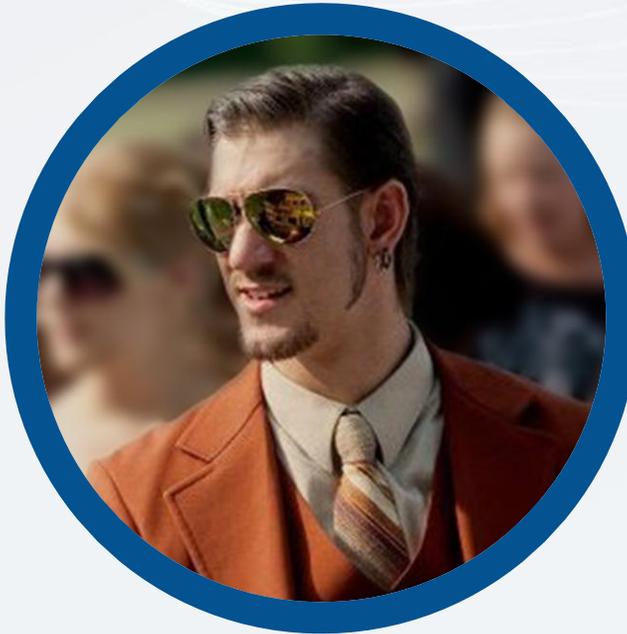




Labor and Materials Billing with Work Orders in SA5

Labor and Materials Billing with Work Orders



Thom Boersma

Customer Success Manager, RealGreen

Agenda

- Work Orders
- Product and Service Setup
- Adding/Editing Work Orders
- Copy Options
- Document Options

SA5 Work Orders

SA5 Work Orders

What is a Work Order?

Work Order services are services that need to be priced based on time(labor) and material cost.

- Typically used for irrigation installs/repairs, landscaping/hardscaping, pruning work, or any other job that needs material and labor charges
- Work Order pricing is based on each added line item
- Work Orders pricing can be detailed in different ways depending on the situation

SA5 Work Orders

Work Order services are added as a special job. Once saved, the Work Order screen will automatically open for adding products as needed. Work Orders are available through Mobile Live.

Service Assistant

Program Details Documents 0

Account # 3896 9-Active Mr. Joe Masters 28401 Gita St, Livonia, MI 48154 (313) 522-9061

Customer Details

Work Order - #1175344 Clear Done Update All Done: 12/13/2023

Charge for Actual Time and Materials

Group	Prod. Code	Prod. Desc	Est. Qty	Act. Qty	Unit	Location	Est. Cost (\$)	Ext. Est. Cost (\$)	Price (\$)	Act. Cost (\$)	Ext. Act. Cost
1	C1WM	1" Weather Matic Cont. Valve	4.0000	0.0000	each	Select...	11.90	47.60	26.77	11.90	0.00
2	F1POLY	1" Poly Pipe Fittings	25.0000	0.0000	each	Select...	0.96	24.00	2.16	0.96	0.00
3	BO1/2	1/2" Boiler Drain	2.0000	0.0000	each	Select...	2.47	4.94	5.56	2.47	0.00
4	P1PVC	1" PVC Schd 40 Pipe	15.0000	0.0000	linear feet	Select...	0.22	3.30	0.50	0.22	0.00
5	Lab	Labor	6.0000	0.0000	each	Select...	45.00	270.00	100.00	0.00	0.00

Original Estimated Price: 779.70 Estimated Price: 779.70 Extended Estimated Cost: 349.84 Extended Actual Cost: 0.00 Total Tax: 10.78*

Back Save

Work Order Costs

Cost Variance: 349.84 Price Variance: 779.70 Gross Profit: 0.00 Gross Profit %: 0.00%

Form Options

Generate: Nothing selected Include: Job Totals Only

Job #: 1175344

Print Proposal Notes Print Previous Balance Include All Phases

Print Crew Work Order Notes Print Other Services Done Since Last Statement Show Product Codes

Print Special Job Invoice Message Mark Invoice as Printed Show Quantities

Print Job Notes Print Incomplete Work Only Show Done Date

Print Logo Print Completed Work Only Print Flag Codes

Last Statement Date: 12/13/2023 Format: Normal

Printer Offset: inches

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Work Orders: Product and Service Setup

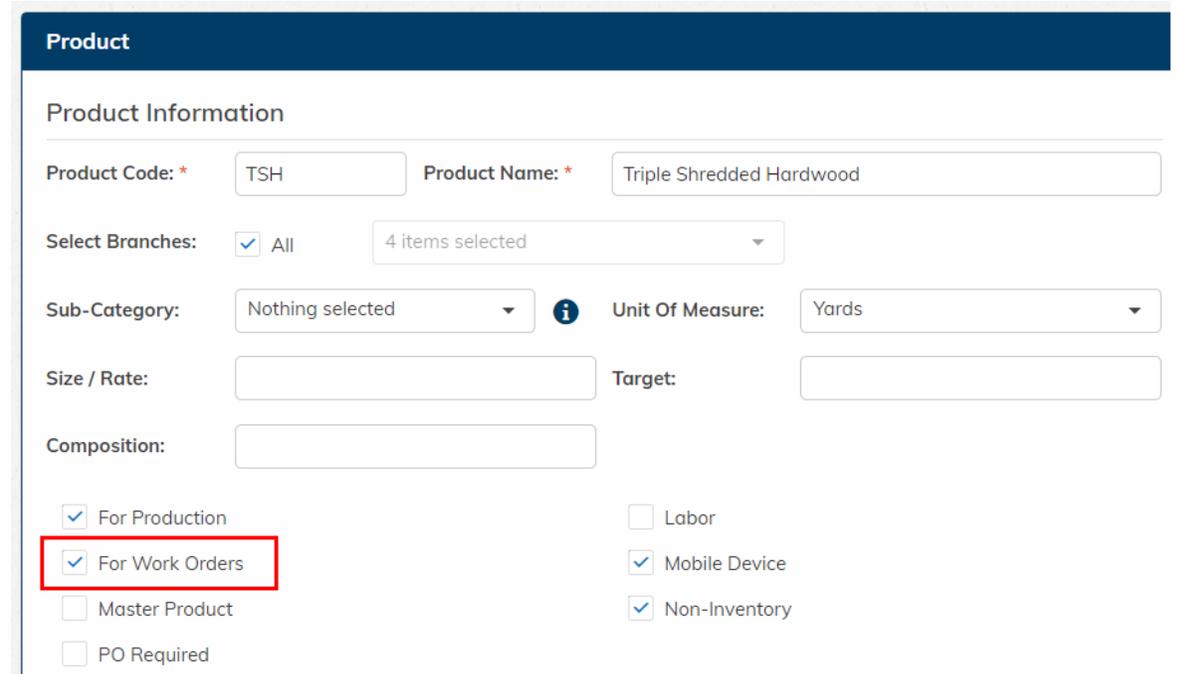
Work Orders: Product and Service Setup

Product Setup

Settings > Product Setup >
Product Setup

Products need to be set
specifically for Work Order use.

Products are taxable on Work
Order services, not the service
itself.



The screenshot shows the 'Product' setup form. The 'Product Code' is 'TSH' and the 'Product Name' is 'Triple Shredded Hardwood'. The 'Select Branches' dropdown is set to 'All' with '4 items selected'. The 'Sub-Category' is 'Nothing selected' and the 'Unit Of Measure' is 'Yards'. The 'Size / Rate' and 'Target' fields are empty. The 'Composition' field is also empty. The 'For Work Orders' checkbox is checked and highlighted with a red box. Other checked options include 'For Production', 'Mobile Device', and 'Non-Inventory'. Unchecked options include 'Labor', 'Master Product', and 'PO Required'.

Field	Value
Product Code: *	TSH
Product Name: *	Triple Shredded Hardwood
Select Branches:	<input checked="" type="checkbox"/> All (4 items selected)
Sub-Category:	Nothing selected
Unit Of Measure:	Yards
Size / Rate:	
Target:	
Composition:	
<input checked="" type="checkbox"/> For Production	<input type="checkbox"/> Labor
<input checked="" type="checkbox"/> For Work Orders	<input checked="" type="checkbox"/> Mobile Device
<input type="checkbox"/> Master Product	<input checked="" type="checkbox"/> Non-Inventory
<input type="checkbox"/> PO Required	

Work Orders: Product and Service Setup

Product Setup

Labor needs to be set up as a specific product code.

Labor and Non-Inventory checkboxes should be checked.

The Labor unit of measure should be hours or minutes based on your charges.

Product

Product Information

Product Code: * Lab Product Name: * Labor

Select Branches: All 4 items selected

Sub-Category: Nothing selected Unit Of Measure: Hours

Size / Rate: Target:

Composition: SKU #:

For Production Labor

For Work Orders Mobile Device

Master Product Non-Inventory

PO Required

Work Orders: Product and Service Setup

Product Setup

Master Products can be set up to easily price based on product groupings.

Master Product needs to be checked.

Sub-Products are assigned by quantity per unit of Master Product.

Master Products will always price based on Sub-Product pricing.

Product

Product Information

Product Code: * Product Name: *

Select Branches: All

Sub-Category: Unit Of Measure:

Size / Rate: Target:

Composition: SKU #:

For Production Labor
 For Work Orders Mobile Device
 Master Product Non-Inventory
 PO Required

Sub-Products

Sub-Products	Quantity	
WIN - WINDOWS ON THE HOME	1.0000	Delete
RDG - RIDGE ROWS	5.0000	Delete

Work Orders: Product and Service Setup

Product Pricing

Settings > Product Setup > Inventory Adjustment

Inventory Adjustment is by branch.

Search by Category, keyword, or optional product settings like Master Product or Labor.

Service Assistant > Settings > Inventory Adjustment

Branch: south - Super Green

Search for Products

Master Category: ALL

Sub-Category: ALL

For Production

For Work Orders

Master Product

PO Required

Labor

Mobile Device

Showing: 25 Results

Code	Product Name	Product Category	Master Category	Count	Size	Unit Of Measure	Cost (\$)	Unit Cost (\$)	Unit Price (\$)	Markup (\$)
000	000			400		lbs	910.00	2.28	2.00	-0.28
1234546...				-1			0.00	0.00	0.00	0.00
1234567...	test			0			0.00	0.00	0.00	0.00
1234567...	test2			-22			0.00	0.00	0.00	0.00
35	35-3-5	fertilizer	lawn care	11079.6		lbs	55,397.61	5.00	10.00	5.00
BA3/4BR	3/4" Brass Ball Valve	irrigation supplies	landscape	0		each	0.00	11.37	25.58	0.00
BO1J2	1/2" Boiler Drain	irrigation supplies	landscape	-135		each	-333.45	2.47	5.56	3.09
BOW	Christmas Bow			0			0.00	0.00	0.00	0.00

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Work Orders: Product and Service Setup

Product Pricing

Inventory Adjustment has 5 available columns:

- Count – Quantity currently on hand
 - Count will reduce as production is posted unless the product is set as Non-Inventory
- Cost – Count times Unit Cost
 - If Count is entered and Cost is updated, the Unit Cost will update based on Cost divided by Count
- Unit Cost – Cost to purchase single unit code
- Unit Price – Price charged to customer for single unit code
- Markup – Unit Price minus Unit Cost

Code ↑	Product Name	Product Category	Master Category	Count	Size	Unit Of Measure	Cost (\$)	Unit Cost (\$)	Unit Price (\$)	Markup (\$)
HOSTA	Variegated Hosta			421			5052.00	12.00	45.00	33.00

Work Orders: Product and Service Setup

Service Setup

Settings > Program/Job Setup
Service Setup

Services need to be set as a Special Job and Work Order.

Work Orders cannot be part of a program.

Work Orders are priced by Estimated Time/Materials or Actual Time/Materials.

Service Setup

Service Information

Service Code: * LAN Description: Landscape Job

Available: Branches: * All 4 items selected

Type: ⓘ * L - Lawn Care

Service can be: * Round / Cycle Special Work Order Service Call

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

Price By: ⓘ Estimated Time / Materials

Default Price Table: Manual Man Hour Price Table

Base Price: Estimated Time / Materials Actual Time / Materials

Man Hour Rate:

Work Orders: Adding/Editing Work Orders

Work Orders: Adding/Editing Work Orders

Adding Work Orders

Work Order services are added the same way any other special job are added.

They can be added through the normal Add Service wizard, or through the Quick Add function.

Work Order service codes should always be under the Special Job option.



The screenshot shows a web interface for 'Services'. At the top left, there is a 'Services' header with a truck icon. Below this is a search bar containing the year '2023' and a 'Clear' button. On the right side, there is a '+ Add Service' button with a menu icon. Below this button, there are two 'Quick Add' options: 'Quick Add Program' and 'Quick Add Service'. Red boxes highlight the '+ Add Service' button and the 'Quick Add Service' option.

Work Orders: Adding/Editing Work Orders

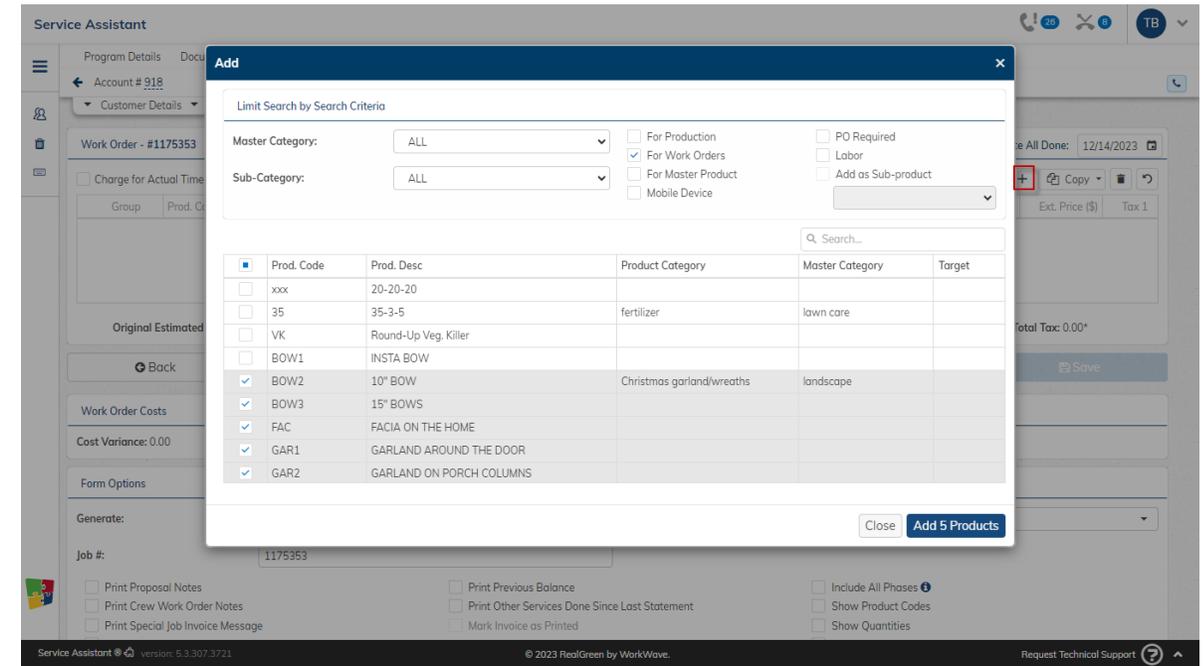
Adding Work Orders

After adding the service, it will start directly on the Work Order screen.

Click the + button to add new products.

- Add one or more products
- Limit displayed products using the search options

Update Qty after products have been added to update price.



Group	Prod. Code	Prod. Desc	Est. Qty	Act. Qty	Unit
<input type="checkbox"/> 1	BOW3	15" BOWS	1.0000	0.0000	each
<input type="checkbox"/> 2	BOW2	10" BOW	1.0000	0.0000	each

Work Orders: Adding/Editing Work Orders

Adding Work Orders

A Master Product will add as a single line item to the work order but can be expanded to show all sub-products.

- Update the Qty of the master product to update all sub-products
- Each sub-product can also be changed independent of the master product

Program Details Documents 0

Account # 918 9-Active Mrs. Barbara Angott 6615 Sycan

Customer Details

Work Order - #1175353

Charge for Actual Time and Materials You have uns

Group	Prod. Code	Prod. Desc	Est. Qty	Act. Qty	Unit	Location
7	BOW	Christmas Bow	5.0000	0.0000		Select...
1	BOW1	INSTA ...	5.0000	0.0000	each	Select...
2	BOW2	10" BO...	5.0000	0.0000	each	Select...
3	BOW3	15" BO...	5.0000	0.0000	each	Select...

Original Estimated Price: 47.13 Estimated Price: 223.50 Extended Estim

Back

Work Order Costs

Cost Variance: 37.85 Price Variance: 223.50

Work Orders: Adding/Editing Work Orders

Editing Work Orders

After a Work Order service has been saved, you can return to the Work Order to edit and make changes.

You can go to the Work Order directly from the Customer Details page, or from within the job itself.

Posted Work Order services cannot be edited.

The screenshot shows the 'Services' section of the Workwave interface. A dropdown menu is open for the year '2023'. Below it, two service entries are visible: 'LC - Lawn Care' and 'LAN - Landscape Job'. The 'LC - Lawn Care' entry is selected, and a context menu is open over it, with the 'Work Order' option highlighted. The context menu also includes options like 'Production Entry', 'New State Form', 'Add Document', 'Live Truck Tracking', 'Quick Fit Scheduler', 'New Diagram', and 'Delete'.

The screenshot shows a detailed view of a service in the 'Services' section. The service is 'LAN - Landscape Job'. The context menu is open, and the 'Work Order' option is highlighted. The menu also includes options like 'Send to Production Entry', 'Print Invoice', 'Text Message', and 'Quick Fit Scheduler'. The service details include: Size: 18.0000, Lawn 1000 sq ft, Difficulty: 1.00, Service Price: \$4, Average Man Hours: 47.13, and Total Amount: \$4.

Work Orders: Adding/Editing Work Orders

Editing Work Orders

Almost all fields can be updated as needed.

- Add additional products
- Delete products
- Move products to a new work order
- Update Qty, Price, Cost

Service Assistant

Program Details Documents 0

Account # 918 9-Active Mrs. Barbara Angott 6615 Sycamore St. Orchard Lake, MI 48324 (248) 363-4411

Customer Details

Work Order - #1175353 Clear Done Update All Done: 12/18/2023

Charge for Actual Time and Materials

Group	Prod. Code	Prod. Desc	Est. Qty	Act. Qty	Unit	Location	Est. Cost (\$)	Ext. Est. Co	Ext. A
1	FAC	FACIA ON THE HOME	1.0000	0.0000	linear feet	Select...	0.97		
2	GAR2	GARLAND ON PORCH COLUMNS	1.0000	0.0000	linear feet	Select...	2.23	2.23	7.62
3	GAR1	GARLAND AROUND THE DOOR	1.0000	0.0000	linear feet	Select...	2.23	2.23	7.62

Original Estimated Price: 17.18 Estimated Price: 0.00 Extended Estimated Cost: 5.43 Extended Actual Cost: 0.00 Total Tax: 0.00*

Back Save

Work Order Costs

Cost Variance: 5.43 Price Variance: 17.18 Gross Profit: 0.00 Gross Profit %: 0.00%

Form Options

Generate: Nothing selected Include: Job Totals Only

Job #: 1175353

Print Proposal Notes Print Previous Balance Include All Phases

Print Crew Work Order Notes Print Other Services Done Since Last Statement Show Product Codes

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Work Orders: Adding/Editing Work Orders

Work Order - #338981

Clear any dates in the Done column → Clear Done Update All Done: 9/26/2017

Update all empty Done fields with listed date. (Click date to change it before updating)

Charge for Actual Time and Materials

Indicates if the price should be updated based on Actual Quantity (Act. Qty.) once those amounts are entered. If you want to price by Actual Quantities, you will need to remember to check mark this before posting production and after updating the Actual Quantities.

	Grp...	Prod. Code	Pr. Desc	Est. Qty	Act. Qty	Unit	Location	Est. Cost	Est. Est. Cost	Price	Act. Cost	Est. Act. Cost	Est. Price	Tax 1	Tax 2	Tax 3	Done
<input type="checkbox"/>	*	1	IPC	One Person Crew	1	0	Hours	45.00	45.00	45.00	45.00	0.00	0.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	*	2	NIS							21.00	15.00	0.00	0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Original Estimated Price: 66.00 Estimated Price: 0.00 Extended Estimated Cost: 60.00 Extended Actual Cost: 0.00 Total Tax: 0.00

Return to Program Details → Return to the Job screen without saving any changes (if any were made)

Save

Activates when any changes are made. **MUST BE CLICKED** to save those changes.

Save

- + Add a product
- Copy products from another Work Order
- Delete a Product
- Start Over (clear all unsaved changes)

Work Orders: Adding/Editing Work Orders

Work Order # (It can be used when copying the products from one work order to another)

Product Code and Description

Est. Qty – How many or how much you think you will use.
Act. Qty. – How much you actually used.

Est. Cost – How much estimate it will cost per unit.

Price – How much per unit you are charging the customer

Ext. Act. Cost – Act. Qty. multiplied by Act. Cost

The total price of the quantity used multiplied by the unit price. If using Actual Quantities, it will update when you enter the Act. Qty.

Work Order - #339025

Charge for Actual Time and Materials,

Gro...	Prod. Code	Prod. Desc	Est. Qty	Act. Qty	Unit	Location	Est. Cost	Ext. Est. Cost	Price	Act. Cost	Ext. Act. Cost	Ext. Price	Tax 1	Tax 2	Tax 3	Done
1	1PC	One Person Crew	1	0	Hours		45.00	45.00	45.00	45.00	0.00	0.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
2	1AEP1	An Example Product 1	1	0	Each		10.00	10.00	20.00	10.00	0.00	0.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Which group the product belongs to. Also used for Master Products that have sub-products tied to them.

Unit – How the product is measured when used
Location – Where the product is used.

Ext. Est. Cost - Est. Cost multiplied by Est. Qty.

Act. Cost – How much it did cost per unit.

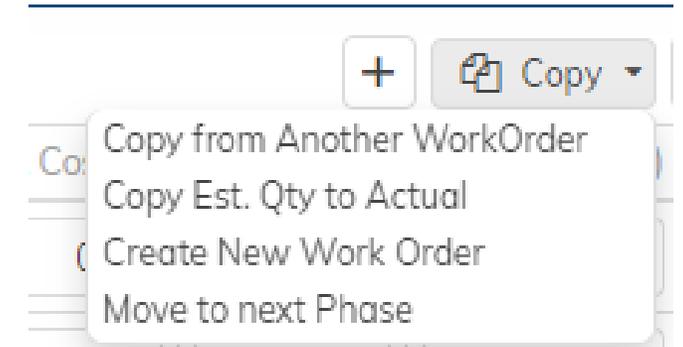
Which tax codes on the account will be used for this product. These correspond with the tax codes listed on the account.

Work Orders: Copy Options

Work Orders: Copy Options

Work Order information can be copied to or from prior work orders, or they can be moved to the next phase.

- Copy from Another Work Order – copies information from another work order
- Copy Est. Qty to Actual – copies estimated quantity amounts to the actual amount fields
- Create New Work Order – moves selected products to a new work order
- Move to next Phase – moves selected products to another round within the same service

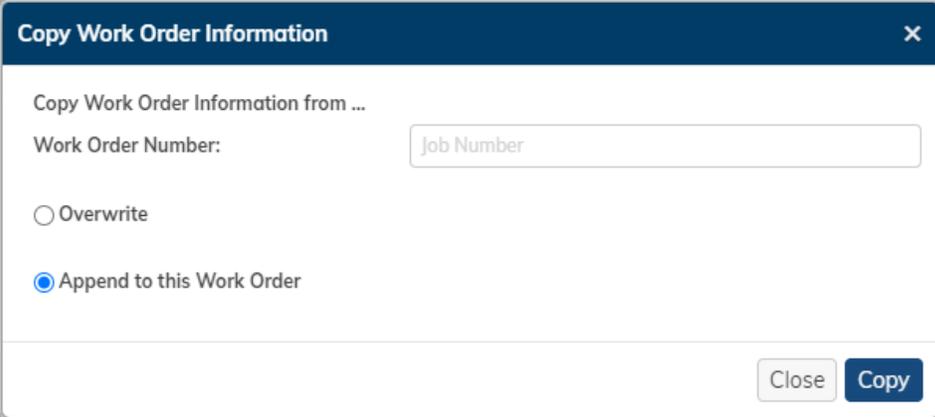


Work Orders: Copy Options

Copy from Another Work Order:

Copies all product, pricing, and cost information from an existing work order service.

- Work Order Number – Job number from the existing work order
 - Overwrite – overwrites all existing products on the current work order with products from selected work order
 - Append to this Work Order – adds products from the selected work order to the current work order products



Copy Work Order Information

Copy Work Order Information from ...

Work Order Number:

Overwrite

Append to this Work Order

Close Copy

Work Orders: Copy Options

Copy Est. Qty to Actual:

Copies all values in the Est. Qty column to the Act. Qty column.

- Important to use if the current Act. Qty. column is empty, and the work order is billed on Actual Time and Materials
- Techs should be filling in Act. Qty product usage when performing the service for more accurate Job Costing Report numbers

Work Order - #1175353

Charge for Actual Time and Materials

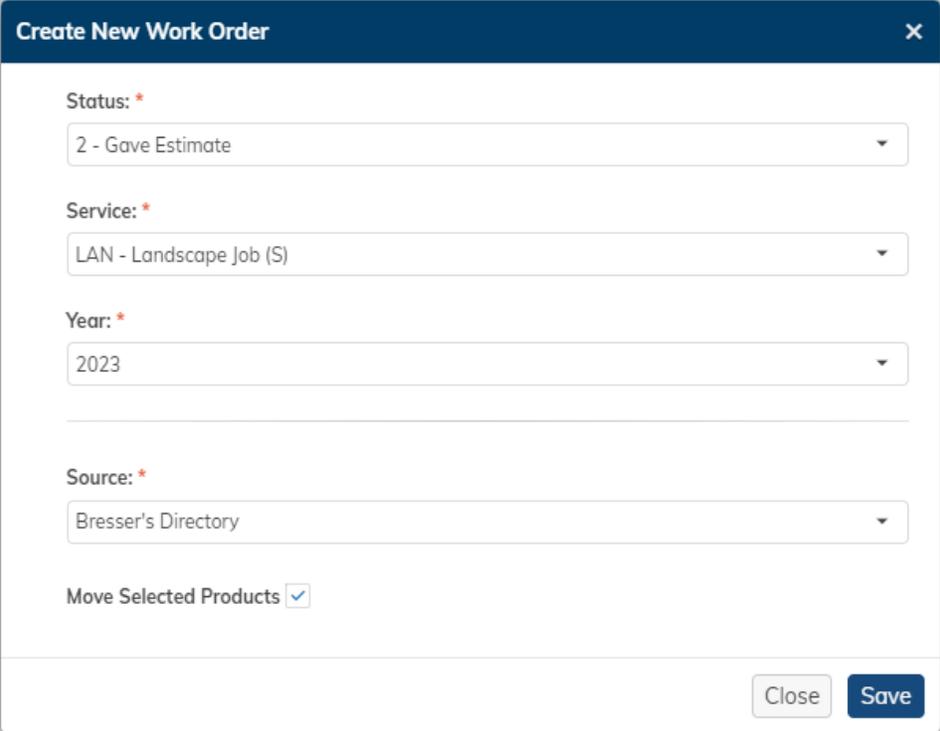
Group	Prod. Code	Prod. Desc	Est. Qty	Act. Qty
<input type="checkbox"/> 1	FAC	FACIA ON THE HOME	1.0000	0.0000
<input type="checkbox"/> 2	GAR2	GARLAND ON PORCH COLUMNS	1.0000	0.0000
<input type="checkbox"/> 3	GAR1	GARLAND AROUND THE DOOR	1.0000	0.0000

Work Orders: Copy Options

Create New Work Order:

Moves selected products from the current work order to a new work order.

- Used if multiple products were quoted to the customer and they only wanted a portion of what was offered
- Allows the rejected products, quantities, and prices to be moved to a separate estimate for later bidding



The screenshot shows a 'Create New Work Order' dialog box with the following fields:

- Status:** 2 - Gave Estimate
- Service:** LAN - Landscape Job (S)
- Year:** 2023
- Source:** Bresser's Directory
- Move Selected Products:**

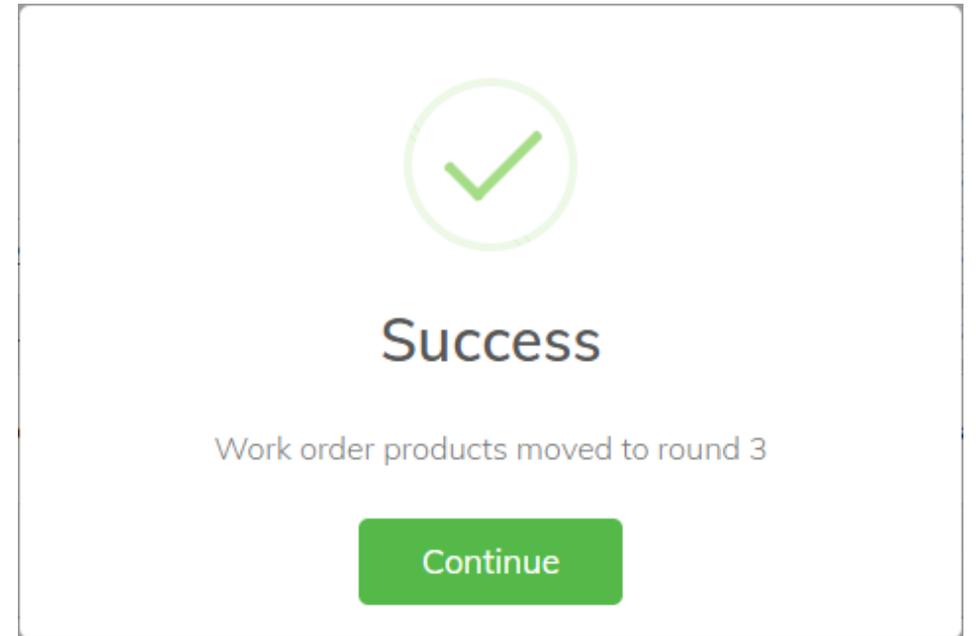
Buttons: Close, Save

Work Orders: Copy Options

Move to next Phase:

Moves selected products from the current work order to a new work order as a round within the same job.

- Typically used for multi-day projects that need labor tracked daily
- Allows products and labor to be completed as portions of a whole
- All phases (rounds) can be included on proposals



Work Orders: Document Options

Work Orders: Document Options

Once a work order has been set up, there are a variety of print options available for both crew and customer forms.

- Proposal – A document of proposed work that can be printed or emailed to the customer for signature. Will say “Proposal” at the top of the form
- Invoice – The actual invoice for service. This uses Estimated or Actual Quantity depending on pricing option. Will say “Invoice” at the top of the form
- Work Order – The list of products for the project to be given to the crew. This will always use the Estimated Quantity
- Packing Slip – The list of products included for the project that can be used by the crew or for a delivery of goods. This uses the Estimated Quantity
- Statement – Available only after the service has been posted as complete and can be used as a bill after the fact. Will say “Statement” at the top of the form

Work Orders: Document Options

Optional form fields:

- Job Totals Only – includes just the grand total cost of combined products
- Master Item Subtotals – includes master item totals per master product and grand total cost
- Item Detail Billing – includes detailed per product pricing and grand total cost
- Combine By Product Code – includes combined product code pricing (should the same product be listed multiple times) and total cost

Include :

nce Last Statement

- Job Totals Only
- Master Item Subtotals
- Item Detail Billing
- Combine By Product Code

Work Orders: Document Options

Optional form fields:

- Print Proposal Notes – includes customer facing proposal product notes
- Print Crew Work Order Notes – includes crew facing work order product notes
- Print Special Job Invoice Message – includes the invoice message field from Service Setup
- Print Job Notes – includes customer facing notes from the program/job
- Print Logo – includes logo from Branch Setup

Form Options

Generate: Include:

Job #:

<input type="checkbox"/> Print Proposal Notes	<input type="checkbox"/> Print Previous Balance	<input type="checkbox"/> Include All Phases ?
<input type="checkbox"/> Print Crew Work Order Notes	<input type="checkbox"/> Print Other Services Done Since Last Statement	<input type="checkbox"/> Show Product Codes
<input type="checkbox"/> Print Special Job Invoice Message	<input type="checkbox"/> Mark Invoice as Printed	<input type="checkbox"/> Show Quantities
<input type="checkbox"/> Print Job Notes	<input type="radio"/> Print Incomplete Work Only	<input type="checkbox"/> Show Done Date
<input type="checkbox"/> Print Logo	<input type="radio"/> Print Completed Work Only	<input type="checkbox"/> Print Flag Codes

Work Orders: Document Options

Optional form fields:

- Print Previous Balance – includes customer previous balance (Statement)
- Print Other Services Done Since Last Statement – includes all services completed since last statement date (Invoice and Statement)
- Mark Invoice as Printed – sets service status to \$ (Work Order)
 - Print Incomplete Work Only – includes products without done date (Work Order and Packing Slip)
 - Print Completed Work Only – includes products with done date (Work Order and Packing Slip)

Form Options

Generate: Include:

Job #:

<input type="checkbox"/> Print Proposal Notes	<input type="checkbox"/> Print Previous Balance	<input type="checkbox"/> Include All Phases ⓘ
<input type="checkbox"/> Print Crew Work Order Notes	<input type="checkbox"/> Print Other Services Done Since Last Statement	<input type="checkbox"/> Show Product Codes
<input type="checkbox"/> Print Special Job Invoice Message	<input type="checkbox"/> Mark Invoice as Printed	<input type="checkbox"/> Show Quantities
<input type="checkbox"/> Print Job Notes	<input type="radio"/> Print Incomplete Work Only	<input type="checkbox"/> Show Done Date
<input type="checkbox"/> Print Logo	<input type="radio"/> Print Completed Work Only	<input type="checkbox"/> Print Flag Codes

Work Orders: Document Options

Optional form fields:

- Include All Phases – includes products from all phases (rounds) that have not been invoiced
- Show Product Codes – includes product code AND description from Product Setup
- Show Quantities – includes product quantities (Estimated or Actual depends on form)
- Show Done Date – includes product done date(s)
- Print Flag Codes – includes customer Flag Codes

Form Options

Generate: Include :

Job #:

<input type="checkbox"/> Print Proposal Notes	<input type="checkbox"/> Print Previous Balance	<input type="checkbox"/> Include All Phases ⓘ
<input type="checkbox"/> Print Crew Work Order Notes	<input type="checkbox"/> Print Other Services Done Since Last Statement	<input type="checkbox"/> Show Product Codes
<input type="checkbox"/> Print Special Job Invoice Message	<input type="checkbox"/> Mark Invoice as Printed	<input type="checkbox"/> Show Quantities
<input type="checkbox"/> Print Job Notes	<input type="radio"/> Print Incomplete Work Only	<input type="checkbox"/> Show Done Date
<input type="checkbox"/> Print Logo	<input type="radio"/> Print Completed Work Only	<input type="checkbox"/> Print Flag Codes

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

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