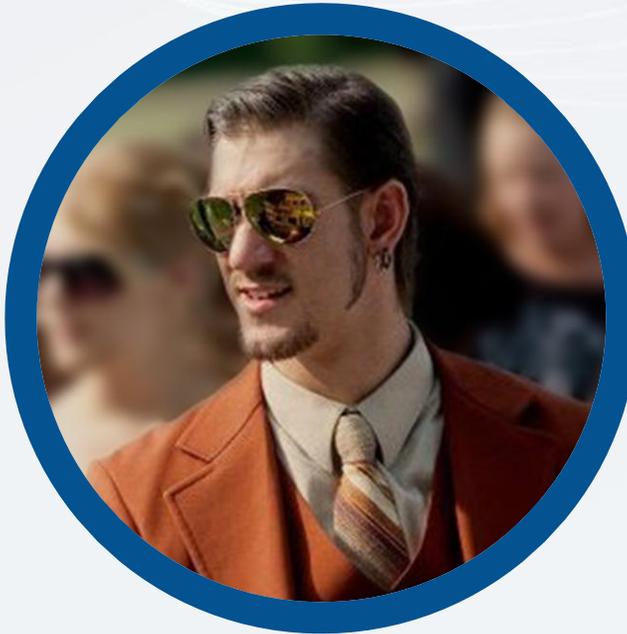




SA5 Services:

Understanding the Different Types,
Adding Programs and Jobs, and
Reviewing the Program Screen

SA5 Services



Thom Boersma

Customer Success Manager, RealGreen

Agenda

- Terminology
- Service Setup
- Program Setup
- Package Setup
- Adding Services/Programs to a Customer
- Understanding Job Screens

Terminology

Program/Job Setup Terminology

Service Setup

An individual service, a single service that repeats multiple times, a service within a program, a service call, or an estimate service.



Service Setup

Create and manage services

Program Setup

A collection of services sold together as a group.



Program Setup

Create and manage programs

Packages

A collection of programs and/or services grouped together to be added to the customer at one time.



Package Setup

Create and manage packages

Service Setup

Service Setup

Special Job

Service sold individually, or a single service that repeats multiple times.

Example: Aeration, Monthly Mosquito Control, Mowing

Round / Cycle

A service that makes up a round in a Program.

Example: Lawn Care Program, Tree Care Program, Irrigation Program

Estimate Services

Service to be completed to give a customer an estimate/quote. This service will never be charged.

Example: Estimate Service

Work Order

A service that is billed based on time and materials.

Example: Patio Installation, Irrigation Install

Service Call

A follow-up service that is needed to help fix or check something as a one off.

Example: Service Call - Sprinkler Head Issue

Service Setup

Service Assistant > Settings > Service Setup

Service: LAE - Aeration

Service Setup

Service Information

Service Code: LAE Description: Aeration Service can be: Round / Cycle Special
 Estimate Service Work Order
 Service Call

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

Available: Branches: * All 5 items selected

Type: * S - Special Job Curative

Start Date: Don't fill in Schedule Date

Product Usage

Advanced Product Usage Calculation

Code - Description	All	Branches	Rate	Application Method
No data				

Production Entry

<input checked="" type="checkbox"/> Product Amounts	<input checked="" type="checkbox"/> Conditions
<input checked="" type="checkbox"/> Wind Speed & Direction	<input checked="" type="checkbox"/> Rating
<input checked="" type="checkbox"/> Start Time	<input checked="" type="checkbox"/> pH
<input checked="" type="checkbox"/> End Time	<input checked="" type="checkbox"/> Size
<input checked="" type="checkbox"/> Temperature	<input checked="" type="checkbox"/> Price

General

<input type="checkbox"/> Ignore Credit Hold
<input type="checkbox"/> Pesticides Used
<input type="checkbox"/> Pre-Notification
<input type="checkbox"/> Mobile Before Service Picture Required
<input type="checkbox"/> Mobile After Service Picture Required

Weather

Maximum Wind Speed:

Minimum Temperature:

Maximum Temperature:

Settings > Service Setup

To set up single, recurring, or program services, you will need to start with Service Setup.

1. Add in the Service Code and Description
2. Select the Type the Service falls into
3. Select what the Service Can Be
4. Add any default products used with the service
5. Check Production Entry boxes that need to be or can be entered during production
Production Defaults for new services pull from General Setup – Program/Job
6. Additional General details and requirements regarding this service code
7. Maximum/Minimum Weather for applying product

All rounds that belong to the same program will need to be the same Type. You cannot add more than one program to a customer's account with the same Type.

Service Setup

Service Assistant > Settings > Service Setup

Messaging and Notes

Invoice Description: Aeration

Invoice Message:

Spring Aeration helps roots establish growth and absorb needed nutrients during the prime growing season.

Fall Lawn Aeration helps relieve stress and compaction following a hot and dry summer.

Abbreviated Message for Multi-Service Invoices:

Spring Aeration helps roots establish growth and absorb needed nutrients during the prime growing season.

Technician Notes:

Notes for tech on Service Setup page

Before Service Message:

Incomplete Message:

Sales Message:

Testing to see how this looks.

Taxes

Add All +

Code - Description	Taxable P	
2 - County Tax		
3 - City Tax		
4ST - MI State Tax		
EX - Tax Exempt		

Stations

Station Type

No data

Settings > Service Setup

8. Enter in the customer facing messaging for the invoices and for your technicians
9. For the additional messaging, hover over the 'i' bubble in each section for more information as to what it is used for
10. If applicable, add in any/all taxes required for this service
11. Stations are normally used to help pinpoint the exact location of a serviceable item on a customer's property: *Trees/Shrubs, Portable Toilets, Rodent Traps, Termite Bait, Septic Tank Lids, etc.*

Service Setup

Service Assistant > Settings > Service Setup

Accounts

Residential Account	Commercial Account
Standard: Nothing selected	Nothing selected
Prepay: Nothing selected	Nothing selected
Discount: Nothing selected	Nothing selected
Surcharge: Nothing selected	Nothing selected

Pricing

Price By: Price Table

Default Price Table: Aeration Pricing

Base Price:

Man Hour Rate:

Est. Minutes:

Defaults and Required Fields

Required Information	Default Information
<input checked="" type="checkbox"/> Date Sold	<input type="checkbox"/> Non-Service Year
<input checked="" type="checkbox"/> Salesperson	<input checked="" type="checkbox"/> Don't Print Invoice If Previous Not Done
<input checked="" type="checkbox"/> Source	<input type="checkbox"/> Automatic Renew
<input checked="" type="checkbox"/> Size	<input type="checkbox"/> Automatic Renew Date
<input checked="" type="checkbox"/> Route	<input checked="" type="checkbox"/> Send Confirmation Letter
<input checked="" type="checkbox"/> Cancel Date	<input checked="" type="checkbox"/> CAW Available
<input checked="" type="checkbox"/> Cancel Reason	<input checked="" type="checkbox"/> Mobile Device
<input checked="" type="checkbox"/> Reject Reason	<input type="checkbox"/> Lock Sold / Cancel Dates
<input checked="" type="checkbox"/> Estimated By	<input type="checkbox"/> Lock Schedule Default
	<input type="checkbox"/> Round Quick Fit
	<input checked="" type="checkbox"/> Autopost Mobile

Estimate Service: ES - Estimate Service

Initial Service: Nothing selected

Default Billing Type: Regular / Invoice

Program Type: S - Special Job Curati

Units: 1000 Sq. Feet

Min for Full: 1

Service Category: Additional

Text Color: [X]

Background Color: [X]

Quick Fit Time Window: None

Scheduling

Days: Nothing selected

Repeats: None

Max: 1

Cancel

You have unsaved changes. Save.

Delete Save

Settings > Service Setup

- Accounts do not need to be updated and will use default ledger accounts
- Select the appropriate option to price services, and fill out the subsequent boxes, if needed.
- Required Information: information to be filled out each time the service is added to a customer

Required Defaults for new services pull from General Setup – Program/Job

- Default Information: default options assigned to this service: CAW Available, Automatically renewable, etc.
- Units the service is measured/priced by, special job service type, default billing type, and additional information
- Scheduling: only required for repeating specials that occur more than one time

14 through 17 are not required on Round/Cycle service codes.

Program Setup

Program Setup

Service Assistant > Settings > Program Setup

Program Code: 6R - 6 Round Lawn

Program Setup

Program Code: 6R Type: G - Lawn Care Curative Branch: All All Branches Selected

Available: Min Rounds for CAW Prepay: 7 Min Rounds for Full Program: 2

English Description: 6 Round Lawn CAW/Mobile Sales Message:

Defaults and Required Fields

Required Information <ul style="list-style-type: none"><input checked="" type="checkbox"/> Date Sold<input checked="" type="checkbox"/> Salesperson<input checked="" type="checkbox"/> Source<input checked="" type="checkbox"/> Size<input type="checkbox"/> Route<input checked="" type="checkbox"/> Cancel Date<input checked="" type="checkbox"/> Cancel Reason<input checked="" type="checkbox"/> Reject Reason<input type="checkbox"/> Estimated By	Default Information <ul style="list-style-type: none"><input type="checkbox"/> Non-Service Year<input checked="" type="checkbox"/> Don't Print Invoice If Previous Not Done<input checked="" type="checkbox"/> Automatic Renew<input type="checkbox"/> Automatic Renew Date<input type="checkbox"/> Send Confirmation Letter<input checked="" type="checkbox"/> CAW Available<input checked="" type="checkbox"/> Mobile Device<input type="checkbox"/> Lock Sold / Cancel Dates	Estimate Service: Nothing selected Initial Service: Nothing selected Default Billing Type: Nothing selected Units: 1000 Sq. Feet Service Category: Core Text Color: <input type="checkbox"/> Background Color: <input type="checkbox"/>	Scheduling <ul style="list-style-type: none"><input type="checkbox"/> Lock Schedule by DefaultDays: MondayRepeats: Twice MonthlyWeeks: 1st & 3rdEnd On: 10/31/2024
--	---	--	---

Services

Missing a service? Visit the Services page to add a new service. Please consult RealGreen technical support before changing services included within a program.

Round	Code	Service	Do	Dependent Service	Skip After	
1	LC1	Lawn Application Round 1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	04/03	Delete
2	LC2	Lawn Application Round 2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	05/03	Delete
3	LC3	Lawn Application Round 3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	06/05	Delete
4	LC4	Lawn Application Round 4	<input checked="" type="checkbox"/>	<input type="checkbox"/>	09/04	Delete

Settings > Program Setup

Once Round/Cycle Services have been created, it is easy to setup the Program.

1. Add in the Program Code and name/description
2. Select the Type the program falls into
3. Complete the Defaults and Required Fields, similarly to that found in the Service Setup
4. Add each Round in chronological order in which they should be performed

Programs can be made branch specific.

Full/Partial Programs are defined by the Min. Rounds for Full Program option.

Program Setup

Services

Missing a service? Visit the [Services](#) page to add a new service. Please consult RealGreen technical support before changing services included within a program. +

↑	Round	Code	Service	Do	Dependent Service	Skip After	
	1	LC1	Lawn Application Round 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	04/03	Delete
	2	LC2	Lawn Application Round 2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	05/03	Delete
	3	LC3	Lawn Application Round 3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	06/05	Delete
	4	LC4	Lawn Application Round 4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	09/04	Delete
	5	LC5	Lawn Application Round 5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	10/31	Delete
	6	AER	Aeration	<input checked="" type="checkbox"/>	<input type="checkbox"/>	04/03	Delete
	7	OVR	Overseed	<input type="checkbox"/>	<input type="checkbox"/>		Delete

Do

Checking this box means the service will be marked as a 'Y' status (To Do) when the service is added to the customer.

Leave unchecked if the round is optional and requires customers to opt-in.

Dependent Service

If service timing is dependent on the previously completed services done date, check the box under Dependent Service.

For this function to work, make sure that "Don't Print Invoice If Previous Not Done" is checked under Default Information.

Skip After

This feature helps mid-season sales stay up-to-date. The round will still appear but will appear as a 'K' status (Skip).

When adding the program, you can always change the service back to 'Y', if you still want to complete the round.

Package Setup

Package Setup

Service Assistant > Settings > Package Setup

Package: TEST +

Package Setup

English Description: TEST Available: Select Branches: All 5 items selected

French Description: Spanish Description:

Programs and Services *

Code	Program/Job	Discount	Apply Discount To	
LP6	Lawn Care Program 6	Select...	First Round	
MOT	Mosquito Treatment	Select...	First Round	

Settings > Package Setup

It is simple to get a package setup:

1. Add in the name/description of the package
2. Add the programs and/or special jobs that need to be a part of the package

If the package is part of a sales strategy or specific promotion and will always give a discount to customers, you can set it up here. You have the option to apply discounts to the first round, last round, or all rounds.

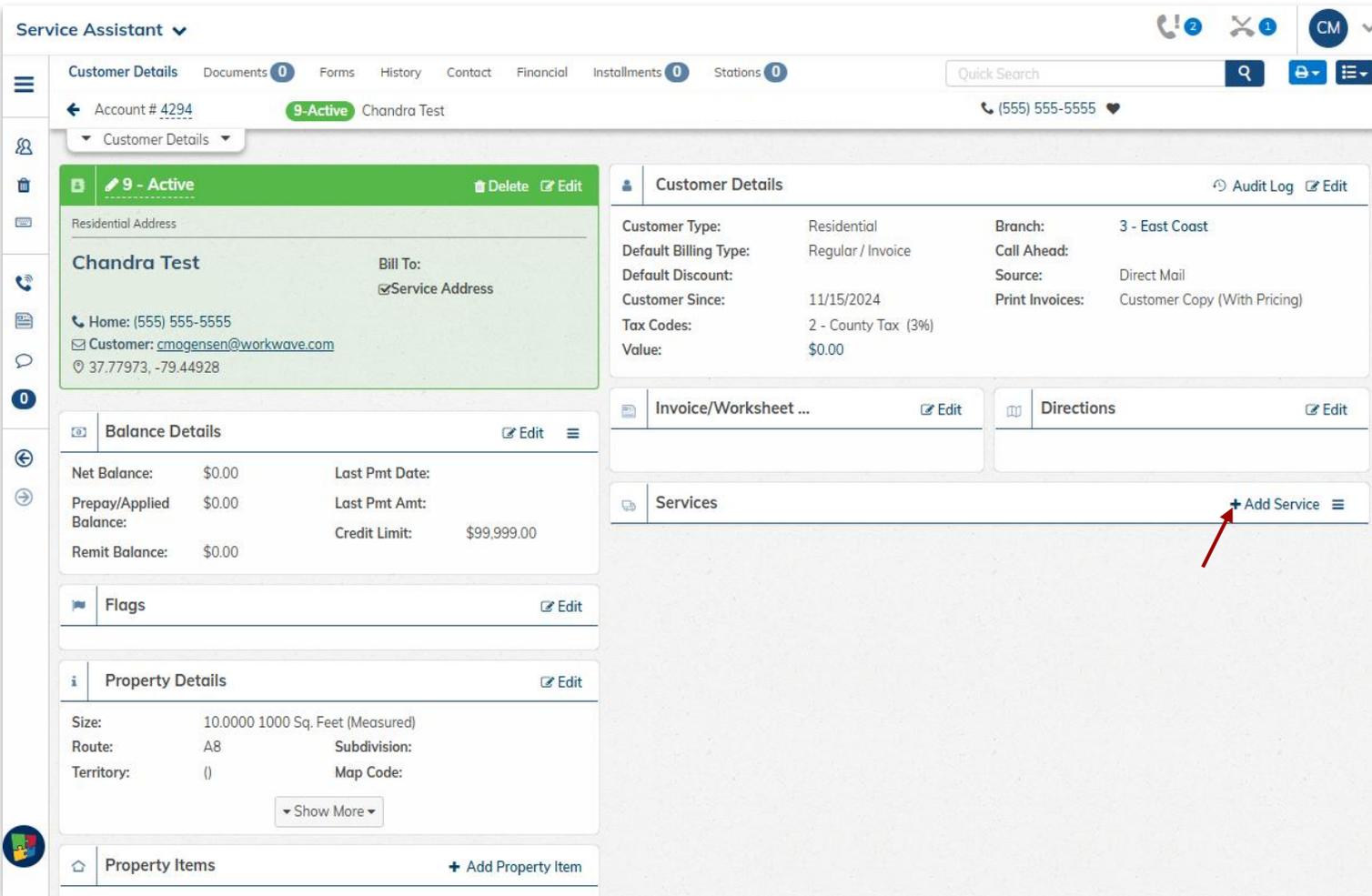
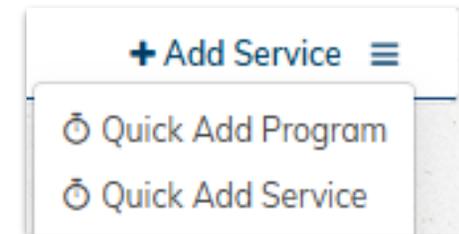
Adding Services/Programs to a Customer

Adding a Service

Customer Account > +Add Service

Click +Add Service to launch the Add Service Wizard.

If you are familiar with service entry and want a quicker process, click on the three horizontal lines to the left of Add Service to launch the Quick Action buttons.

A screenshot of the 'Service Assistant' software interface. The top navigation bar includes 'Customer Details', 'Documents', 'Forms', 'History', 'Contact', 'Financial', 'Installments', and 'Stations'. The main content area is divided into several sections: 'Customer Details' (with a green header for '9 - Active'), 'Balance Details', 'Flags', 'Property Details', and 'Property Items'. The 'Services' section at the bottom right contains a '+ Add Service' button with a three-line menu icon to its left. A red arrow points to this button. The interface also shows a 'Quick Search' bar and various utility icons in the top right corner.

Adding a Service

The screenshot displays a three-step process for adding a service. Step 1, 'Select Service', is the current step. It features a progress bar at the top with three numbered steps. Below the progress bar, the form is titled 'Select Service'. It contains four dropdown menus: 'Type' (Special Job), 'Service' (LAE - Aeration (S)), 'Status' (9 - Active), and 'Year' (2025). At the bottom left is a 'Cancel' button with a close icon, and at the bottom right is a 'Next' button with a right arrow icon.

Select the type of service you would like to add:

- Special Job
- Program
- Service Call
- Package (if created)

Choose the service and status you would like to add to the customer's account.

The service status options are the same as the customer status. However, your status does not need to match the customer.

Select the Year the service is being added for.

Services added for future years will not be affected by Skip After dates.

Adding a Service

Step 1 Select Service

Step 2 Program/Service Info

Step 3 General Info

Program/Service Info

Type: Special Job	Status: 9 - Active
Service: LAE - Aeration (S)	Year: 2025

Source: * Direct Mail

Estimate Requested Date: 12/27/2024

Requested By:

Request Taken By: Select Employee...

Referred By: Account #

Estimate Given By: * Select Employee...

Estimate Given Date:

Sold Date: * 12/27/2024

Sold By 1: * Select Employee...

Sold By 2: Select Employee...

Confirm Date: 12/27/2024

Confirmed By: Select Employee...

Add in the additional details about the sale/estimate:

- Source: how they heard about you
- Requested By: who is requesting the estimate/service
- Referred By: account number of referring customer
- Estimate Given By and Date: who gave the estimate and when
- Sold By and Date: who sold the service and when

Required fields will be designated with a red asterisk '*' and may change based on the service status.

Adding a Service

Step 1 Select Service ✓

Step 2 Program/Service Info ✓

Step 3 General Info 3

General Information

Type: Special Job Status: 9 - Active
Service: LAE - Aeration (S) Year: 2025

[Find Neighbors](#)

Program	Size*	Difficulty	Price (\$)	Billing Type	Route *	Day Code	Seq #	Start Date	Not...
LAE - Aeration (S)	10.0000	1.00	125.00	Regula... <input type="checkbox"/>	A8- <input type="checkbox"/>	1		<input type="text"/>	<input type="text"/>

If a size on the customer's main screen matches the unit of measure assigned to the service or program, it will automatically be added.

Difficulty can be used to multiply the price table price based on how difficult you deem the work to be on the customer's property.

If you did not setup a price chart on the service setup, you will need to manually add in a price or leave it 0.00 for an estimate that needs to be quoted.

Update Billing Type, Route, and Notes as needed.

Any of the default information pulled in may be changed.

Required fields will be designated with a red asterisk "*" and may change based on the service status.

Adding a Service

Service Assistant | Program Details | Documents 0 | Account # 4294 | 9-Active Chandra Test | (555) 555-5555

Customer Details

9 - Active LAE - Aeration

Status: 9 - Active | Completed: | Year: 2025 | Call Ahead: Select... | Billing Type: Regular / Invoice | Source: DM - Direct Mail | Route: A8 - | Temp Route: A8 - | Day Code: 1 | Temp Day Code: 1 | Sequence: 0 | Temp Sequence: 0 | PO #: | Last Price Increase: 12/27/2024 | Last Serviced: | Hold Reason: Select... | Hold Start Date: | Hold End Date: |

Scheduling

Done: 0 of 1 Times | Max: 1 | Days: Nothing selected | Repeats: None | Start On: | End On: 12/31/2025

Program Notes | Copy Notes

Tech. Notes: | Cust. Notes: | Exp. Date: | Exp. Date: |

Services | Show All Details

Size: 10.0000 1000 Sq. Feet | Difficulty: 1.00 | Service Price: 125.00 | Average Man Hours: | Discount: Select Discount... | Total Amount: \$128.75

#	Description	Extra Descripti...	Status	Size	Renewal Si...	Price	Renewal Pri...	Discount	Production Val...	Scheduled Date
1	LAE - Aeration		Y - Do every year	10.0000	10.0000	125.00	125.00	-No Discount-	125.00	12/31/2025

Estimate Details

Everything added during the Add Service Wizard will populate into the Program Details screen. Make any necessary changes before saving.

Items to Note:

1. If you need to build out a schedule, fill out the Scheduling section with the information needed. Once you save, a new option will appear to **Build Schedule** for your services.

Build Schedule will factor in:

- Max: total yearly service count
- Days: day(s) of the week service can be done
- Repeats: how often the service repeats
- Start On/End On: when the schedule should begin and end
 - All services will naturally end 12/31 of the current year
 - End On overrides Max total service count

Adding a Service

Service Assistant | Program Details | Documents 0 | (555) 555-5555 | CM

Account # 4294 | 9-Active | Chandra Test

Customer Details

9 - Active LAE - Aeration

Status: 9 - Active | Completed:

Year: 2025 | Call Ahead: Select...

Billing Type: Regular / Invoice | Source: * DM - Direct Mail

Route: * A8 - | Temp Route: * A8 -

Day Code: 1 | Temp Day Code: 1

Sequence: 0 | Temp Sequence: 0

PO #: | Last Price Increase: 12/27/2024

Last Served: | Hold Reason: Select...

Hold Start Date: | Hold End Date: |

Scheduling

Done: 0 of 1 Times

Max: 1 | Locked

Days: Nothing selected

Repeats: None

Start On: | End On: 12/31/2025

Program Notes | Copy Notes

Tech. Notes: | Cust. Notes: |

Exp. Date: | Exp. Date: |

Services | Show All Details

Size: * 10.0000 | 1000 Sq. Feet | Difficulty: 1.00 | Service Price: 125.00

Average Man Hours: | Discount: Select Discount... | Total Amount: \$128.75

#	Description	Extra Descripti...	Status	Size	Renewal Si...	Price	Renewal Pri...	Discount	Production Val...	Scheduled Date
1	LAE - Aeration		Y - Do every year	10.0000	10.0000	125.00	125.00	-No Discount-	125.00	

Estimate Details

2. There are two places to enter Discounts on this page. Discounts will stack.
 - The top Discount will apply the discount to all services/rounds
 - Row level Discounts will only apply to that specific service/round
3. You can find more information about the single service/round by clicking on the small gray arrow to the left of each service.
4. There is a scroll bar at the bottom to scroll to the right for more columns of information depending on screen size and resolution.
5. To return to the customer account screen, click on the BLUE arrow in the upper left corner.

Required fields will be designated with a red asterisk '*' and may change based on the service status.

Understanding Job Screens

Understanding Job Screens

- Status: current service status
- Completed: are all rounds completed/skipped
- Season: current service season
- Call Ahead: whole service level call ahead reason
- Billing Type: service billing type
- Source: service source
- Route/Temp Route: permanent and temporary routes
- Day Code/Temp Day Code: permanent and temporary day codes
- Sequence/Temp Sequence: permanent and temporary sequence number
- PO #: purchase order number
- Last Price Increase: date of last price increase
- Last Serviced: date of the last completed round/service
- Hold Reason: if the service is on a temporary hold
- Hold Start/End Date: hold beginning and end dates

Account # 3202 9-Active The Bears 684 Pinehurst Dr, Canton, MI 48188 (734) 555-5555

Customer Details

9 - Active LP6 - Lawn Care Program 6

Status:	9 - Active	Completed:	<input type="checkbox"/>
Year:	2025	Call Ahead:	Select...
Billing Type:	Installment	Source: *	MGI - Imp Import ...
Route: *	- None	Temp Route: *	- None
Day Code:	1	Temp Day Code:	1
Sequence:	320	Temp Sequence:	320
PO #:		Last Price Increase:	11/20/2023
Last Serviced:	06/03/2025	Hold Reason:	Select...
Hold Start Date:		Hold End Date:	

Scheduling

Max: 6 Locked

Days: Nothing selected

Repeats: Daily

Repeats Every: 7 Days Minimum

Start On: 01/22/2025 End On: 12/31/2025

Program Notes [Copy Notes](#)

Tech. Notes: Cust. Notes:

Exp. Date: Exp. Date:

Understanding Job Screens

- Max: max number of rounds to be completed
- Locked: should the schedule change after production has been posted
- Days: acceptable schedule days within the week
- Repeats: if the service schedule repeats at a frequency
- Repeats Every: how often the schedule repeats
- Start On: the first service schedule date
- End On: the ending schedule date
- Tech Notes: notes that need to print on the tech portion of the invoice
 - Exp. Date: if/when the notes should stop printing
- Cust. Notes: notes that need to print on the customer portion of the invoice
 - Exp. Date: if/when the notes should stop printing

Account # 3202 9-Active The Bears 684 Pinehurst Dr, Canton, MI 48188 (734) 555-5555

Customer Details

9 - Active LP6 - Lawn Care Program 6

Status:	9 - Active	Completed:	<input type="checkbox"/>
Year:	2025	Call Ahead:	Select...
Billing Type:	Installment	Source: *	MGI - Imp Import ...
Route: *	- None	Temp Route: *	- None
Day Code:	1	Temp Day Code:	1
Sequence:	320	Temp Sequence:	320
PO #:		Last Price Increase:	11/20/2023
Last Served:	06/03/2025	Hold Reason:	Select...
Hold Start Date:		Hold End Date:	

Scheduling

Max: 6 Locked

Days: Nothing selected

Repeats: Daily

Repeats Every: 7 Days Minimum

Start On: 01/22/2025 End On: 12/31/2025

Program Notes [Copy Notes](#)

Tech. Notes: Cust. Notes:

Exp. Date: Exp. Date:

Understanding Job Screens

- Size: main service/program size
- Difficulty: difficulty multiplier
- Service Price: individual round/service price
- Gross Amount: total service amount before discounts
- Discount: total service/program discount
- Total Amount: total service amount after discounts

The screenshot displays a 'Services' interface with a summary section at the top and a table of service items below. The summary section includes fields for Size, Difficulty, Service Price, Gross Amount, Discount, and Total Amount. The table lists four service items, each with a description, size, price, and discount. A summary table on the right shows the total charges and net amount.

#	Description	Extra Descripti...	Status	Size	Renewal Si...	Price	Renewal Pri...	Discount	Production Val...	St
1	LC1 - Lawn Application Round 1		S - Service has b...	6.5000	6.5000	69.00	69.00	-No Discount-	69.00	C
2	LC2 - Lawn Application Round 2		S - Service has b...	6.5000	6.5000	69.00	69.00	-No Discount-	69.00	C
3	LC3 - Lawn Application Round 3		S - Service has b...	6.5000	6.5000	69.00	69.00	-No Discount-	69.00	C
4	LC4 - Lawn Application Round 4		Y - Do every year	6.5000	6.5000	69.00	69.00	-No Discount-	69.00	C

Summary Table:

Full Charge	\$69.00
Subtotal	\$69.00
Tax	\$0.00
Net Amount	\$0.00

Understanding Job Screens

- Status: current service status
- Size/Renewal Size: round size/next season size
- Price/Renewal Price: round price/next season price
- Discount: round level discount
- Production Value: production value of service
- Schedule Date/Time: round schedule date and time
- Start After/End Before: round time window
- Promised: is the schedule date/time promised
- Done Date: round completed date
- Call Ahead: round level call ahead
- Confirmed: has the round been confirmed for servicing
- Sold Date/Salesperson: round level sold date/sold by
- Service Tech Note: round level tech facing note
- Service Customer Note: round level customer facing note

Services
Show All Details

Size: 1000 Sq. Feet Difficulty: Service Price:

Gross Amount: \$414.00 Discount: Total Amount: \$414.00

#	Description	Extra Descripti...	Status	Size	Renewal Si...	Price	Renewal Pri...	Discount	Production Val...	Se
1	LC1 - Lawn Application Round 1		S - Service has b...	6.5000	6.5000	69.00	69.00	-No Discount-	69.00	C

Invoice No.: 8787 Posted: 09/26/2025 1:10 PM Paid: 04/01/2025 4:00 AM

Assigned To: Matt Gifford Completed By: MG Matt Gifford Prepaid: Reversed:

Man Hours: 00:00 Estimated Man Hours: 00:12 Difference (Man Hours): 0:12

Pre-Conditions: Associations:

Service Technician Notes: (Copy) Service Customer Notes:

Exp. Date: Exp. Date:

Full Charge	\$69.00
Subtotal	\$69.00
Tax	+\$0.00
Net Amount	\$0.00

2	LC2 - Lawn Application Round 2		S - Service has b...	6.5000	6.5000	69.00	69.00	-No Discount-	69.00	C
3	LC3 - Lawn Application Round 3		S - Service has b...	6.5000	6.5000	69.00	69.00	-No Discount-	69.00	C
4	LC4 - Lawn Application Round 4		Y - Do every year	6.5000	6.5000	69.00	69.00	-No Discount-	69.00	C

Understanding Job Screens

Estimate Details:

- Estimate Req Date/By: who asked for the estimate and when
- Request Taken By: who entered the estimate
- Printed Date/By: who printed the estimate and when
- Assigned/To: date and who the estimate is assigned to
- Est. Given Date/By: who gave the estimate and when
- Referred By: customer account that referred the service
- Reject Date/Reason: when and why the estimate was rejected

Sales Details:

- Sold Date/By: who sold the service and when
- Confirmed By/Date: who confirmed the sale and when
- Payment Plan By/Date: who set up the plan and when

Cancellation Details:

- Cancel Date/By: who cancelled the customer and when
- Cancel Reason: why did the customer cancel

The screenshot displays three stacked panels in a software interface:

- Estimate Details (Yellow Header):** Fields include Estimate Req Date (11/20/2023), Requested By, Request Taken By (Select...), Estimate Scheduled (checkbox), Printed, Printed By, Assigned, Assigned To (MG), Estimate Given Date (11/20/2023), Estimate Given By (MG - Matt Gifford), Referred By, Rejected Date, Reject Reason (Select...), and Last Contact.
- Sales Details (Green Header):** Fields include Sold Date (11/20/2023), Salesperson 1 (MG - Matt Gifford), Salesperson 2 (Select...), Confirmed By (Select...), Confirmed (11/20/2023), Payment Plan By (Select...), Payment Plan Date, Confirmation Letter (checkbox), Renewed (checkbox), Auto Renew (checked), and Renewal Date (12/31/2025).
- Cancellation Details (Red Header):** Fields include Cancel Date, Cancel Reason (Select...), Cancelled By (Select...), and Cancel ID (19108).

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

