	<input type="checkbox"/> Minimum	<input type="checkbox"/> Purslane
<input type="checkbox"/> Bentgrass	<input type="checkbox"/> Under 1/2"	<input type="checkbox"/> Plantain
<input type="checkbox"/> Zoysia	<input type="checkbox"/> Over 1/2"	<input type="checkbox"/> Dock
	<input type="checkbox"/> Sandy	<input type="checkbox"/> Chickweed
	<input type="checkbox"/> Clay	<input type="checkbox"/> Spurge
	<input type="checkbox"/> Loam	<input type="checkbox"/> Ground Ivy
	<input type="checkbox"/> Compacted	<input type="checkbox"/> Other _____
		<input type="checkbox"/> Creeping Buttercup
		<input type="checkbox"/> Wild Violets
		<input type="checkbox"/> Clover
		<input type="checkbox"/> Other _____
		<input type="checkbox"/> Other _____
		<input type="checkbox"/> Other _____

Disease / Insect Problems	
Disease Activity	Insect Activity
<input type="checkbox"/> Leaf Spot / Melting Out	<input type="checkbox"/> Snow Mold
<input type="checkbox"/> Dollar Spot	<input type="checkbox"/> Other _____
<input type="checkbox"/> Fusarium Blight	<input type="checkbox"/> Other _____
	<input type="checkbox"/> Sod Webworm Evident
	<input type="checkbox"/> Chinch Bug Evident
	<input type="checkbox"/> Grub Worms Evident
	<input type="checkbox"/> Summer Patch
	<input type="checkbox"/> Red Thread
	<input type="checkbox"/> Other _____

Problems Needing Correction By The Homeowner	
<input type="checkbox"/> Lawn cut too high	<input type="checkbox"/> Lawn cut too low
<input type="checkbox"/> Pet damage	<input type="checkbox"/> Too little watering
	<input type="checkbox"/> Dull mower blades
	<input type="checkbox"/> Too much watering
	<input type="checkbox"/> Too much shade
	<input type="checkbox"/> Other _____

Lawn Care Program	
March thru Early May	An application of complete balanced fertilizer with pre-emerged crabgrass control (and broadleaf weed control, weather allowing)
Early May thru June	A complete balance fertilization with broadleaf weed control
June thru August	A complete balance fertilization (spot treatment broadleaf weeds)
September thru October	A complete balance fertilization (spot treatment broadleaf weeds)
November thru December	A winter feeding (promotes root development and faster green up)

Beneficial Services		Cost:
<input type="checkbox"/> Core Aeration	<input type="checkbox"/> Fungus Control	\$ _____
<input type="checkbox"/> Soil Test	<input type="checkbox"/> De-thatching	Sales Tax: 5.0000% \$ _____
<input type="checkbox"/> Soil Amendment	<input type="checkbox"/> Over-seeding	Cost per Application: \$ _____
<input type="checkbox"/> Insect Control	<input type="checkbox"/> _____	Total Annual Cost: \$ _____
<input type="checkbox"/> Disease Control	<input type="checkbox"/> _____	

Optional programs normally require separate estimates performed free of charge. Your Landscape Specialist will be happy to schedule an estimate for you.

Notes:

Evaluator: _____ Date: _____

Contact us at (800) 422-7478 or <http://mycompanywebsite@emailaddress>

Customize Template

To modify the body of the template, simply **edit as you would a word document, update descriptions etc.** This is why you should pick a layout as close to what you want to end with.



*For that extra customization having **HTML knowledge** will help with customizing the templates



Estimate Template - Customize

Select a template to use, clone and add a name.

Select the new document and edit. Data fields are in the left side panel, select- drag and drop onto form.

The screenshot displays the 'Document Template Setup' interface. On the left, a panel titled 'Available Data Fields' lists various fields: [[COMPANY_LOGO]], [[THE_PIC]], [[CUST_NO]], [[CUST_NO_BARCODE]], [[IMAGEADDR]], [[MEASUREDSIZE]], [[EMAILADDR]], [[STATUS]], [[STREETADDR]], [[ADDRESS2]], [[CITY]], [[STATE]], [[ZIPCODE]], [[BILLADDR]], [[BILLTO]], and [[B_TITLE]]. A red box highlights the list icon in the left sidebar. A red arrow points from this icon to the '[[CUST_NO]]' field in the list. Another red arrow points from the '[[CUST_NO]]' field to its corresponding placeholder in the form template. The form template, titled 'My new blue estimate', includes a header bar, a toolbar with various editing tools, and a main content area. The main content area contains several data field placeholders: [[COMPNAME]] #[[CUST_NO]], [[TITLE]] [[FIRSTNAME]] [LASTNAME], [[STREETADDR]], [[CITY]], [[STATE]] [[ZIPCODE]], Directions: DIRECTIONS_CONTAINER, Program Tech. Notes: TECH_NOTES_CONTAINER, Home: [[PHONE_HOME]], Work: [[PHONE_WORK]], and [[DATE_CURRENT]]. The form is titled 'Lawn Care Estimate' and has a section for 'Lawn Conditions'.

Estimate Printing



Filtering & Defaults

Estimate Printing defaults to pull jobs with **status 0** but can be set to print for any status with the option to filter down to only those with empty print dates.

Typically, work is pulled for **status 0** or **status 1**.



Batching & Status Update

Once you have a batch of estimates to print, you can select the **form/documents** you want to use.

Status 0
(estimate requested)



Status 1
(estimate printed)

If printing **status 0** (estimate requested), the status will automatically change to **status 1** (estimate printed)



Printing Specifics

If using **RG estimate forms**, you will need to be sure that you select to print **2 copies** and **do not collate**.

Estimate Printing

Step 1 are the selections to find customers with estimates to print

Progress bar: 1 Step 1 Search Estimates | 2 Step 2 Search Results | 3 Step 3 Options

Search By: Company / Branch

Companies/Branches: * 5 of 8 Branches Selected

Schedule Date: All

Services: * All Services

Service Year: 2021

Customer Type: Both

Program Status: * 0 - estimated requested

Program Source: * 15 items selected

Only print estimates with empty print date

More filters

- + Flag Codes
- + Advanced Options

Selected Services: A&S - Aeration and Seeding, AEF - Fall Aeration, AER - Spring Aeration, BED - Bed Maintenance, BW - Bed Weed Control, CON - Consultation

Estimate Printing

Step 2 will list all results from step 1, these can be selected and printed or they can be taken to routing to be selected and optimized.

Progress bar: Step 1 (Search Estimates) - Step 2 (Search Results) - Step 3 (Options)

Search Results Update Customer and Service Send to Routing

Group by: Account # Route Route & Day Territory Map Code Zip [Reset Grouping, Sorting, and Filtering](#)

Search...

Drag a column header here to group by that column

<input type="checkbox"/>	Account #	Name	Address	Zip	Estimate Requested Date	Programs/Jobs	Rt/Day/Seq	Territory	Map Code
<input type="checkbox"/>	28	Grove, Samantha	4856 Recession St	12365	2/24/2021	Aeration and Seeding	R01 - 1- 0		
<input type="checkbox"/>	339131751	Frikker, Lynn	4666 Charing Cross Rd	48304	12/9/2021	Lawn Care Program 1	01 - 1- 0		
<input type="checkbox"/>	591	Flowers, Valerie	9867 Junco Dr	47201	12/8/2020	Best Lawn Program	R01 - 1- 1		
<input type="checkbox"/>	592	DeVoe, William	9567 Actors Pl	47201	12/2/2020	Best Lawn Program	R01 - 1- 1		
<input type="checkbox"/>	294	Million, Bradford	920 Midway St	45042	11/22/2021	Perimeter Pest	R1 - 1- 0		
<input type="checkbox"/>	8	Roach, Kyle	125 Martian Landed Ave	12365	2/24/2021	Tree Program	R2 - 1- 0		
<input type="checkbox"/>	14	Springer, Jerry	9865 Fake Drama Dr	12365	2/24/2021	Tree Program	R1 - 1- 0		
<input type="checkbox"/>	24	House, Gregory	8121 Beech Dr	12365	6/24/2021	Tree Program	R2 - 1- 0		

Selected: 0 of 8

Estimate Printing

Step 3 defines what form to use, who the work is assigned to and when.

It is also where forms are 'generated' - marked as printed and status updated.

Step 1 Search Estimates Step 2 Search Results Step 3 Options

Form Options

Select forms to include:

Driver Report Normal

Schedule Normal

Estimates * My big Red Estimate

Printer Offset: 0 Inches

Assigned To: * BC - Butch Cassidy

Assigned Date: * 09/10/2021

Include Neighbors

Include Neighbors

Max. Distance: 5 Miles

Max. Referrals: 8 Referrals

Similar Programs

Cancel Back Preview Generate

Proposals / Forms

- **Delivery Methods:**

-  Master doc/Proposals
-  Prepay Letter
-  AMA or WorkWave Forms

- **Key Features & Setup:**

-  Templates found under document templates in setup.
-  Prices pull from account or based on customer size and price charts.
-  AMA automatically sends Estimates once in status #2.
-  WorkWave Forms available for e-signature.

COMPANY_LOGO_CONTAINER

THE_PE_CONTAINER

Personalized Proposal for the
Beverly Reinidence
116 Coon St
Fictional City, IN 12365

Measured Lawn Size:
6,500 sq. ft.

Proposal Customer Number:
545147668

There are no other opportunities to present this estimate for your lawn care needs. Our team can provide estimates at other locations if business territories, addresses and grass wear prevention are available upon review.

Proposed Lawn Care Program

Proposed Lawn Care Program	Price Per Application
March thru Early May	\$32.26
Early May thru June	\$42.50*
June thru August	Call the office for pricing
September thru October	\$52.35
October thru November	Call the office for pricing
November thru December	\$42.50*
Optional	\$465.30

Service Calls are free for all Customers on a scheduled year term. See table below for details.

Get started today!

Contact us at (800) 442-7475 or online at [www.workwave.com](#) to begin your service.

Your lawn care program is a continuous service from application to application and year to year with treatments scheduled every 4 to 6 weeks. You may schedule services at anytime, simply by calling our office.

Representative: _____

Measured Lawn Size:
6,500 sq. ft.

Proposal Customer Number:
545147668

There are no other opportunities to present this estimate for your lawn care needs. Our team can provide estimates at other locations if business territories, addresses and grass wear prevention are available upon review.

Proposed Lawn Care Program

Proposed Lawn Care Program	Price Per Application
March thru Early May	\$32.26
Early May thru June	\$42.50*
June thru August	Call the office for pricing
September thru October	\$52.35
October thru November	Call the office for pricing
November thru December	\$42.50*
Optional	\$465.30

Service Calls are free for all Customers on a scheduled year term. See table below for details.

Get started today!

Contact us at (800) 442-7475 or online at [www.workwave.com](#) to begin your service.

Your lawn care program is a continuous service from application to application and year to year with treatments scheduled every 4 to 6 weeks. You may schedule services at anytime, simply by calling our office.

Representative: _____

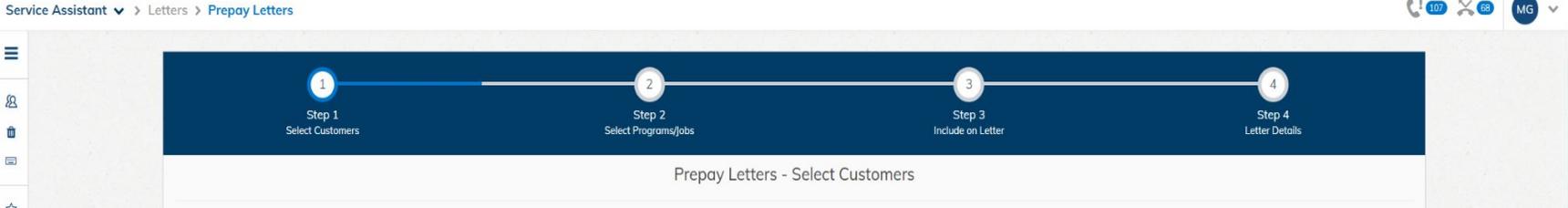
Subtotal: \$210.00

Sales Tax: \$9.50

Discount: \$20.00

Total: \$199.50

Prepay Letters



Prepay Letters are a fast easy way to get a quote to a customer. You can add letter wording specific to estimates. Services can be pulled by price chart or by existing services. Can be printed or emailed. Though the customization is limited the convenience of being able to send something quick makes up for that.

Acme CO.
4321 Looney Tunes Dr. Somewhere MI 48198
(800) 422-7478 (800) 555-5555 **ACME CORPORATION**

Billing Address
Beaky Buzzard
3145 Packard St
Ann Arbor, MI 48197

Service Address
Beaky Buzzard
3145 Packard St
Ann Arbor, MI 48197

Customer Number: 1140
1/21/2025

VALUED CUSTOMER PREPAY DISCOUNT

Save!

5%

On This Service for One Full Year

Expires on **1/21/2025**

ACT NOW 5% OFF BUDGET BILLING EXPIRES 1/1/24

Dear Valued Customer,

ACME CO would like to thank you for choosing us to service your lawn for this season. Below you will find a list of services that are scheduled for your property for 2025. Please visit our website to set up your online account with us and take advantage of the many great features you have access to. Your friends at ACME CO sincerely thank you for your business!

Lawn Treatments	Number of Services	Price Per Service
Season Long Grub Control	1	\$52.00
	1	\$150.00
 <i>Total Service Amount</i>		<i>\$202.00</i>
<i>After 5% Prepay Discount</i>		<i>\$191.90</i>
<i>You Save</i>		<i>\$10.10</i>
<i>Prepay Amount</i>		<i>\$191.90</i>

Yes! I wish to prepay for scheduled services
Enclosed is my check for **\$191.90**

Yes! Please bill me as services are performed

Billing Address
Beaky Buzzard
3145 Packard St
Ann Arbor, MI 48197

Customer Number: 1140

Your prepayment of

\$191.90

gives you a \$10.10

discount off regular service for one full year

Expires on 1/21/2025

ACME CORPORATION Acme CO.
4321 Looney Tunes Dr.
Somewhere MI 48198

AMA and WorkWave Forms

AMA Estimate Follow Up

Set it and forget it: Automated emails for estimates.



Customizable templates



Pulls pricing from existing services (Status #2 or #3 triggers email).

WorkWave Forms

A great option for sending professional estimates.



Fully customizable in Adobe



Pulls pricing from existing services



E-signature capability.

What to do after you have a Price Quote?

1. Generate & Deliver Quote



Obtain via on-site visit, online tool, or other means.
Deliver as a leave-behind, emailed proposal, or phone call.

2. Update Account Status



Crucial step: Update the account with gathered information and new status.



Estimate Given

Status 2 or 3



Sold

Status 8 or 9



Estimate Rejected

Status 4

Updating Estimate Statuses

Two Main Ways to Update Accounts



Quick Estimate Entry – A quick way to update the customer and have the required fields identified easily.



Program/Jobs can be updated manually.

Defining Required Fields



Estimated By becomes required starting at status 2.



Rejected Reason is required for just status 4.



Date Sold, Salesperson and **Size** all become required for status 8 and 9.

Call Logs

- **Automatic Creation:** Call Logs can automatically be created when an estimate is updated to estimate given (status 2 or 3).
- **Settings Path:** Settings - General Setup - Program/Job

The calls will be assigned to the 'estimated by' employee.

t > Settings > General Setup - Program/Job

Messages

English	French	Spanish
Remit None Text none	Remit None Text nit (french none)	Remit None Text Nada
Continuous Service Message For vna rrvnenionro corviro will rrvntivo for cansn	Continuous Service Message nn in in French Continuous Service Message	Continuous Service Message cnnieh - rrvntivie sorviro msn

New Job Options

<input checked="" type="checkbox"/> Automatically add a call in the call log	With Call Log Status: \$ - Sales Call
<input checked="" type="checkbox"/> Default to Status 0 for 2nd Program of Active Customer	<input checked="" type="checkbox"/> Default to Status 0 for 2nd Job of Active Customer
<input type="checkbox"/> Lock Estimate Request Date	<input checked="" type="checkbox"/> Require "Estimated by" after printing estimates

Questions?

Session Feedback

We appreciate your feedback and attendance

-  Login to the event mobile app
-  Add this session to your schedule
-  Click survey
-  Give it a rating 1-5 stars

