



Service Assistant Estimate to Proposal

Estimate to Proposal



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Agenda

- Terminology
- Estimate Creation: Start to Finish
- Estimate is Complete - Now What?
- Proposal Creation with Master Documents
- Estimate Services

As you peruse this deck,
be on the lookout for some
QUICK TIPS!

Terminology

Estimate vs. Estimate Services

What is an Estimate?

Estimate is any program or job that has an 'Estimate Status'.

Regardless of the naming convention, the statuses themselves have defined functions:

- Status 0 - Estimate Requested
- Status 1 - Estimate Printed
- Status 2 & 3 - Estimate Given
- Status 4 - Estimate Given/Not Sold

What is a Estimate Service?

Estimate Service is a special service created and attached to programs and services that will never be charged or appear on invoices.

- This type of service was originally created simply so the jobs would show up on the Scheduler.
- These can show up and be 'measured' using Mobile Live.
- These services can only be setup from within the program/service, and are marked complete by using Quick Estimate Entry or through Mobile Live.
- These services will also show up in history when completed.

Estimate Forms vs. Proposals

What is an Estimate Form?

Estimate Forms within **Service Assistant** are meant to be printed prior to going to a customer's property and used to gather information while at a customer's property. It can be left behind for the customer to review. After information is collected, you will manually need to add it into Service Assistant.

What is a Proposal?

Proposals can be emailed or mailed through **Service Assistant** to provide service and program pricing requested by customers.

Proposals can be created in Service Assistant:

- Master Documents
- Prepay Letters
- RealGreen Forms

Estimate Creation: Start to Finish

Adding Estimates to Customers

Step 1
Select Service

Step 2
Program/Service Info

Step 3
General Info

Select Service

Type: Special Job

Service: LGR - Grub Control (S)

Status: 0 - No Status

Year: 2025

Cancel

Next

0 - No Status LGR - Grub Control

Status: 0 - No Status

Year: 2025

Billing Type: Regular / Invoice

Route: * A8 -

Day Code: 1

Sequence: 0

PO #:

Last Served:

Hold Start Date:

Completed:

Call Ahead: Select...

Source: * DM - Direct Mail

Temp Route: * A8 -

Temp Day Code: 1

Temp Sequence: 0

Last Price Increase: 01/25/2025

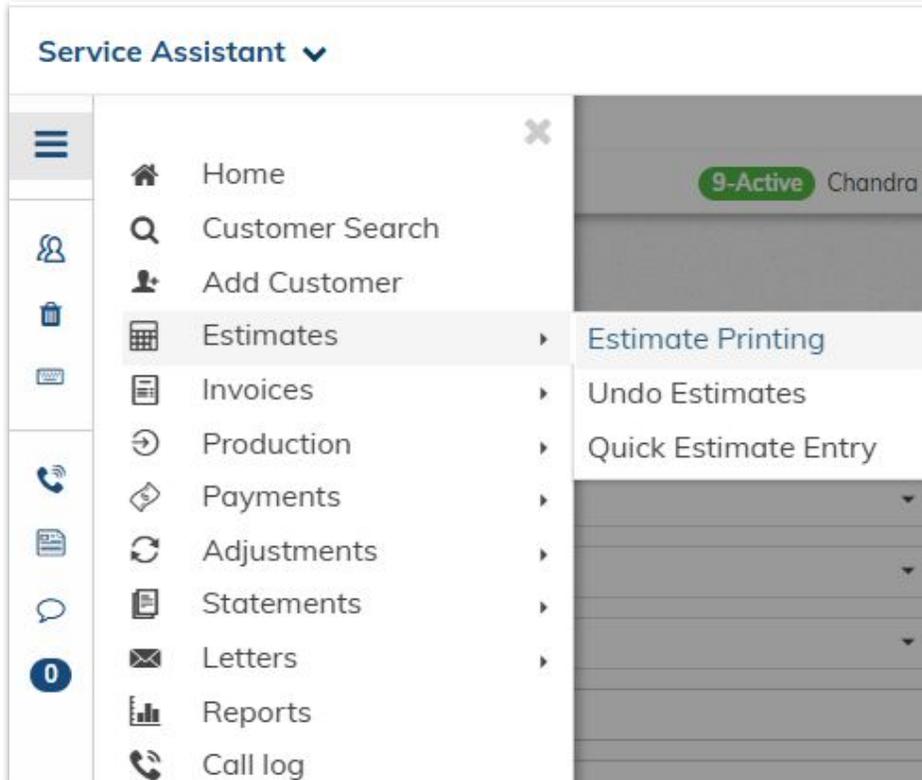
Hold Reason: Select...

Hold End Date:

Adding the Service

- Add whatever service or program the customer is interested in with a status of 0 or 1.
 - If you plan on printing an estimate from Service Assistant then use status 0.
- New Service Wizard, Quick Add Program/Service, Suggested Service Price, and Mass Service Assignment can all add jobs to a customer.

Estimate Printing



The More You Know...

- 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 1.
- Once you have a batch of estimates to print, you can select the form/document you want to use.
- If printing status 0 (estimate requested), the status will automatically change to status 1 (estimate printed).
- 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

1 Step 1 Search Estimates

2 Step 2 Search Results

3 Step 3 Options

Search By: Company / Branch

Companies/Branches: * 1 - Implementation Team Training

Service Year: 2025

Schedule Date: 📅 Earliest to date

Customer Type: Both

Services: * All Services

- KG - K&U test
- LAE - Aeration
- LAW - Lawn Seedw/ Property Inventory
- LIM - Lime Treatment
- LM - Lawn Maintenance
- LM1 - Lawn Mowing Round 1
- LM2 - Weed Whacking Round 2

Selected Services

LGR - Grub Control

Program Status: * 5 of 10 Statuses Selected

Program Source: * 33 items selected

Only print estimates with empty print date

More filters

- + Flag Codes
- + Advanced Options

Find the customers with Estimates to print.

Estimate Printing – Step 2

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 Requ... | Programs/Jobs | Rt/Day/Seq | Territory | Map Code |
|--------------------------|-----------|---------------|----------------|-------|------------------|---------------|------------|-----------|----------|
| <input type="checkbox"/> | 4294 | Test, Chandra | 21 Westside Ct | 24450 | 1/25/2025 | Grub Control | A8 - 1 - 0 | | |

Selected: 0 of 1

Cancel Back Next

All results from Step 1 will be listed in this table. The results can be selected and printed, or can be sent to routing to select and optimize a route.

Estimate Printing – Step 3

Progress indicator: Step 1 (Search Estimates) ✓, Step 2 (Search Results) ✓, Step 3 (Options) 3

Form Options

Select forms to include:

- Driver Report
- Schedule
- Estimates *

Printer Offset: Inches

Assigned To: *

Assigned Date: *

Normal (dropdown)

Normal (dropdown)

Estimate (dropdown)

Include Neighbors

Include Neighbors

Max. Distance: Miles

Max. Referrals: Referrals

Similar Programs

In this final stage, you will define which form to use, who the work is assigned to, and the date the estimating should occur.

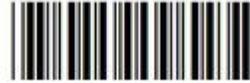
After the forms are 'generated', the services will be marked as printed, and status of the service will be updated on the customer's accounts.

Final Estimate

1/25/2025

Implementation Team Training #4294
Chandra Test
 21 Westside Ct
 Lexington, VA 24450

#4294



Home: (555) 555-5555

Work:

Route: A8

Directions:

Program Tech. Notes:

Lawn Care Estimate

| Lawn Considerations | | | | | |
|---|--|------------------------------------|--------------------------------------|-------------------------------------|---|
| Types of Turf | | Soil | Weeds Present | | |
| <input type="checkbox"/> Tall Fescue | <input type="checkbox"/> Grass Color: _____ | <input type="checkbox"/> Sandy | <input type="checkbox"/> Red Sorrel | <input type="checkbox"/> Chickweed | <input type="checkbox"/> Creeping Buttercup |
| <input type="checkbox"/> Kentucky Bluegrass | <input type="checkbox"/> Turf Density: _____ | <input type="checkbox"/> Clay | <input type="checkbox"/> Speedwell | <input type="checkbox"/> Spurge | <input type="checkbox"/> Wild Violets |
| <input type="checkbox"/> Rye | Thatch Depth | <input type="checkbox"/> Loam | <input type="checkbox"/> Black Medic | <input type="checkbox"/> Ground Ivy | <input type="checkbox"/> Clover |
| <input type="checkbox"/> Fine Fescue | <input type="checkbox"/> Minimum | <input type="checkbox"/> Compacted | <input type="checkbox"/> Henbit | <input type="checkbox"/> Purslane | <input type="checkbox"/> Other _____ |
| <input type="checkbox"/> Bentgrass | <input type="checkbox"/> Under 1/2" | | <input type="checkbox"/> Plantain | <input type="checkbox"/> Oxalis | <input type="checkbox"/> Other _____ |
| <input type="checkbox"/> Zoysiz | <input type="checkbox"/> Over 1/2" | | <input type="checkbox"/> Dock | <input type="checkbox"/> Thistle | <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"/> Sod Webworm Evident | <input type="checkbox"/> Summer Patch |
| <input type="checkbox"/> Dollar Spot | <input type="checkbox"/> Other _____ | <input type="checkbox"/> Chinch Bug Evident | <input type="checkbox"/> Red Thread |
| <input type="checkbox"/> Fusarium Blight | <input type="checkbox"/> Other _____ | <input type="checkbox"/> Grub Worms Evident | <input type="checkbox"/> Other _____ |

Estimate is Complete – Now What?

After Estimate

The screenshot shows a software interface for managing estimate quote statuses. The title bar reads "1 - Estimate Quote Status LGR - Grub Control". The interface is divided into two columns of fields. The left column includes: Status (a dropdown menu currently showing "1 - Estimate Quote Status" with other options like "0 - No Status", "2 - Gave Estimate", "3 - Gave Estimate - Call C...", "4 - Gave Estimate-NotSol...", "5 - Cancelled-Do Not Call", "6 - Cancelled-Market to N...", "7 - Cancelled-Customer M...", "8 - Always Active", and "9 - Active"), Year, Billing Type, Route (*), Day Code, Sequence, PO #, Last Serviced, and Hold Start Date. The right column includes: Completed (checkbox), Call Ahead (dropdown), Source (*), Temp Route (*), Temp Day Code, Temp Sequence, Last Price Increase (date field), Hold Reason (dropdown), and Hold End Date (date field).

- An Estimate can have a quote by going to the property, using an online tool, or some other means.
- Getting that quote to the customer could be a leave behind (estimate form), a proposal (master document) mailed or emailed, or just a phone call.
- Regardless of the means, the account should be updated with the information gathered and the new status.
 - Estimate Given - Status 2 or 3
 - Estimate Rejected - Status 4
 - Sold - Status 8 or 9

Updating the Estimate Status

There are two main ways to update customers accounts:

- Quick Estimate Entry - This is a quick way to update the customer and have the required fields identified easily.
- Program and Services can be updated manually.

What is 'Required' can be defined for each program and service in Settings > Service or Program Setup.

- 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.

The screenshot shows the 'Quick Estimate Entry' form. On the left, there is a search bar for 'Enter an Estimate or Customer Number' with the value '4294'. Below it, a card displays account details for 'Account #4294 - Chandra Test'. The main form area contains several fields: 'Program/Job Status' (2-Gave Estimate), 'Estimate Given' (01/25/2025), 'Given By' (CM - Chandra Mogensen), 'Size' (10, 1000 Sq. Feet), 'Round Price' (105), 'Total Price' (105), 'Call Ahead' (none), 'Lawn Rating' (0), 'Technician Notes' (Need to go through back gate on left side to service.), 'Customer Notes', and 'Estimate Notes'. At the bottom, there are 'Condition Codes' and 'Flag Codes' sections, a 'Reset Changes' button, and a 'Save' button.

Sales Call Logs

Sales Call Log Setup

Call Logs can automatically be created when an estimate is updated to Estimate Given (status 2 or 3).

Setup

- Navigate to Settings > General Setup – Program/Job.
- Scroll to New Job Options.
- Ensure 'Automatically add a call in the call log' is checked AND 'With Call Log Status: \$ – Sales Call' is selected.
- The Call Log will be assigned to the 'Estimated By' employee.

New Job Options

| | |
|--|---|
| <input checked="" type="checkbox"/> Automatically add a call in the call log | With Call Log Status: <input type="text" value="\$ - Sales Call"/> |
| <input checked="" type="checkbox"/> Default to Status 0 for 2nd Program of Active Customer | <input 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 |

Proposal Creation with Master Documents

Proposal Form Setup

If you want to email the prices to the homeowner, you can do so with master document proposals, prepay letters, or RealGreen Forms.

Form Creation

- Navigate to Settings > Document Templates.
- Search for Master Document in the 'Search Field', and mark the 'Show System Templates' checkbox to view and copy a template.
- To modify the template, simply edit the document as you would a Word document.
- If additional fields are needed, you can select the three dotted lines on the left hand side, and a drawer will appear. These 'Available Data Fields' can be dragged into the document, and the information will be pulled from information found within your Service Assistant.
- Pricing can pull from what is on the customer's account that is added in manually, prices pulled from price charts based on the customer's property size, or both.

COMPANY_LOGO_CONTAINER
[[COURT]]

Measured Lawn Size: [[DISPSIZE]] sq. ft.
Proposal/Custom Number: [[CUST_NO]]

Thank you for the opportunity to present this proposal for your lawn care needs. Our lawn care program consists of timely feedings of balanced fertilizers, crabgrass and grassy weed prevention and dandelion weed control.

Personalized Proposal for the
[[LASTNAME]] Residence
[[STREETADDR]]
[[CITY]], [[STATE]] [[ZIPCODE]]

THE_PIC_CONTAINER

The [[LASTNAME]] Residence

| Proposed Lawn Care Program | Price Per Application |
|----------------------------|--|
| March thru Early May | An application of complete balanced fertilizer with pre-emerged crabgrass control (and broadleaf weed control, weather allowing) (ADD PRICING FIELDS) |
| Early May thru June | A complete balance fertilization with broadleaf weed control (ADD PRICING FIELDS) |
| June thru August | A complete balance fertilization (spot treatment broadleaf weeds) (ADD PRICING FIELDS) |
| September thru October | A complete balance fertilization (spot treatment broadleaf weeds) (ADD PRICING FIELDS) |
| November thru December | A winter feeding (promotes root development and faster green up) (ADD PRICING FIELDS) |
| Optional | Core Aeration and Lime Application (ADD PRICING FIELDS) |

Service Calls are free for all Customers on our Lawn Care Program. So, if you ever have any questions, please don't hesitate to call. Thank you for the opportunity to service your lawn. We look forward to working as your partner towards a healthier, greener lawn that we'll both be proud of for years to come.

We service these neighbors in your area

[[NEIGHBR1]]
[[NEIGHBR2]]
[[NEIGHBR3]]
[[NEIGHBR4]]
[[NEIGHBR5]]
[[NEIGHBR6]]
[[NEIGHBR7]]
[[NEIGHBR8]]
[[NEIGHBR9]]
[[NEIGHBR10]]
[[NEIGHBR11]]
[[NEIGHBR12]]

Beneficial Recommended Services

Grubs can devastate your lawn!
Late summer or early fall is a great time to control these potentially devastating insects, catching them before they hibernate deep in the soil, preparing to destroy your lawn next year. We are now scheduling grub treatments for lawns. Just call us and we will soon be out to help save your lawn!

Grub Control: (ADD PRICING FIELDS)

Too much thatch can choke your lawn to death!
For many years, professional golf course greenskeepers have known that the secret of a beautiful, dense turf is to aerate their courses two or three times each year, allowing the healthy grass roots to thrive. Now your lawn, too can enjoy the benefits of professional aeration.

Core Aeration: (ADD PRICING FIELDS)

Subtotal: [[TOTALBASEPRICE]]

Sales Tax: [[TOTALTAX]]
[[TAXRATE]]

Total: [[TOTALPRICE]]

We accept these credit cards

To begin your service simply contact us at [[COPHONE1]] or online at [[COURL]]. 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 discontinue services at anytime, simply by writing or calling our office.

Representative: _____ Accepted By: _____
Customer Signature

Contact us at [[COPHONE1]] or [[COURL]]

Printing the Proposal

- A proposal can be printed individually from the Customer's Documents tab. Select 'New', and choose 'Master Document from Template'.
- Proposals can also be printed in batch by going to Actions > Targets and selecting 'Send to Master Documents' from any Report.

The screenshot shows the WorkWave software interface. At the top, there are navigation tabs: Customer Details, Documents (0), Forms, History, Contact, Financial, Installments (0), and Stations (0). A search bar labeled 'Quick Search' is on the right. Below the navigation, the customer information is displayed: Account # 4294, 9-Active Chandra Test, 21 Westside Ct, Lexington, VA 24450, and phone number (555) 555-5555. The 'Documents' tab is selected, showing a table with columns: Type, Title, Filename, Category, Date, Linked Program, Linked By, Print With Invoice, and Before/After Image. The table is currently empty, displaying 'No data'. A dropdown menu is open over the table, showing options: Upload New File, State Form, Diagram, Web Page, and Master Document from Template. The 'Master Document from Template' option is highlighted. At the bottom, there are pagination controls showing 'Page 1 of 1 (0 items)' and a '1' button.

Estimate Service

Estimate Service Setup

An 'estimate service' that is created with a service is unrelated to what is printed, left or emailed. Mobile Live must have an Estimate Service to route.

Service: ES - Estimate Service +

Service Setup

Service Information

| | | | | | | |
|-----------------|-------------------------------------|--|---|-----------------|--|---------------------------------------|
| Service Code: * | ES | Description: | Estimate Service | Service can be: | <input type="checkbox"/> Round / Cycle | <input type="checkbox"/> Special |
| Available: | <input checked="" type="checkbox"/> | Branches: * | <input checked="" type="checkbox"/> All 5 items selected | | <input checked="" type="checkbox"/> Estimate Service | <input type="checkbox"/> Work Order |
| Type: ⓘ * | E - Lawn Care Program | | | | | <input type="checkbox"/> Service Call |
| Start Date: | <input type="text"/> | <input type="checkbox"/> Don't fill in Schedule Date | | | | |

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

Setup

- Navigate to Settings > Service Setup.
- An estimate service simply needs to be classified as an 'Estimate Service', but the Description of the service 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 or service.

Defaults and Required Fields

| | | | | |
|--|---|------------------------------|----------------------|-------------------|
| Required Information | Default Information | Estimate Service: | Nothing selected | Scheduling |
| <input type="checkbox"/> Date Sold | <input type="checkbox"/> Non-Service Year | Initial Service: | <input type="text"/> | |
| <input type="checkbox"/> Salesperson | <input type="checkbox"/> Don't Print Invoice If Previous Not Done | Default Billing Type: | Nothing selected | |
| <input type="checkbox"/> Source | <input type="checkbox"/> Automatic Renew | Program Type: * | Nothing selected | |
| <input type="checkbox"/> Size | <input type="checkbox"/> Automatic Renew Date | Units: | Nothing selected | |
| <input type="checkbox"/> Route | <input type="checkbox"/> Send Confirmation Letter | Min for Full: | <input type="text"/> | |
| <input type="checkbox"/> Cancel Date | <input type="checkbox"/> CAW Available | | | |
| <input type="checkbox"/> Cancel Reason | <input type="checkbox"/> Mobile Device | | | |
| <input type="checkbox"/> Reject Reason | <input type="checkbox"/> Lock Sold / Cancel Dates | | | |
| <input type="checkbox"/> Estimated By | <input type="checkbox"/> Lock Schedule Default | | | |

Estimate Service Setup continued

Once a service or program has been added to a customer with an estimate status – you can add an estimate service by scheduling it to be done.

2 - Gave Estimate LGR - Grub Control

| | | | |
|------------------|-------------------|----------------------|--------------------------|
| Status: | 2 - Gave Estimate | Completed: | <input type="checkbox"/> |
| Year: | 2025 | Call Ahead: | <input type="checkbox"/> |
| Billing Type: | Regular / Invoice | Source: * | <input type="checkbox"/> |
| Route: * | A8 - | Temp Route: * | <input type="checkbox"/> |
| Day Code: | 1 | Temp Day Code: | 1 |
| Sequence: | 1 | Temp Sequence: | 1 |
| PO #: | | Last Price Increase: | 01/25/2025 |
| Last Serviced: | | Hold Reason: | Select... |
| Hold Start Date: | | Hold End Date: | |

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

Schedule an Estimate : LGR - Grub Control

Schedule Date: 01/25/2025

Schedule Time: 10:00am

Time Window:

Note:

Cancel Schedule Send to Scheduler

Estimate Details

Estimate Req Date: * 01/25/2025 Requested By: Request Taken By: CM - Chandra Mog... Estimate Scheduled: 1/25/2025 10:00:00 AM

Completing Estimate Services

Estimate Services are 'completed' when the estimate is done and updated through quick estimate entry. These will then show in History, on the customer's account, as record of the estimate being given.

The screenshot displays a software interface for customer management. At the top, there are navigation tabs: Customer Details, Documents, History, Contact, Financial, Installments, and Stations. The main header shows 'Account # 222', a status indicator '4 - Give Estimate - Not Sold', and customer information 'Mr. Santa Rosa' with address '4809 Western Dr, Martinsville, IN 46151' and phone '(82) 124-5889'. Below this, the 'History' section is active, showing a table with columns: Done, Code, Net Amount, Net Balance, Prepay Balance, Remit Balance, and Unpaid/Open Amt. A single entry is visible for '11/8/2021' with code 'EST'. To the right, the 'Treatment - 11/8/2021' details are shown, including 'Service: EST - estimate service', 'Posted: 23411', 'Invoice #: 23411', 'Billing Type: Regular / Invoice', 'Sold: 0', and 'Rating: 0'. A financial summary table shows 'Full Charge', 'Prepay Discount', 'Net Amount', 'Previous Balance', 'Net Balance', and 'Balance', all at '\$0.00'. A 'Weather Details' section lists 'BS - Brown Spots', 'CF - Course Focus', and 'ID - Insect Damage' with a note '**pre-existing condition**'. A 'Note' at the bottom states: 'Customer wants quote for front only vs. entire. front = 2.7, entire is 6.0'.

Session Feedback

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

Questions?