



**Get Paid Faster,  
Handle Fewer Calls – Customer  
Assistant Website Overview**

# SA5 Letter Setup and Processing



**Yvonne Orrin**

Training Specialist, RealGreen by WorkWave

# Agenda

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- What is CAW
- How CAW Provides Value and Benefits Your Company
- Review the CAW Site Pages
- Look at examples of CAW and AMA working together to, Increase sales, Reduce Receivables and Drive Retention.

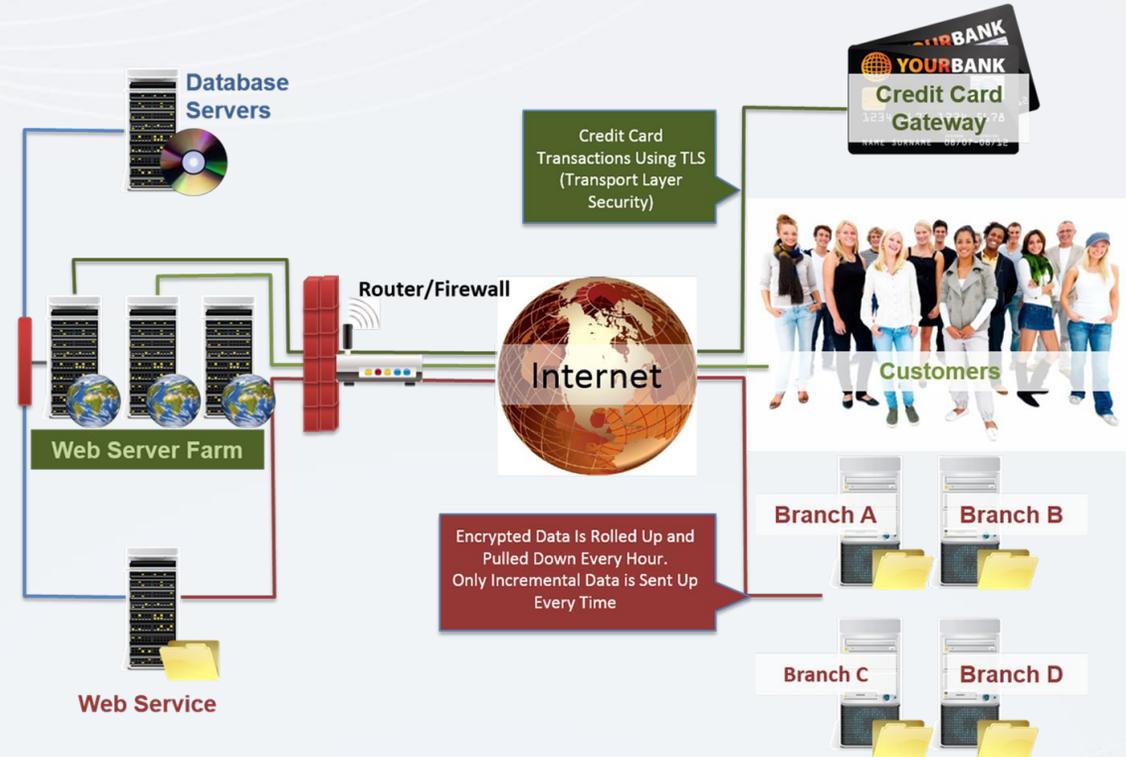
# What is CAW:

Your data is hosted securely so that your customers can:

- Make Online Payments
- Enroll in AutoPay
- Purchase additional services
- Review payment and service history,
- Reprint invoices, review service summaries
- Review and Activate Estimates
- Request Service Calls or for someone to contact them

**CAW works with links from AMA**

- Payment reminders
- After Service emails
- Prepay Emails
- Rejected Estimate offers
- Cancel Win Back offers.
- Upsells



# How Does CAW Provide Value and Benefit Your Company

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- Provides access in a manner customer expect, desire and prefer today
- Improves communication by providing customers access to their account and service information when it is convenient to them
- Reduces your Accounts Receivables by providing a Secure and Convenient payment platform
- Improves Customer Retention by improving communication and managing AutoPay and Installment options
- Increases sales by providing easy links from estimates, upsells and prepays

# Landing Page Overview

The Landing Page can be customized by changing the colors, layout and keeping or removing the Offer Code as well as the Not a customer section.

Customer Assistant Website will allow you to:

- Make secure, online payments
- Prepay for services
- Sign up for Auto Pay
- Purchase additional services
- Request estimates and service calls
- View payment & service history
- Get maintenance tips
- Refer Friends & Neighbors
- 24/7 availability

## Access Your Account Today!

Login to view your services, make payments or review your historical services.

Email Address

Password



[Forgot Password?](#)

Login

Not Registered? [Sign-up!](#)

Have an Offer Code?

Submit

Not a Current Customer?

Get Started Today!

# Not a Customer?

It is easy for anyone to sign up as a customer with CAW.



## Get Started Today!

Enter your Address \* = Required

Address: \*

Email: \*

ZIP Code: \*

Confirm Email: \*

Cancel

Submit



## Promotions

Promotion



**Aeration - Promo**  
We will contact you with a quote

1 Program of 1 Rounds

[Details](#) [Add to Cart](#)

Promotion



**Grub Control - Upsell**  
We will contact you with a quote

1 Program of 1 Rounds

[Details](#) [Add to Cart](#)

Promotion



**Overseeding**  
We will contact you with a quote

1 Program of 1 Rounds

[Details](#) [Add to Cart](#)

Promotion



**BOGO**  
We will contact you with a quote

1 Program of 6 Rounds

[Details](#) [Add to Cart](#)

**Service Address**  
4755 W. Hibbard Rd, Orono  
Orono, MI 49867

Summary	
Selected Promotions	\$0.00
Subtotal	\$0.00
Total Charge	\$0.00

[Checkout](#)

# CAW Home Page



Navigation Options



### My Services

Service Year 2026

Service Address: 1500 Nelson St (#255)

#### Your Services for 2026

Service	Last Service Date	Visits to Date/Total Visits	Amount	Payment Type
Yvonne Lawncare 5 Rounds	1/28/2026	1/5	\$337.92	
<b>Service Summary</b>				
Service	Completed On		Amount	
Lawn Application Round 1	1/28/2026		Invoiced	
Lawn Application Round 2			\$66.00	
Lawn Application Round 3			\$69.96	
Lawn Application Round 4			\$66.00	
Lawn Application Round 5			\$66.00	
Aeration Yvonne		0/1	\$168.00	
Pest Outdoor Spray	5/12/2025	0/30	\$58.30	
Weekly mowing	5/12/2025	0/52	\$50.00	

Hyper links for copies of Service Summaries and Invoice reprints.



Shows all services for the current service year

**Account Balance**  
**\$69.96**  
We received your payment of \$203.26 on July 03, 2025.  
[Pay Balance](#)

[View My Estimates](#)  
[Available Promotions](#)

**Did you know?**  
You could save  
**\$199.10**  
by prepaying \$3,785.86 for your remaining services.  
Remaining subtotal: \$3,984.96  
[View Remaining Service Details](#)  
[Prepay Now!](#)

**Have an offer code?**  
Enter offer code...  
[Submit](#)

# My History



- Home
- Add Service
- Contact Us
- Make a Payment
- My History**
- Refer A Friend
- About Us

Transaction History

## Transaction History

My History shows completed services as well as payments

Transaction	CH/Invoice #	Date	Amount	Tax
Lawn Application Round 1	7210	1/28/2026	\$69.96	\$3.96  
<i>Payment - Thank You!</i>	5623	7/3/2025	-\$203.26	\$0.00
Lawn Application Round 1	6912	5/29/2025	\$69.96	\$3.96  
Yvonne None Service Year 1	7000	5/27/2025	\$0.00	\$0.00  
Yvonne None Service Year 1	6999	5/27/2025	\$0.00	\$0.00  
Yvonne None Service Year 1	6998	5/13/2025	\$0.00	\$0.00  
Weekly mowing	6907	5/12/2025	\$75.00	\$0.00  
Pest Outdoor Spray	6904	5/12/2025	\$58.30	\$3.30  
Yvonne None Service Year 1	6997	5/6/2025	\$0.00	\$0.00  
Yvonne None Service Year 1	6996	4/29/2025	\$0.00	\$0.00  
Yvonne None Service Year 1	6995	4/22/2025	\$0.00	\$0.00  
Yvonne None Service Year 1	6994	4/15/2025	\$0.00	\$0.00  
Yvonne None Service Year 1	6993	4/8/2025	\$0.00	\$0.00  
<i>Payment - Thank You!</i>		4/4/2025	-\$100.00	\$0.00
Yvonne None Service Year 1	6992	4/1/2025	\$0.00	\$0.00  
Yvonne test	5585	3/7/2025	\$824.60	\$2.10  
Weekly mowing	6774	1/31/2025	\$75.00	\$0.00  
Weekly mowing	6773	1/30/2025	\$75.00	\$0.00  
Weekly mowing	5132	1/23/2025	\$50.00	\$0.00  

Customer can conveniently pay their balance from this page

**Account Balance**  
**\$69.96**  
We received your payment of \$203.26 on July 03, 2025.  
[Pay Balance](#)

### Aging Information

Current	\$69.96
31 - 60 Days	\$0.00
61 - 90 Days	\$0.00
91 - 120 Days	\$0.00
121 - 180 Days	\$0.00
Over 180 Days	\$0.00

# Make a Payment



- Home
- Add Service
- Contact Us
- Make a Payment**
- My History
- Refer A Friend
- About Us

Complete your billing and account information to pay for all outstanding invoices

<input checked="" type="checkbox"/>	Service	CH/Invoice #	Date	Charges	Amount Paid	Balance
<input checked="" type="checkbox"/>	Lawn Application Round 1	7210	1/28/2026	\$69.96	\$0.00	\$69.96
				\$69.96	\$0.00	\$69.96

**Total Payment Amount: \$69.96**

Automatically displays any open invoices

## Billing and Account Information

Payment Method: **Credit Card**

Cardholder Name: Mickey Mouse

Card Number: Enter Card #

CVV Code: CVV

Expiration Month and Year: Expiration Month | Expiration Year

Payment Amount: 69.96

House and Street: 1500 | Nelson St

City: Owosso

State: MI

Zip: 48867

Service Address  Other

Create Autopay Profile

Chose payment type from the drop down

# Add Service

**RealGreen**  
by WORKWAVE

Home Add Service Contact Us

**Add Services**  
Add Service (Cart) Subheading:

Recommendations Additional Services

**Promotion**

**Aeration - Promo**  
Price: \$91.00  
1 Program of 1 Rounds  
Details Add to Cart

**Promotion**

**Spring Aeration - Upsell**  
Price: \$91.00  
1 Program of 1 Rounds  
Details Add to Cart

**Promotion**

**Grub Control - Upsell**  
Price: \$88.00

**Promotion**

**Overseeding**  
We will contact you with a quote

© 2026 RealGreen by WorkWave Version: 2.3.359.87

**Recommendations will show promotions as well as upsells based on condition codes.**

**RealGreen**  
by WORKWAVE

Home Add Service Contact Us Make a Payment

**Add Services**  
Add Service (Cart) Subheading:

Recommendations Additional Services

**Any service that has the CAW available box on either the service or program level checked will show in this section.**

**RealGreen**  
by WORKWAVE

**Aeration**  
Price: \$91.00  
Details Add to Cart

**RealGreen**  
by WORKWAVE

**Aeration**  
Price: \$91.00  
Details Add to Cart

**RealGreen**  
by WORKWAVE

**Aeration Yvonne**  
Price: \$168.00  
Details Add to Cart

**RealGreen**  
by WORKWAVE

**Bed Weed Control**  
We will contact you with a quote  
Details Add to Cart

**RealGreen**  
by WORKWAVE

**Bermuda Grass**  
We will contact you with a quote  
Details Add to Cart

**RealGreen**  
by WORKWAVE

**Bi-Weekly Bedwork**  
We will contact you with a quote  
Details Add to Cart

**Services without price chart**

# Customer Account Settings

This section allows the customer to edit their contact information, set up Autopay and manage multiple properties if applicable.

**RealGreen** by WORKWAVE

Home Add Service Contact Us Make a Payment My History Refer A Friend

Account #: 255  
Mickey Mouse  
1500 Nelson St Owosso MI 48867

Customer Profile  
Manage Properties  
Autopay Management  
Submit Feedback  
Sign Out

**Account #**  
**\$69**  
We received your payment of  
**Pay Balance**

[View My Estimates](#)

**My Services** Service Year 2026 Service Address: 1500 Nelson St (#255)

**Your Services for 2026**

Service	Last Service Date	Visits to Date/Total Visits	Amount	Payment Type
Yvonne Lawncare 5 Rounds	1/28/2026	1/5	\$337.92	
Aeration Yvonne		0/1	\$168.00	
Pest Outdoor Spray	5/12/2025	0/30	\$58.30	
Weekly mowing	5/12/2025	0/52	\$50.00	

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Mickey Mouse  
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Customer Profile  
Manage Properties  
Autopay Management  
Submit Feedback  
Sign Out

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We received your payment of  
**Pay Balance**

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**My Services** Service Year 2026 Service Address: 1500 Nelson St (#255)

**Your Services for 2026**

Service	Last Service Date	Visits to Date/Total Visits	Amount	Payment Type
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Aeration Yvonne		0/1	\$168.00	
Pest Outdoor Spray	5/12/2025	0/30	\$58.30	
Weekly mowing	5/12/2025	0/52	\$50.00	

# Customer Profile Settings

This section allows the customer to edit their contact information, set up Autopay and manage multiple properties if applicable.

**RealGreen** by WORKWAVE

Home Add Service Contact Us Make a Payment My History Refer A Friend

Account #: 255  
Mickey Mouse  
1500 Nelson St Owosso MI 48867

Customer Profile  
Manage Properties  
Autopay Management  
Submit Feedback  
Sign Out

Account # 255  
**\$69**  
We received your payment of  
Pay Balance

[View My Estimates](#)

My Services Service Year 2026 Service Address: 1500 Nelson St (#255)

Your Services for 2026

Service	Last Service Date	Visits to Date/Total Visits	Amount	Payment Type
Yvonne Lawncare 5 Rounds	1/28/2026	1/5	\$337.92	
Aeration Yvonne		0/1	\$168.00	
Pest Outdoor Spray	5/12/2025	0/30	\$58.30	
Weekly mowing	5/12/2025	0/52	\$50.00	

# Customer Profile Settings continued

- User Preferences will allow your customer to add or update contact information.
- Email Settings: Customers can easily change the email that is used to sign into CAW.
- Change Password: Enables your customers to update their password without having to contact you.

Home    Add Service    Contact Us    Make a Payment    My History    Refer A Friend    About Us

### Customer Profile

- User Preferences
- Email Settings
- Change Password
- Sign Out

**User Preferences**

**Contact Information**

Home Phone:	<input type="text" value="(234) 567-8901"/>	Work Phone:	<input type="text" value="( ) - -"/>
Cell Phone:	<input type="text" value="( ) - -"/>	Text Phone:	<input type="text" value="(989) 277-8326"/>
Fax Phone:	<input type="text" value="( ) - -"/>	Other Phone:	<input type="text" value="( ) - -"/>
Preferred Phone Number:	<input type="text" value="Select.."/>		

# Manage Properties

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Home Add Service Contact Us Make a Payment My History Refer A Friend About Us

### Manage Properties

Customer Number: \*  House Number: \*

Zip Code: \*

[Add Property](#)

Customer #	Address	
255	1500 Nelson St Owosso MI 48867	<a href="#">View Property</a>
302	1405 Nelson St Corunna MI 48867	<a href="#">View Property</a>
356	20E Monroe St Owosso MI 48867	<a href="#">View Property</a>

This allows customers to quickly add additional properties (group billing accounts) to manage them online with one login.

# Autopay Management

[Home](#)[Add Service](#)[Contact Us](#)[Make a Payment](#)[My History](#)[Refer A Friend](#)[About Us](#)

## Autopay Management

### Autopay Setup

You haven't setup an Autopay Profile yet. Set one up now for stress-free billing

[Create Autopay Profile](#)

### Understanding Autopay

Autopay is a secure, easy and convenient way to pay your bill. You just tell us that you want to pay your bill automatically, and we debit an account of your choosing the amount you owe. You don't have to worry about misplacing a bill or missing a due date, everything is taken care of for you.

## Autopay Advantages

- **Customer Retention**
- **Customer's that are on autopay retain at a 12% higher rate**
- **In other words for every 1000 customers on autopay you have 33 less cancels if your cancel rate is 28%**

# CAW and AMA

Integration and coordination with AMA really escalates the value of both CAW and AMA.

Links and buttons on AMA communications, for instance the After Service Email, will direct your customers to the Customer Assistant Website.

RealGreen SYSTEMS

Account No: 2058

## Service Summary Report

Signup for AutoPay | Pay Your Bill | Contact Us

**We've serviced your property. These services were performed...**

Mel,  
Today we visited your property:  
1812 Center Ave  
Bay City, MI 48708

We performed the following:

- Late Spring Application** - [\(view invoice\)](#)  
[\(view detailed report\)](#)  
Technician: Carl Lainesse  
- Wind Speed: 0

This is crucial for this application. We are applying a complete balanced fertilizer... promote root growth with Broadleaf Weed Control Trimec 889 (2,4-D, MCP, Dicamba) and Crabgrass Control Dimension (Dithiopyr). Please keep children and pets off lawn for 1 hour or until dry. Rainfall or any precipitation will help activate this treatment.

**Products Used:**

- 1.00 pounds - Dylox Insecticide
- 2.00 Oz. - Flea and Tick Stuff
- 3.00 Fluid Oz. - TURFLON-D (WEED CONTROL)

RealGreen SYSTEMS

### Make A Payment

How likely is it that you would recommend our company to a friend or colleague?

Not at all likely | Extremely likely

0 1 2 3 4 5 6 7 8 9 10

Submit

**Billing Information**

Mel Smith 1812 Center Ave Bay City MI 48708

Other

**Account Information**

VISA | MASTERCARD | DISCOVER

\* Name On Card: John Smith | \* Card Number: 1234 5678 9012 3456

\* Expiration: Month | Year | \* CV# or Security Code: 111

**Remit**

Click Boxes to change the amount to pay!

To make balance payment, you must have at least one line selected

Remit						
	Invoice #	Date	Service	Charge(s)	Credit	Balance
<input checked="" type="checkbox"/>	91785	07/23/19	Early Spring Application	\$45.45		\$45.45
<input checked="" type="checkbox"/>	91791	07/23/19	Early Spring Application	\$42.17		\$42.17
<input checked="" type="checkbox"/>	91778	07/18/18	Late Spring Application	\$35.25		\$35.25
<input checked="" type="checkbox"/>	91771	07/05/18	Early Spring Application	\$35.25		\$35.25
			Remit Total			\$158.12

**Payment**

Payment Amount: 158.12

Submit

# CAW Registration

You can easily direct customers to the Customer Assistant Website to register using the CAW Registration email from AMA.



Sign Up Now Save 20% Off  
Your Next Visit

Account No: 4285714  
Service Address: 13722 Milton Dr  
Belleville, MI 48111

## Online Registration...

Dear Joseph,  
Your time is precious and we respect it. Now you can access your self-serve Customer Private Access Portal with us at your convenience - at any time! When you activate your secure, PCI compliant self-serve Customer Private Access Portal, you will be able to:

- Pay your bill online
- View your account history
- Schedule service calls or new services
- Get helpful tips
- Save money by opting into automatic and prepay options

Simply select the link to activate your safe and secure PCI compliant Customer Private Access Portal today.

Sincerely,

Ken White  
(810) 355-7100  
kwhite@hometownlawnandpest.com  
www.lawndeal.com

[Click here to manage your profile](#)

Customer Assistant Website will allow you to:

- Make secure, online payments
- Prepay for services
- Sign up for Auto Pay
- Purchase additional services
- Request estimates and service calls
- View payment & service history
- Get maintenance tips
- Refer Friends & Neighbors
- 24/7 availability

## Access Your Account Today!

Login to view your services, make payments or review your historical services.

Email Address

Enter an email address...

Password

Enter a password...

[Forgot Password?](#)

Login

Not Registered? [Sign Up!](#)

Have an Offer Code?

Enter offer code...

Submit

Not a Current Customer?

[Get Started Today!](#)



Sign up for  
Aeration & Seeding  
service at a  
discounted price  
exp. 08/4/2019

Manage My Account   Activate Estimate   Contact Us

Considering the following...

Dear John,

We have attempted to follow up with you regarding the estimate given for your annual lawn application program and have been unable to reach you.

We are still very interested in providing you with the lawn you have always wanted. We believe with our quality products and our licensed technicians this is the best way to achieve the results you desire. If you sign up today you can also receive our bonus offer.

We would, of course, like the opportunity to serve you as a customer and hope you can take advantage of the attached offer.

We appreciate the opportunity to be considered as your lawn care professional.  
Sincerely,

Account Number:  
132605

Service Address:  
John Smith  
6304 Dublin Ave  
Midland, MI 48640

Billing Address:  
John Smith  
6304 Dublin Ave  
Midland, MI 48640

Estimate Services

Super Lawn Care Program

- Early Spring Application (July 1st - August 1st) \$61.25
- Late Spring Application \$61.25
- Summer Application \$61.25
- Mid-Summer Application \$61.25
- Early Fall Application \$61.25
- Late Fall Application \$61.25
- Scotts Winterizer \$61.25

Total Service Amount ..... \$574.75  
Tax ..... \$16.12  
Payment Amount ..... \$590.87

- Fall Aeration \$146.00
- Fall Aeration

\*Too late to do this season and/or not applicable - Prices Reflected Are Standard Price Unless Noted

[Click Here to activate your Estimate!](#)

# Estimate follow up

Manage My Account   Activate Estimate   Contact Us

## Considering the following...

Dear John,

We have attempted to follow up with you regarding your annual lawn application program and have been unable to reach you.

We are still very interested in providing you with the lawn you have always wanted. We believe with our quality products and our licensed technicians this is the best way to achieve the results you desire. If you sign up today you can also receive our bonus offer.

We would, of course, like the opportunity to serve you as a customer and hope you can take advantage of the attached offer.

We appreciate the opportunity to be considered as your lawn care professional.

Sincerely,

Account Number:  
132605

## Estimate Services

### Super Lawn Care Program

- Early Spring Application (July 1st - August 1st) \$61.25
- Late Spring Application \$61.25
- Summer Application \$61.25
- Mid-Summer Application \$61.25
- Early Fall Application \$61.25
- Late Fall Application \$61.25
- Scotts Winterizer \$61.25

Total Service Amount ..... \$574.75  
Tax ..... \$16.12  
Payment Amount ..... \$590.87

### Fall Aeration

- Fall Aeration \$146.00

\*Too late to do this season and/or not applicable - Prices Reflected Are Standard Price Unless Noted

[Click Here to activate your Estimate!](#)

Automatically follow-up and close open estimates.

Increases the effectiveness of your marketing efforts

Helps to reach out to those hard to reach customers or those customers that are more comfortable purchasing services online.

# Payment Reminder Email

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- Increased payments using AMA payment Reminders
- Changed A/R cash position for TG Temperance by 5%
- When customers stay off Credit Hold you gain efficiency in Routing and costs savings in service delivery

# Session Feedback

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

# Questions?