



Your New Employee of the Month: How to make CAW work for you

Put CAW to work for you

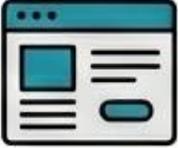


Matthew Gifford
Technical Consultant, RealGreen

Agenda



**CAW 2.0
Features**



**Admin Site
Overview**



**Email
Confirmation
Setup**



**Promotions
Setup**



**Upsell
Options**



**Follow up
emails**



**Payment
Reminders**



**CAW
Payments**

Your Business Never Sleeps: CAW Works 24/7 365

Business Owner's Life

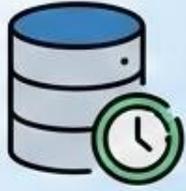
CAW Automated Tasks (24/7 365)



CAW 2.0 Features



Admin Site
Integrated with
SA5



Real-time SA5
Database Sync



Shopping Cart
Option



2 Season
Services
Displayed



Flexible Prepay
& Payment
Options



Enhanced
Promotions
& Upsells



Customizable
Available Pages



Branch-Specific
Theme Builder



Customizable
Homepage

Admin Site Overview



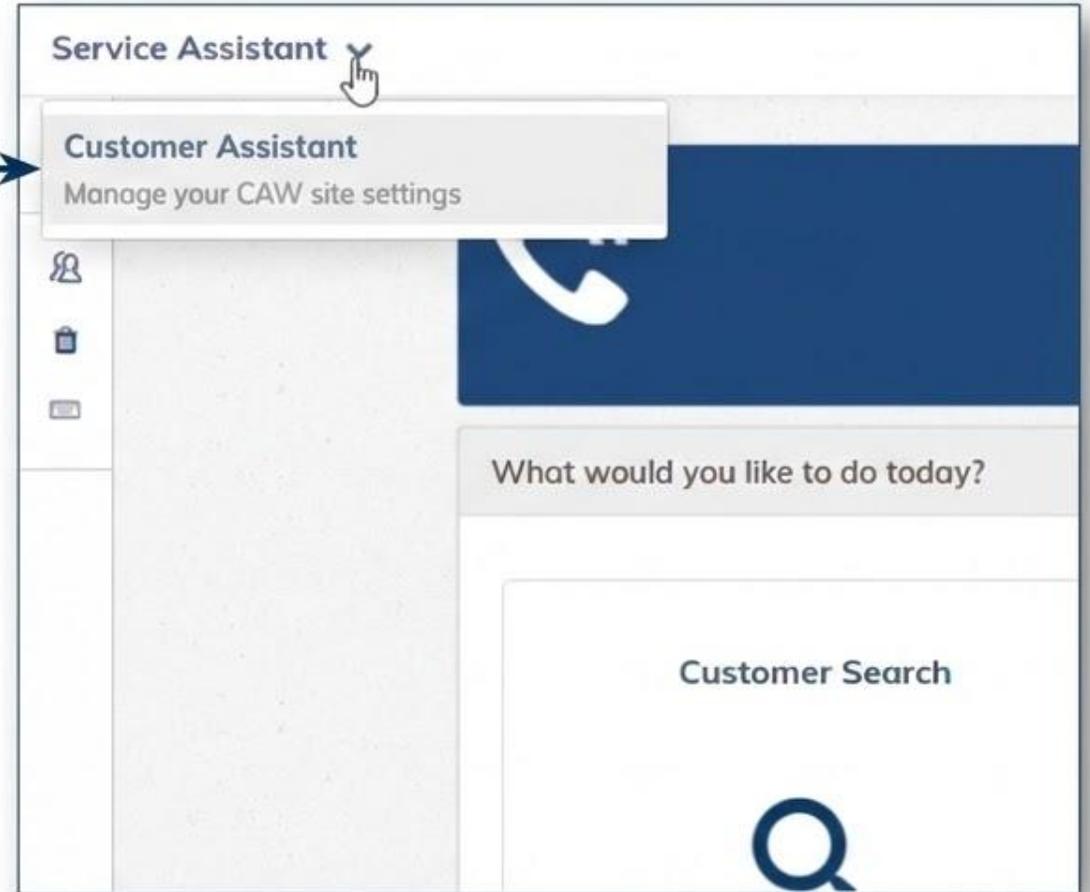
Self-Serve Integration

Now fully self serve and no longer external links.



Direct Access via SA5

Access to the Admin Site is now through SA5.



Email Confirmation Setup

Details

Branch: 2222 - Super Green

Email Type: *

Email Subject: *

From Email Address: *

Merged Code Word: For example, use DETAILS:

Email Body: *

↶ ↷ Size Font **B** *I* ~~S~~ U [List Icons] Normal text A° [Link Icon] [Image Icon] [Code Icon] [Quote Icon]

Hi There,

Your Customer Assistant Website account was successfully registered!

If you have additional questions, please contact Real Green Support at support@realgreen.com.

Best Regards,
RealGreen Support Team

Copy Settings to:

Confirmation Emails

Easy path for customer to buy
Lists details and payment options
Autopay enrollment
Installment
Prepay or one-time payments

The screenshot shows a confirmation email from ACME Corporation. At the top left is the ACME CORPORATION logo, and at the top right is a 'Log In' link. Below the header is a red banner with the text 'Service Confirmation'. The main content area includes a 'NEW SERVICE REPORT' header on the left and 'ACCOUNT NO:0' on the right. Below this are two columns: 'Service Address' and 'Billing Address'. The Service Address is: Property Management Corp, Mr. John Doe, 123 Main St, Anytown, MI 48108. The Billing Address is: Property Management Corp, Mr. John Doe, 789 Billing Dr, Anytown, MI 48108. A message follows: '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!'. Below this is a 'Summary of New Services' table. The table has two sections. The first section lists 'Lawn Care Program' with '5 Rounds' for a subtotal of '\$350.00'. The second section lists 'Season Total' for '\$350.00', 'Additional Discounts' for '\$14.00', 'Tax' for '\$16.80', and 'Total Charge' for '\$352.80'. Below the table are two rows: 'Pay Today & Save' for '\$17.65' and 'Prepay Amount' for '\$335.15'. A 'Pre-Pay Now' button is located below the table. At the bottom of the email is a black banner with the text 'Pre-Pay and Save! Pre-pay Today and Save \$17.65'. The footer contains three links: 'Signup for AutoPay', 'Pay Your Bill', and 'Contact Us'. Below the links is the company name 'Acme CO.' and the address '4321 Looney Tunes Dr. Somewhere MI 48198' with the phone number '(800) 422-7478'.

ACME CORPORATION [Log In](#)

Service Confirmation

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 789 Billing Dr 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!

Summary of New Services

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

[Pre-Pay Now](#)

Pre-Pay and Save!
Pre-pay Today and Save \$17.65

[Signup for AutoPay](#) | [Pay Your Bill](#) | [Contact Us](#)

Acme CO.
4321 Looney Tunes Dr. Somewhere MI 48198
(800) 422-7478

Promotions Setup

Customer Assistant > Settings > Promotion Setup



Promotion Setup

+ Add Promotion + Add Upsell

Filter:

Q Search

Core Aeration

5 Branches
Display Order: 0
Bundle Id: 1

Not a Customer Marketing Customer



Season Long Grub Control

5 Branches
Display Order: 0
Bundle Id: 2

Not a Customer Marketing Customer



Lawn Care Program

5 Branches
Display Order: 0
Bundle Id: 3

Not a Customer Marketing Customer



Prepay 2024

5 Branches
Display Order: 0
Bundle Id: 4

Prepay



Promotions Setup

Promotion Details

Promotion Name: *

Season Long Grub Control

Branch *

All Branches Selected

Display Order:

0

Source:

Door to Door

Bundle Id:

2

Availability: *

Not a Customer x Marketing x Customer x

Card Image:

No file chosen



Filters

Start Date:

January 1

End Date:

December 31

Minimum Size:

0.00

Maximum Size:

99,999.99

Flag Code Filter:

With:

Select...

Description

Gallery

Size

Font

B

I

S

U



Grub Control

Lawn grubs are pale white, squirmy larvae that can destroy your lawn from the ground up, munching on roots until your grass dies off. These pests are a natural part of the ecosystem, so if you just have a few, there's no need to worry. However, if you're finding a lot of grubs, you need to eliminate them immediately to avoid damage to your lawn.

Promotions Setup

Promotions

Expand all Collapse All

Build your promotion by adding individual services, or adding services onto an existing program.

Program/Service	Prepay Code	Discount Code	Set Price
11 - GRUB CONTROL	Select...	10% off discount	\$

Programs: Select... + Add Program

Services: Nothing Selected + Add Services

Promotion for Next Available Round:

Prepay Code: Select...

Discount Code: Select...

Set Price: \$ 0.00

Upsells

Want to recommend services? Customers will be able to add the services below **after** adding this promotion to their cart.

Service	Prepay Code	Discount Code	Set Price
86 - Grup Control Preventative	Select...	10% off discount	\$

Services: Nothing Selected + Add

Cancel

Delete

Save

Upsells & Promotions

Create Upsells for CAW Checkout

- Promote additional services
- Consultative to customers

Offers to Promote and Sell

- Sell a season or year
- Target specific events
- Set it, reuse it, and let the product do the job!

My Services **My History** **Add Services** **Make a Payment** **Refer a Friend** **FAQ** **About Us** **Contact Us**

Add Services

Customizable add service text.

Your Cart Service Address: 123 Blue Skies, Utica, MI 48317

Spring Aeration Special Complete Program of 6 Rounds View Details	\$243.00 Regular Price \$313.00 Pay today & Save \$7.10 Remove
Weekly Mowing View Details	\$46.00 Pay today & Save \$3.60 Remove

Available Promotions

Overseeding Special View Details	\$40.00 Regular Price \$50.00 Add to Cart
Dormant Oil - Tree View Details	\$15.00 Pay today & Save \$1.50 Add to Cart

Totals

Selected Services	\$359.00
Discount	-\$70.00
Subtotal	\$289.00
Total Charge	\$289.00
Pay today & Save	\$10.70
Prepay Amount	\$278.30

Upsell Options

Continuous Promotion

- Schedule & Plan out the year
- Target specific days
- Specify programs and services

Set it and Forget it!

- Automatically Updates SA Records
- Create new customer in SA
- Add services to customer record in SA
- Capture Payments via CAW
- Autopay, Prepay, etc.



The screenshot displays a CAW interface with a green header bar containing three sections: "CAW Manage Account Text", "CAW Pay Bill AutoPay Refer Text", and "CAW Contact Text". Below the header, the main content area is titled "Please Consider The Following..." and includes a personalized message to "John" about lawn care services. To the right of the message, there are fields for "Account Number #00001", "Service Address" (123 Street Name, City, State Zip Code), and "Account Number" (123 Street Name, City, State Zip Code). Below the message, there is a "Summary of Service" section with a table showing "Service Block" and "Total Service Amount..... Total Price". The table also includes "Tax..... Total Tax", "Discounts..... Add Discounts", "You Save..... Prepay Discount", and "Payment Amount..... Total Prepay".

Estimate Follow up

Automated Estimate Follow up
Lists details and purchase options
Autopay enrollment
Installment
Prepay or one-time payments

Home Add Service Contact Us Make a Payment My History Refer a friend FAQ About Us

Checkout

Payment Details

Prepay
Pay today and save \$30.45! [Prepay](#)

Autopay
Sign Up today, and enter your payment details, we will charge you after the completion of each service automatically. [Autopay](#)

Have us call you
I'm interested, but I still need more details. [Contact Me](#)

Service Address
1766 Hilltop Dr Milford MI 48380

Your Cart
Lawn Care \$621.25

Summary

Selected Promotions	\$621.25
Discount	-\$12.39
Subtotal	\$608.86
Total Charge	\$608.86
Pay today & Save	\$30.45
Prepay Amount	\$578.41

[Change Services](#)

Get Started Today
With Hometown and
Save 50% On
Your First Visit!
exp. 02/25/2023
Full Program Required

Manage My Account Activate Estimate Contact Us

We have attempted to follow up with you regarding your lawns needs and have not heard back from you. We are still very interested in providing you with the service you wanted.

We believe with our quality products and our licensed technicians this is the best way to achieve the results you desire.

If you sign up today you can still receive our bonus offer. We would, of course, like the opportunity to serve you as a customer and hope you can take advantage of the attached offer.

We appreciate the opportunity to be considered your professional provider. Hope to hear from you soon.

Sincerely,

Your Hometown Team

Account Number

2148993

Service Address

Michael Shouse

515 North Rd

Fenton, MI 48430

Billing Address

Michael Shouse

515 North Rd

Fenton, MI 48430

Estimate Services

Lawn Care EMB		Total Service Amount	\$274.60
- Early Spring Application	\$21.10	Payment Amount	\$274.60
- Late Spring Application	\$42.25		
- Early Summer Application	\$42.25		
- Summer Application	\$42.25		
- Early Fall Application	\$42.25		
- Fall Application	\$42.25		
- Winterizer	\$42.25		

Reject Follow up

Follow up with a stronger offer
Catches customers who:
You could not reach
Were looking at other offers
Are ready to buy

Home Add Service Contact Us Make a Payment My History Refer a friend FAQ About Us

Checkout

Payment Details

Prepay
Pay today and save \$30.45! [Prepay](#)

Autopay
Sign Up today, and enter your payment details, we will charge you after the completion of each service automatically. [Autopay](#)

Have us call you
I'm interested, but I still need more details. [Contact Me](#)

Service Address
1766 Hilltop Dr Milford MI 48380

Your Cart
Lawn Care \$621.25

Summary

Selected Promotions	\$621.25
Discount	-\$12.39
Subtotal	\$608.86
Total Charge	\$608.86
Pay today & Save	\$30.45
Prepay Amount	\$578.41

[Change Services](#)

**Get Started Today
With Hometown and
Save 50% On
Your First Visit!**
exp. 02/19/2023
Full Program Required

[Manage My Account](#) [Activate Estimate](#) [Contact Us](#)

We have spoken with you in the past about your lawns needs and we are still interested in helping provide you with a green and weed free lawn.

We believe with our quality products and licensed technicians this is the best way to achieve the results you desire.

If you sign up today you can receive our bonus offer. We hope you will take advantage of the attached offer to begin your professional service with your first treatment.

We appreciate having the opportunity to be your professional provider. Hope to hear from you soon.

Sincerely,
Your Hometown Team

Account Number
2148993

Service Address
Michael Shouse
515 North Rd
Fenton, MI 48430

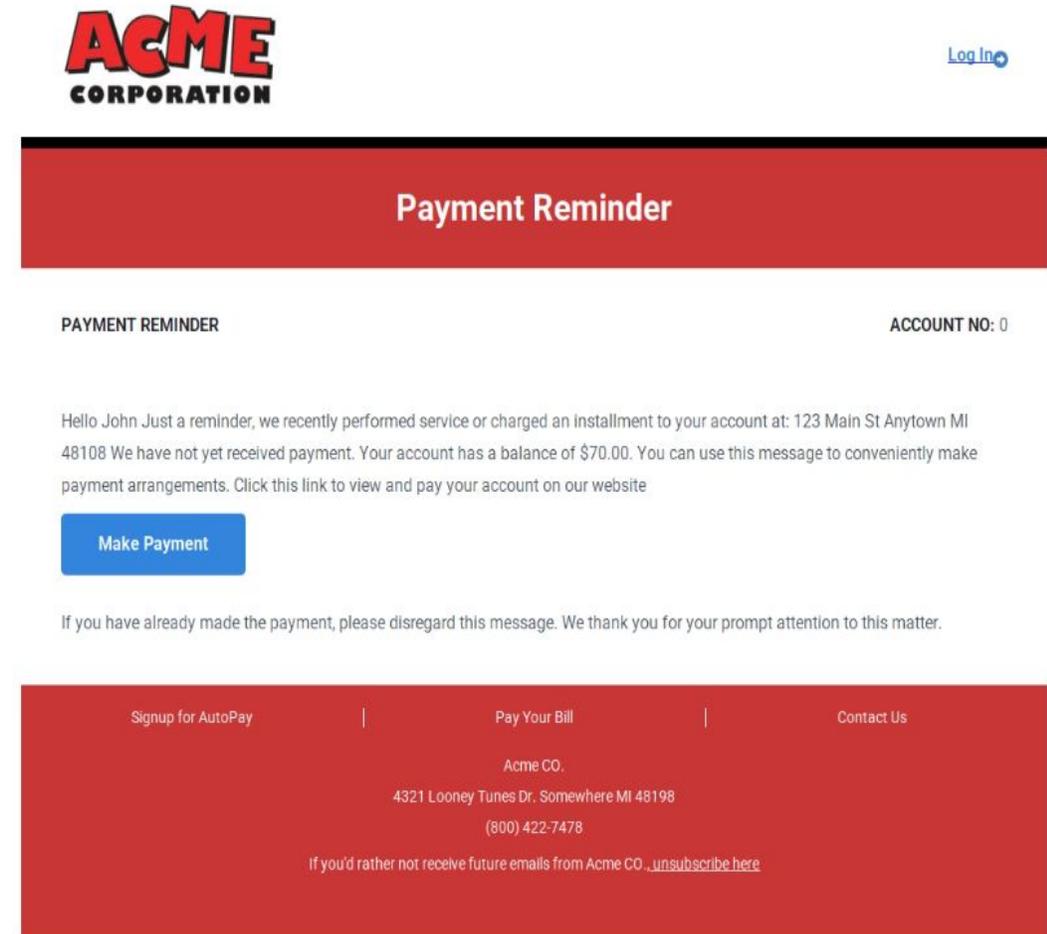
Billing Address
Michael Shouse
515 North Rd
Fenton, MI 48430

Estimate Services

Lawn Care EMB		Total Service Amount	\$274.60
- Early Spring Application	\$21.10	Payment Amount	\$274.60
- Late Spring Application	\$42.25		
- Early Summer Application	\$42.25		
- Summer Application	\$42.25		
- Early Fall Application	\$42.25		

Payment Reminders

- Reduce Costs Less than sending statements
- Customers now prefer paying online and autopay
- Much easier for a customer to pay online than mail a check
- Getting paid by card is automated and saves you money
 - Card payment 3% is typically cheaper than printing and mailing a statement before labor!
 - Processing a check is more costly than a credit card



CAW Payments Working For Your Business

Autopay & Prepay Benefits

- Set it and forget it (autopay)
- Budget for your services (prepay)
- Never worry about getting behind on payments

Reduce Payment Processing Time

- Reduce check processing
- Automate payment processing
- Update SA customer account automatically

Terms and Conditions	
Payment Details	
Pay as you go Sign Up today and pay after each service is complete.	Pay as you go
Prepay Pay today and save \$10.70!	Prepay
Autopay Sign Up today, and enter your payment details. We will charge you after the completion of each service automatically.	Autopay
Installments Sign Up today, and we'll charge you once a month via installments. Four monthly payments of \$72.25, first payment due on 09/30/2020. + View Installment Details	Installments
Have us call you I'm interested, but I still need more details.	Contact Me

Service Address	
123 Blue Skies Utica, MI 48317	
Your Cart	
Spring Aeration Special	\$313.00
Weekly Mowing	\$46.00
Totals	
Selected Services	\$359.00
Discount	-\$70.00
Subtotal	\$289.00
Total Charge	\$289.00
Pay today & Save	\$10.70
Prepay Amount	\$278.30
Comments	
hi, Please make sure to contact me before service. I've got more comments where these came from! Thanks!	

After Service Emails

Drives Customer to CAW Site with Dynamic Links

Manage My Account

Refer a Friend

Enroll in autopay

Pay Your Bill

Contact Us



[Log In](#)

Service Summary

SERVICE SUMMARY REPORT

ACCOUNT NO: 0

Hello John We were at your property on 04/15/2024 at 11:30 AM to perform service.

We performed the following:

[View Invoice- Lawn Care Round 1](#)

[View Service Summary - Lawn Care Round 1](#)

Technician: John Smith

License: 0451

Products Used:

- 1.25 - Units Weed Killer (12345-67)

We noticed the following conditions...

While servicing your property your technician noted the following property condition:



Dandelions are perennial weeds that have bright yellow flower heads. When the dandelion flower dries out, the see-bearing white parachutes expand and lift out of the dried flower head. These parachutes are then carried by the wind or birds that spread the seeds to the ground.

Technician's Recommendations

[Learn More](#)

[Signup for AutoPay](#)

[Pay Your Bill](#)

[Contact Us](#)

Acme CO

4321 Looney Tunes Dr. Somewhere MI 48198

(800) 422-7478

If you'd rather not receive future emails from Acme CO, [unsubscribe here](#).

Customer Feedback \ Testimonials

**“Saves us a lot of time
and a lot of money!”**

CAW Promotion Created to target specific services & programs

Contact list and service details loaded from SA5

Email sent via AMA directly to customers

Customers directed to CAW to sign-up for service & prepay or autopay



1 week, sold \$20,000
more in grub



The phone barely rang.
It just showed up.



1 Weekend, sold
\$45,000 in Aerations

Questions?

Session Feedback

We appreciate your feedback and attendance

-  Login to the event mobile app
-  Add this session to your schedule
-  Click survey
-  Give it a rating 1-5 stars

