



More Money Sooner: Billing within SA5 – 101

More Money Sooner: Billing within SA5 – 101



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Agenda

- Review different billing types and how customers are billed
- The overview of payment entry
- How to print a past due statement
- How to do basic adjustments to customer balances
- SMS AMA/CNA

Billing Types

There are 4 main types of billing types within SA5

- **Regular** - an invoice is either printed and left behind or emailed
 - Essentially - the balance is due at time of service / when the job is posted as completed
- **Statement Only** - an invoice is printed that contains all services with the billing type that have been completed within a time frame that have not yet been invoiced.
- **Installment** - services with this billing type are not charged when completed, instead service totals are added and broken into even payments.
- **CC/ACH** - regardless of the way a customer is invoiced, this typically represents customers with autopay setup and will be automatically charged when the service is completed/invoiced.

Note: there is a class on Alternate Invoice Options that covers all of these in greater detail

Statement Only

- Through invoice printing, typically the driver report or worksheet are printed for the technician. Or you go paperless with Real Green Mobile
 - Services that are done more frequently are commonly setup this way. Example Mowing.
- Through 'Monthly Invoices' based on the date completed, all services with this billing type that have not yet been invoiced will be included on a single invoice.
 - When the monthly invoice is printed, all the services will be updated to have the same invoice number
 - There is an option for statement only billing services to be aged when the job is done or when the invoice is printed.

Service Assistant > Settings > General Setup - Financial

%	5.00	\$	5.00
<input type="checkbox"/> Use done date instead of invoice print date to age statement only billing services			

Invoice

Customer #: 8
Invoice #: 25246
Printed: 12/30/2022

Your Company Name
(800) 422-7478 (123) 456-7895
<http://mycompanywebsite@emailaddress>

Service Address
Mr. Kyle Roach
125 Martian Landed Ave
Fictional City, IN 12365

Please Remit: \$92.50 Res.: (682) 158-9854 Bus.:

Description	Date	Amount	Tax	Total
Bi-Weekly Mowing	3/2/2022	\$46.25		\$46.25
Bi-Weekly Mowing	3/14/2022	\$46.25		\$46.25

For your convenience, service will continue for season to season. For a change in service, please call our office.
Please pay within 10 days. Net 30 days 1.5% thereafter. Please call with any questions about your lawn, how much more can i get in the
For your convenience, service will continue for season to season. For a change in service, please call our office.

<http://mycompanywebsite@emailaddress>

Your Company Name
address line 1 or P. O. Box
city, state zip

Charge My: Exp: / /

Card #: _____ Security Code: _____

Signature: _____

Invoice #: 25246
Cust #: 8
Please Remit: \$92.50
Printed: 12/30/2022

PLEASE RETURN THIS PORTION WITH YOUR PAYMENT. BE SURE ADDRESS SHOWS THROUGH WINDOW

Installment

- An installment must be created on the customer record with a breakdown of charges to be made on a repeating schedule.
 - Typically the total amount of all services with this billing type will be divided evenly and billed monthly.
- Installments can have invoices or coupons mailed or emailed to the homeowner before the due date. (Coupons can be printed for the whole year)
- Installments can have the amount due 'posted' on the due date automatically or they must be posted manually.

Invoice

Customer #: 7
Invoice #: 24828
Printed: 12/30/2022

Service Address
Tom Turkey
9586 Sleeping Circle Ct
Fictional City, ID 12365
Bus. (682) 885-4751 Res.

Your Company Name
(800) 422-7478 (123) 456-7895
http://mycompanywebsite@emailaddress

PO #:

Description	Date	Amount	Tax	Total
April 2022 Charge	4/1/2022	\$174.13	\$8.71	\$182.84

PAYMENT STUB PLEASE KEEP FOR YOUR RECORD 1

Tom Turkey
9586 Sleeping Circle Ct
Fictional City ID 12365

ACCOUNT NO.: 7
CHARGE: 174.13
TAX: 8.71
DATE DUE: 4/1/2022

DATE: _____
CHECK NO.: _____
AMOUNT: _____
PAYMENT NO.: _____

Your Company Name
address line 1 or P. O. Box
city, state zip

9586 Sleeping Circle Ct
Fictional City ID 12365

PLEASE RETURN THIS STUB WITH YOUR PAYMENT

PAYMENT STUB PLEASE KEEP FOR YOUR RECORD 2

Tom Turkey
9586 Sleeping Circle Ct
Fictional City ID 12365

ACCOUNT NO.: 7
CHARGE: 174.13
TAX: 8.71
DATE DUE: 5/1/2022

DATE: _____
CHECK NO.: _____
AMOUNT: _____
PAYMENT NO.: _____

Your Company Name
address line 1 or P. O. Box
city, state zip

9586 Sleeping Circle Ct
Fictional City ID 12365

PLEASE RETURN THIS STUB WITH YOUR PAYMENT

PAYMENT STUB PLEASE KEEP FOR YOUR RECORD 3

Tom Turkey
9586 Sleeping Circle Ct
Fictional City ID 12365

ACCOUNT NO.: 7
CHARGE: 174.13
TAX: 8.71
DATE DUE: 6/1/2022

DATE: _____
CHECK NO.: _____
AMOUNT: _____
PAYMENT NO.: _____

Your Company Name
address line 1 or P. O. Box
city, state zip

9586 Sleeping Circle Ct
Fictional City ID 12365

PLEASE RETURN THIS STUB WITH YOUR PAYMENT

QUESTIONS ABOUT YOUR LAWN: HOW MUCH MORE CAN I KNOW, HOW ABOUT NOW? LA DEE DA, DEE DA

PLEASE INDICATE PAYMENT AMOUNT & CHECK NUMBER

CHECK NO.

Charge My: VISA M/C DISC AMEX EXP

Card #: _____ Security Code: _____

Signature: _____

Invoice #: 24828
Cust # 7

Please Remit **\$182.84**

Printed: 12/30/2022

ADDRESS SHOWS THROUGH WINDOW

Basic Payment Entry

Access from the customer
Scan (customer number) / Invoice No
Customer Information - customer status, notification if have
collection code.
Understanding Net, Prepay, Credit balances
Default Amount Due
Default Date
Review of the allocation grid
Saving

Payment Entry Screen

Scan/ enter customer number or enter in invoice number.

The customer details color matches customer status, and shows the customer current balances.

The services and or installments that have not been paid in full will be listed in the allocation grid.

Payment Entry Search Claim Journal (0) Payment Journal (0)

Scan

271 Suzanne Stewart
2508 Flemming Rd
Heartland, OH 45042
(682) 422-9289

Net Balance: \$70.75
Prepay Balance: \$0.00
Remit Balance: \$70.75

+ Add New Service

Amount: \$ 70.75 Date: 12/30/2022
Payment Type: Check Check Number:
Notes:

Amount Remaining: \$70.75
Amount Allocated: \$0.00
Total Amount Under Allocated: \$0.00
Add New Adjustment

Select Prepay Code to Update All Clear All

	Prepay Code	Allocate	Year	Start/Due	Service/Installment	Price	Discount(s)	Prepay Discount	Tax	Amount	Unpaid	DoneDate	Invoice #
⊕	Select...	\$0.00	2022	4/4/2022	L1 - Lawn Fert Rd 1	\$67.00	\$0.00		\$3.75	\$70.75	\$70.75	4/12/2022	25147
	Select...	\$0.00	2022		L2 - Lawn Fert 2	\$67.00	\$0.00		\$3.75	\$70.75	\$70.75		
	Select...	\$0.00	2022		L4 - Lawn Fert Rd 4	\$67.00	\$0.00		\$3.75	\$70.75	\$70.75		
	Select...	\$0.00	2022		L5 - Lawn Fert Rd 5	\$67.00	\$0.00		\$3.75	\$70.75	\$70.75		
	Select...	\$0.00	2022		L6 - Lawn Fert Rd 6	\$67.00	\$0.00		\$3.75	\$70.75	\$70.75		

Cancel Save and Post

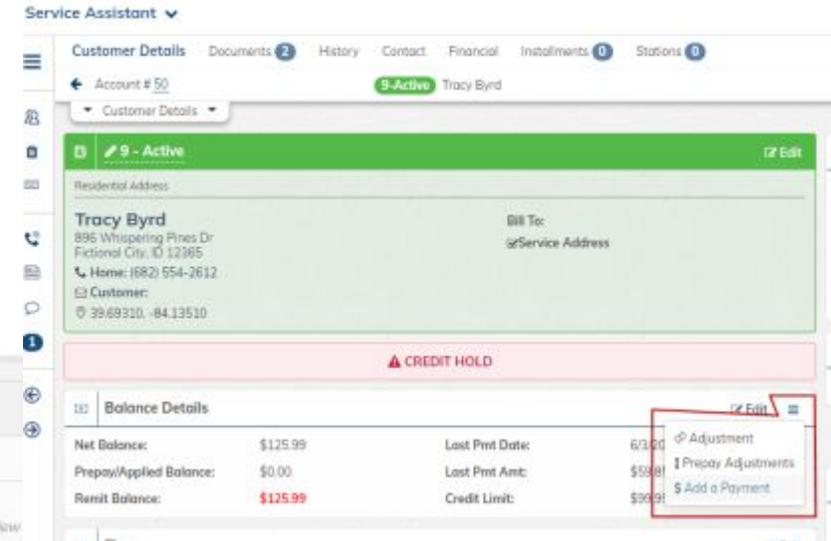
Use 'Tab' to move through the entry portion.

The amount will default to the remit balance if using customer number. If the page is being opened the date will default to current date. Once the date is changed, that date will remain as long as the page remains open and the journal has not been posted.

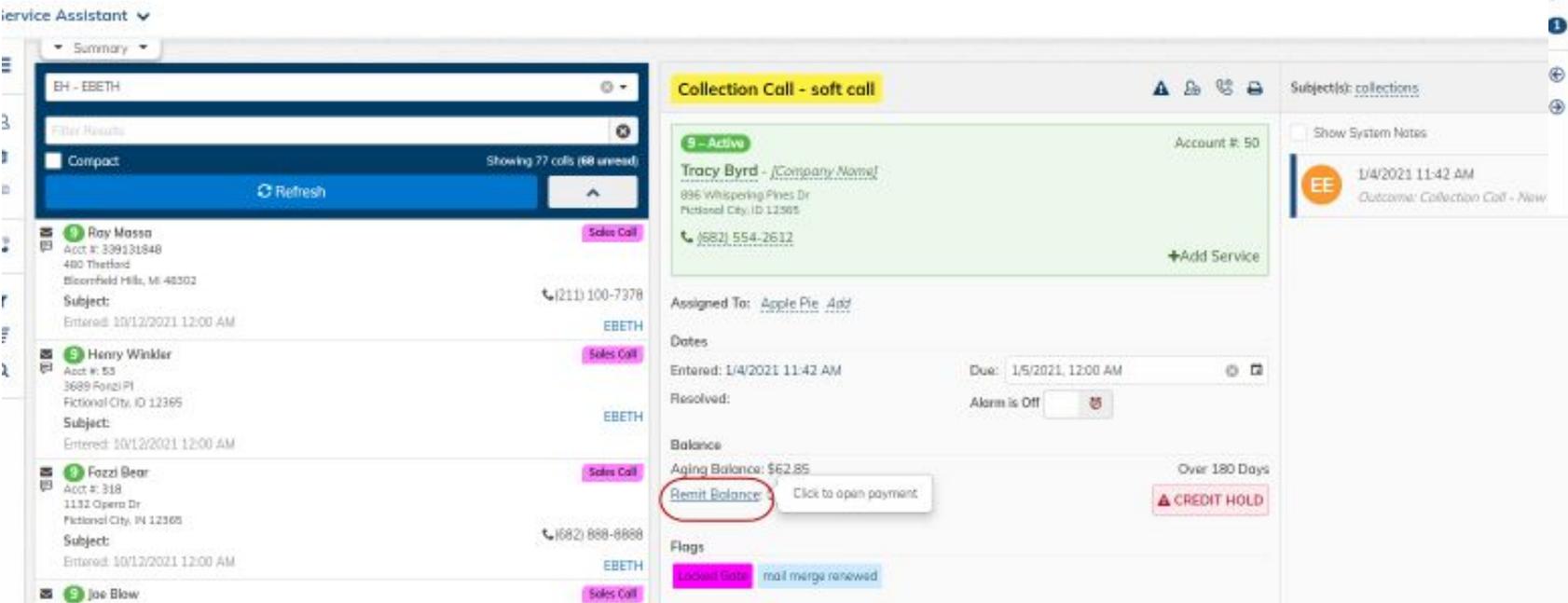
Payment Type default is setup under payment settings. Any Note will be added to history and if a payment receipt is sent, the note is added to the receipt.

Payment Entry from the Customer

Payments can be applied to a customer from any customer screen using the window shade, but also the customer screen, history screen, call log screen, program screen (services), production entry, and the prepay calculator



The default payment amount will change based on the page payment entry is accessed from. If from history or service, the amount will be the invoice amount, from the customer, it will be the net balance due.



Payment Entry Screen

Payments do not **NEED** to be allocated to specific services. If nothing is specified the payment will automatically go to the oldest service. This does one important thing, if the oldest services are 'paid' the account may not go on credit hold so that you can continue to treat it.

Service Assistant > Payments > Payment Entry

Payment Entry Search Claim Journal (0) Payment Journal (1)

Scan

63 Blair Underwood
6231 Heights Landing Cres
Fictional City, ID 12365
(682) 233-0870

Net Balance: \$106.49 Prepay Balance: \$0.00 Remit Balance: \$106.49

+ Add New Service

Amount: \$ 106.49 Date: 11/08/2021

Payment Type: Check Check Number:

Notes:

Amount Remaining: \$106.49
Amount Allocated: \$0.00
Total Amount Under Allocated: \$0.00

+ Add New Adjustment

Select Prepay Code to Update All Clear All

Prepay Code	Allocate	Year	Start/Due	Service/Installment	Price	Discount(s)	Prepay Discount	Tax	Amount	Unpaid	DoneDate	Invoice #
Select...	\$0.00	2020	3/16/2020	MOW - Weekly Mowing	\$47.50	\$0.00		\$0.00	\$47.50	\$47.50	3/16/2020	21382
Select...	\$0.00	2020		L5 - Lawn Fert Rd 5	\$53.50	\$0.00		\$2.68	\$56.18	\$56.18	11/13/2020	22897
Select...	\$0.00			II - II Interest Charge Interest Charge	\$2.81	\$0.00		\$0.00	\$2.81	\$2.81	1/4/2021	
Select...	\$0.00	2021	3/1/2021	MOW - Weekly Mowing	\$47.50	\$0.00		\$0.00	\$47.50	\$47.50		
Select...	\$0.00	2021		L1 - Lawn Fert Rd 1	\$53.50	\$0.00		\$2.68	\$56.18	\$56.18		
Select...	\$0.00	2021		L2 - Lawn Fert 2	\$53.50	\$0.00		\$2.68	\$56.18	\$56.18		

Payment Entry Continued

Quick select to apply a prepay to all eligible charges

Quick button to apply unpaid amount to service

9 41
Billy Bob
32645 Harvester Holw
Fictional City, ID 12365
(682) 986-5238

Net Balance: \$277.13 Prepay Balance: \$0.00 Remit Balance: \$277.13

+ Add New Service

Amount: \$ 277.13 Date: 12/30/2022

Payment Type: Check Check Number:

Notes:

Amount Remaining: \$277.13
Amount Allocated: \$0.00
Total Amount Under Allocated: \$0.00

+ Add New Adjustment

Select Prepay Code to Update All Clear All

	Prepay Code	Allocate	Year	Start/Due	Service/Installment	Price	Discount(s)	Prepay Discount	Tax	Amount	Unpaid	DoneDate	Invoice #
<input type="radio"/>	Select...	\$0.00	2022	4/13/2022	L1 - Lawn Fert Rd 1	\$90.75	\$0.00		\$4.54	\$86.55	\$86.55	3/17/2022	25445
<input type="radio"/>	Select...	\$0.00	2022		L2 - Lawn Fert 2	\$90.75	\$0.00		\$4.54	\$95.29	\$95.29	4/28/2022	25723
<input type="radio"/>	Select...	\$0.00	2022		L3 - Lawn Fert Rd 3	\$90.75	\$0.00		\$4.54	\$95.29	\$95.29	6/8/2022	25794
<input type="radio"/>	Select...	\$0.00	2022	1/5/2022	MOW - Weekly Mowing	\$72.00	\$0.00		\$0.00	\$72.00	\$72.00		
<input type="radio"/>	Select...	\$0.00	2022	1/12/2022	MOW - Weekly Mowing	\$72.00	\$0.00		\$0.00	\$72.00	\$72.00		
<input type="radio"/>	Select...	\$0.00	2022	1/19/2022	MOW - Weekly Mowing	\$72.00	\$0.00		\$0.00	\$72.00	\$72.00		
<input type="radio"/>	Select...	\$0.00	2022	1/26/2022	MOW - Weekly Mowing	\$72.00	\$0.00		\$0.00	\$72.00	\$72.00		
<input type="radio"/>	Select...	\$0.00	2022	2/2/2022	MOW - Weekly Mowing	\$72.00	\$0.00		\$0.00	\$72.00	\$72.00		
<input type="radio"/>	Select...	\$0.00	2022	2/9/2022	MOW - Weekly Mowing	\$72.00	\$0.00		\$0.00	\$72.00	\$72.00		

'Deposit or partial payment amounts can be entered here

The 'save' entry button can be changed so that instead of going to the journal, the entry immediately is saved and posted. This is helpful when doing a CC payment while on the phone with the customer.

Prepayments & Deposits

Prepayments typically have a discount applied, but more importantly they pay for the services selected in full. Deposits can be any amount applied to a service, typically before it's completed, where the money is being reserved.

Payment Entry Search Claim Journal (0) Payment Journal (2)

Scan

339131793 Wing Lake Woods Homeowners Assoc.
4125 Wing Mdw
Bloomfield, MI 48301
(714) 588-7771

Net Balance: \$0.00 Prepay Balance: \$0.00 Credit Balance: \$0.00

+ Add New Service

Amount: \$ 308.90 Date: 11/08/2021

Payment Type: Check Check Number:

Notes:

Amount Remaining: \$0.00
Amount Allocated: \$308.90
Total Amount Under Allocated: \$0.00

+ Add New Adjustment

Select Prepay Code to Update All Clear All

Payment allocated to 4 services/targets.

	Prepay Code	Allocate	Year	Start/Due	Service/Installment	Price	Discount(s)	Prepay Discount	Tax	Amount	Unpaid	DoneDate	Invoice #
X	5 - 5% Prepay	109.25	2021	11/8/2021	GCU - Grub Curative	\$120.00	\$5.00	\$5.75	\$0.00	\$115.00	\$115.00		
X	5 - 5% Prepay	54.68	2021		L4 - Lawn Fert Rd 4	\$84.50	\$30.00	\$2.72	\$2.90	\$57.55	\$57.55		
X	5 - 5% Prepay	84.78	2021		L6 - Lawn Fert Rd 6	\$84.50	\$0.00	\$4.22	\$4.50	\$89.23	\$89.23		
X	5 - 5% Prepay	60.19	2021		T5 - Tree rd 5	\$60.00	\$0.00	\$3.00	\$3.19	\$63.36	\$63.36		

Claim Journal

Users could have access to only enter but not post payments, payments that come from mobile or caw can also be set to go to the journal and not directly post. For a user with rights to post payments, they can go to the 'Claim Journal' tab to find payments that need to be posted.

Payment Entry Search Claim Journal (9) Payment Journal (0)

Claim Journal

<input type="checkbox"/>	Owner ID	Owner Name	Date	Amount	Journals
<input type="checkbox"/>	▶ PP	Polly Pocket	5/17/2022	226.5	2
<input type="checkbox"/>	▶ PP	Polly Pocket	5/18/2022	126	1
<input type="checkbox"/>	▶ PP	Polly Pocket	5/27/2022	1581.09	4
<input type="checkbox"/>	▶ PP	Polly Pocket	6/15/2022	345.4	2
<input type="checkbox"/>	▶ PP	Polly Pocket	6/16/2022	122.42	1
<input type="checkbox"/>	▶ PP	Polly Pocket	6/22/2022	126	1
<input type="checkbox"/>	▶ PP	Polly Pocket	6/27/2022	119.32	1
<input type="checkbox"/>	▶ PP	Polly Pocket	6/29/2022	110	1
<input type="checkbox"/>	▶ PP	Polly Pocket	7/1/2022	996.64	4

Payment Journal

Payment Entry Search Claim Journal (0) Payment Journal (2)

Payment Journal

The following payments are ready to be posted.

Showing: 25 Results

Search...

	Customer #	Check #	Date	Amount	Payment Type	Name	CustomerAddress	Balance	Remaining
<input checked="" type="checkbox"/>	33		11/8/2021	\$600.00	CK	Jesse Vantura	689 Woodstock Ct Fictional City, ID 12365	(\$57.19)	\$598.42
<input checked="" type="checkbox"/>	63		11/8/2021	\$106.49	CK	Blair Underwood	6231 Heights Landing Cres Fictional City, ID 12365	\$106.49	\$50.31

10 25 50 100

Page 1 of 1 (2 items) < 1 >

Number of Payments: 2

Total Amount: 706.49

Delete Receipt Preview Post

Linked Documents

Email Documents

Payment Transaction Journal

11/8/2021 Entered By : EH - EBETH

Acct #	Check Number	Payment Date	Prepay Code	Prepay Amount	Payment Amount	Payment Type	Customer / Name	Collection Code	Preferred Phone	Balance	Age
33		11/8/2021			600.00	Check	Vantura, Jesse		(682) 954-5456	-57.19	180+
63		11/8/2021			106.49	Check	Underwood, Blair		(682) 233-0870	106.49	180+
			Payment Type	Total	Count			Amount	Count		
Totals by Payment Type			Check	706.49	2			Regular Payments	706.49		2
								Pre-Payments	0.00		0
								Total	706.49		
								Number of Payments	2.00		

Statement Printing

- How often should you print statements
- Aging to charge Interest
- Review of the steps with statement printing
- Statement Options

Statement Printing

- Statements are past due reminders.
 - This is where aging categories come into play
- Ideally statements should be printed frequently to keep the number of statements to be processed each time to a manageable number. (Weekly is recommended)
- If interest or statement fees are added, this needs to be done before statements are printed.
- Customers have statement setting that could alter or affect who is getting a statement to show up.

Aging to charge Interest

> Utilities > Age Accounts



Age Accounts Utility

Branch: 4004 - boo boo

Aging Category	Amount	Count	Charge Interest
1 - 30 Days	\$349.21	3	
31 - 45 Days	\$47.50	1	
46 - 60 Days	\$0.00	0	Residential
61 - 90 Days	\$32.50	1	Residential
91 - 120 Days	\$47.50	1	Residential/Commercial
121 - 180 Days	\$0.00	0	Residential/Commercial
Over 180 Days	\$515.50	6	

Total Amount: \$992.21 Total Count: 12 Unique Customers: 9

Charge Interest **← The option to charge needs to be selected**

Last Aging Date: 12/29/2022 Charge if calculated interest is at least: \$0.40

Charge if last interest before: 11/30/2022 Minimum interest charge: \$1.00

Age date/charge interest on: 12/30/2022 Percent of interest to charge: 5.00%

Number of customers charged interest: 2 Amount of interest charged: \$16.27

After Aging, there will be a total and option to go to adjustments

Statements - Find Customers

> Statements > Statements



1 Step 1
Select Customers

2 Step 2
Customer List

Select Customers

Account #: All Enter Account Number...

Branch: * 5 of 7 Branches Selected

Route: * 17 items selected

Billing Type: * 5 items selected

Days Since Last Service:

Days Since Last Statement:

Aging Category: * 6 items selected

Customer Type: Both

Customer Status: * 10 items selected

Collection Status: Ignore

All Customers Regardless of Balance

Minimum Balance: \$

Include Prepay Customers

More filters

+ Flag Codes

+ Advanced Options

Send To Mapping Filter

Cancel

Step 1 is primarily to find the customers that should get a statement based on the selections.

(If printing directly from a customer account, step 1 is ignored)

All settings are 'sticky' for the user so the next time the page is accessed, the settings should be the same.

Statement Details - Step 1

- Days Since Last Service is useful if Invoices include previous balance.
- Days Since Last Statement is almost always set at 30 days
- Include Prepay Customers will pull in any prepay customer that has a balance due, even if not aged.

Days Since Last Service: 15
Days Since Last Statement: 30
Aging Category: * 6 items selected
Minimum Balance: \$ 5
All Customers Regardless of Balance
Include Prepay Customers

More filters

+ Flag Codes

- Advanced Options (1 Option(s) Selected)

Customer Information
Documents
Letters
Letters (Master Documents)
Decile

Preferences*

Telemarket: Ignore
Direct Mail: Ignore
Email Market: Ignore
Email Follow-Up: Ignore
Upsell: Ignore
Knock: Ignore
CAW Registered: Ignore
Autopay: Ignore
Language: Ignore
Email Statements: Allowed
Email Pre-Notify: Ignore

If planning on emailing statements and the preference 'Email Statements' is used to identify customers, filter the list to just those customers through Advanced Options.

Statement Details

- Step 2 has all the customers identified from step 1.
- Selections on step 2 affect how the statement is sent, what will be included and how it will be displayed.

<input checked="" type="checkbox"/>	256	Beth, Kitchen	207 Utensil Dr	66	0	66	4/12/2022	121 - 180	R2	46151
<input checked="" type="checkbox"/>	259	Pinatta, Abole	108 Harrison St	-1430.42	-1489.29	58.87	4/12/2022	121 - 180	R2	45042

Total Statements: 38 Total Balance: \$7713.80 Total Prepay Balance: \$-4010.20 Total Remit Balance: \$11724.00

Options

Form Options

Select forms to include:

Statements
(selected items will be marked as printed and removed from the list)

Summary Report

Show History:

Print only transactions since last statement date
 Show History since last Zero balance:

Linked Documents

Save Linked Documents Email Documents

[+ Show More](#)

- History date range should include current date to be the most accurate.
- If emailing; email first then print remaining. (If using the advanced option filter, go back and remove the option before printing.)

Statement Details Cont.

'Statement Options' defines what is printed on the statement and also the main layout.

A regular statement shows all history in order of the transaction date

Open invoice will only show services with an amount due or payments/adjustments unapplied. (History date range is ignored)

Open invoice with paid services will list all history but grouped by the service transaction.

The screenshot shows a web interface for configuring statement options. At the top, there is a 'Show More' link. Below it is the 'Statement Options' section, which is divided into three columns of checkboxes and two input fields. The first column, 'Print Company Info', includes checkboxes for Logo, URL, Name, Phone, and Address, along with input fields for 'Days Until Due' and 'Printer Offset'. The second column includes checkboxes for 'Print Remit Barcode', 'Print Credit Card Panel', 'Print Overdue Message', 'Print Payment Request Message', 'NPS', 'Print Continuous Service Message', and 'Exclude Prepayment Information'. The third column includes checkboxes for 'Exclude Installment Services', 'One Page Statement', 'Print Service Feedback', 'Show Aging Information', 'Show Discount Amount', 'Open Invoice', and 'Show Paid Services'. At the bottom of the interface, there are three buttons: 'Cancel', 'Back', and 'Preview', followed by a green 'Generate' button.

Statement Examples

STATEMENT Printed 12/30/2022 Customer # 1

Your Company Name
 (800) 422-7478 (123) 456-7895

Service Address: Bruce Campbell
 2689 Wixom Curv
 Fictional City ID 12365

Res. (682) 592-3354 Bus.

Description	Ck # / Inv #	Date	Amount	Tax	Balance
Previous Balance					\$534.66
Interest Charge		01/04/2021	\$2.42		\$537.08
Payment Check **Thank You**		02/09/2021	(\$536.42)		\$0.66
Landscape Service	23414	02/17/2021	\$108.00		\$108.66
Landscape Service	23421	03/15/2021	\$108.00		\$216.66
Lawn Fert Rd 1 (\$2.75)	23240	03/22/2021	\$55.00	\$2.61	\$271.52
Payment Check **Thank You**		03/30/2021	(\$216.00)		\$55.52
Landscape Service	23101	07/05/2021	\$200.00	\$10.00	\$265.52
Payment Check **Thank You**		07/13/2021	(\$0.66)		\$264.86
Pre-Payment Check **Thank You**		07/13/2021	(\$259.34)		\$5.52
Lawn Fert Rd 3 (\$2.75)	23903	07/13/2021	\$55.00	\$2.61	\$60.38
Lawn Fert Rd 4 (\$2.75)	24162	08/19/2021	\$55.00	\$2.61	\$115.24
Landscape Service	25526	01/03/2022	\$0.00		\$115.24
Landscape Service (\$15.00)	25526	02/01/2022	\$1,645.00	\$81.50	\$1,826.74
Landscape Service (\$10.00)	25533	02/16/2022	\$2,763.88	\$137.69	\$4,718.31
Lawn Fert Rd 1	25526	04/12/2022	\$70.00	\$3.50	\$4,791.81
Lawn Fert 2		05/10/2022	\$70.00	\$3.50	\$4,865.31
Payment Check **Thank You**		05/13/2022	(\$600.00)		\$4,265.31
Lawn Fert Rd 3		06/25/2022	\$70.00	\$3.50	\$4,338.81
Total Amount Due:					\$4,433.57

For your convenience, service will continue for season to season. For a change in service, please call our office.

Current	31 - 45 days	46 - 60 days	61 - 90 days	91 - 120 days	121 - 180 days	Over 180 days
\$4,286.57	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$147.00

Please pay within 10 days. Net 30 days 1.5% thereafter. Please call with any questions about your lawn, how much more can I get in this field? should

On a scale of 0 (not likely) to 10 (very likely), how likely are you to recommend us to a friend/neighbor?

PLEASE INDICATE PAYMENT AMOUNT & CHECK NUMBER

AMOUNT CHECK NO.

Charge My: VISA M/C DISC Exp: / /

Card #: _____ Security Code: _____

Signature: _____

Wowers you are SO SO SO OLD

Bill To: Bruce Campbell
 2689 Wixom Curv
 Fictional City ID 12365

Barcode: [Barcode]

CUSTOMER # 1

Your Company Name
 address line 1 or P. O. Box
 city, state zip

PLEASE REMIT **\$4,433.57**

PRINTED 12/30/2022

PLEASE RETURN THIS PORTION WITH YOUR PAYMENT. BE SURE ADDRESS SHOWS THROUGH WINDOW.

STATEMENT Printed 12/30/2022 Customer # 13

Your Company Name
 (800) 422-7478 (123) 456-7895

Service Address: Mr. Robert Locke
 7632 Lost Island Curv
 Fictional City 12365

Res. (111) 222-3333 Bus. (333) 444-5555

Description	Ck # / Inv #	Date	Amount	Tax	Balance
Termite Treatment 1	24730	03/22/2022	\$1,560.00	\$78.00	
Lawn Fert 2	25248	05/05/2022	\$90.75	\$4.54	
Termite Treatment	25760	05/05/2022	\$1,560.00	\$78.00	
Lawn Fert Rd 3	25901	06/23/2022	\$90.75	\$4.54	
Total Amount Due:					\$3,466.58

Open Invoice

For your convenience, service will continue for season to season. For a change in service, please call our office.

Current	31 - 45 days	46 - 60 days	61 - 90 days	91 - 120 days	121 - 180 days	Over 180 days
\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,466.58

Please pay within 10 days. Net 30 days 1.5% thereafter. Please call with any questions about your lawn, how much more can I get in this field? should

On a scale of 0 (not likely) to 10 (very likely), how likely are you to recommend us to a friend/neighbor?

PLEASE INDICATE PAYMENT AMOUNT & CHECK NUMBER

AMOUNT CHECK NO.

Charge My: VISA M/C DISC Exp: / /

Card #: _____ Security Code: _____

Signature: _____

Wowers you are SO SO SO OLD

Bill To: Mr. Robert Locke
 7632 Lost Island Curv
 Fictional City 12365

Barcode: [Barcode]

CUSTOMER # 13

Your Company Name
 address line 1 or P. O. Box
 city, state zip

PLEASE REMIT **\$3,466.58**

PRINTED 12/30/2022

PLEASE RETURN THIS PORTION WITH YOUR PAYMENT. BE SURE ADDRESS SHOWS THROUGH WINDOW.

STATEMENT Printed 12/30/2022 Customer # 339131696

Your Company Name
 (800) 422-7478 (123) 456-7895

Service Address: Billy Bass
 1345 Lafayette Ave
 Columbus IN 47201

Res. (222) 555-5666 Bus.

Description	Ck # / Inv #	Date	Amount	Tax	Balance
Referral Discount / Credit		01/18/2022	(\$5.00)		
Dormant Oil	22984	03/23/2021	\$36.00	\$1.80	
Payment Check **Thank You**	653	05/19/2021	(\$37.80)		
Balance Due - Invoice # 22984			\$0.00		\$5.00
Lawn Fert Rd 1	22960	04/12/2021	\$49.00	\$2.45	
Payment Check **Thank You**		09/25/2020	(\$1.97)		
Payment Check **Thank You**	653	05/19/2021	(\$49.48)		
Balance Due - Invoice # 22960			\$0.00		\$5.00
I&D Spray	23056	04/14/2021	\$36.00	\$1.80	
Payment Check **Thank You**	653	05/19/2021	(\$37.80)		
Balance Due - Invoice # 23056			\$0.00		\$5.00
Lawn Fert 2	23745	05/10/2021	\$49.00	\$2.45	
Payment Check **Thank You**	653	05/19/2021	(\$0.72)		
Payment Check **Thank You**	671	06/17/2021	(\$50.73)		
Balance Due - Invoice # 23745			\$0.00		\$5.00
Lawn Fert Rd 3	24139	06/29/2021	\$53.60	\$2.68	
Payment Check **Thank You**	671	06/17/2021	(\$0.72)		
Payment Check **Thank You**		08/12/2021	(\$55.56)		
Balance Due - Invoice # 24139			\$0.00		\$5.00
Tree rd 3	23056	07/02/2021	\$36.00	\$1.80	
Payment Check **Thank You**		08/12/2021	(\$37.80)		
Balance Due - Invoice # 23056			\$0.00		\$5.00
Lawn Fert Rd 1	25556	03/22/2022	\$49.00	\$2.45	
Balance Due - Invoice # 25556			\$51.45		\$56.45
Lawn Fert 2	25728	04/28/2022	\$49.00	\$2.45	

Please pay within 10 days. Net 30 days 1.5% thereafter. Please call with any questions about your lawn, how much more can I get in this field? should

On a scale of 0 (not likely) to 10 (very likely), how likely are you to recommend us to a friend/neighbor?

PLEASE INDICATE PAYMENT AMOUNT & CHECK NUMBER

AMOUNT CHECK NO.

Charge My: VISA M/C DISC Exp: / /

Card #: _____ Security Code: _____

Signature: _____

Wowers you are SO SO SO OLD

Open Invoice with paid

This only works well with multiple pages (could be lots)

Example Pre-Service Email

The full pre-service email template for Super Green. It features a header with the Super Green logo and a 'Log In' link. Below the header is a dark blue 'Service Reminder' banner. The main content includes a 'SERVICE REMINDER' section with the account number 10783, a message to the customer, and a list of services to be performed: 'LATE SPRING APPLICATION'. A blue button labeled 'Confirm Your Appointment' is provided. Below this is a 'Meet your technician!' section featuring a profile for Joseph Olson, a Lawn Care Specialist with 16 years of experience. The footer contains customer portal information: 'Signup for AutoPay', 'Pay Your Bill', 'Contact Us', the phone number '(800) 422-7478', an unsubscribe link, and social media icons for Facebook, X, and Instagram.

A section of the email showing the service reminder message and the 'Confirm Your Appointment' button. The message reads: 'Hello John Smith 123 Main St St Super Green Livonia will be servicing your property on. Please ensure the service area is accessible and clear of any obstructions. We will be performing the following: LATE SPRING APPLICATION'. The button is blue with white text.

Add your messaging and option to confirm appointment

The footer section of the email, which is dark grey. It contains links for 'Signup for AutoPay', 'Pay Your Bill', and 'Contact Us', the phone number '(800) 422-7478', an unsubscribe link, and social media icons for Facebook, X, and Instagram.

Add customer portal info and social links to footer.

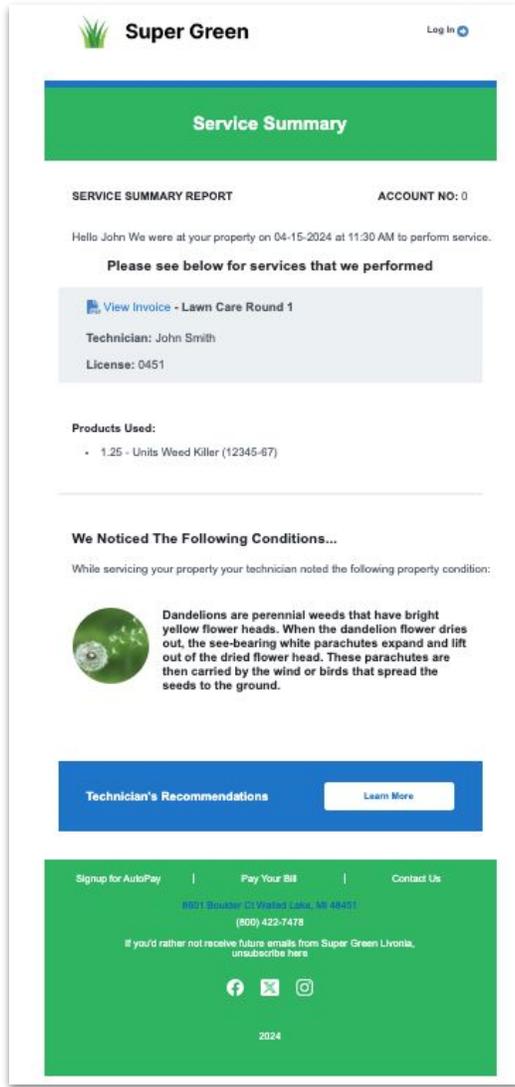
The header section of the email, featuring the Super Green logo and a 'Log In' link. Below the header is a dark blue 'Service Reminder' banner.

Add logo and brand colors to header

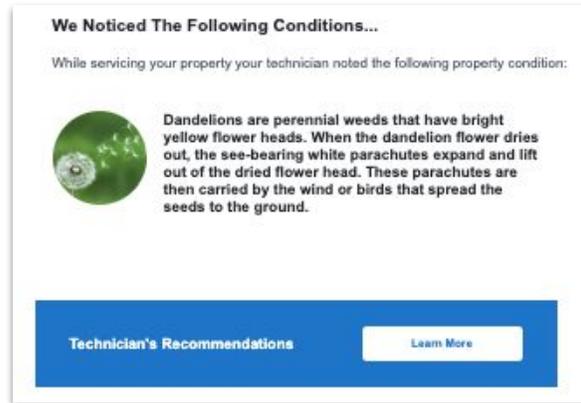
The 'Meet your technician!' section, featuring a profile picture of Joseph Olson and a short biography: 'Meet Joe Olson, a seasoned Lawn Care Specialist with an impressive 16 years of hands-on experience in creating lush, vibrant landscapes. Born with a passion for the outdoors, Joe has dedicated his career to transforming lawns into thriving green spaces that not only enhance curb appeal but also contribute to the overall well-being of communities.'

Introduce your technician

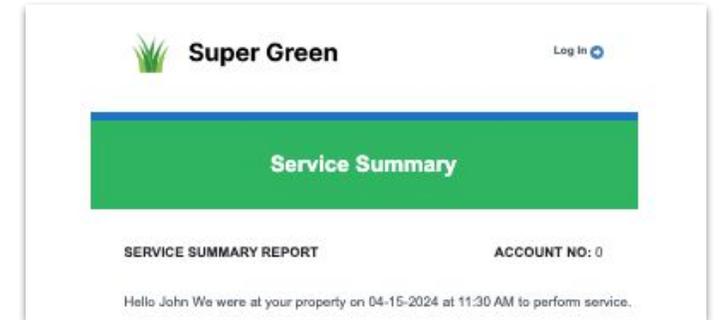
Example Post-Service Email



Add invoice and services performed/products used



Include conditions and technician recommendations for upsell



Add logo and brand colors to header, customize messaging



Add links in footer for autopay, pay your bill and more

Example Payment Reminder Email

Super Green Log In

Payment Reminder

PAYMENT REMINDER **ACCOUNT NO: 0**

Hello John Just a reminder, we recently performed service or charged an installment to your account at: 123 Main St Anytown MI 48108 We have not yet received payment. Your account has a balance of \$70.00. You can use this message to conveniently make payment arrangements. Click this link to view and pay your account on our website

[Make Payment](#)

If you have already made the payment, please disregard this message. We thank you for your prompt attention to this matter.

Signup for AutoPay | Pay Your Bill | Contact Us

8601 Boulder Ct Walled Lake, MI 48451
(800) 422-7478

[f](#) [X](#) [i](#)

2024

PAYMENT REMINDER **ACCOUNT NO: 0**

Hello John Just a reminder, we recently performed service or charged an installment to your account at: 123 Main St Anytown MI 48108 We have not yet received payment. Your account has a balance of \$70.00. You can use this message to conveniently make payment arrangements. Click this link to view and pay your account on our website

Customize your payment reminder messaging.

[Make Payment](#)

If you have already made the payment, please disregard this message. We thank you for your prompt attention to this matter.

Drive customers directly to a payment portal

Signup for AutoPay | Pay Your Bill | Contact Us

8601 Boulder Ct Walled Lake, MI 48451
(800) 422-7478

[f](#) [X](#) [i](#)

2024

Customize header and footer with brand colors and logo. Plus, links for payments, auto-pay and more.

Example New Service Email

The full email layout includes a header with the Super Green logo and a 'Log In' link. Below is a green 'Service Confirmation' button. The main body contains a 'NEW SERVICE REPORT' header with 'ACCOUNT NO: 0'. It features two columns for 'Service Address' and 'Billing Address', both listing 'Property Management Corp' at '123 Main St, Anytown, MI 48108'. A paragraph of service confirmation text follows. A 'Service Description' table lists items like 'Lawn Care Program' and 'Prepay Amount'. A blue 'Pre-Pay Now' button is present. At the bottom, there is a blue 'Pre-Pay and Save!' banner with a link to pre-pay today and save \$17.65, and a green footer with contact information and social media icons.

NEW SERVICE REPORT **ACCOUNT NO: 0**

Service Address	Billing Address
Property Management Corp Mr. John Doe 123 Main St Anytown, MI 48108	Property Management Corp Mr. John Doe 123 Main St Anytown, MI 48108

We are excited to provide you with service at 123 Main St, Anytown, MI 48108. We will work diligently to provide you an experience and results that are best in class!

Custom message and property/billing confirmation

Service Description:

DESCRIPTION	SUBTOTAL
Lawn Care Program 5 Rounds	\$350.00
Season Total	\$350.00
Additional Discounts	\$14.00
Tax	\$16.80
Total Charge	\$352.80
Pay Today & Save	\$17.65
Prepay Amount	\$335.15

Service and cost description

Super Green [Log In](#)

Service Confirmation

Customize header/footer with links for payment options and more

Pay Today & Save	\$17.65
Prepay Amount	\$335.15

Pre-Pay Now

Add pre-pay offer and links to customer payment portal

Questions?