



SA5 Basic Routing, Invoicing, and Production Entry

SA5 Basic Routing and Production



Thom Boersma

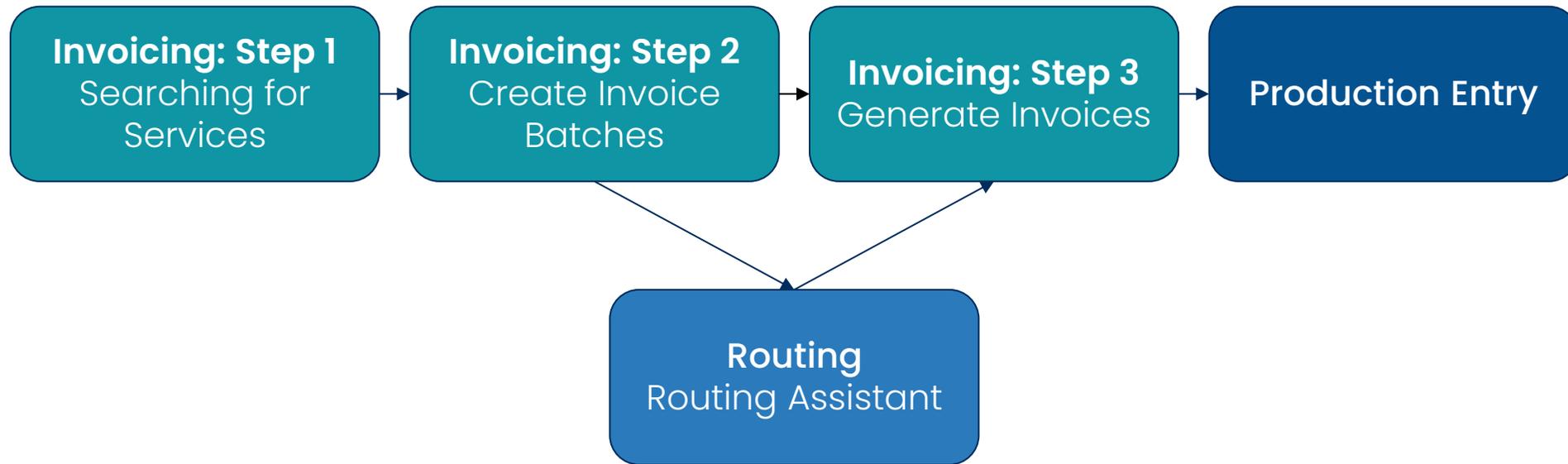
Customer Success Manager, RealGreen

Agenda

- Process Overview
- Billing Types
- Invoicing
- Routing
- Production Entry

Process Overview

Process Overview

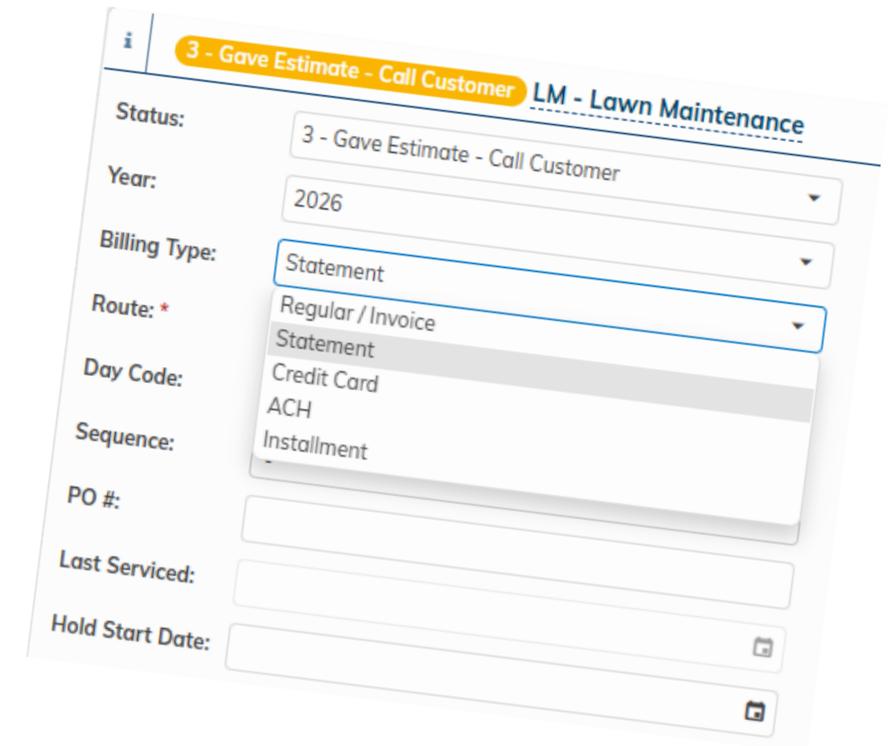


What Are Billing Types?

Billing Types control how your customers pay for services, and the forms that are needed for remittance.

Billing Types:

- Regular/Invoice – Balance is due at time of service, or due when the job is posted as completed
- Statement – Balances are due for a set time frame after services are completed (Monthly, Weekly, etc.)
- Installment – Balances do not accrue from services, but are billed equally on the same day over a set time frame (Monthly, Bi-Monthly, Quarterly, etc.)
- Credit Card/ACH – Both are considered autopay billing, and automatically charge the card or bank account on file after services are completed



The screenshot shows a software interface for selecting a billing type. At the top, there are two tabs: "3 - Gave Estimate - Call Customer" (highlighted in orange) and "LM - Lawn Maintenance". Below the tabs, there are several fields:

- Status: 3 - Gave Estimate - Call Customer
- Year: 2026
- Billing Type: Statement (highlighted with a blue border)
- Route: * Regular / Invoice (highlighted with a blue border)
- Day Code: Statement
- Sequence: Credit Card, ACH, Installment
- PO #: [empty field]
- Last Served: [empty field]
- Hold Start Date: [empty field]

What Is Invoicing?

Invoicing in SA5 is many things:

- Generating/Printing Invoices
- Updating services to note that the work is progressing toward completion
- The process by which you will assign work to technicians and/or push that information to RealGreen Mobile

RealGreen INVOICE

Service Address: Marion Jones, 956 Lakeside Dr, Waterford, MI 48328
Phone: (248) 555-1212
Cust # 63
Chandra Mogensen Lic # 867-5309-555-1212
PRINTED: 12/29/2023

Implementation Team Training
(800) 422-7478 (OPT) ION-1
Invoice # 2 Please Remit \$623.62**

Description	Date	Amount	Tax	Total
Lawn Application Round 1 \$37.27 During this visit we have applied pre-emergent crabgrass and broadleaf control as well as a specialized fertilizer blend to give your grass a mix of nutrients as it comes out of seasonal dormancy.	12/29/2023	37.27	0.56	(\$37.27)

Start Time: _____ End Time: _____

Today's Invoice Charge: 37.27
City Tax: 0.56
Applied Payments: (\$37.27)
Prev Bal as of 12/29/2023: 524.37
Please Remit \$623.62**
Payment due upon receipt. Net 30 days 1.5% thereafter. Please call with any questions about your lawn.

Your balance is over 90 days old. Please remit IMMEDIATELY. Thank you.
For your convenience, service continues from season to season. For a change in service, please call our office.

www.realgreen.com
Implementation Team Training
4375 Pineview Dr
Walled Lake, MI 48390

Billing Address:
Kathy Whitworth
5624 Tequesta Dr
West Bloomfield, MI 48323

Implementation Team Training
4375 Pineview Dr
Walled Lake, MI 48390

Charge My: Visa MC AmEx Discover PrePay

Card #: _____ Security Code: _____
Signature: _____

(I) Please have technician call me!
Invoice # 2 Customer 63
Today's Invoice Charge: 37.27
City Tax: 0.56
Applied Payments: (\$37.27)
Prev Bal as of 12/29/2023: 524.37
Please Remit \$623.62**
Due Date: 1/13/2024
Invoice # 2

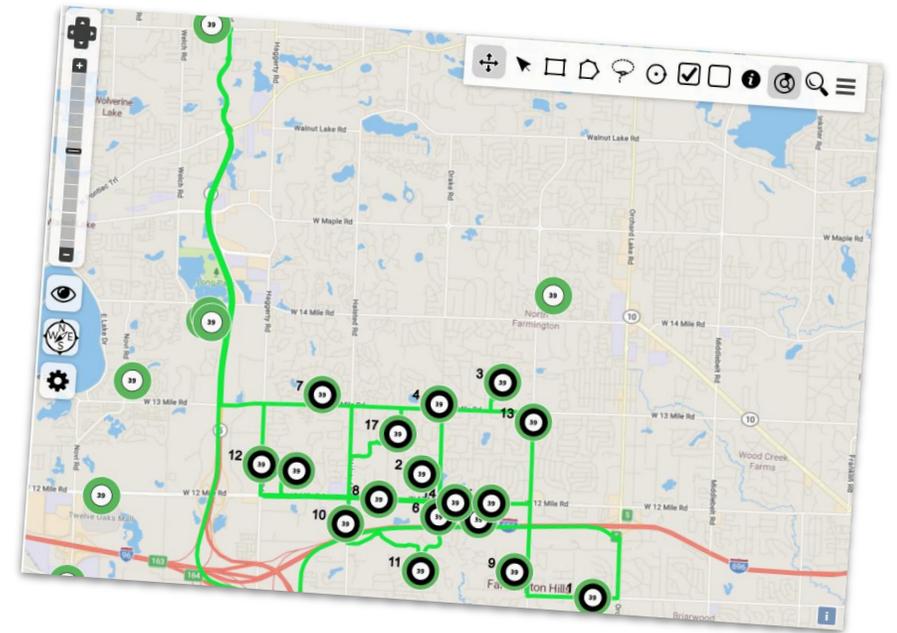
** Additional services may not be covered by your Pre-Pay Plan.
PLEASE RETURN THIS PORTION WITH YOUR PAYMENT. BE SURE ADDRESS SHOWS THROUGH WINDOW.

What Is Routing?

Routes in Service Assistant define a subset of your entire production data. Routes provide the ability to group customers/services by geographic region, which is the best practice method of defining routes.

Alternatively, routes can be defined by:

- An employee licensed for or capable of completing specific services
- A vehicle equipped especially for certain services



What Is Production Entry?

Production entry is the process of entering information into Service Assistant 5 for completed work. Posting production will update the customer's balance to reflect the charge for work completed.

Production Terminology:

- Journal: where production entries are saved once the details about the completed work are added and saved
- Claim Journal: the process of pulling information from another user's journal or a RealGreen Mobile technician's journal into your journal

The screenshot displays the 'Production Entry' form in Service Assistant 5. The interface includes a sidebar with a customer profile for Johnny (Account # 163, Invoice Number 123) and a list of production journals for 2021, including Irrigation Startup and six rounds of Lawn Application. The main form area contains fields for Date (03/16/2022), Employee (CC - Chris Carter), Done Date (03/16/2022), Start Time (12:00am), and End Time (12:00am). It also shows a Production Value of \$89.03, Man Hours of 3.48, and a Net amount of \$89.03. A 'Products' table at the bottom is currently empty, showing columns for Product, Actual Amount, Treated Area, Location(s), Application Method, Rate, and Targets.

Billing Types

Statement Billing

Balances are due for a set time frame after services are completed (Monthly, Weekly, etc.), generally used for frequently done services like mowing or snow removal.

- Balances age as of the done date on the service
 - Optionally age the balance as of the Monthly Invoice print date
- Statement services may be prepaid as normal
 - Paid/Prepaid services will still display on the Monthly Invoice

Remittance Forms:

Statement billing services require a Monthly Invoice to be printed or emailed through the Monthly Invoice module or Reprint Monthly Invoices.

Monthly Invoices will include all Statement billing services without invoice numbers between the done dates selected.

***Option to charge card on file for Statement billing services included on the invoice.**

Invoice

Customer #: 8
Invoice #: 25246
Printed: 12/30/2022

Your Company Name
(800) 422-7478 (123) 456-7895
<http://mycompanywebsite@emailaddress>

Service Address
Mr. Kyle Roach
125 Marlin Landed Ave
Fictional City, IN 12365

Please Remit: \$92.50 Res.: (662) 156-9854 Bus.:

Description	Date	Amount	Tax	Total
Bi-Weekly Mowing	3/2/2022	\$46.25		\$46.25
Bi-Weekly Mowing	3/14/2022	\$46.25		\$46.25

For your convenience, service will continue for season to season. For a change in service, please call our office.
Please pay within 10 days. Net 30 days 1.5% thereafter. Please call with any questions about your lawn, how much more can I get in this season.
For your convenience, service will continue for season to season. For a change in service, please call our office.

<http://mycompanywebsite@emailaddress>

Your Company Name
address line 1 or P. O. Box
city, state zip

Your Company Logo

Amount Check

Charge My Exp: / /

Card # Security Code

Signature

Invoice #: 25246

Cust #: 8

Please Remit: \$92.50

Printed: 12/30/2022

Your Company Name
address line 1 or P. O. Box
city, state zip

PLEASE RETURN THIS PORTION WITH YOUR PAYMENT. BE SURE ADDRESS SHOWS THROUGH WINDOW.

Installment Billing

Balances do not accrue from services but are billed equally on the same day over a set time frame (Monthly, Bi-Monthly, Quarterly, etc.).

- Balances are aged as of the Installment due dates
- Installment charges can be prepaid, Installment billed services cannot
- Installment charges can be set to autopost on the due dates
- Installments can be set to automatically bill a customer's credit card or ACH account

Remittance Forms:

Installments can have Installment Invoices or Coupons printed or emailed. Coupons are typically printed for the whole year.

Installment Invoices printed after the due date has passed will need the 'Reprint' option enabled.



Your Company Name
(800) 422-7478 (123) 456-7895
http://mycompanywebsite@emailaddress

Invoice

Customer #: 7
Invoice #: 24828
Printed: 12/30/2022

Service Address: Tom Turkey, 9586 Sleeping Circle Ct, Fictional City, ID 12365
Bus. (682) 885-4751

Description	Date	Amount	Tax	Total
April 2022 Charge	4/1/2022	\$174.13	\$8.71	\$182.84

PO #: _____

PAYMENT STUB PLEASE KEEP FOR YOUR RECORDS

DATE: _____

CHECK NO.: _____

AMOUNT: _____

PAYMENT NO.: _____

DETACH BEFORE MAILING

ACCOUNT NO.: 7

CHARGE: 174.13
TAX: 8.71
DATE DUE: 4/1/2022

AMOUNT DUE: 182.84

CHECK NO.: _____

PLEASE RETURN THIS STUB WITH YOUR PAYMENT

9586 Sleeping Circle Ct
Fictional City ID 12365

PAYMENT STUB PLEASE KEEP FOR YOUR RECORDS

DATE: _____

CHECK NO.: _____

AMOUNT: _____

PAYMENT NO.: _____

DETACH BEFORE MAILING

ACCOUNT NO.: 7

CHARGE: 174.13
TAX: 8.71
DATE DUE: 5/1/2022

AMOUNT DUE: 182.84

CHECK NO.: _____

PLEASE RETURN THIS STUB WITH YOUR PAYMENT

9586 Sleeping Circle Ct
Fictional City ID 12365

PAYMENT STUB PLEASE KEEP FOR YOUR RECORDS

DATE: _____

CHECK NO.: _____

AMOUNT: _____

PAYMENT NO.: _____

DETACH BEFORE MAILING

ACCOUNT NO.: 7

CHARGE: 174.13
TAX: 8.71
DATE DUE: 6/1/2022

AMOUNT DUE: 182.84

CHECK NO.: _____

PLEASE RETURN THIS STUB WITH YOUR PAYMENT

9586 Sleeping Circle Ct
Fictional City ID 12365

any questions about your lawn, how much more can i pay now, how about now? | a d e e d a d e e d a

PLEASE INDICATE PAYMENT AMOUNT & CHECK NUMBER

	CHECK NO.

Charge My: VISA M/C A/C D/C A/E A/C

Card #: _____ Security Code: _____

Signature: _____

Invoice #: 24828
Cust # 7

Please Remit \$182.84

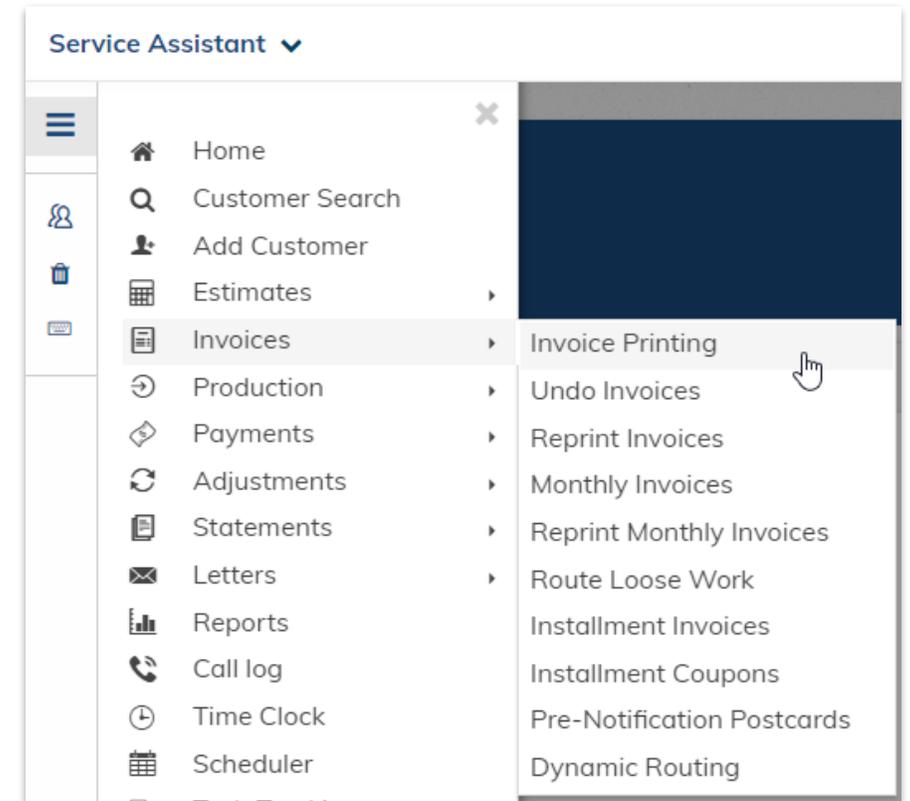
Printed: 12/30/2022

SURE ADDRESS SHOWS THROUGH WINDOW

Invoicing

Invoicing

To access the Invoicing and Routing Wizard, navigate to the Main Menu > Invoices > Invoice Printing.



Invoicing Step 1: Search for Services

Search By: Company/Branch

Year: Company/Branch

Services: Group Billing Account
Subdivision

Search By: Specify your search by criteria.

Branch: * 1 - Implementation Team Training

Branch: Select the Branch to generate invoices for. Multiple can be selected.

Year: 2023

Year: Select the Service Year.

Automatic Association:

Automatic Association: If this box is checked and multiple services are selected, any customer with more than one service will generate a single invoice with multiple services assigned to that invoice.

Invoicing Step 1: Search for Services



Services: Select the services that need to be routed and/or invoiced.

There are two service panels in this area:

- All Services: the left panel is displaying all available services in your database
- Selected Services: the right panel displays the services selected from the All Services Panel

Services selected on the right side will be used in your results as you move into Step 2.

Invoicing Step 1: Search for Services

Date Based On: * Last Serviced Days Ago (12/29/2023)

Early View: ▼

Schedule Date:

Earliest to date ▼

Date Based On: If the rounds of a program are dependent, you can pull services based on when the last service in a program was completed by specifying how many Days Ago the service must have been completed.

Early View: This drop-down allows you to specify customers that may be close enough to the last serviced date if they are in the same neighborhood that you will be working in. These days are added to the Last Serviced days. I.e. If you normally service at 35 days since last serviced, you will set your Last Serviced days as 30 and leave Early View at 5 to capture anyone between 30 and 35 days as Early View customers.

Schedule Date: Selecting this allows you to specify the scheduled date range as a criteria to pull invoices. To use this effectively, services will need specific scheduled dates

Invoicing Step 1: Search for Services

Only Services That Can Be Done On:

Only Services That Can Be Done On: You can restrict the results by acceptable days. This looks at the specific day(s) on each customer's job screen under the Scheduling subsection.

Route:

Route: If you have services that are tied to a route, you can filter the route here.

Customer Type:

Customer Type: Select if the customer can be Residential, Commercial, or Both.

With Inventory Items:

With Inventory Items: Filter services based on the Customer's Property Inventory subsection on the customer's account page.

Invoicing Step 1: Search for Services

Other Options:

- [Credit Hold Settings*](#) ▼
- [Add Associations](#) ▼
- [With or Without Services](#) ▼

Credit Hold Settings: Override default Credit Hold Settings configured in Settings > General Setup Financial. This may be useful as you approach the end of the time window for a given service.

Add Associations: Manually associate or filter the invoices pulled based on whether a customer does or does not have a defined associated service. This requires Automatic Association to be disabled. Define your primary service only in the top service area and then use this area to define required associations. You can utilize different “date based on” criteria for the associated service(s).

With or Without Services: Restrict the invoices by whether a customer simply has or does not have a selected service on their account in an active 8 or 9 status. If you do not define selected services in the Add Associations or the With or without services areas, then these are ignored, and only the upper service selection is honored.

Invoicing Step 1: Search for Services

More filters

— Flag Codes

With:

Without:

— Advanced Options

Customer Information <input type="checkbox"/>	Preferences <input type="checkbox"/>
Documents <input type="checkbox"/>	Size Source <input type="checkbox"/>
Letters <input type="checkbox"/>	Subdivision <input type="checkbox"/>
Letters (Master Documents) <input type="checkbox"/>	NPS <input type="checkbox"/>
Decile <input type="checkbox"/>	

Send To Mapping Filter

Filter By List

Flag Codes: Filter customers by flag codes that have been added to the Customer's accounts.

Advanced Options: Explore this section for additional options to filter the results of your search criteria.

Once all options have been selected, click **Add to Search** and **Next** to proceed to Step 2.

Invoicing Step 2: Create Invoice Batch

<input type="checkbox"/>	Call Ahead	Account #	Name	Address	Address line 2	City	Zip	Last Serviced	Service	Route	Day	Sequence	Schedule	Time	A
<input type="checkbox"/>		21	Miller, Cheryl	2444 Brockton Ave		Royal Oak	48067	6/14/2022	LC1	EMC	1	10			S
<input type="checkbox"/>		63	Jones, Marion	995 Lakeside Dr		Waterford	48328	2/21/2023	LC1	R01	1	6			
<input type="checkbox"/>		203	Sexton, Chase	1818 Gilsam Ave		Rochester Hills	48309	8/4/2023	LC1	EMC	1	70	5/4/2023	8:23 AM	
<input type="checkbox"/>		205	Denver, John	1216 Country Dr		Troy	48098	8/4/2023	LC1	EMC	1	60	5/4/2023	9:36 AM	

Selecting Jobs to Be Performed: The results from Step 1 will appear in this grid and can be selected based on your needs for routing and assignment purposes. Selecting the jobs to be performed is as easy as clicking the checkbox on the line of the customer you would like to route.

You can group, filter, or sort by the different headers listed in the table by clicking on the Group By above the table or dragging the column header to the Group By area, clicking on the funnel in each header, or by selecting the title in each column.

Invoicing Step 2: Create Invoice Batch

Totals (with Association):	Services Selected: 3034	Unique Customers Selected: 3034	Size: 1790422.9800 	Charge: \$17922765.01	Total Time: 148809:23	Call Aheads: 0
Quick Select:	Call Ahead Confirmed New Sale ASAP Promised Associated Past Due Service Call None	<input checked="" type="checkbox"/> Include Associated Services in Totals				

Below the Table:

Details about the selected services are listed:

- Totals (with or without Association): based on the Include Associated Services in Totals option at the bottom right of the page
- Services Selected: total services selected
- Unique Customers Selected: total number of unique customer accounts selected
- Size: total size selected
"i" button below displays size totals by Unit of Measure
- Charge: total charge selected
- Total Time: total estimated production time selected
- Call Aheads: total # of call aheads selected

The ability to click the different Quick Select options to select all services that fall into any of the specified categories.

Invoicing Step 2: Create Invoice Batch

Once your services have been selected, you can now move on to the Routing step or select Create Batch to move to the Generate Invoices step (See Slide 29).

Click on the **Send to Routing** verbiage in the upper right corner to take selected stops to the map.

The screenshot displays the 'Create Invoice Batches' interface. At the top, a progress bar shows three steps: Step 1 (Search for Services, completed), Step 2 (Create Invoice Batches, active), and Step 3 (Generate Invoices). Below the progress bar, the main interface includes a search bar, a 'Group by' dropdown menu, and a table of data. A red arrow points to the 'Send to Routing' button in the top right corner.

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

Search...

Zip	Call Ahead	Account #	Name	Address	Address line 2	City	Last Serviced	Service	Route	Day
Zip: 48098 (Count: 1, Total Size: 3.0000, Total Charge: \$45.00, Total Time: 0:25)	All	None								
Zip: 48101 (Count: 281, Total Size: 1919.7700, Total Charge: \$21373.00, Total Time: 157:51)	All	None								

Routing

Routing

Routing Assistant

Optimize [Map Controls]

Search: No data to display

Invoices	Drive Time	Distance	Call Aheads
0	00:00	0.00	0
Size	Charge	Production Time	Production Value
0	\$0.00	0:00	\$0.00

Incl. Assoc.

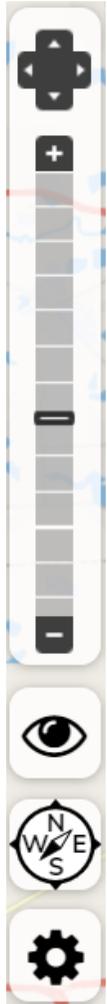
Legend: Depot (black square), Available (black circle), Printed (black pentagon), Batched (black diamond)

Call Ahead (blue), Confirmed (purple), New Sale (green), ASAP (red), Promised (pink), Associated (orange), Early View (light blue), Past Due (yellow), Service Call (black)

Assigned To: Employee Employee: NULL -- No Employee - Assigned Date:

Create Batch Next

Routing



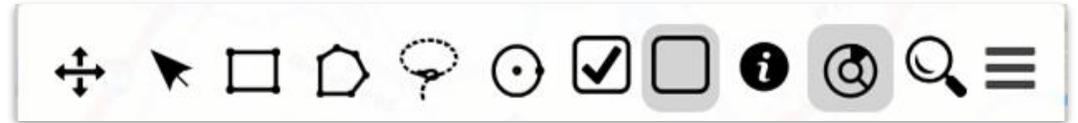
Arrows: while you can navigate around the map with your mouse, these arrows will allow you to also move left, right, up, and down throughout the routing screen.

Plus/Minus: zoom in and out.

Eye: map view in default or satellite view.

Compass: view the map in a different direction.

Settings: map options for auto zoom and default pan tool.



Selection Tools: you can use these tools to select the services on the screen. From one stop at a time to multiple, there are several options to choose from.

Check Box: select all stops on the map.

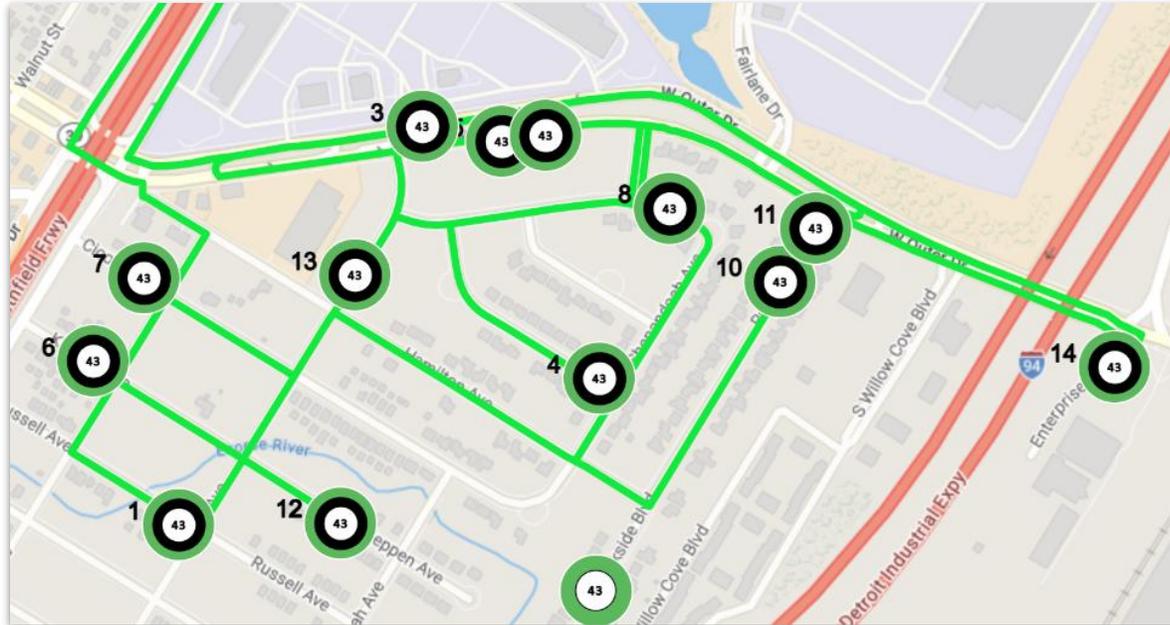
Empty Box: clear current selection.

"i": pull up the information for all customers on the screen with this button.

Halo: show key-coded identifiers for customers.

Search: search for a specific address.

Routing



Select the stops you would like to assign to your technician using the available select tools.

Routing

The screenshot shows a routing interface with a list of 7 stops. Each stop is numbered 1 through 7 and includes a location name, address, and size. To the right of each stop is an 'X' icon and a three-dot menu icon. Below the list is a summary table with columns for Invoices, Drive Time, Distance, Call Aheads, Size, Charge, Production Time, and Production Value. At the bottom, there is a checkbox labeled 'Incl. Assoc.' which is checked.

Invoices	Drive Time	Distance	Call Aheads
14	01:29	67.32	0
Size	Charge	Production Time	Production Value
139.8	\$1483.00	9:01	\$1483.00

Incl. Assoc.

After the services have been selected, review the selected stops to confirm the list for your technician. It is important to review the bottom portion on the left side of the screen to confirm Drive Time and Production Time are correct for your technician's work window.

If you need to remove or change any stops, you can do so by clicking the X to remove the stop or using the six dots to move a customer up and down in the list.

You can also right click on a stop to lock the stop as the first or last stop in the route.

****Needs to be done BEFORE optimizing.***

Routing

Optimize: after the route list set, click the Optimize button to ensure the route is optimized based on the most efficient order.

Marker Options: choose to make the markers larger or show different information inside the pushpins, like how long it has been since last serviced or sold.

Filters: additional filters are available to prioritize the stops based on selected criteria.

Reverse Route: reverse the current route order.

Update Customer & Service: this pop-up will allow you to update routes, taxes, and scheduling details for the selected services.

Maps: if your technicians are not using RealGreen Mobile, you can print off a helpful map and directions.

Add Stops: if you have stops that were invoiced but not completed, you can use this tool to grab those stops and add them into your route list. This is a great alternative to Route Loose Work.



Routing

Assigned To: Employee ▾ Employee:* NULL - - No Employee - ✕ ▾ Assigned Date:* 📅 ↻

The last step before creating the batch is to assign the route list to your technician on the day for the day of expected completion.

Assign To: assign the route to an employee or a crew.

Employee or Crew: select the employee or crew to assign.

Assigned Date: assign the date the route should be completed.

Routing

Assigned To: Employee ▾ Employee:* NULL - - No Employee - ✕ ▾ Assigned Date:* 📅 ↶

The last step before creating the batch is to assign the route list to your technician on the day for the day of expected completion.

Assign To: assign the route to an employee or a crew.

Employee or Crew: select the employee or crew to assign.

Assigned Date: assign the date the route should be completed.

The final step is to Click on the **Create Batch** button.

Once clicked, the selected stops will disappear from the map. Additional routes can be created before moving to the final step.

Once finished, click **Next** and move on to Step 3.



Invoicing Step 3: Generate Invoices

Step 1 Search for Services Step 2 Create Invoice Batches Step 3 Generate Invoices

Generate Invoices

Batches

Sort By: Routing/Sequence

Search...

<input checked="" type="checkbox"/>	Services	Size	Charge	Estimated Man Hours	Assigned Employee	Assigned Date
<input checked="" type="checkbox"/>	14	139.8000	\$1,483.00	9:01	CM - Chandra Mogensen	01/02/2024

Include Associated Services in Totals

Form Options

Select items to include:

- Invoices
- Driver Report
- Worksheet
- Schedule
- Call Ahead List
- Property Evaluation

Large Note Area

Normal

Normal

Normal

Normal

Property Evaluation Letter

BBS

- Include Page Separators
- Diagrams/Documents
- Full Page
- Generate & Mark as Printed
- Don't print invoices for those with email

Invoicing Step 3: Generate Invoices

Batches

Sort By: Routing/Sequence

Search...

<input checked="" type="checkbox"/>	Services	Size	Charge	Estimated Man Hours	Assigned Employee	Assigned Date
<input checked="" type="checkbox"/>	▶ 14	139.8000	\$1,483.00	9:01	CM - Chandra Mogensen	01/02/2024

Include Associated Services in Totals

Created batches are displayed in this area. Last minute date or employee assignment changes can be made before generating and finalizing the route assignment.

Invoicing Step 3: Generate Invoices

Select any forms to include when generating the invoices. If no physical invoice or paperwork is required at the time of generation, select Generate & Mark as Printed to mark the invoice as printed on the customer's account.

Form Options

Select items to include:

<input checked="" type="checkbox"/> Invoices	Large Note Area		<input type="checkbox"/> Include Page Separators
<input type="checkbox"/> Driver Report	Normal		<input type="checkbox"/> Diagrams/Documents
<input type="checkbox"/> Worksheet	Normal		<input type="checkbox"/> Full Page
<input type="checkbox"/> Schedule	Normal		<input type="checkbox"/> Generate & Mark as Printed
<input type="checkbox"/> Call Ahead List	Normal		<input type="checkbox"/> Don't print invoices for those with email 
<input type="checkbox"/> Property Evaluation	Property Evaluation Letter	BBS	

Invoicing Step 3: Generate Invoices

RealGreen INVOICE PRINTED: 1/2/2024

Implementation Team Training
(800) 422-7478 (OPT) ION-1
Invoice # 1 Please Remit \$64.00

Service Address
Clyde Bunny
23306 Outer Dr
Allen Park, MI 48101

Phone (734) 555-5555 Cust # 1655
Chandra Mogensen Lic # 867-5309-555-1212

Description	Date	Amount	Tax	Total
Lawn Application Round 1 \$64.00 <small>During this visit we have applied pre-emergent, crabgrass and broadleaf control as well as a specialized fertilizer blend to give your grass a mix of nutrients as it comes out of seasonal dormancy.</small>	1/2/2024	64.00		64.00
		Today's Invoice Charge	64.00	\$0.00
		Invoice Total	64.00	
		Prev Bal as of 1/2/2024	0.00	
		Please Remit \$64.00		
		<small>Payments due upon receipt. Net 30 days 1.5% thereafter. Please call into any questions about your lawn.</small>		

Start Time: _____ End Time: _____

For your convenience, service continues from season to season. For a change in service, please call our office.

www.realgreen.com
Implementation Team Training
4375 Pineview Dr
Walled Lake, MI 48390

RealGreen by WORKWAVE

Charge My: Debit MC VISA Exp

Card# _____ Signature _____ Security Code _____

[1] Please have technician call me!
Invoice # 1 Customer 1655
Today's Invoice Charge 64.00
Invoice Total 64.00
Prev Bal as of 1/2/2024 0.00
Please Remit \$64.00

Due Date 1/17/2024
Invoice # 1

Implementation Team Training
4375 Pineview Dr
Walled Lake, MI 48390

For your convenience, service continues from season to season. For a change in service, please call our office.

PLEASE RETURN THIS PORTION WITH YOUR PAYMENT. BE SURE ADDRESS SHOWS THROUGH WINDOW.

Several **Invoice** options available. Please ensure the correct format is selected that correlate with your pre-printed invoice paper before printing.

Only Basic format Invoices will be emailed if you opt to email the invoice from this screen.

Invoicing Step 3: Generate Invoices

DRIVER INVOICE REPORT		Implementation Team Training		Printed on 1/2/2024 1/2/2024	
Route Code CM - Chandra Mogensen					
Customer: 1666 Clyde Bunny 23306 Outer Dr Allen Park, MI 48101	Phone(s) (734) 555-5555 (734) 323-0372 (734) 323-0372	Service LC1 Lawn Application Round 1	Size 6.00	Hour 00:10	# Done 0 Max Done 7 <input type="checkbox"/> YYYYYY
Map Code Terr					
Route 1	DayCode 10	Sched -08:39	Charge \$64.00	Prod.Val \$64.00	Net \$64.00 Balance \$0.00
Appointment -08:39					
St	En	Notes Technician Notes in Service Setup - This will appear on all Invoices and the Services on Mobile Live.			
Directions					
Flags Import_11_17_23					
Customer: 2728 Pussyfoot Looneytunes 23320 Outer Dr Allen Park, MI 48101		Phone(s) (734) 555-5555 (734) 323-0372 (734) 323-0372	Service LC1 Lawn Application Round 1	Size 4.50	Hour 00:02
Map Code Terr					
Route 1	DayCode 20	Sched -08:50	Charge \$49.00	Prod.Val \$49.00	Net \$49.00 Balance \$0.00
Appointment -08:50					
St	En	Notes Technician Notes in Service Setup - This will appear on all Invoices and the Services on Mobile Live.			
Directions					
Flags Import_11_17_23					
Customer: 2596 Petunia Pkg 16958 Cambridge Ave Allen Park, MI 48101		Phone(s) (734) 555-5555 (734) 323-0372 (734) 323-0372	Service LC1 Lawn Application Round 1	Size 5.00	Hour 00:05
Map Code Terr					
Route 1	DayCode 30	Sched -08:52	Charge \$54.00	Prod.Val \$54.00	Net \$54.00 Balance \$0.00
Appointment -08:52					
St	En	Notes Technician Notes in Service Setup - This will appear on all Invoices and the Services on Mobile Live.			
Directions					
Flags Import_11_17_23					

The **Driver Invoice Report** provides details about the work being performed. It also provides space for your technicians to leave notes. This document does include customer pricing information.

This form is a good alternative if your technician is not using RealGreen Mobile.

Invoicing Step 3: Generate Invoices

WORKSHEET FOR CREW **Implementation Team Training** Printed on 1/2/2024 1/2/2024

Route Code CM - Chandra Mogensen

Customer: 1665 Phone(s) Service Size Hour # Done Max Done 123456789012345
 Clyde Sunny (734) 555-5555 LC1 Lawn Application Round 1 6.00 00:10 0 7 YYYYYY
 23306 Outer Dr (734) 323-0372
 Allen Park, MI 48101 (734) 323-0372

Map Code Terr

Route DayCode Seq# Sched Conditions  39447W
 1 10 -08:39

Appointment -08:39

St En Notes

Directions Technician Notes in Service Setup - This will appear on all Invoices and the Services on Mobile Live.

Flags Import_11_17_23

Customer: 2728 Phone(s) Service Size Hour # Done Max Done 123456789012345
 Pussyfoot LooneyTunes (734) 555-5555 LC1 Lawn Application Round 1 4.50 00:02 0 7 YYYYYY
 23320 Outer Dr (734) 323-0372
 Allen Park, MI 48101 (734) 323-0372

Map Code Terr

Route DayCode Seq# Sched Conditions  50990W
 1 20 -08:50

Appointment -08:50

St En Notes

Directions Technician Notes in Service Setup - This will appear on all Invoices and the Services on Mobile Live.

Flags Import_11_17_23

Customer: 2596 Phone(s) Service Size Hour # Done Max Done 123456789012345
 Petunia Pg (734) 555-5555 LC1 Lawn Application Round 1 5.00 00:05 0 7 YYYYYY
 16958 Cambridge Ave (734) 323-0372
 Allen Park, MI 48101 (734) 323-0372

Map Code Terr

Route DayCode Seq# Sched Conditions  51620W
 1 30 -08:52

Appointment -08:52

St En Notes

Directions Technician Notes in Service Setup - This will appear on all Invoices and the Services on Mobile Live.

Flags Import_11_17_23

The **Worksheet** provides details about the work being performed. This document does **NOT** include customer pricing information and is often used for mowing crews or sub-contractor work.

This form is a good alternative if your technician is not using RealGreen Mobile.

Invoicing Step 3: Generate Invoices

Stop #	Station / Customer # / Address	Charge	Area	Total Charge	Total Area	Call Ahead
Route Schedule For <input type="text" value="Chandra Mogensen"/>						
New Sale						
10	23306 Outer Dr Allen Park, MI 48101 Cust# 1655 Clyde Bunny	\$64.00 (734) 555-5555	6.00	\$64.00 LP6 - LC1	6.00	Appt. 1/2/2024 8:39 AM
New Sale						
20	23320 Outer Dr Allen Park, MI 48101 Cust# 2728 Pussfoot Looneytunes	\$49.00 (734) 555-5555	4.50	\$113.00 LP6 - LC1	10.50	Appt. 1/2/2024 8:50 AM
New Sale						
30	16958 Cambridge Ave Allen Park, MI 48101 Cust# 2596 Petunia Pg	\$54.00 (734) 555-5555	5.00	\$167.00 LP6 - LC1	15.50	Appt. 1/2/2024 8:52 AM
New Sale						
40	4000 Enterprise Dr Allen Park, MI 48101 Cust# 1931 Gabby Goat	\$739.00 (734) 555-5555	73.50	\$906.00 LP6 - LC1	89.00	Appt. 1/2/2024 8:58 AM
New Sale						
50	23099 Outer Dr Allen Park, MI 48101 Cust# 1456 Witch Haze's Herbal Remedies	\$144.00 (734) 555-5555	14.00	\$1,050.00 LP6 - LC1	103.00	Appt. 1/2/2024 2:47 PM
New Sale						
60	4364 Parkside Blvd Allen Park, MI 48101 Cust# 2934 Slowpoke Rodriguez	\$69.00 (734) 555-5555	6.50	\$1,119.00 LP6 - LC1	109.50	Appt. 1/2/2024 3:39 PM
New Sale						
70	4388 Parkside Blvd Allen Park, MI 48101 Cust# 2796 Rapid Rabbit	\$44.00 (734) 555-5555	4.00	\$1,163.00 LP6 - LC1	113.50	Appt. 1/2/2024 3:51 PM
New Sale						
80	16950 Sherborne Ave Allen Park, MI 48101 Cust# 1658 Clyde Bunny	\$49.00 (734) 555-5555	4.50	\$1,212.00 LP6 - LC1	118.00	Appt. 1/2/2024 4:07 PM
New Sale						
90	4586 Larme Allen Park, MI 48101 Cust# 3435 Yosemite Sam	\$44.00 (734) 555-5555	4.00	\$1,256.00 LP6 - LC1	122.00	Appt. 1/2/2024 4:09 PM
New Sale						
100	17070 Keppen Ave Allen Park, MI 48101 Cust# 1170 Beans Cat	\$40.00 (734) 555-5555	2.50	\$1,296.00 LP6 - LC1	124.50	Appt. 1/2/2024 4:24 PM
New Sale						
110	17071 Keppen Ave Allen Park, MI 48101 Cust# 3362 Willoughby Looneytunes	\$32.00 (734) 555-5555	2.00	\$1,328.00 LP6 - LC1	126.50	Appt. 1/2/2024 4:24 PM
New Sale						
120	17217 Russell Ave Allen Park, MI 48101 Cust# 696 Babbit Catstelo	\$74.00 (734) 555-5555	7.00	\$1,402.00 LP6 - LC1	133.50	Appt. 1/2/2024 5:10 PM
New Sale						
130	17447 Keppen Ave Allen Park, MI 48101 Cust# 2327 Melissa Duck	\$32.00 (734) 555-5555	1.80	\$1,434.00 LP6 - LC1	135.30	Appt. 1/2/2024 5:25 PM
New Sale						
140	17412 Cicotte Ave Allen Park, MI 48101 Cust# 2369 Merlin Themagic	\$49.00 (734) 555-5555	4.50	\$1,483.00 LP6 - LC1	139.80	Appt. 1/2/2024 5:45 PM
Grand Total			\$1,483.00		139.80	

The **Schedule** provides a high-level overview of the stops scheduled for the day.

It is recommended to at least print this document each time a route is created to ensure the technician has a schedule if something were to happen to their RealGreen Mobile device.

Invoicing Step 3: Generate Invoices

Sales Messages			
Sales Message 1:	<input type="text" value="Start and End Times"/>	Sales Message 2:	<input type="text" value="Nothing selected"/>
Sales Message 3:	<input type="text" value="Nothing selected"/>	Sales Message 4:	<input type="text" value="Nothing selected"/>

Upsells or generic customer messages can be included on your invoice.

Selecting the pre-created messages under **Sales Messages**.

Create these messages under Settings > Invoice/Statement Message Gallery.

Sales Message 1 can be assigned as a default under Settings > Company/Branch Info. All others are sticky settings.

Invoicing Step 3: Generate Invoices

Invoice Options

Include:

<input checked="" type="checkbox"/> Logo	<input type="checkbox"/> Print Driver Initials Box
<input checked="" type="checkbox"/> URL	<input checked="" type="checkbox"/> Print Payment Request Message
<input checked="" type="checkbox"/> Name	<input checked="" type="checkbox"/> Print Continuous Service Message
<input checked="" type="checkbox"/> Phone	<input checked="" type="checkbox"/> Hide Payment, NPS, Adjustments and Installments
<input checked="" type="checkbox"/> Address	<input checked="" type="checkbox"/> Print "Please have technician call me"
<input checked="" type="checkbox"/> Print Remit Barcode	<input checked="" type="checkbox"/> Assign To Technician
<input checked="" type="checkbox"/> Print Credit Card Panel	<input type="checkbox"/> NPS
<input checked="" type="checkbox"/> Print Overdue Message	<input type="checkbox"/> Print Property Dimensions
<input checked="" type="checkbox"/> Print Email	<input type="checkbox"/> Print Customer Signature
<input checked="" type="checkbox"/> Include Service Feedback on Reprints	

Do not print remit amount unless it is at least:

Previous Balance:

History Cutoff:

Print Products:

Days Until Due:

Printer Offset: Inches

Invoicing Options provide options for what printed information to include on the invoice. These settings are defaults pulled from Settings > General Setup – Documents/Letters.

Printer Offset moves the page vertically up or down depending on printer alignment and/or predefined margins.

Invoicing Step 3: Generate Invoices

Linked Documents

Save Linked Documents Email Documents

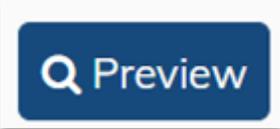
Save Linked Documents: save the invoice as a pdf document on the customer's account.

RealGreen does not recommend saving linked copies of the invoices for each route. Invoices can be reprinted under Invoice > Reprint Invoice, or directly from the customer's account.

Email Documents: email the invoice directly to the customer instead of generating them to print.

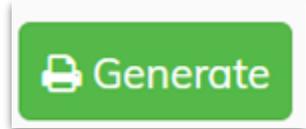
Invoice batches can also be emailed from Invoice > Reprint Invoice, or directly from the customer's account.

Invoicing Step 3: Generate Invoices



Preview

Preview: preview invoices and supporting documentation to verify layout and information are correct before generating.



Generate

Generate: all selected forms will open pdf versions in a new tab for each form type. If documents were selected to email, a pop-up status update will show how many emailed.

Clicking Generate will send the route listing to the assigned technician's RealGreen Mobile device.



Print

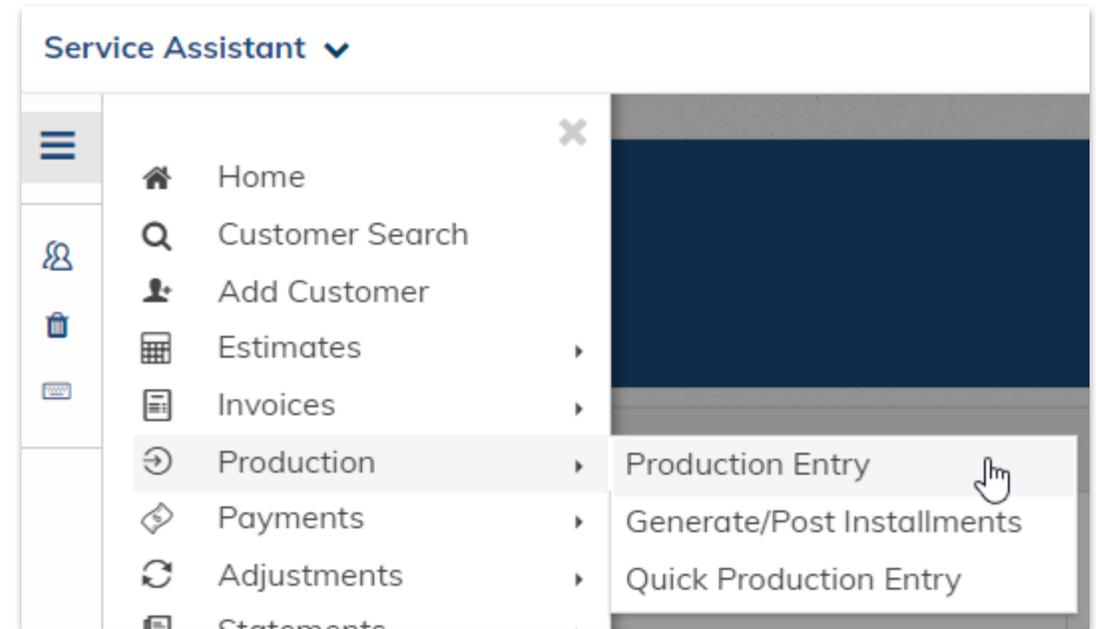
To print physical copies of the documents, find and click the printer icon along the top edge of the document. This launches the browser print dialog box.

Verify your printer selection and settings. It is recommended that you expand "More settings" to specify the paper size and scaling. Prior to printing all the invoices, it is recommended that you run a test on one page to confirm that it is printing as expected. If invoices are not aligned vertically, you may need to adjust the printer offset.

Production Entry

Production Entry

To access Production Entry, navigate to the Main Menu > Production > Production Entry.



Production Entry

Production Entry | Claim Journal (6) | Production Journal (6)

Invoice #:
Invoice #

Account #:
Account #

Year:
2024

Service:
-Services-

Search

Start by entering

Production Entry: find the Service that was completed for the customer by the invoice number or by the customer's account number, Year and Service.

Claim Journal: select another Service Assistant user's production journal, or a RealGreen Mobile technician's production journal to "claim" and add into your journal.

Production Journal: all saved production entries, and where to finalize the production process and post work as completed to the customer history.

Enter in the desired information
and click **Search**.

Production Entry

Marion Jones
Account #: 63
995 Lakeside Dr
Waterford, MI 48328
📞 2485551212
Invoice Number : 2229
+ Add New Service
+ Add a Payment

NEW 2023 — (LAE) Aeration >

🔍 Search Again

All **scheduled services** on the invoice will show up on the left side of the Production Entry screen.

Skip A - Skip-customer scheduled alt service

Undo Print Nothing selected

Skip & Undo Print: Skip or undo an invoice for a services that could not be completed. If skipping, select a skip reason from the dropdown.
If you plan to do the service later, check the Undo Print checkbox and select the reason the service was not performed.

Production Entry

Date:

Date: the date the service was completed.

Vehicle:

Vehicle: the vehicle used, if applicable.

Crew Size: 1

Employee	Done Date	Start Time	End Time	Elapsed Time	Percentage	
<input type="text" value="CC - [Employee Name]"/>	<input type="text" value="12/30/2023"/>	<input type="text"/>	<input type="text"/>		100.000	Add Delete

Start Time: End Time: Man Hours:

Employee: the originally assigned employee will automatically be selected. If another employee, or additional employees helped completed the work, change it here.

Percentage: if only one person completed the service, the percentage will default to 100%. If multiple people performed the service, percentages will be split equally by default but can be changed as needed.

Done Date: enter the date the service was performed.

Man Hours: This field will automatically calculate based on the Start and End Times entered, and the number of employees that performed the work.

Start & End Time: enter the started and end times.

Production Entry

Size:	<input type="text" value="2.23"/>	Charge:	<input type="text" value="\$ 60.00"/>
Production Value: \$60.00	Discount: \$0.00	Tax: \$0.90	Net: \$60.90
Notes:	<input type="text"/>		

Size: the size will automatically populate based on what was on the customer's service.

Charge: the charge of the service.

Balance Details: overview of the charges, discounts, and taxes for the service.

Notes: technician notes about what was performed, or any comments about what was observed.

Products							
Product	Actual Amount	Treated Area	Location(s)	Application Method	Rate	Targets	
							<input type="button" value="+"/> <input type="button" value="🗑"/>

Products: products used during the completion of the service. Add products with the + button. Once added, you can update the amount used, treated areas, locations, the application method, the rate of application, and the target pest/weed/etc. the product works on.

Production Entry

Conditions

Condition Codes:

Condition Codes: conditions are like flag codes for services. They can include details observed on property such as insects or damages, you can highlight who was home during the time of visit, or specific weather conditions.

Weather

Wind Speed: Direction: Temperature:

pH: Rating:

Wind Speed & Direction: enter in the wind speed and direction during the time of application.

pH: enter in the pH of the soil collected that day, if applicable.

Rating: if applicable, enter in the company's internal rating for the condition of the property.

Temperature: enter in the temperature during the time of the service.

Click **Save** to proceed to the Production Journal.

Production Entry

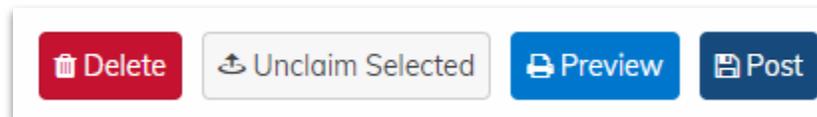
Production Journal

The following production entries are ready to be posted.

View: Conditions & Emplo... Expand All Print Order: Entry Order Search...

<input type="checkbox"/>	Status	Customer #	Service	Done Date	Start/End Time	Products	Conditions	Price	After Disc...	Tax	Size	Name	Customer Address	ID	
<input type="checkbox"/>	✓	47	Lawn Application Round 3	12/21/2023		39 (2.0125), 1234...		32	32	0	1.15	Pat McCormick	1330 Sycamore Dr Rochester MI 48307	CM	
<input type="checkbox"/>	✓	63	Aeration	12/29/2023	1:00 AM - 2:30 AM			60	60	0.9	2.23	Marion Jones	995 Lakeside Dr Waterford MI 48328	CC	

Once all services have been entered as completed to the Production Journal, click the Post button to finalize production and record the services as complete in history.



Session Feedback

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

Questions?

**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

