



RealGreen Mobile

Getting Started, Setup, and
Configuration 101

Presenters

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Manager – Technical Support

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Mobile – Product Owner

Agenda

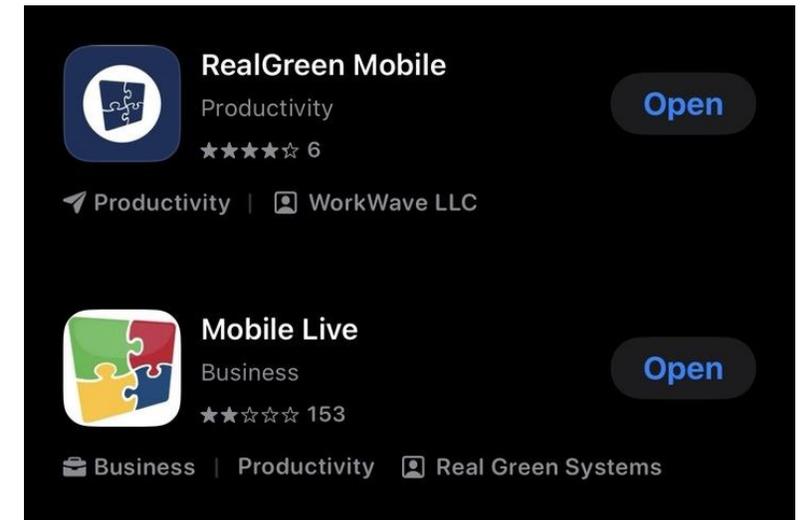
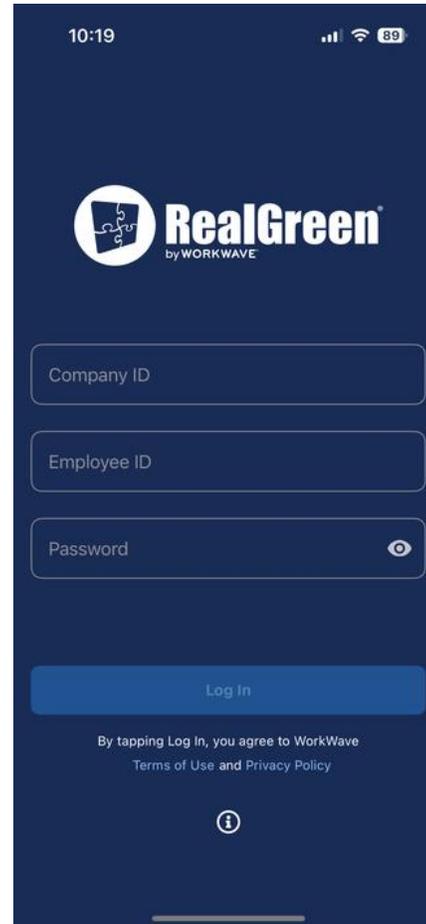
1. End of Life for Mobile Live
2. Enabling a user to login to RealGreen Mobile
3. Configuring the mobile admin site
4. Brief Feature overview
5. Questions

Mobile Live End of Life

- July 31, 2026
- If you are paying for Mobile Live today, you have the ability to start using RealGreen Mobile today
- Don't postpone testing your workflows

RealGreen Mobile App

The RealGreen Mobile App is an application available for iOS and Android devices that allows technicians to manage jobs and services while in the field via standard or quick production, and syncs data in real-time to the RealGreen server automatically.



Assign a Mobile App License

A mobile license MUST be assigned for an employee to utilize the RealGreen Mobile App.



To assign a mobile license:

1. Navigate to Settings > Company Setup > Mobile Licensing.
2. Select the desired branch in the Branch drop-down, and then click Apply. *Note: An error message displays when there are no mobile licenses setup for the selected Branch. Please contact Sales to purchase additional licenses.*
3. Select the desired employee from the Employee Available list. Hold the CTRL key to select multiple employees.
4. Click the right arrow to move the selected employee(s) to the Selected Employees list.
5. When finished, click Save.

An indicator appears on the Employee Setup Page informing the employee that a mobile license is assigned.

Note: The number of mobile licenses assigned cannot be greater than the number of mobile licenses purchased. An error message displays when too many employees have been assigned a license.

Unassign a Mobile App License

To unassign a mobile license:

1. Select the desired employee from the Selected Employees list. Hold the CTRL key to select multiple employees.
2. Click the left arrow to move the selected employee(s) to the Employee Available list.
3. When finished, click Save.



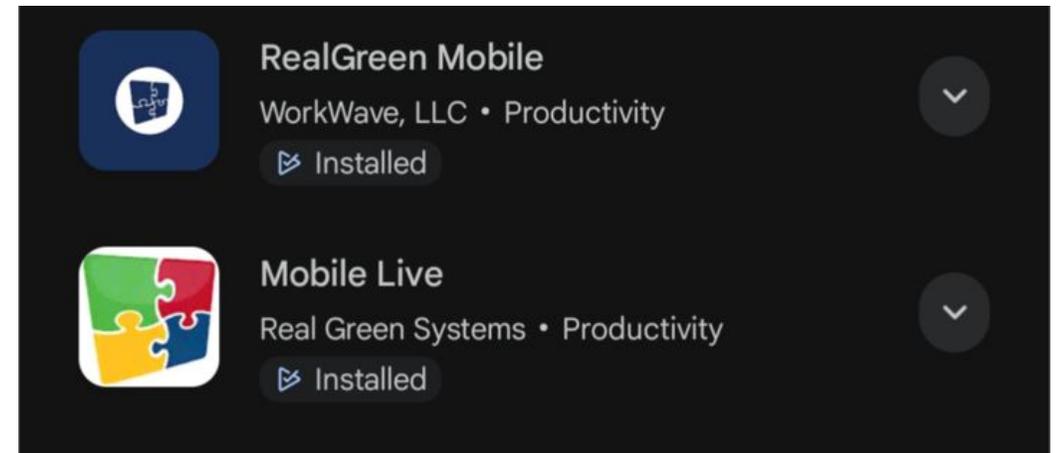
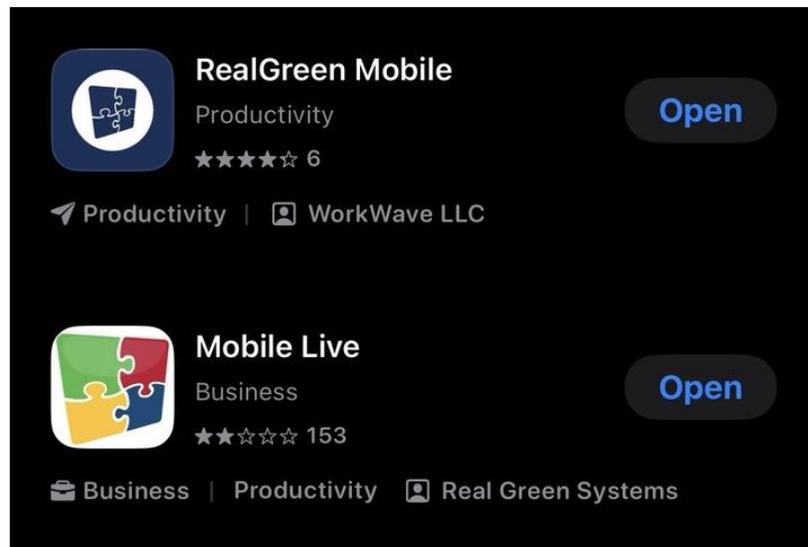
Note: A mobile license is automatically unassigned and added back to the available licenses when an employee's status is changed to inactive or when an employee is assigned to a new branch. Any employee whose branch has been reassigned must be assigned a mobile license in the new branch to continue utilizing the Mobile App.

Installing the Mobile App

The RealGreen Mobile App is available on both iOS and Android devices.

To install the RealGreen Mobile app:

- iOS device: Visit the Apple store and search for **RealGreen Mobile**.
- Android device: Visit the Google Play store and search for **RealGreen Mobile**.



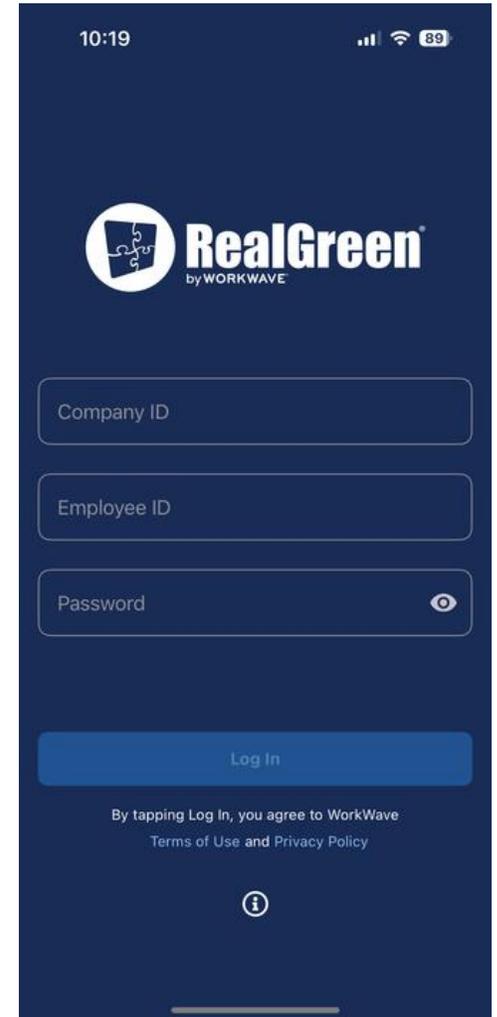
Logging into the RealGreen Mobile App

Logging in and Using the RealGreen Mobile App

After installing the RealGreen Mobile App, open the application, enter the following credentials, and then tap Log In:

1. Company ID: Enter your company's ID number.
2. Employee ID: Enter your assigned employee ID.
3. Password: Enter your password

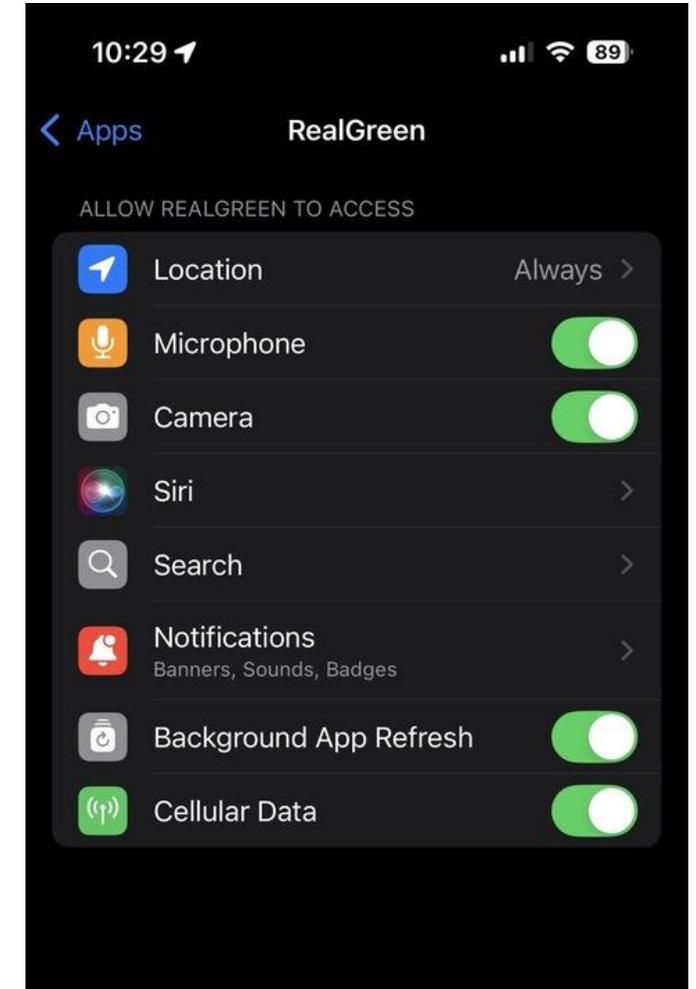
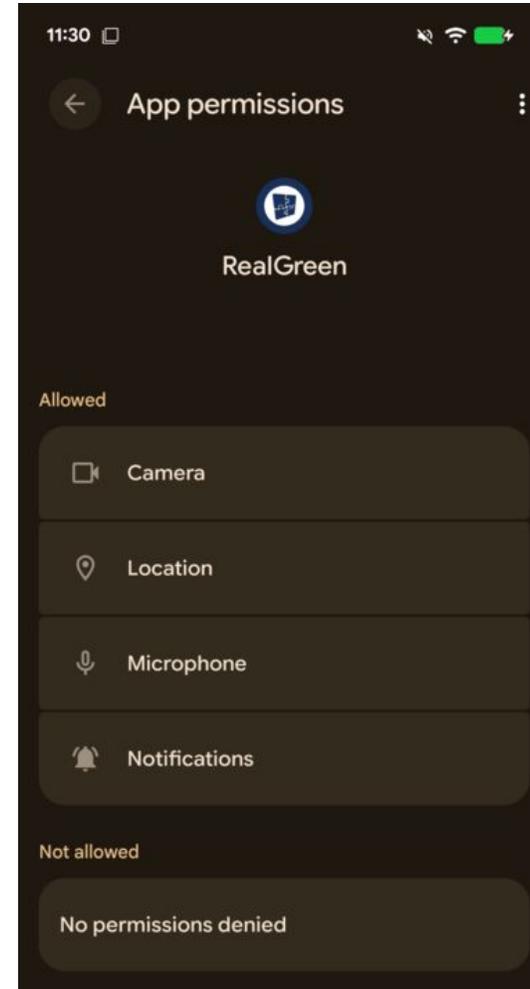
NOTE: There is no scan sheet like there was with Mobile Live



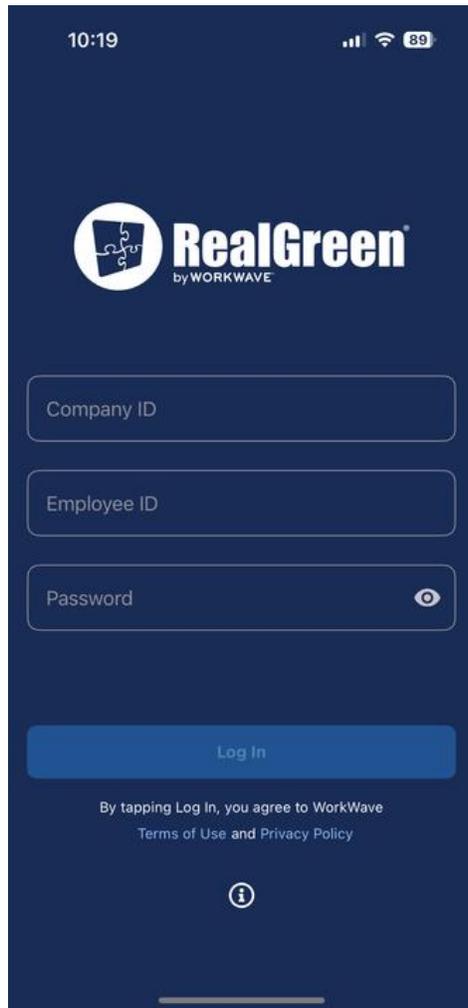
RealGreen Mobile App Permissions

The RealGreen Mobile App will need all App Permissions enabled to get the most out of it.

- Live Truck Tracking
- Camera
- Voice to Text
- Alerts



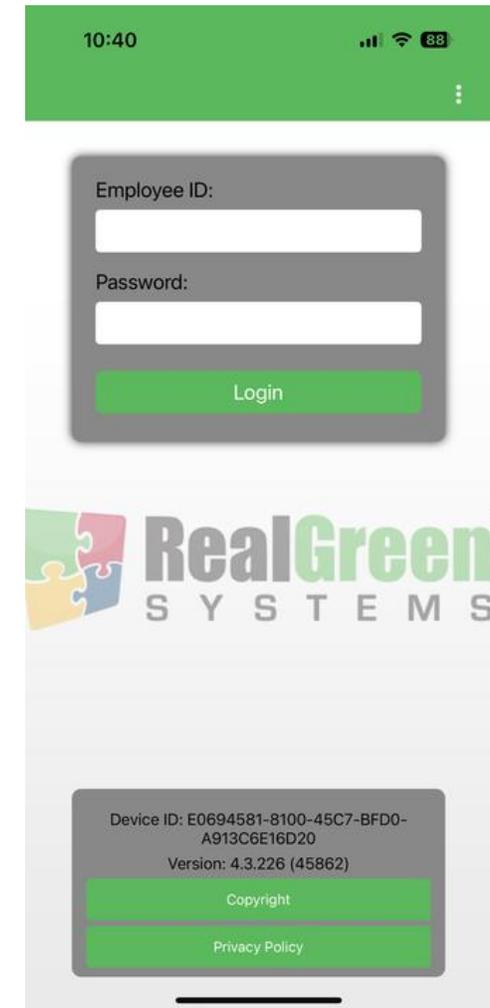
Use RealGreen Mobile Exclusively



Important Usage Note:

The Mobile Live and RealGreen Mobile Apps cannot be used simultaneously by the same user, whether on the same device or across multiple devices.

Risk: This may result in data corruption or overwritten changes, as both apps modify the same data.



Logging into the Mobile Admin Site

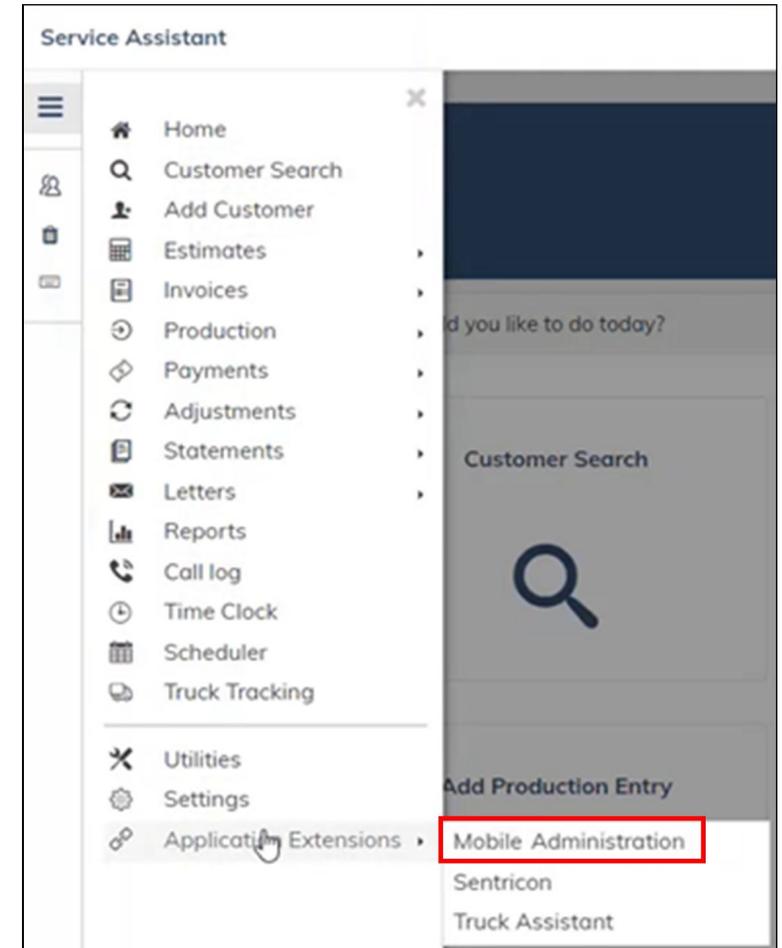
Settings for the RealGreen Mobile app are configured and managed on the Mobile Admin site. This site controls global configuration settings applicable to all users utilizing the RealGreen Mobile app.

To log into the Mobile Admin site:

- Click the hamburger icon in Service Assistant. Select Application Extensions > Mobile Live Administration.

The login credentials should be the same as the login credentials for Service Assistant.

Note: There are many settings in here that exist for the MobileLive app and will either be moved into SA5 Parameters in the future or not needed by RGM.



Configuring Login Route Settings

Login Route settings control the login and route listing options in the RealGreen Mobile App.

To configure Login Route settings:

- Select General as the Setting Type and then choose Login Route as the Setting Sub Type.
 - **Show Price on Route listing:** Price will display on the job cards on the route list
 - **Show Size on Route listing:** Size will display on the job cards on the route list
 - **Show Subdivision on Route listing:** Subdivision will display on the job cards on the route list and in Customer Search results

The screenshot shows the configuration interface for Login Route settings. At the top, there are three dropdown menus: 'Location' set to 'Real Green Systems, Inc. (1)', 'Setting Type' set to 'General', and 'Setting Sub Type' set to 'Login Route'. Below these is an information icon and a heading 'Setup the login and route listing options'. A 'Post Login Message' text area contains the text 'you should see this when you log in'. A list of checkboxes follows, with several checked: 'Upload Attachments After Linking', 'Only Download Services For Selected Date', 'Do Not Upload Production Start', 'Display Route Setup After Login', 'Enable Live Truck Tracking', and 'Show Completed Production Dollar Amount in Route Listing Header'. At the bottom, there is a 'Minutes Between Route Refreshes' field set to '5' and three checkboxes: 'Show Size On Route Listing', 'Show Price On Route Listing', and 'Show Subdivision On Route Listing'.

Continued: Login Route Settings

Select the desired settings to apply it to the RealGreen Mobile App users.

Only the following settings apply to the RealGreen Mobile App:

- **Post Login Message:** Enter the message that displays after Mobile App Users have logged into the Mobile App. Note: This message will appear every time they log in.
- **Disable The Update Message When A New Version of Mobile Live is Available:** Alerts Mobile app users when there is a new version of the app available.
- **Display Customer Memo on Notes Screen:** Displays the Memo Alert message configured in Service Assistant 5 for the customer after starting a job or service and when viewing customer details.
- **Download Customers on Credit Hold:** Downloads jobs for customers with a credit hold. Note: When this option is enabled and a customer has a credit hold, a Credit Hold label displays on the job card. Also, an alert message displays in the job notes and job details before starting a job or service and when viewing customer details.
- **Enable Live Truck Tracking:** Enables the Live Truck Tracking feature to gather location positioning details on users using the Mobile App.

When finished, click Save.

The screenshot shows the 'Login Route Settings' configuration page. At the top, there are three dropdown menus: 'Location' set to 'Real Green Systems, Inc. (1)', 'Setting Type' set to 'General', and 'Setting Sub Type' set to 'Login Route'. Below these is an information icon and the text 'Setup the login and route listing options'. The 'Post Login Message' section contains a text area with the placeholder text 'you should see this when you log in'. Below the text area is a list of checkboxes for various settings. The 'Minutes Between Route Refreshes' section has a numeric input field set to '5' with a range of '(1 - 60)'. At the bottom, there are three more checkboxes for 'Show Size On Route Listing', 'Show Price On Route Listing', and 'Show Subdivision On Route Listing'.

Location: Real Green Systems, Inc. (1)

Setting Type: General

Setting Sub Type: Login Route

i Setup the login and route listing options

Post Login Message

you should see this when you log in

Disable The Update Message When A New Version Of Mobile Live Is Available

Disable adding new Quick Text

Upload Attachments After Linking

Add Description To Photos

Display Customer Memo On Notes Screen

Only Download Services For Selected Date

Do Not Upload Production Start

Download Customers on Credit Hold

Display Route Setup After Login

Enable Live Truck Tracking

Preload Unused Invoice Number

Refresh Route on Start Timers

Limit Route Selections

Lock Route Selection

Automatically set to Route that has Employee ID set to Logged in Employee.

Show Completed Production Dollar Amount in Route Listing Header

Minutes Between Route Refreshes

5 (1 - 60)

Show Size On Route Listing

Show Price On Route Listing

Show Subdivision On Route Listing

Configure Modify Route Settings

Modify Route settings control a RealGreen Mobile App user's ability to perform certain actions on jobs in the route.

To configure Modify Route settings:

Select General as the Setting Type and then choose Modify Route as the Setting Sub Type.

Only the following settings apply to the RealGreen Mobile App:

Allow Techs To Assign Not Serviceable Reasons: Allows Mobile app users the ability to assign not serviceable reasons to a job and/or service.

Reschedule and Re-assign Services to Routes/Techs: Displays the Reschedule/Reassign option in the Modify Route screen to reschedule and reassign jobs/services en mass.

Do not Remove Schedule Date: Prevents the schedule date from being changed when modifying a job.

Allow the stops to be sent to other employees or routes on the device: Allows a Mobile App user to reschedule and/or reassign a job to a different route or technician from the Job List and Job Details screen before starting the job.

The screenshot shows a configuration interface for 'Modify Route' settings. At the top, there are three dropdown menus: 'Location' set to 'Real Green Systems, Inc. (1)', 'Setting Type' set to 'General', and 'Setting Sub Type' set to 'Modify Route'. Below these is an information icon (a blue circle with a white 'i') and the text 'Set or change default Route & Modify conditions.' followed by a list of settings with checkboxes:

- Allow Techs To Assign Not Serviceable Reasons
- Allow Skip Service
- Reschedule And Re-assign Services To Routes/Techs
- Allow Undo Invoice
- Do not Remove Schedule Date
- Clear Promised Date
- Reset Temp Route/Day/Seq To Original
- Allow stops to be reordered
- Allow the stops to be sent to other employees or routes on the device

Configure General Geocode Settings

General Geocode settings control how a mobile device's location settings are utilized with the RealGreen Mobile App.

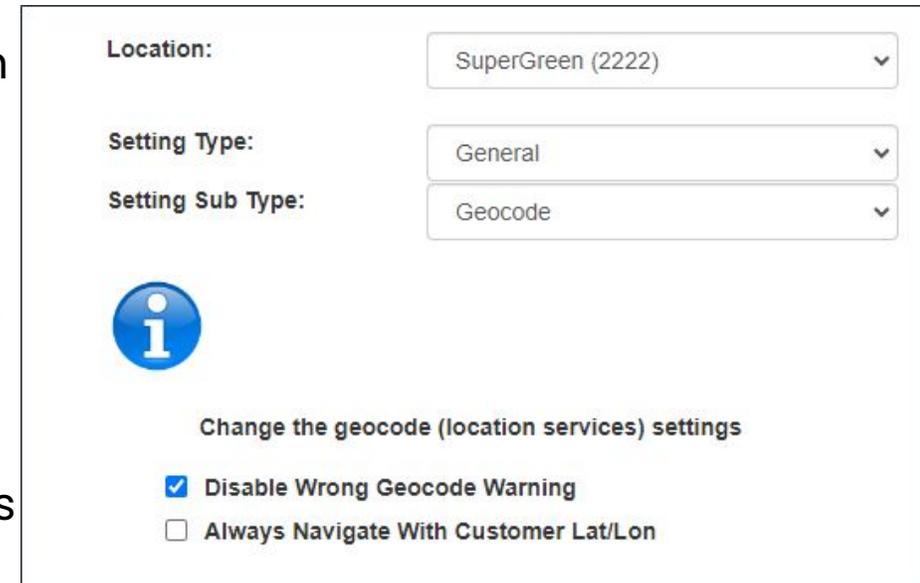
To configure General Geocode settings:

Select General as the Setting Type, and then choose Geocode as the Setting Sub Type.

Only the following settings apply to the RealGreen Mobile App:

Disable Wrong Geocode Warning: Prevents the Mobile App user's latitude and longitude location from being compared to the service location's latitude and longitude when configured on the customer account. *Note: When disabled and the Mobile App user's directional location does not match the latitude and longitude of the service location, Mobile App users receive a prompt to update the latitude and longitude to the Mobile App user's current location.*

When finished, click Save.



The screenshot shows a settings page with three dropdown menus: 'Location' set to 'SuperGreen (2222)', 'Setting Type' set to 'General', and 'Setting Sub Type' set to 'Geocode'. Below the dropdowns is an information icon (a blue circle with a white 'i') and the text 'Change the geocode (location services) settings'. Underneath are two checkboxes: 'Disable Wrong Geocode Warning' (checked) and 'Always Navigate With Customer Lat/Lon' (unchecked).

Always Navigate with Customer Lat/Lon: If the customer has been geocoded, navigation will use the geocode over the address.

Configure General Timeclock Settings

General Timeclock settings control which timeclock requirements are enabled for the RealGreen Mobile App.

To configure General Geocode settings:

Select General as the Setting Type, and then choose Timeclock as the Setting Sub Type.

Only the following settings apply to the RealGreen Mobile App.

Allow Crew Clock In/Out: Allows the Mobile App user to clock in/out their crew member while logged into the RealGreen Mobile App.

Clock in Enforced: When wage type is hourly, users will be required to clock in before they can access jobs.

Location: SuperGreen (2222) ▼

Setting Type: General ▼

Setting Sub Type: Timeclock ▼

 Check off requirements for timeclock use

- Clock In Enforced
- Clock Out Prompt Before Exiting
- Allow Crew Clock In/Out
- Enforce Break Lock Out

Configuring Production Requirement Settings

Production Requirement settings control what information is required when completing a service.

To configure Production Requirement settings:

Select Requirements as the Setting Type, and then choose Production as the Setting Sub Type.

Continued Next Slide

Location: Real Green Systems, Inc. (1) ▼

Setting Type: Requirements ▼

Setting Sub Type: Production ▼

 Check off the required fields for production entry

- Product Method Of Application
- Product Amount
- Product Location
- Treated Area
- At Least One Product
- At Least One Condition Code
- Size
- Price
- Rating
- Wind Speed
- Wind Direction
- Temperature
- PH
- Feedback

- Copy Products On Same Service Type
- Display Automatic Temperature In Celsius
- Auto Select All Targets On Products
- Auto Post All Production (Override SA Setting)
- Disable Automatic Weather Lookup
- Disable Feedback Copy
- Update Appointment Time w/ Start Time
- Auto-show Worksheet Notes When Timer Starts
- Display property photo before starting production
- Require address verification before starting production
- Enable Quick Production
- Automatically link reports from production when printed
- Do not auto associate services added in production
- Prompt user for status 8 or 9 when adding additional production service.
- Replace gross numbers with Net amounts, renaming the customer balance and total price labels.

WARNING: Enabling the "Generate Next Repeating Special" option below will bypass normal rules for repeating specials such as frequency, day of week restriction and max settings.

- Enable Generation of Next Repeating Special

Configuring Production Requirement Settings

Only the following settings apply to the RealGreen Mobile App:

Check off the required fields for production entry: Enabling any of these options makes the field required and must be filled out when completing a service.

Copy Products on Same Service Type: Copies product codes and amounts added to a service to the next service when it's the same type of service.

Display Automatic Temperature in Celsius: Displays the temperature measurement in Celsius degrees.

Auto Post All Production (Override SA Setting): Ignores the service setup auto-post settings configured in Service Assistant.

Disable Automatic Weather Lookup: Prevents the weather information from automatically populating.

Update Appointment Time w/ Start Time: Updates the appointment time with the time a job or service is started.

Display property photo before starting production: Displays existing property images and allows Mobile App users to capture a new property image.

Require address verification before starting production: Requires the Mobile App user to enter the property's house number to verify the location address before a job or service is started.

Enable Quick Production: Allows Mobile app users to enable quick production. *Note: Quick Production only allows Mobile app users to start and complete jobs. Users won't have the ability to add additional details when completing services.*

Location: Real Green Systems, Inc. (1) ▼

Setting Type: Requirements ▼

Setting Sub Type: Production ▼

 Check off the required fields for production entry

- Product Method Of Application
- Product Amount
- Product Location
- Treated Area
- At Least One Product
- At Least One Condition Code
- Size
- Price
- Rating
- Wind Speed
- Wind Direction
- Temperature
- PH
- Feedback

- Copy Products On Same Service Type
- Display Automatic Temperature In Celsius
- Auto Select All Targets On Products
- Auto Post All Production (Override SA Setting)
- Disable Automatic Weather Lookup
- Disable Feedback Copy
- Update Appointment Time w/ Start Time
- Auto-show Worksheet Notes When Timer Starts
- Display property photo before starting production
- Require address verification before starting production
- Enable Quick Production
- Automatically link reports from production when printed
- Do not auto associate services added in production
- Prompt user for status 8 or 9 when adding additional production service.
- Replace gross numbers with Net amounts, renaming the customer balance and total price labels.

WARNING: Enabling the "Generate Next Repeating Special" option below will bypass normal rules for repeating specials such as frequency, day of week restriction and max settings.

- Enable Generation of Next Repeating Special

Condition Category Requirement Settings

Condition Category Requirement settings identify which condition categories are required.

To configure Condition Category Requirement settings:

Select Requirements as the Setting Type and then choose Condition Categories as the Setting Sub Type.

Select the condition categories that should be required under the Required column.

Note: RealGreen Mobile app users MUST include at least 1 condition in the required categories for each service to complete the job.

The Sticky options are not available in the RealGreen Mobile App.

Location: Real Green Systems, Inc. (1) ▼

Setting Type: Requirements ▼

Setting Sub Type: Condition Categories ▼



Check off the required and sticky condition categories

Required	Sticky	
<input type="checkbox"/>	<input type="checkbox"/>	Account Changes
<input type="checkbox"/>	<input type="checkbox"/>	Broadleaf Weeds
<input type="checkbox"/>	<input type="checkbox"/>	Cultural Practices
<input type="checkbox"/>	<input type="checkbox"/>	Customer Contact
<input type="checkbox"/>	<input type="checkbox"/>	General Turf Conditions
<input type="checkbox"/>	<input type="checkbox"/>	Grassy Weeds
<input type="checkbox"/>	<input type="checkbox"/>	Lawn Insects
<input type="checkbox"/>	<input type="checkbox"/>	Pest Control
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Poisonous Plants
<input type="checkbox"/>	<input type="checkbox"/>	Weather Conditions

Hide Pricing Requirement Settings

Hide Pricing Requirement settings prevent a price from being displayed for a service.

To configure Hide Pricing Requirement settings:

Select Requirements as the Setting Type and then choose Hide Pricing as the Setting Sub Type.

Select the programs RealGreen Mobile app users should not see pricing information for.

When finished selecting all settings, click Save.

Location:

Setting Type:

Setting Sub Type:



Check any program that you would like to hide pricing on

- 5SP: Premium Lawn Care
- AAA:
- BLO: Edge & Blow - 1
- BST: Bait Station (Termite)
- CA: Core Aeration
- ES: Estimate Service
- GC: Grub Control
- MLC: Minimum Lawn Care
- OS: Over Seeding
- PRU: Pruning Service
- SC: Service Call
- SNO: Snow Removal
- SSI: Service Station Install
- WO: Work Order

General Customer Settings

General Customer settings identify what customer information can be accessed or changed via the RealGreen Mobile App.

To configure General Customer settings:

Select Customer as the Setting Type and then choose General as the Setting Sub Type.

Only the following settings apply to the RealGreen Mobile App:

Download Linked Docs Even if Not Marked for Mobile: Downloads all documents linked to a customer account to view on the Mobile App.

Prompt for Email if Missing (Customer and Production Screens):

Displays an alert message when an email address does not exist for the customer.

Note: When an email address is missing from the customer's details, the Mobile App user can start and complete jobs.

When finished, click Save.

Location: SuperGreen (2222) ▾

Setting Type: Customer ▾

Setting Sub Type: General ▾



Additional customer settings

- Show Customer Balance
- Disable Size Change On Status 8 Or 9 Customers/Programs
- Disable Price Change On Status 8 Or 9 Customers/Programs
- Allow Changing of Sold By 1 on Services
- Show Phone Number For Customers That Are 'Do Not Call'
- Download Linked Docs Even If Not Marked For Mobile
- Prompt For Email If Missing (Customer And Production Screens)

Default Source ▾

- When Adding Services - Sort By Service Code

Estimate Salesperson

- Allow sales person change for estimates
- Do not allow salesperson changes on status 8 or 9 programs or special jobs

Configuring Production Reports

Print Options for production reports identify the production reports available and details displayed for the report when viewed on the RealGreen Mobile App.

To configure Print Option settings:

Select Print Options as the Setting Type and then choose Production Reports as the Setting Sub Type.

Only the following settings apply to the RealGreen Mobile App:

Enable Production Status: Displays the Production Status report in Daily Overview on the Mobile App.

Choose or hide items on the production status report: Enable the checkbox next to desired items to choose to display them on the production status report.

The screenshot shows the configuration interface for Production Reports. At the top, there are three dropdown menus: 'Location' set to 'RealGreen Mobile ()', 'Setting Type' set to 'Print Options', and 'Setting Sub Type' set to 'Production Reports'. Below these is an information icon (i) and a section titled 'Enable access to the production status or production values report'. This section contains two checked checkboxes: 'Enable Production Status' and 'Enable Production Values Report'. The next section is titled 'Choose to show or hide items on the production status report' and contains eight checked checkboxes: 'Production Status: Service Summary', 'Production Status: Total Dollars', 'Production Status: Total After Discounts', 'Production Status: Total Size', 'Production Status: Total Hours', 'Production Status: Dollars Per Hour', 'Production Status: Total Services', and 'Production Status: Total Stops'. The final section is titled 'Choose to show or hide items on the production values report' and contains eight checked checkboxes: 'Production Values: Show Logo', 'Production Values: Total Dollars', 'Production Values: Total After Discounts', 'Production Values: Total Size', 'Production Values: Total Hours', 'Production Values: Dollars Per Hour', 'Production Values: Total Services', and 'Production Values: Payments'. A 'Save' button is located at the bottom right of the form.

2025 RealGreen Mobile Feature Summary



Scheduling & Route Management

- Bulk Actions:** Mass review job notes, reschedule, or reassign jobs (v2.8).
- Route Control:** Reorder jobs within a route and auto-advance to the current date (v2.12).
- Status Management:** Reset 'Not Serviceable' jobs to 'Not Started' (v2.9) and reopen completed jobs for editing (v2.10).
- Quick Actions:** Long-press menus to quickly reschedule, reassign, or start services (v2.14, v2.14.1).



Field Production & Operations

- Job Details:** Edit products, weather, conditions, and job notes after completion (v2.9).
- Time Tracking:** Mandatory clock-in before job access (v2.9), balance timers based on job size (v2.9), and enforced break lockout periods (v2.12).
- Reporting:** View and share Daily Overview reports (v2.8, v2.10) and track total daily production value on the job list (v2.13.1).
- Navigation:** Set default navigation apps, use geocode-only navigation, and access directions directly from customer screens (v2.10, v2.11, v2.12).



Sales & Customer Management

- Customer Acquisition:** Add new customers, edit statuses/names, and perform advanced filtered searches (proximity, flags, account type) (v2.9, v2.10).
- Estimates & Upsells:** Auto-generate estimates from upsell conditions; get alerts for duplicate upsells (v2.12, v2.13).
- Payments:** Enroll customers in Autopay (v2.11) and process card, check, or cash payments in the field (v2.14).
- Programs/Services:** Add programs/special jobs, update eligible scheduling days, and recalculate pricing when job size changes (v2.11, v2.14.1).



Communication & Data Accuracy

- Automated Logs:** Auto-create call logs for 'Not Serviceable' status changes or when adding estimates (v2.10.1, v2.12).
- Messaging:** Contact customers via their preferred phone number directly from the app (v2.13).
- UI Enhancements:** New labels for 'Posted' jobs to prevent accidental edits (v2.10.1) and support for localized currency symbols (v2.12).

Session Feedback

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

Join the WorkWave Mobile Inner Circle



Scan to explore prototypes, provide feedback, & shape the future

Questions?

(Auto Posting and other SA5 rules)