

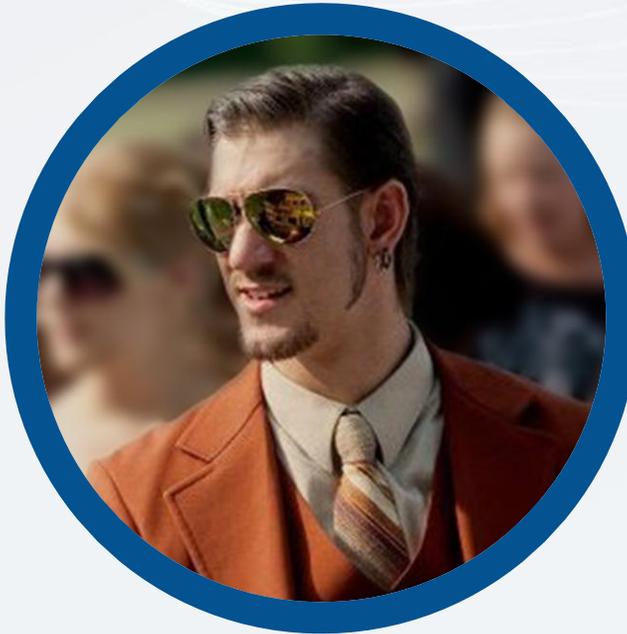


# Is the Price Right?

How to Improve Quoting with  
Property Inventory in SA5

# Is the Price Right?

---



**Thom Boersma**

Customer Success Manager, RealGreen

# 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.

The screenshot shows the 'Service Assistant' interface for a customer. The 'Customer Details' tab is active, displaying account information for Mr. William Hermanson. The 'Property Details' section shows a lawn area of 7,000 sq ft. The 'Property Items' section is highlighted, showing a list of items:

Notes	Item	Location	Quantity
	Pear	Back Yard	7 each
	Linear Feet	Entire Yard	725 feet
	Zones	Front Yard	6 zones

Notes	Item	Location	Quantity
	Pear	Back Yard	7 each
	Linear Feet	Entire Yard	725 feet
	Zones	Front Yard	6 zones

# 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.

Description *	French Description	Spanish Description	Measurement	Unit
Lawn 1000 sq ft			Area	1000 Square Feet (ft²/10C)
lbs			Weight	Pound (lb)
LT				
mL			Volume	Milliliter (ml)
Mosquito 1000 sq ft			Area	1000 Square Feet (ft²/10C)
Mosquito Sq.Ft.			Area	1000 Square Feet (ft²/10C)
N				
ounces			Volume	US Fluid Ounce (oz. (US L)
tons				
warm season			Area	1000 Square Feet (ft²/10C)
zones			Number	Piece (pce)

# 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

The screenshot displays the 'Property Location' configuration interface. It features a table with four columns: 'Location Description \*', 'French Description', 'Spanish Description', and 'Measurement Entry Order'. The table contains the following rows:

Location Description *	French Description	Spanish Description	Measurement Entry Order
Location Description	French Description	Spanish Description	Measurement Entry Order
Left Side Yard			0
Main Floor			0
Right Side Yard			0
Upstairs			0
Back Yard			1
Entire Yard			1
Basement			2
Front Yard			3
Inside			9

At the bottom of the interface, there are 'Cancel' and 'Save' buttons. A trash icon is visible next to the 'Inside' row.

# 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.

The screenshot displays two sections of the software interface. The top section, titled "Property Categories", features a table with columns for "Category Description", "French Description", and "Spanish Description". It includes input fields for descriptions and a "Service Type" dropdown menu. A red-bordered tooltip points to the "Service Type" dropdown, containing the text: "Adding a program type will allow property inventory items to be printed on driver reports and worksheets of services with the same type. Click here to go to Program/Job Type Setup". The bottom section, titled "Property Inventory", shows a table with columns for "Inventory Description", "Category", "Unit", "Branch", "French Description", and "Spanish Description". It lists various items like "Linear Feet", "Mosquito", "Pear", "St. Augustine", "test", "Test", and "Tree", each with associated dropdown menus for category, unit, and branch, and a "4 items selected" indicator.

Category Description *	French Description	Spanish Description	Service Type
Enter description	French Description	Spanish Description	
Lawn			
Misc			
Pest			P - Perimeter Pest Control

Inventory Description *	Category	Unit	Branch *	French Description	Spanish Description
Linear Feet	Misc	feet	All		
Mosquito	Misc	Mosquito Sq.F	All	4 items selected	
Pear	Tree/Shrub	each	All	4 items selected	
St. Augustine	Lawn	Lawn 1000 sq	All	4 items selected	
test	Lawn	acres	All	4 items selected	
Test	Misc	gallons	All	4 items selected	
Tree	Tree/Shrub	gallons	All	4 items selected	

# 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.

Price Description: Standard Lawn Care + Note: You can only edit if you have assigned branch access.

### Price Chart Setup

Available:

Any Branch:  All

Branches: \* 4 items selected

Description: \* Standard Lawn Care

French Description:

Spanish Description:

Price Per Unit After: 30 \$ 3.00

Estimated Minutes: 1.0000

Size	Rate	Estimated Man Hours (in minutes)
4	27.95	33
4.5	29.45	33
5	30.00	34
5.5	32.45	34
6	33.95	35
6.5	35.45	35

# 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.

Program / Job Type	+ Add
<input type="text" value="Search"/>	
2 - Test	>
7 - Test 2	>
F - Pesticide Free Lawn Care	>
L - Lawn Care	>
N - New Program Type	>
O - Organic Lawn Care	>
P - Perimeter Pest Control	>
Q - Non-Service Year	>

Details	
Type: *	<input type="text" value="P"/>
Description:	<input type="text" value="Perimeter Pest Control"/>
French Description:	<input type="text" value="French Description"/>
Spanish Description:	<input type="text" value="Spanish Description"/>
Credit Hold By:	<input type="text" value="Customer Balance"/>
Property Category: ⓘ	<input type="text" value="Pest"/>

# 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).

**Service Setup**

**Service Information**

Service Code: \* L01 Description: EARLY SPRING APPLICATION 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 4 items selected

Type: \* L - Lawn Care

Start Date:   Don't fill in Schedule Date

**Product Usage**

Advanced Product Usage Calculation

Code - Description	All	Branches	Property Inventory	Rate	Application Method
35 - 35-3-5	<input checked="" type="checkbox"/>	Select...	Zoysia	3.0000	Spreader
PE - Pendimethalin w/Fert	<input checked="" type="checkbox"/>	Select...	Bermuda	0.7500	Spreader

**Residential Account**      **Commercial Account**

Standard: 8012 - CORE AERATION      8012 - CORE AERATION

Prepay: 9096 - Prepay Discount - Lawn      9096 - Prepay Discount - Lawn

Discount: 9098 - Discounts - Lawn      9098 - Discounts - Lawn

Surcharge: Nothing selected      Nothing selected

**Price By:** Price Table  
**Default Price Table:** Core Aeration

Base Price: 0  
Man Hour Rate: 0  
Est. Minutes:

**Defaults and Required Fields**

<b>Required Information</b>	<b>Default Information</b>	Estimate Service: Nothing selected	<b>Scheduling</b>
<input checked="" type="checkbox"/> Date Sold	<input type="checkbox"/> Non-Service Year	Initial Service: Nothing selected	
<input checked="" type="checkbox"/> Salesperson	<input checked="" type="checkbox"/> Don't Print Invoice If Previous Not Done	Default Billing Type: Nothing selected	
<input checked="" type="checkbox"/> Source	<input checked="" type="checkbox"/> Automatic Renew	Program Type: * N - New Program Type	
<input checked="" type="checkbox"/> Size	<input type="checkbox"/> Automatic Renew Date	Units: Lawn 1000 sq ft	
<input type="checkbox"/> Route	<input type="checkbox"/> Send Confirmation Letter		
<input checked="" type="checkbox"/> Cancel Date	<input type="checkbox"/> CAW Available		

# 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

Property Items + Add Property Item

Notes	Item	Location	Quantity
	Home Perimeter	Entire Yard	725 Lin. Feet

Item: Kentucky Bluegrass Location: Back Yard

Quantity: 1.25 Unit Of Measure: 1000 Sq. Feet

Notes:

Cancel Save

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

Step 1  
Customer Information

Step 2  
Property Information

Property Information

Branch: \* 1001 - Your Company Name

Source: \* (None)

Route / Territory: (None) (None)

Map Code: Select...

Subdivision: (None)

Size / Unit / Source: 1000 Sq. Feet Measured

Tax 1: \* HA (11%) - HA-Can't Pay Tax

Tax 2: (None)

Tax 3: (None)

Find Neighbors

Invoice / Worksheet Notes:

Directions:

Other Options: Flag Codes

Property Inventory

Item	Quantity	Unit Of Measure	Location	Note
Mulch Beds	86	Yards	Front Yard	

Cancel Back Save

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

Property Items + Add Property Item

Select Property Item:  
Fescue

Property Item Details:

Category: Lawn

Inventory: Fescue

Location:  
Front Yard

Property Item Size: 1.43 ft<sup>2</sup>/1000

Include Shapes in Size Measurement:  
2 of 3 Shapes Selected x

Search...

New Shape 0.13 ft<sup>2</sup>/1000 +

New Shape 1.30 ft<sup>2</sup>/1000 +

Account # 1141802

Customer Details

Measurement Assistant (Transa

Property Inventory

Category: Lawn

Property Inventory: Fescue

Location: Front Yard

Note:

Cancel Save

Area: 1.30 ft<sup>2</sup>/1000

Area: 0.13 ft<sup>2</sup>/1000

## 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

Settings > General Setup - Customer

### General Setup - Customer

Required Information:

- Title
- Cancel Reason
- Size
- Zip/Postal Code
- Property Inventory

### Add Property Inventory

Item:\*  
Select...

Location:  
Select...

Quantity:

Unit Of Measure:

Cancel Continue

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

Copy Size

Branch: \* south - Super Green Custom

Program/Job: \* Nothing selected Year: \*

Action: Select Action Flags

Only Replace if Blank:

- Copy Customer Size To Service
- Copy Property Inventory Size To Service
- Copy Service Size To Customer
- Copy Service Size To Property Inventory

Cancel

# 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.**

The screenshot displays the WorkWave Service Assistant interface. A 'Quick Add Service' modal is open, showing fields for Status (9 - Active), Service (PES - Perimeter Pest (S)), Year (2021), Sold Date (11/10/2021), Sold By (MAP - Matthew Parise), and Route (PEST-Pest Route). The 'Size' field is highlighted with a red box and contains the value '725'. Below the modal, the 'Property Items' table is visible, with the 'Home Perimeter' item highlighted in red, showing a quantity of '725 Lin. Feet'.

Notes	Item	Location	Quantity	
	Home Perimeter	Entire Yard	725 Lin. Feet	
	Kentucky Bluegrass	Back Yard	1.25 1000 Sq. Feet	

# 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.

**Suggested Service Price**

Program Discount: (None)  \* Clear  
Service Discount: (None)  \* Clear  
Prepay Discount: (None)  \* Clear

Update: Size  
Using Unit of Measure: 1000 Sq. Feet  
Size:

Package Select:

Program/Service	Available	Size	Available \$	Discount \$	Tax \$	Net \$	Program/Service Discount Code	Prepay Code	Start Date
<input type="checkbox"/> CON - Consultation	4 / 4	0 Bags	\$0.00	\$0.00	\$0.00	\$0.00	Select...	Select...	<input type="button" value=""/>
<input type="checkbox"/> LC - Lawn Care Program 1	2 / 6	16.57 1000 Sq. Feet	\$200.00	\$0.00	\$11.20	\$211.20	Select...	Select...	<input type="button" value=""/>
<input type="checkbox"/> LCC - Best Lawn Program	1 / 6	16.57 1000 Sq. Feet	\$100.00	\$0.00	\$5.60	\$105.60	Select...	Select...	<input type="button" value=""/>
<input type="checkbox"/> NL2 - 12 Month LC Pgm no skip	6 / 6	16.57 1000 Sq. Feet	\$600.00	\$0.00	\$33.60	\$633.60	Select...	Select...	<input type="button" value=""/>
<input type="checkbox"/> PES - pest program	4 / 6	0 Linear Ft	\$0.00	\$0.00	\$0.00	\$0.00	Select...	Select...	<input type="button" value=""/>
<input type="checkbox"/> T2 - test schedule dates	1 / 1	0 Flat	\$0.00	\$0.00	\$0.00	\$0.00	Select...	Select...	<input type="button" value=""/>
<input type="checkbox"/> TER - Termite Treatment Plan	5 / 5	5 Termite Infest Level	\$650.00	\$0.00	\$36.40	\$686.40	Select...	Select...	<input type="button" value=""/>
<input type="checkbox"/> TR - Tree Program	0 / 6	6 Landscape Density Rating	\$0.00	\$0.00	\$0.00	\$0.00	Select...	Select...	<input type="button" value=""/>
<input type="checkbox"/> A&S - Aeration and Seeding	1 / 1	16.57 1000 Sq. Feet	\$570.00	\$0.00	\$31.92	\$601.92	Select...	Select...	<input type="button" value=""/>
<input type="checkbox"/> AEF - Fall Aeration	1 / 1	16.57 1000 Sq. Feet	\$170.00	\$0.00	\$9.52	\$179.52	Select...	Select...	<input type="button" value=""/>

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

Number of Installments:   
Amount per Installment:

# 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

<i>Total Service Amount</i>	\$1,000.00
<i>Total Service Amount With Tax</i>	\$1,056.00
<i>After 5% Prepay Discount</i>	\$1,003.20
<i>You Save</i>	\$52.80
<i>Prepay Amount After Your Credit Balance of \$1,727.60 is Applied</i>	(\$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

Product Usage

Advanced Product Usage Calculation

Code - Description	All	Branches	Property Inventory	Rate	Application Method
28 - 28-5-11 x (fert)	<input checked="" type="checkbox"/>	5 of 8 Selected	Select...	6.0000	spreader - push it
3W - 3-way (weed Control)	<input type="checkbox"/>	3003 - My way southside	Select...	1.0000	spot spray
46 - 46-0-0 Fertilizer	<input checked="" type="checkbox"/>	Select...	Tall Fescue	4.0000	spreader - push it

# 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.

DRIVER INVOICE REPORT      MY OTHER COMPANY NAME GOES HERE      Printed on 1/3/2024 1/3/2024

Route Code    SO    -

---

Customer: 5      Phone(s)    Service      Size    Hour      # Done    Max Done    123456789012345  
Mr. Don Juan    (682) 466-8911    LAN Landscape Service    0.00    00:15      0    1     Y  
1235 Romeo's Dr  
Fictional City, ID 12365

Map Code      Terr  
                    T10

Route    DayCode    Seq#    Sched      Charge \$150.00    Prod.Val \$150.00    Net \$150.00    Balance (\$1,727.60)       61914W  
SO      1      0

Appointment  
St      En

Directions      Notes  
                    invoice note

Flags    renew early  
         mail merge renewed  
         Dog  
         Locked Gate  
         Has Email  
         Elite Customer

**Call Ahead:  
OK to leave message**

**Property Inventory Items**  
Mulch Beds      160.0000 Yards

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!**

 **BEYOND SERVICE**  
CUSTOMER CONFERENCE '27

**SEE YOU IN  
NEW ORLEANS!**

Sunday, January 31, through  
Wednesday, February 3, 2027

Hilton New Orleans Riverside

