



How To Use The Suggested Service Price Tool

How To Use the Suggested Service Price Tool



Thom Boersma

Customer Success Manager, RealGreen

Agenda

- Setup
- Suggested Service Price Utility
- Adding Services
- Go To Options

SA5 Suggested Service Price Utility Setup

SA5 Suggested Service Price Utility Setup

What is the Suggested Service Price Utility?

The Suggested Service Price Utility allows users to quickly find and quote pricing for programs and services.

- Uses price table priced services only
- Can include discounts and prepay discounts
- Allows round level customization within programs
- Quickly calculate installment prices
- Add multiple services to customer accounts

SA5 Suggested Service Price Utility Setup

The Suggested Service Price Utility will only work if both the customer and the service meet specific criteria.

Requirements:

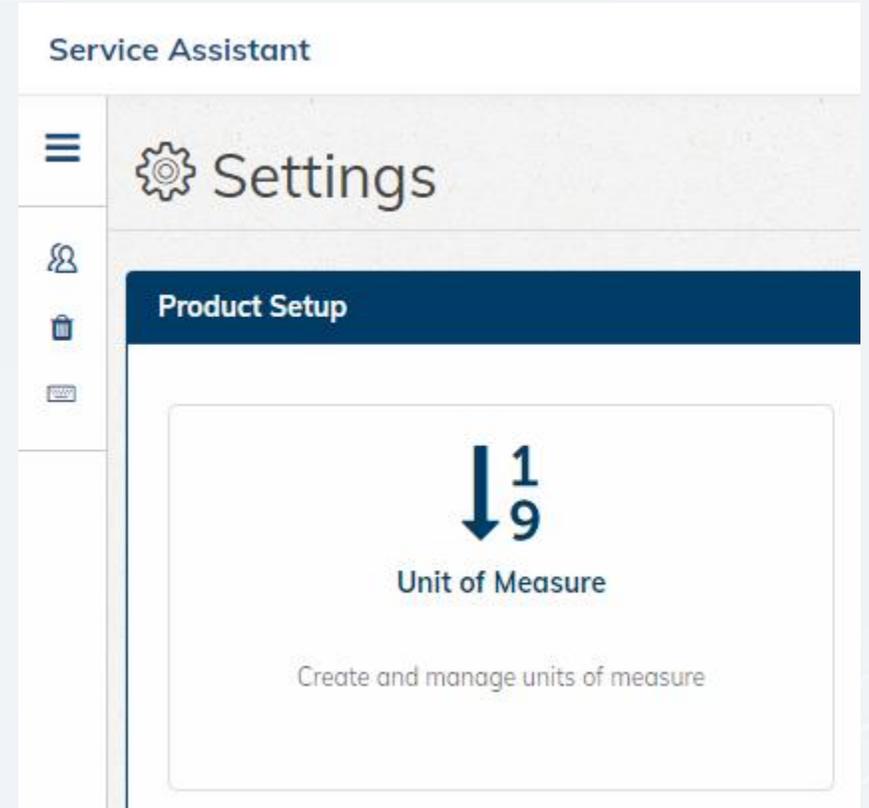
- Defined Unit of Measure
- Price Chart
- Customer Size Associated to Unit of Measure (can be pulled from neighbor sizes)

SA5 Suggested Service Price Utility Setup

Defined Unit of Measure

Units of Measure can be set up under Settings > Product Setup > Unit of Measure.

- Any unit of measure can be defined
- Any numerical value can be used
- Multiple options for the same measurement can be used



SA5 Suggested Service Price Utility Setup

Service Assistant > Settings > Unit of Measure Setup

Unit of Measure Setup

Description *	French Description	Spanish Description	Measurement	Unit
<input type="text"/>	<input type="text"/>	<input type="text"/>	Nothing select ▾	Nothing selected ▾
acres	<input type="text"/>	<input type="text"/>	Area ▾	Acre (a) ▾

+

Unit of Measure Setup

- Description – Unit description
- Measurement – Select the type of measurement from a defined dropdown
 - Area – standard lawn (1000 sq. ft) and mosquito measurements (Acre)
 - Length – often used with perimeter pest (Linear Feet)
 - Number – often used for irrigation services (Zones)
 - Time – can be used for hourly price rates or with labor product codes
 - Volume – used typically on product rates
 - Weight – used typically on product rates
- Unit – Select the unit type from a defined dropdown and will correspond to the Measurement option selected

Area ▾

Length

Number

Time

Volume

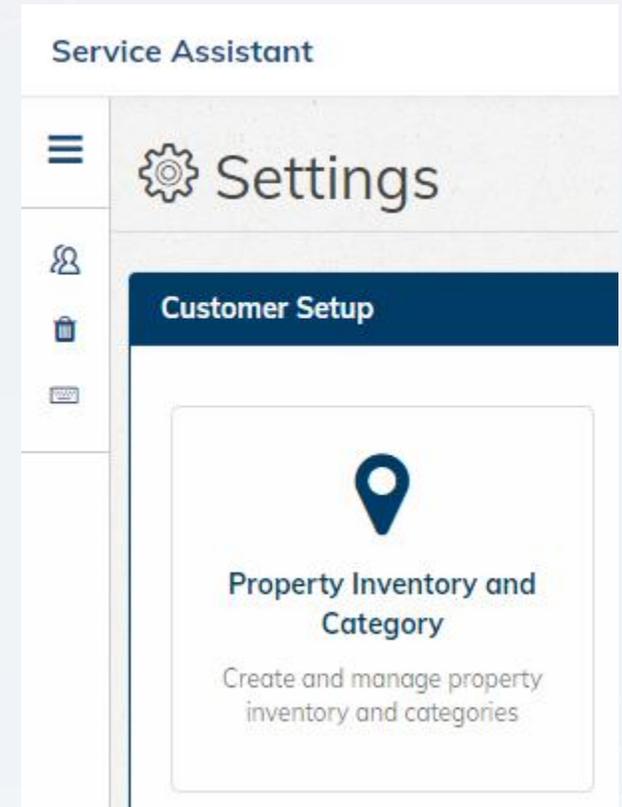
Weight

SA5 Suggested Service Price Utility Setup

Property Inventory

Property Inventory can be set up under Settings > Customer Setup > Property Inventory and Category.

- Track additional property measurements
- Track turf types and measurements
- Track front/back/sides independently
- Can use Measurement Assistant to measure property inventory items
- Can be added to accounts via Mobile Live



SA5 Suggested Service Price Utility Setup

Property Inventory

Define property categories for the inventory types

- Assigned to program/service type

Define individual inventory types

- Define the Inventory Description
- Assign the Property Category it belongs to
- Assign the Unit using a dropdown of the Units that you have defined

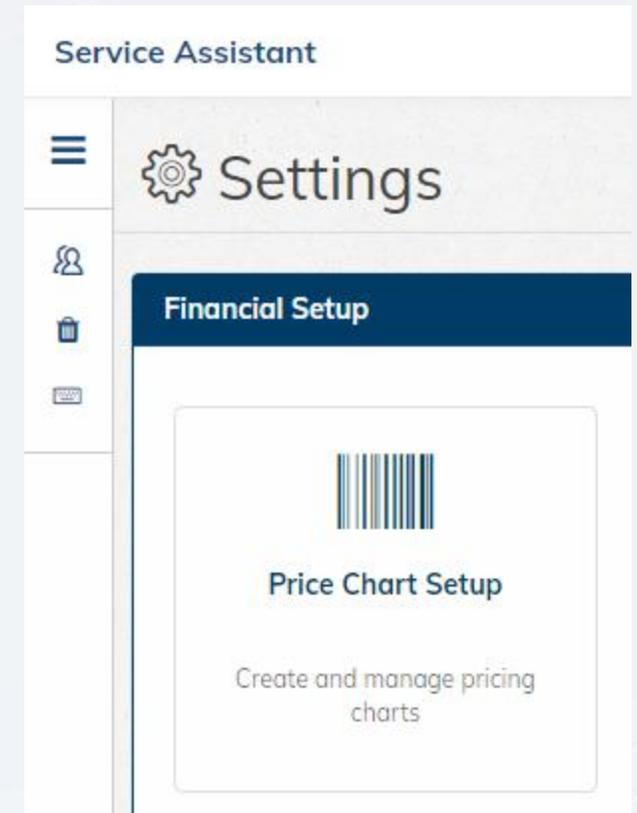
The screenshot shows the 'Service Assistant > Settings > Property Inventory and Category' interface. It features a sidebar with navigation icons and a main content area with two expandable sections: 'Property Categories' and 'Property Inventory'. The 'Property Inventory' section is expanded, showing a table with columns for 'Inventory Description', 'Category', 'Unit', 'Branch', 'French Description', and 'Spanish Description'. A row is highlighted with the following values: 'Irrigation Zones', 'Misc', 'zones', 'All', '4 items selected', 'French Descriptio', and 'Spanish Descripti'. There are also input fields for 'French Description' and 'Spanish Description' and a plus sign icon.

SA5 Suggested Service Price Utility Setup

Price Chart Setup

Price Chart Setup can be set up under Settings > Financial Setup > Price Chart Setup.

- Price Charts correspond to a numerical value and price
- Any numerical value can be used if there is a matching unit of measure
- The matching unit of measure comes from both the customer and service/program



SA5 Suggested Service Price Utility Setup

Price Chart Setup

- Size – Quantity
- Rate – Price at size
- Est. Man Hours – Est. production minutes at size
- Price Per Unit After – Price and est. production minutes per whole unit of size after the last entered value on the chart

Price Chart Setup

Available: +

Description: *

French Description:

Spanish Description:

Price Per Unit After: \$

Estimated Minutes:

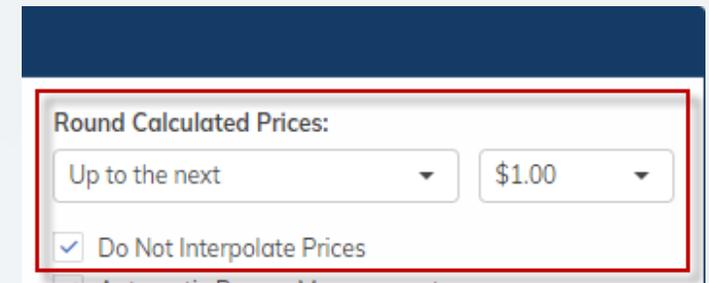
↑	Size	Rate	Estimated Man Hours (in minutes)	
	5	60.00	15	🗑️
	5.5	66.00	17	🗑️
	6	72.00	19	🗑️
	6.5	78.00	21	🗑️
	7	83.50	23	🗑️
	7.5	89.50	25	🗑️

SA5 Suggested Service Price Utility Setup

General Setup – Financial

- Round Calculated Prices – Pre-tax prices can be rounded as needed to cent or dollar values
 - Up to the next – Always rounds up
 - Off to the nearest – Rounds up or down based on pre-rounded cents value
- Do Not Interpolate Prices – Will only use the price chart prices as they exist, with sizes that fall between defined prices always using the next available price
 - Allowing price interpolation will price to the exact size using a value between what exists on the price chart

Price per unit after will always extrapolate prices to the actual size.



Round Calculated Prices:

Up to the next \$1.00

Do Not Interpolate Prices

SA5 Suggested Service Price Utility Setup

Customer Size

All customer sizes can be used on the Suggested Service Price utility. Customers without sizes can still be sent to the utility and sizes can be manually entered or pulled from neighbors.

- Property Details – The main property size or most used size is generally listed here as a unit of 1000 sq. ft. or Acres
- Property Items – All other sizes and units of measure will be listed as additional quantities under the property inventory items
 - Can also be used to track Front, Back, Left Side, Right Side for lawn measurements
 - Property Inventory can be measured and added from Measurement Assistant

The screenshot shows a customer details page for Account # 3896, Mr. Joe Masters. The page is divided into several sections:

- Customer Details:** Account # 3896, 9-Active, Mr. Joe Masters. Address: 28401 Gita St, Livonia, MI 48154. Home: (313) 522-9061. Customer: tboersma@realgreen.com. Phone: 42.38583, -83.32428.
- Balance Details:** Net Balance: \$0.00, Last Pmt Date: 5/15/2023. Prepay/Applied Balance: \$0.00, Last Pmt Amt: \$1,051.54. Remit Balance: \$0.00, Credit Limit: \$3,000.00.
- Flags:** test3.
- Property Details:** Size: 7,4300 Lawn 1000 sq ft (Online Measurement). Route: 06, Subdivision: Southwyck Sub. Territory: (), Map Code: 602 -U -.
- Property Items:** A table with columns: Notes, Item, Location, Quantity. Items include Zones (6 zones) and Linear Feet (600 linear feet).

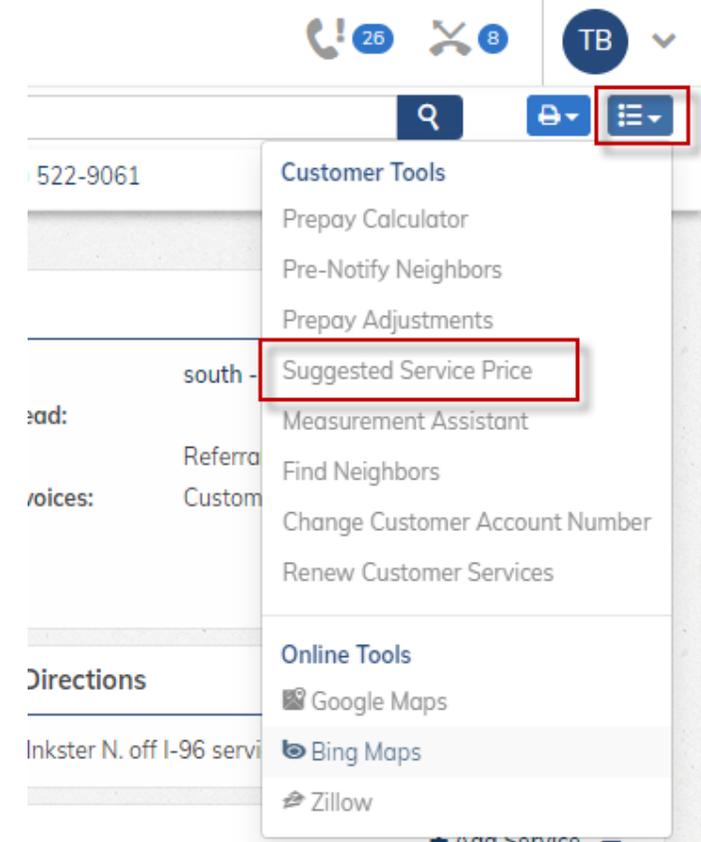
SA5 Suggested Service Price Utility

SA5 Suggested Service Price Utility

The Suggested Service Price Utility can be accessed from the Tools drop-down menu in the upper right of the main customer screen.

You can also reach the Suggested Service Price Utility directly from Measurement Assistant.

Only services with price charts will be displayed under the utility.



SA5 Suggested Service Price Utility

Suggested Service Price

Program Discount: (None) Service Discount: (None) Prepay Discount: (None)

Update: Size Using Unit of Measure: Lawn 1000 sq ft Size:

Package Select:

Program/Service	Available	Size	Available \$	Discount \$	Tax \$	Net \$	Program/Service Discount Code	Prepay Code	Start Date
<input type="checkbox"/> LC - Lawn Care	2 / 6	5 Lawn 1000 sq ft	\$60.00	\$0.00	\$3.60	\$63.60	Select...	Select...	<input type="text"/>
<input type="checkbox"/> LC+ - Lawn Plus	7 / 8	5 Lawn 1000 sq ft	\$210.00	\$0.00	\$12.60	\$222.60	Select...	Select...	<input type="text"/>
<input type="checkbox"/> LNS - Lawn - Non season	1 / 1	5 Lawn 1000 sq ft	\$30.00	\$0.00	\$1.80	\$31.80	Select...	Select...	<input type="text"/>
<input type="checkbox"/> NEW - TEST	4 / 4	5 Lawn 1000 sq ft	\$80.00	\$0.00	\$0.00	\$80.00	Select...	Select...	<input type="text"/>
<input type="checkbox"/> TS - Tree and Shrub	0 / 6	0 gallons	\$0.00	\$0.00	\$0.00	\$0.00	Select...	Select...	<input type="text"/>
<input type="checkbox"/> 12 - Test Service 1	1 / 1	0 zones	\$0.00	\$0.00	\$0.00	\$0.00	Select...	Select...	<input type="text"/>
<input type="checkbox"/> CA - CORE AERATION	1 / 1	5 Lawn 1000 sq ft	\$60.00	\$0.00	\$3.60	\$63.60	Select...	Select...	<input type="text"/>
<input type="checkbox"/> EST - Estimate/Service	1 / 1	5 Lawn 1000 sq ft	\$40.00	\$0.00	\$0.00	\$40.00	Select...	Select...	<input type="text"/>
<input type="checkbox"/> GCP - Grup Control Preventative	1 / 1	5 Lawn 1000 sq ft	\$79.00	\$0.00	\$0.00	\$79.00	Select...	Select...	<input type="text"/>
<input type="checkbox"/> LA - LIME	1 / 1	0 each	\$0.00	\$0.00	\$0.00	\$0.00	Select...	Select...	<input type="text"/>

Total Available: \$0.00
Total Discount: \$0.00
Tax: \$0.00
Final Total: \$0.00

Number of Installments:
Amount per Installment:

- Any number of options can be made when selecting services:
- Program Discounts
 - Round Discounts
 - Prepayment
 - Customize Rounds
 - Installment Pricing

SA5 Suggested Service Price Utility

Package Select:

Program/Service	Available	Size	Available \$	Discount \$	Tax \$	Net \$	Program/Service Discount Code	Prepay Code	Start Date
<input type="checkbox"/> LC - Lawn Care	2 / 6	5 Lawn 1000 sq ft	\$60.00	\$0.00	\$3.60	\$63.60	Select...	Select...	
<input checked="" type="checkbox"/> LC+ - Lawn Plus	6 / 8	5.00 Lawn 1000 sq ft	\$178.00	\$4.50	\$10.41	\$183.91	Select...	Select...	
L01 - EARLY SPRING APPLICATION	N - Never do	5.00	\$	\$	\$	\$	Select...	Select...	
<input checked="" type="checkbox"/> L02 - LATE SPRING APPLICATION	Y - Do every year	5.00	\$30.00	\$4.50	\$1.53	\$27.03	15 - Discount 15% off	Select...	
<input checked="" type="checkbox"/> L03 - EARLY SUMMER SLOW RELEASE	Y - Do every year	5.00	\$30.00	\$0.00	\$1.80	\$31.80	Select...	Select...	
<input checked="" type="checkbox"/> L04 - LATE SUMMER SLOW RELEASE	Y - Do every year	2.50	\$28.00	\$0.00	\$1.68	\$29.68	Select...	Select...	
<input checked="" type="checkbox"/> L05 - EARLY FALL FEEDING	Y - Do every year	5.00	\$30.00	\$0.00	\$1.80	\$31.80	Select...	Select...	
<input checked="" type="checkbox"/> L06 - WINTER DORMANT FEEDING	Y - Do every year	5.00	\$30.00	\$0.00	\$1.80	\$31.80	Select...	Select...	
LAW - Lawn Other	N - Never do	5.00	\$	\$	\$	\$	Select...	Select...	
<input checked="" type="checkbox"/> LA - LIME	Y - Do every year	5.00	\$30.00	\$0.00	\$1.80	\$31.80	Select...	Select...	

Total Available:	\$178.00
Total Discount:	\$4.50
Tax:	\$10.41
Final Total:	\$183.91

Number of Installments:	<input type="text" value="8"/>
Amount per Installment:	<input type="text" value="\$22.99"/>

Easily customize, tailor, and quote pricing to customers while on the phone with all the options that you offer.

SA5 Suggested Service Price Utility: Adding Services

SA5 Suggested Service Price Utility: Adding Services

Adding Services

Select the individual programs/jobs using the checkboxes on the left.

Multiple of the same program type can be selected but cannot be added as active to an account.

1 or more selected program type already exists with customer.

+ Add Selected Service(s)

Use the Package select drop-down to select all programs/jobs and discount options created under Settings > Package Setup.

Package Select: Select..	Program/Service	Available
<input type="checkbox"/>	LC - Lawn Care	2 / 6
<input checked="" type="checkbox"/>	LC+ - Lawn Plus	6 / 8
<input type="checkbox"/>	LNS - Lawn - Non season	1 / 1
<input type="checkbox"/>	NEW - TEST	4 / 4
<input type="checkbox"/>	TS - Tree and Shrub	0 / 6
<input type="checkbox"/>	12 - Test Service 1	1 / 1
<input checked="" type="checkbox"/>	CA - CORE AERATION	1 / 1
<input type="checkbox"/>	EST - Estimate/Service	1 / 1
<input type="checkbox"/>	GCP - Grup Control Preventative	1 / 1
<input type="checkbox"/>	LA - LIME	1 / 1

SA5 Suggested Service Price Utility: Adding Services

Adding Services

Once services have been priced and quoted, all currently selected services can be added to the customer account.

- Click Add Selected Service(s)
- Fill in required details
- Click Continue to add

+ Add Selected Service(s)

Add Service

Status:* 9 - Active

Year: 2023

Source:* Direct Mail

Call Ahead: Select...

After Adding: Go to Customer Details

Cancel Continue

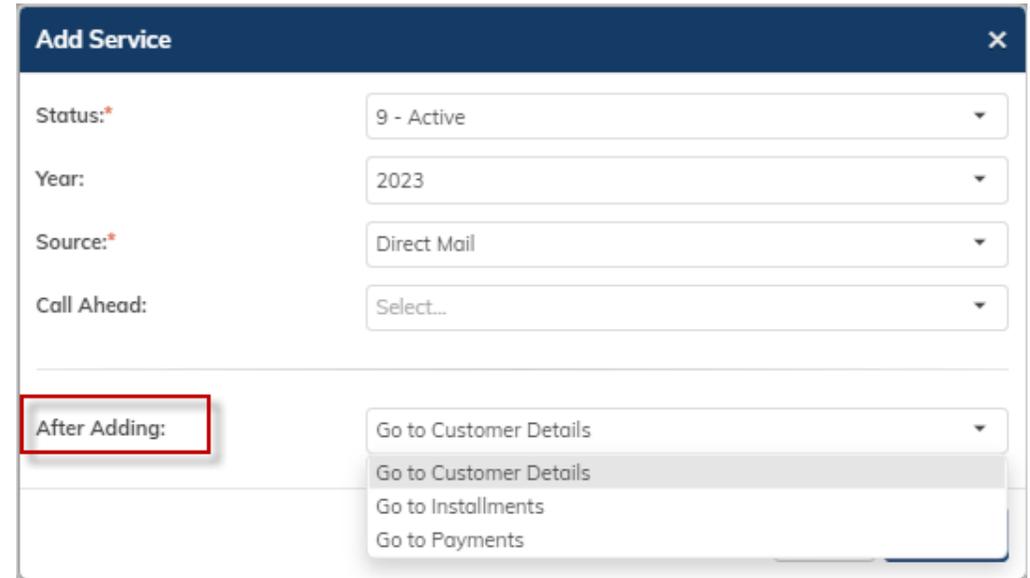
SA5 Suggested Service Price Utility: Go To Options

SA5 Suggested Service Price Utility: Go To Options

Go To Options

Before adding services, you can select the 'Next Step' option to navigate to.

- Go to Customer Details
- Go to Installments
- Go to Payments



The screenshot shows a web form titled "Add Service" with a close button (X) in the top right corner. The form contains several dropdown menus: "Status:" with "9 - Active", "Year:" with "2023", "Source:" with "Direct Mail", and "Call Ahead:" with "Select...". Below these is a dropdown menu labeled "After Adding:" which is highlighted with a red box. This dropdown menu is open, showing four options: "Go to Customer Details", "Go to Customer Details", "Go to Installments", and "Go to Payments".

SA5 Suggested Service Price Utility: Go To Options

Go to Customer Details

Go to Customer Details will take you directly back to the main customer screen with the newly added service(s).

Changes to services can be made as necessary after adding.

The screenshot shows a modal window titled "Add Service" with a close button (X) in the top right corner. The form contains the following fields:

- Status:***: A dropdown menu with the selected value "9 - Active".
- Year:**: A dropdown menu with the selected value "2023".
- Source:***: A dropdown menu with the selected value "Direct Mail".
- Call Ahead:**: A dropdown menu with the selected value "Select...".
- After Adding:**: A dropdown menu with the selected value "Go to Customer Details".

At the bottom right of the dialog, there are two buttons: "Cancel" and "Continue".

SA5 Suggested Service Price Utility: Go To Options

Go to Installments

Go to Installments will take you directly to Step 4 of the Installment Wizard with the criteria from the utility and services included.

The first due date will be today and charges will schedule forward from there. Changes can be made in the Installment Wizard using the Back button to move to previous steps.

Number of Installments:	<input type="text" value="8"/>
Amount per Installment:	<input type="text" value="\$258.38"/>

Add Service ×

Status:*

Year:

Source:*

Call Ahead:

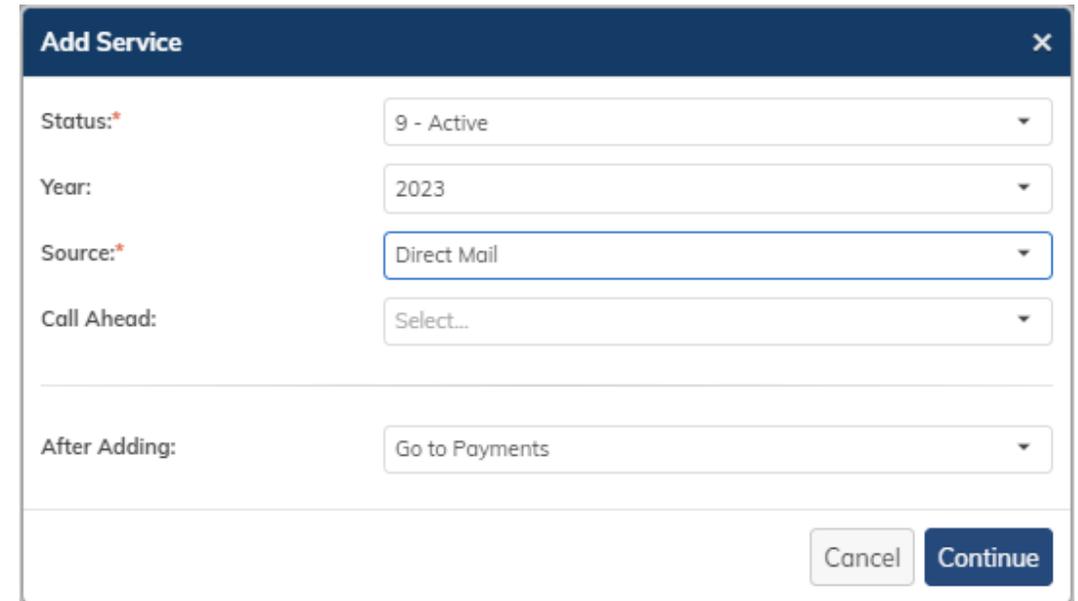
After Adding:

SA5 Suggested Service Price Utility: Go To Options

Go to Payments

Go to Payments will take you directly to payment entry for the selected customer.

Newly added services will be available at that point to pay or prepay for.



The screenshot shows a dialog box titled "Add Service" with a close button (X) in the top right corner. The dialog contains the following fields:

- Status:* 9 - Active
- Year: 2023
- Source:* Direct Mail
- Call Ahead: Select...
- After Adding: Go to Payments

At the bottom right of the dialog, there are two buttons: "Cancel" and "Continue".

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

