RealGreen®
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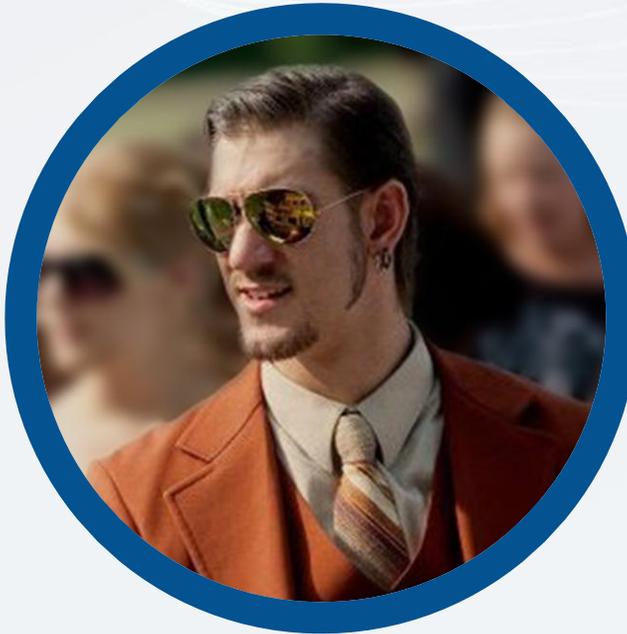# Is the Price Right?

How to Improve Quoting with Property Inventory in SA5

Is the Price Right?

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BEYOND SERVICE
CUSTOMER CONFERENCE '26

RealGreen by WORKWAVE

Agenda

- Property Inventory Items
- Property Inventory Setup
- Adding Property Inventory to Customers
- Copy Size Utility
- Using Property Inventory Effectively

Property Inventory Items

Property Inventory Items

The Property Inventory parameters allow you to measure all aspects of a customer's property:

- Keep track of tree locations
- Shrub/flower bed sizes
- Perimeter of the home
- Irrigation zones
- Any other item that can be tracked numerically

Property Inventory Items

Property Items are stored on the main customer details tab in the bottom, left-hand corner.

Property Inventory Items

When to use Property Inventory Items:

- A service uses a different unit of measurement that varies from your standard (Acreage, 1000 sq.ft., Linear Feet, etc.)

- The need/want to store additional property items for more details on the customer's account.

- Store partial measurements (Front Yard, Back Yard, Left Side, Right Side, Fenced in Areas, Etc.)

- If you need to breakdown product amounts

- Any other home details you would like to document for future reference/upsells

Property Inventory Setup

Property Inventory Setup

Property Inventory has a few areas that need to be set up to work effectively:

- Unit of Measure

- Property Location

- Inventory & Category

- Price Charts

- Program/Job Types

- Service Setup

Property Inventory Setup: Unit of Measure

The first step in setting up property inventory is creating the units of measure that correspond to the item measurement.

Description is the unit of measure that you will price by on services.

The Unit defines how it is measured.

You can use different descriptions with the same measurement and unit combo.

Property Inventory Setup: Property Location

Property Location is where on the property the measurement exists, but this also relates to product application purposes as well.

- Location Description: where on the property the location is

- French Description: French descriptions can be set for French speaking employees

- Spanish Description: Spanish descriptions can be set for Spanish speaking employees

- Measurement Entry Order: reorder the sort order of the items by numerical values

Property Inventory Setup: Inventory & Category

Property Category is the overarching group that Property Inventory measurements fall under. Like Program/Job Type Setup, you can assign a type to each category.

Property Inventory items are the different measurements that you are looking to capture on customer properties.

Descriptions can use the same unit of measure as needed.

Property Inventory Setup: Price Charts

Price Charts are not unit of measure specific; they are tied to a service which dictates the unit to price by.

- Price charts can be branch specific
- Set Size(s), Rate(s), and Estimated Man Hours
- Make sure the Price Per Unit After, and Estimated Minutes is filled in

Price charts can be set up for flat rate pricing, linear pricing, or variable pricing.

Prices can be optionally set to interpolate, but the Price Per Unit After will always extrapolate.

Property Inventory Setup: Program/Job Type

Program/Job Types are assigned at the service or program level. Program/Job Type are used in a variety of settings, but the primary setting for Property Inventory is linked to Property Category. Property Category will include all inventory items linked to that category for all services of the type on Worksheets and Driver Reports.

Property Inventory Setup: Service Setup

Service Setup controls three aspects that work with Property Inventory

- Program/Job Type: controls which property inventory items and sizes can print on Driver Reports/Worksheets

- Price By: the Price Chart that corresponds to the service Unit of Measure

- Units: the specific Unit of Measure that corresponds to the size that should be used on the service

Default Product Usage can also be specific to certain property inventory types (useful in transition turf territories).

Adding Property Inventory to Customers

Adding Property Inventory to Customers

Property Inventory can be added through a variety of means:

- Adding to existing customers
- Adding to new customers
- Adding through Measurement Assistant
- Requiring Property Inventory

Adding Property Inventory to Customers

Adding to Existing Customers:

- Navigate to customer

- Select Add Property Item

- Select the Property Item, Location, and Quantity(size)

- Add Notes if needed (like Backflow location)

- Click Save when complete

Adding Property Inventory to Customers

Adding to New Customers:

- Add new customer

- Proceed to Step 2

- Expand Property Inventory at the bottom of the page

- Click + to add item

- Select the Property Item, Location, and Quantity(size)

- Add Notes if needed

- Click Save when complete

Adding Property Inventory to Customers

Adding through Measurement Assistant:

- Navigate to Measurement Assistant
- Click + Add Property Item
- Select the Property Item and Location
- Add Notes if needed
- Click Save
- Select Item
- Select existing Shapes to add to size, or draw new measurements

Adding Property Inventory to Customers

You can require Property Inventory on customer accounts under Settings > General Setup - Customer:

- Only required for Active customer statuses

- At least one Inventory Item is required

- When updating customers to Active manually, or through service status changes, a pop-up will be presented to add Property Inventory

Copy Size Utility

Copy Size Utility

The Copy Size Utility can be used to either:

- Copy Property Inventory Size To Service
  - Only services with matching units of measure are updated

- Copy Service Size to Property Inventory
  - If the Property Item does not exist, it will be added with the size
  - If the Property Item exists, the size will just be updated

Using Property Inventory Effectively

Using Property Inventory Effectively

For Property Inventory to work correctly for you and your business, there are a few items to consider:

- Use Price Tables
  - Default prices when adding services
  - Used for marketing, upsells, and proposals
- Product amounts and calculations
- Driver Reports/Worksheets

Using Property Inventory Effectively

Utilize the Price Tables and Property Items to your advantage:

- Easily quote and price services based on any measurement that you may add to a property.
- This works through the Add Service Wizard or Quick Add

Stress the importance of gathering all measurements to salespeople and techs while out in the field.

Using Property Inventory Effectively

The Suggested Service Price utility honors all Property Item sizes. If no size is found on a matching item, the price will list as $0.00.

The Mass Service Assignment utility also honors Property Item sizes for pricing services.

Using Property Inventory Effectively

As long as Inventory Items exist on customer accounts, master document proposals, invoice upsells, prepay upsells, and marketing prepay letters all honor the additional sizes to calculate prices.

Dormant Oil uses Gallons as a Unit of Measure vs. the standard 1000sq.ft. that typically exists on as the primary customer size.

Lawn Fert Rd 6	$100.00
Lawn Fert Rd 4	$100.00

Total Service Amount	*$1,000.00*
Total Service Amount With Tax	*$1,056.00*
After 5% Prepay Discount	*$1,003.20*
You Save	*$52.80*
Prepay Amount After Your Credit Balance of $1,727.60 is Applied	*($724.40)*

	Regular Price	Prepay Price (with tax)
Dormant Oil	**$60.00**	**$60.19**

Using Property Inventory Effectively

If a default product is setup with 'Advanced Product Usage Calculation' there is a property inventory column added.

This allows different products to automatically be assigned based on the size of the inventory item instead of the main size on the service.

- If the inventory item on the product also exists on the customer, then the inventory size is used
- If the item doesn't exist on the customer, then the product is not used
- If there is no inventory item on the product, then the size of the service is used for the quantity

Using Property Inventory Effectively

Property Inventory Items can be included on Driver Reports and Worksheets for techs/crews.

If a Program/Job Type is assigned to the Property Category AND the Program/Job Type setup has a category assigned, the Property Item will be included.

This customer has five inventory items, but only one that has a landscape category, which the service also has.

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!

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