



# Service Assistant Scheduler 101

# Agenda

-  Scheduler Overview
-  Options and Configurations
-  Additional Filters
-  Scheduler by Employee
-  Scheduler with Crews
-  Adding Services & Modifying Appointments
-  Quick Fit Scheduler
-  Generating Work & Printing Invoices
-  Reports

As you peruse this deck,  
be on the lookout for some  
**QUICK TIPS!**

# Overview

# Scheduler

## What is Scheduler?

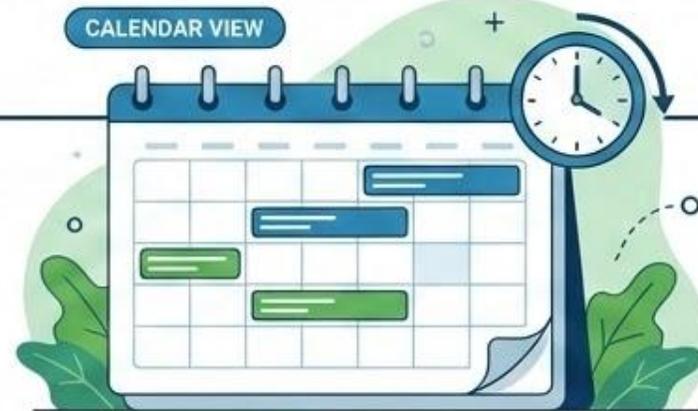
Scheduler is designed for RealGreen clients who schedule services on a specific date at a specific time of day.

This tool is beneficial for those who provide services where the customer is required for access to the property or where customers are needed to authorize work or sign off on the completion of the service.



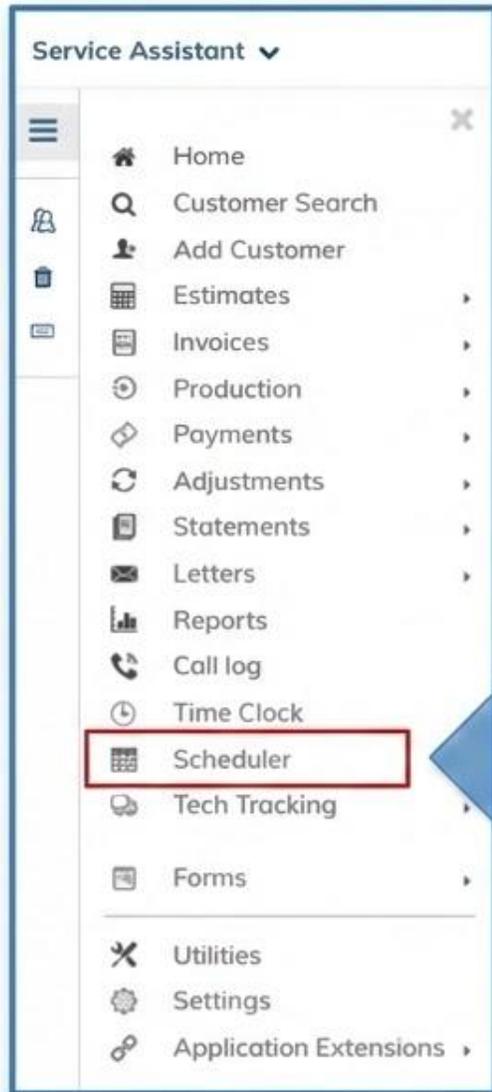
## What Isn't Scheduler?

A common misconception is that the Scheduler can be used as a calendar view for all types of services, those scheduled and on a rolling schedule (generated through Invoice Printing). Scheduler is not a calendar view of all the services you have added to customers.



# Options and Configurations

# Accessing Scheduler



## To access Scheduler:

- Go to the Menu bar.
- Click on **Scheduler**.

# Scheduler Views Top Bar



## Scheduler View

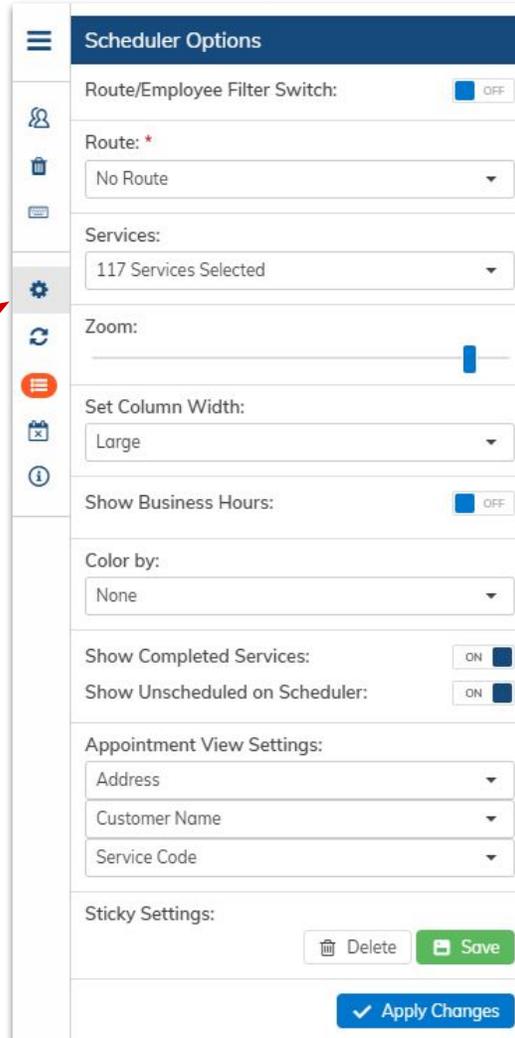
- Day
- Week
- Work Week
- Month
- Flex: View appointments by route for variable days based on a range or manually selected days.

The date picker on the left will be changed based on the Scheduler View you choose. You may have to use the scroll at the bottom of the table to move between the different weeks and routes.

## Icon Key:

-  Promised
-  Confirmed
-  Not Confirmed
-  Invoice Printed
-  Credit Hold
-  Program/Customer Hold
-  Job Started
-  Completed

# Scheduler Options



The screenshot shows the 'Scheduler Options' configuration panel. The left sidebar contains a gear icon highlighted with a red arrow. The main panel includes the following settings:

- Route/Employee Filter Switch:  OFF
- Route: \* (dropdown menu): No Route
- Services: (dropdown menu): 117 Services Selected
- Zoom: (slider control)
- Set Column Width: (dropdown menu): Large
- Show Business Hours:  OFF
- Color by: (dropdown menu): None
- Show Completed Services:  ON
- Show Unscheduled on Scheduler:  ON
- Appointment View Settings: Address, Customer Name, Service Code (dropdown menus)
- Sticky Settings: Delete, Save buttons
- Apply Changes button

## Filters

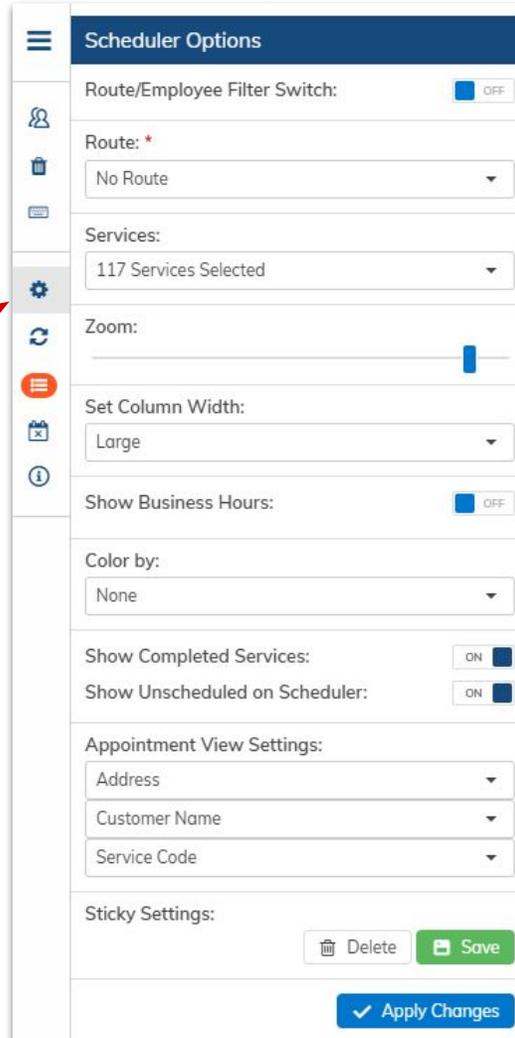
- **Route\*** – The Scheduler is designed around viewing routes and here we can configure which routes to view.
- **Services\*** – Select the Service(s) you want to display on the Scheduler.
- **Zoom** – Scale the size of the appointments shown on the scheduler.
- **Show Business Hours** – If you want to view the hours outside of your regular business hours.
- **Color By** – Modify the color of the appointments to reflect the color specified on routes, services, programs, etc.
- **Show Completed Services** – Toggle on or off to display or hide completed services.

\*Those Options with an asterisk\* have a drop down where you can multi-select options to view at once.

# Scheduler Options

## Filters

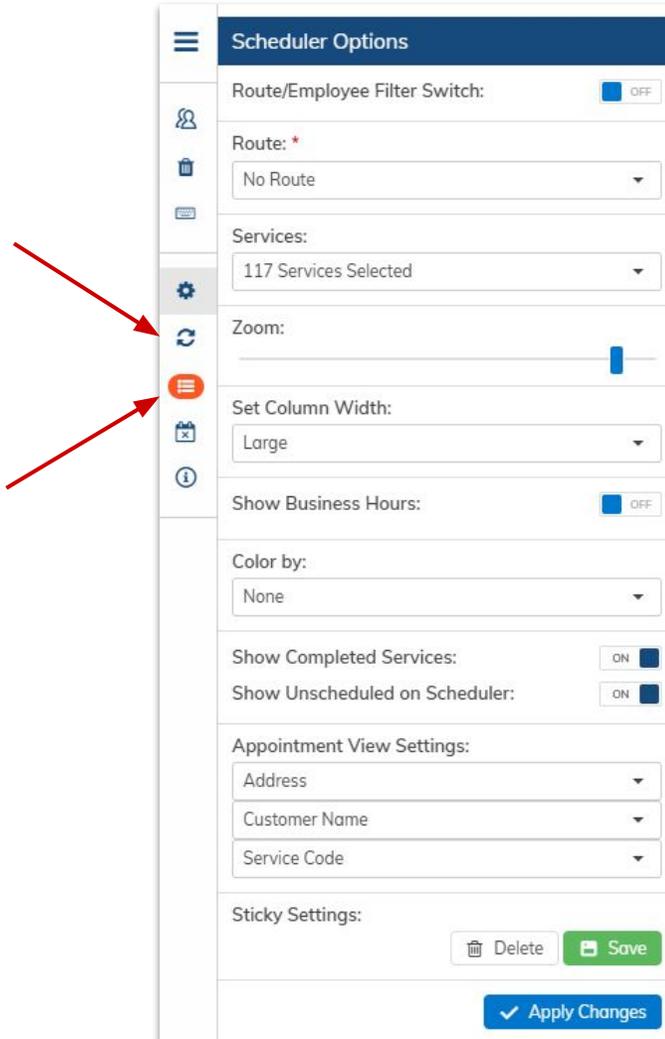
- **Show Unscheduled on Scheduler** - Toggle on or off to display or hide unscheduled work. Please note that when on, unscheduled work displays at 12:00am on the Scheduler. When off, unscheduled work displays in the Unscheduled Items (icon with small x on calendar). An unscheduled service is one that has been assigned a service date, but has not been assigned a specific time.
- **Appointment View Settings** - Choose the details that display on the appointment card.
- **Sticky Settings** - Click Save to set the selected option as sticky. Click Delete to remove the selected options.
- **Apply Changes** - When you are happy with your choices, click Apply Changes.



The screenshot shows the 'Scheduler Options' configuration panel. The left sidebar contains a settings gear icon highlighted with a red arrow. The main panel includes the following sections:

- Route/Employee Filter Switch:** OFF
- Route:** No Route
- Services:** 117 Services Selected
- Zoom:** Slider control
- Set Column Width:** Large
- Show Business Hours:** OFF
- Color by:** None
- Show Completed Services:** ON
- Show Unscheduled on Scheduler:** ON
- Appointment View Settings:** Address, Customer Name, Service Code
- Sticky Settings:** Delete, Save buttons
- Apply Changes:** Checkmark button

# Scheduler Refresh & Workpool



The refresh button (two arrows in a circle) will refresh the listings on the scheduler.

When adding services to customers, instead of entering a date immediately, you can elect to send the services to the workpool. The Workpool section will allow you to navigate to an available day on the Scheduler, and drag/drop the service into an available time slot.

# Additional Filters

# Filters

## Workpool

Auto-filter: Toggle the switch on or off to filter by the selected appointment's route/employee.

Select View: Choose Compact, Normal, or Full to view the less, standard, or more details for the appointment.

Filters: Choose the filters to apply to the workpool appointment list.

Clear Filters: Click to remove all applied filters.

Clear Workpool: Click to remove all appointments from the Workpool.



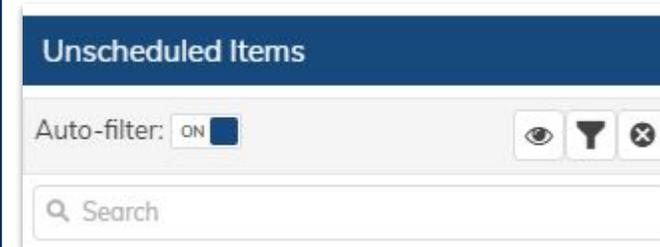
## Unschedule Items

Auto Filter: Toggle the switch on or off to filter by the selected appointment's route/employee.

Select View: Choose Compact, Normal, or Full to view the less, standard, or more details for the appointment.

Filters: Choose the filters to apply to the workpool appointment list.

Clear Filters: Click to remove all applied filters.



# Workpool & Unscheduled Items

When there is missing information such as time, date, or active employee, these stops will be found in the workpool or unscheduled items

## When will it show in Workpool?

When there is an assigned employee, but no schedule date.

## When will it show in Unscheduled Items?

When there is an assigned employee, but no start time.

If there is an assigned employee that is no longer active, but there is a date and time.

## When will it not show in Scheduler By Employee?

When there is no employee assigned.

**Manual Associations:** At least one of the services needs to have the employee assigned.

# Scheduler by Employee

To view scheduled work  
by employee instead of route

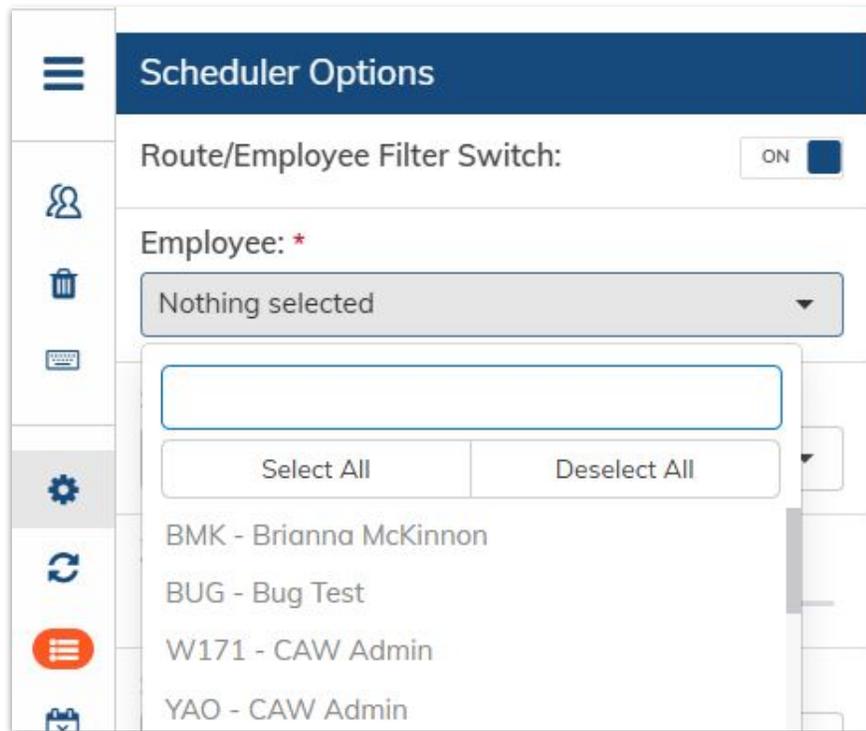
# Viewing Scheduler by Employee

To toggle between Route View and Employee View in Scheduler, go to the Settings icon. There is a box at the top of the options to turn it on or off.  
**Off** = Default (Route View) **On** = Employee View

The image displays two side-by-side screenshots of a software interface for a scheduler, illustrating how to toggle between Route View and Employee View. A central grey column represents the main scheduler view, with the date 'Tue 24' visible. The left screenshot shows the 'Route/Employee Filter Switch' set to 'OFF', with '2 Routes Selected' in the dropdown. The right screenshot shows the switch set to 'ON', with '2 Employees Selected' in the dropdown. A red arrow points from the 'OFF' switch to the 'ON' switch. Another red arrow points from the 'Route: \*' dropdown in the left view to the 'Employee: \*' dropdown in the right view. A third red arrow points from the settings gear icon in the left sidebar to the settings gear icon in the right sidebar. The interface includes various settings such as 'Services: 98 Services Selected', 'Zoom', 'Set Column Width: Small', 'Show Business Hours: OFF', 'Color by: Distance', 'Miles' (with color-coded ranges: 0-1, 1-2, 2-3, 3-5, 5-8, 8-15, >15), 'Show Completed Services: ON', 'Show Unscheduled on Scheduler: ON', 'Appointment View Settings' (Address, Customer Name, Service Code), and 'Sticky Settings' (Delete, Save, Apply Changes).

# Viewing Scheduler by Employee

Once toggled on to the Employee View, a new selector appears to select the Employee(s) you wish to view.



# Viewing Scheduler by Employee

The only view available for Scheduler by Employee is work week (Monday through Friday).

	Mon 27	Tue 28	Wed 29	Thu 30	Fri 31
All day			CM		
12:00 PM					
12:30 PM					
1:00 PM					
1:30 PM					
2:00 PM					

# Service/Program Setup with Employee

Services not batched can have the assigned to manually set from the program or through the Update Customer Service Tool through Invoice Printing (Step 2) or Routing. Please note that crew assignments are not included on the Scheduler.

The screenshot displays the 'Program Details' page for Account # 256. A modal window titled 'Assigned To' is open, showing a dropdown menu for 'Employee' with the following options: None, BLAH -, PIE - Apple Pie, BG - Brandon Grassley, BC - Butch Cassidy, DP - Dolly, EH - EBETH, FRANK - Frank Greenlee, GC - Global Connect, HC - HC, GUY - Just a guy, KC - Kitty Cat, PERCY - Percy Jackson, POLLY - Polly Pocket, PP - Polly Pocket, SUN - Sundance, and WOOP - woop woop. A red arrow points to the 'Assigned To' field in the 'Services' section, which currently shows 'None'. The 'Services' section includes a table with columns for #, Description, Scheduled Time, Extra Description, Status, Size, Renewal Size, Price, and Renewal Price. The first row shows '1 AER - Spring Aeration' with a scheduled time of 10:23am and a status of 'Y - Do every year'. Below the table, the 'Assigned To' field is circled in red.

#	Description	Scheduled Time	Extra Description	Status	Size	Renewal Size	Price	Renewal Price
1	AER - Spring Aeration	10:23am		Y - Do every year	8.0000	8.0000	185.00	185.00

# Scheduler by Employee Usage

General functionality works the same as Scheduler by Route.

- Stops can be selected and dragged to different times, days, or employees.
- Work completed can be shown under scheduler options.
- If a stop is moved to employee that doesn't have access to that branch, a message will appear to identify the customer cannot be moved.



## Drag & Drop Scheduling

Stops can be selected and dragged to different times, days, or employees.



## Track Work Status

Work completed can be shown under scheduler options.

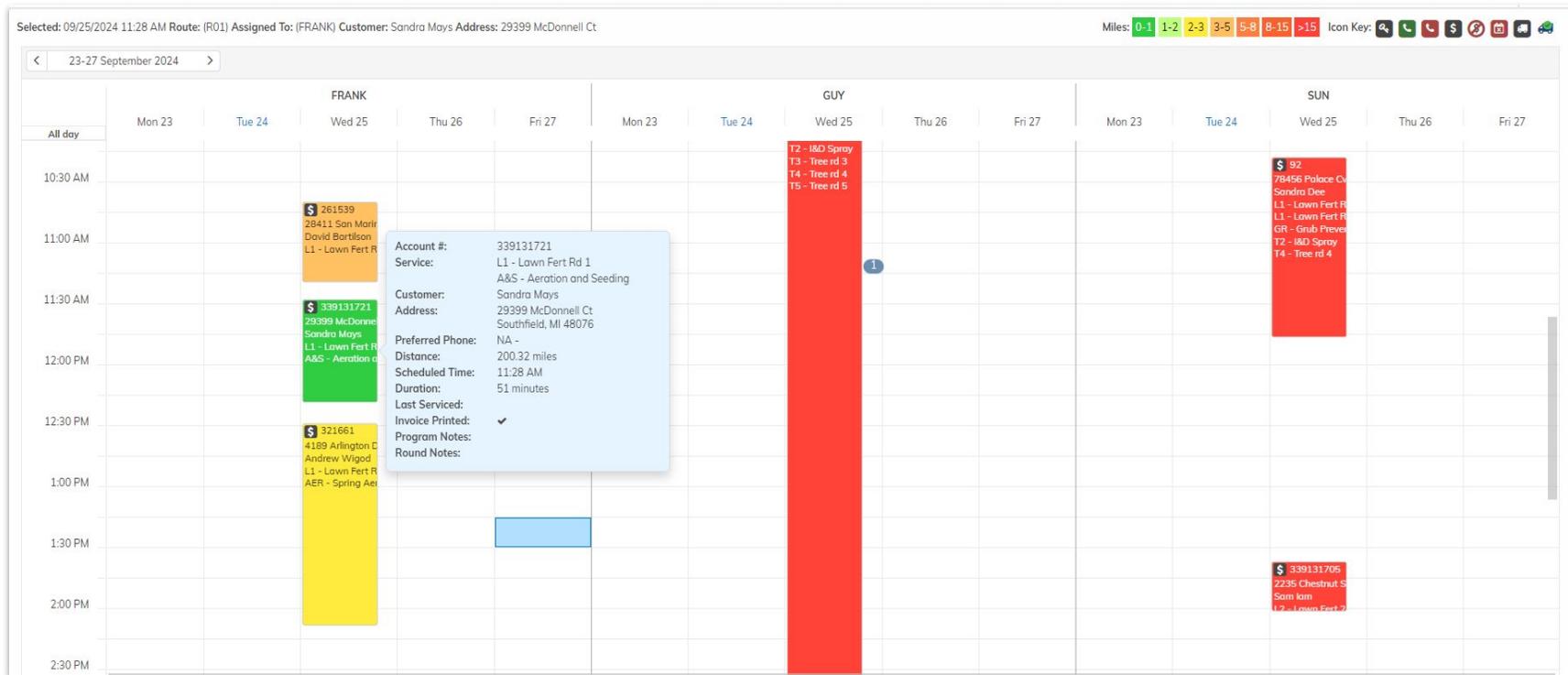


## Branch Access Control

If a stop is moved to employee that doesn't have access to that branch, a message will appear.

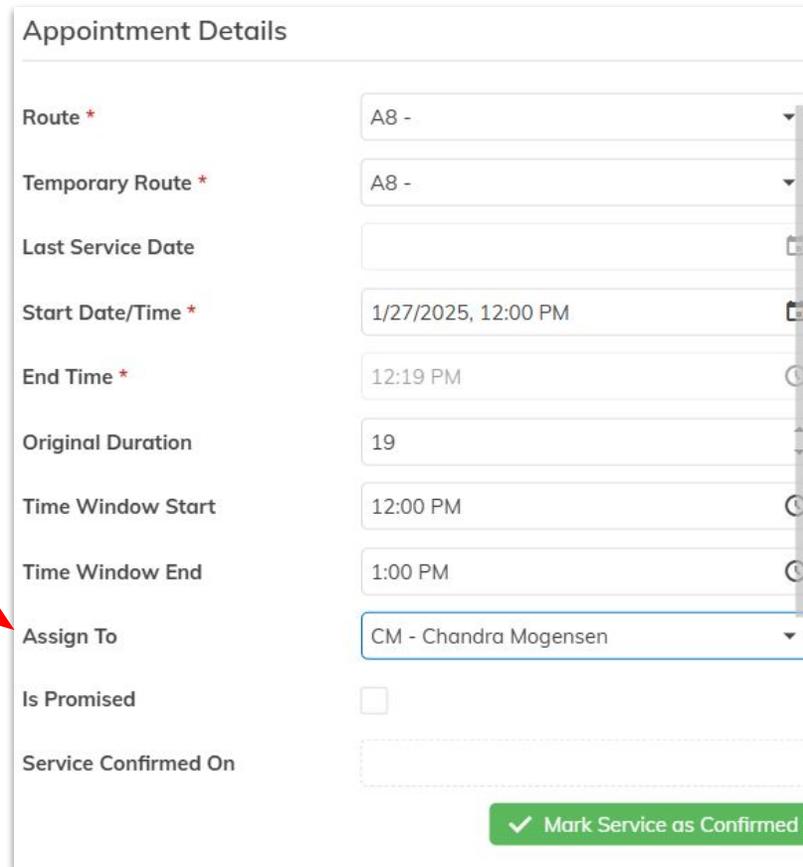
# Scheduler by Employee Usage

Hover information will match what is shown by route.



# Scheduler by Employee Usage

When viewing the appointment details under 'Edit Details', a new field is available to show the assigned to, and can be changed.



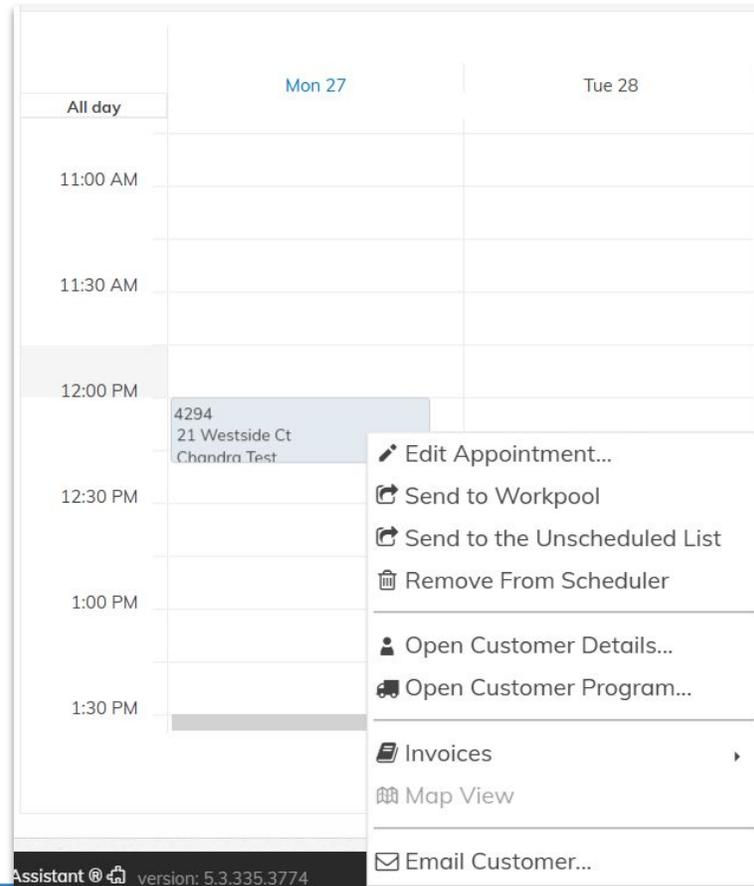
Appointment Details

Route *	A8 -
Temporary Route *	A8 -
Last Service Date	
Start Date/Time *	1/27/2025, 12:00 PM
End Time *	12:19 PM
Original Duration	19
Time Window Start	12:00 PM
Time Window End	1:00 PM
Assign To	CM - Chandra Mogensen
Is Promised	<input type="checkbox"/>
Service Confirmed On	

✓ Mark Service as Confirmed

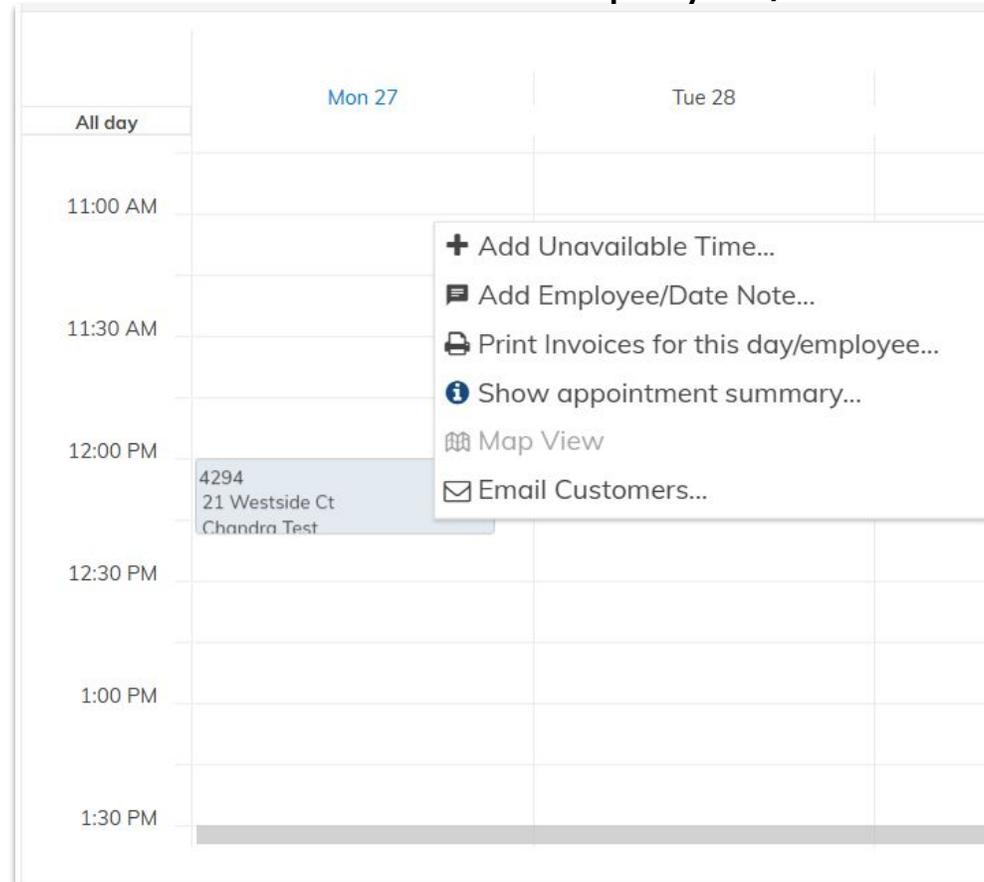
# Scheduler by Employee Usage

By right clicking on the stop, you will be able to see similar options to that of scheduling by route. Please note that the 'Map View' is not available at this time.



# Scheduler by Employee Usage

By right clicking on the scheduler, all options will show, minus 'Map View'. Note that instead of adding a note to the route/date, you will add a note to the employee/date.



# Scheduler with Crews

# Scheduler with Crews

Crews can also be assigned to a service within Scheduler.

The screenshot shows a software interface with a modal dialog box titled "Assigned To". The dialog has two dropdown menus: "Assigned To:" with "Crew" selected, and "Crew:" with "Crew 1" selected. A "Close" button is in the bottom right of the dialog. In the background, a table lists service items. The first row is "1 BER - Bermuda Grass" with a status of "Y - Do every year", a size of "2.7827", and a price of "40.00". Below the table, the "Assigned To:" field is highlighted with a red box and contains "Crew 1" with a small edit icon. Other fields include "Invoice No.", "Posted:", "Paid:", "Man Hours", "Estimated Man Hours: 00:15", "Pre-Conditions:", "Associations:", "Service Technician Notes:", and "Service Customer Notes:". A sidebar on the right shows a summary with "Full Charge", "Subtotal", "Tax", and "Net Amount".

#	Description	Extra...	Status	Size	Renewal Si...	Price	Renewal Pri...	Discount	Production val...	Scheduled
1	BER - Bermuda Grass		Y - Do every year	2.7827	2.7827	40.00	40.00	-No Discount-	40.00	01/28/202

# Scheduler with Crews

After sending the service to Scheduler, you will notice that multiple stops will appear on the Route for that day and time. Each crew member is considered a stop, and multiplies the time for that stop.

The screenshot displays the WorkWave Scheduler interface. On the left, the 'Appointment Summary' for 'TUE 28' is shown. It lists two stops for route R01: Stop 1 (Price: \$100, Time: 00:15, Value: \$100, Area: 2.99) and Stop 2 (Price: \$80, Time: 00:30, Value: \$80, Area: 5.57). A 'Totals' section shows 3 stops, a total price of \$180, a total time of 00:45, a total value of \$180, and a total area of 8.55. A red arrow points from the 'Totals' section to the route view on the right.

The route view on the right shows the date '28 January 2025' and the route 'R01'. The time slots range from 6:00 AM to 8:30 AM. At 6:30 AM, two stops are shown for the location '1801 College Ave SE'. The first stop is labeled '4792' and the second is labeled '792'. Both stops are highlighted with a red box.

Route	Stops	Price (\$)	Time	Value (\$)	Area	Units
R01	1	100	00:15	100	2.99	
R01	2	80	00:30	80	5.57	
<b>Totals</b>						
	Stops	Price (\$)	Time	Value (\$)	Area	
	3	180	00:45	180	8.55	

# Adding Services & Modifying Appointments

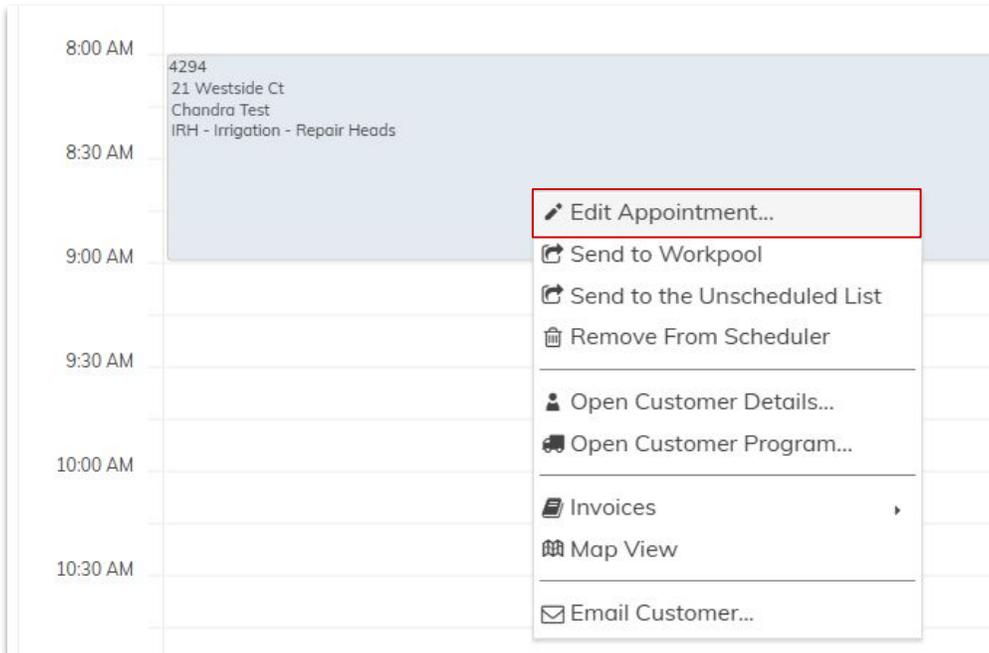
# Sending Services to the Scheduler

The screenshot shows a software interface for managing services. At the top, there are fields for 'Last Serviced', 'Hold Reason', 'Hold Start Date', 'Hold End Date', and 'Exp. Date'. Below this is a 'Services' section with a form for entering service details. The form includes fields for 'Size' (3.0000), 'Difficulty' (1.00), 'Service Price' (\$0.00), 'Average Man Hours', 'Discount' (Select Discount...), and 'Total Amount' (\$0.00). Below the form is a table with columns: #, Description, Extra..., Status, Size, Renewal Si..., Price, Renewal Pri..., Discount, Production Val..., and Scheduled Date. The table contains one row: 1, IRH - Irrigation - Repair Heads, [checkbox], Y - Do every year, 3.0000, 3.0000, 0.00, 0.00, -No Discount-, 0.00, and 12/31/2024. To the right of the table is a dropdown menu with options: 'Send to Scheduler' (highlighted with a red box), 'Add a Payment', 'Send to Production Entry', 'Print Invoice', 'Work Order', 'Text Message', and 'Quick Fit Scheduler'.

The first step of using the Scheduler is to send services to the Scheduler upon adding them to a customer's account or when you are ready to route them.

1. Go into a service or program on a Customer's Account.
2. To Schedule...
  - a. You can fully enter in the date and time of the scheduled appointment in the service bar.
  - b. If you are unsure time, you can enter in the date. When you go to the Scheduler the service will be located either in the Unschedule Items area or at midnight on the date you entered.
  - c. If you are unsure of the date and time, you can send it to the Scheduler Workpool by clicking on the three dots to the right of the service you would like to schedule, and click on 'Send to Scheduler'.

# Modifying Scheduled Services



If you ever need to edit the details of an existing appointment, you can right click on the appointment and select “Edit Appointment...”.

Right clicking will also give you other options such as the ability to send the service to the Workpool, Unscheduled List, or remove the services from Scheduler altogether. Additionally, you can easily navigate back to the Customer’s Details or Program information. Finally you can create an Invoice or view the customer in a Map View if you have Routing Assistant.

# Modifying Scheduled Services

The screenshot displays the 'Edit Appointment' window, divided into two main sections: 'Customer Information' and 'Appointment Details'.

**Customer Information:**

- Account #: 4294
- Name: Chandra Test
- Address: 21 Westside Ct Lexington, VA 24450
- Service: IRH - Irrigation - Repair Heads
- Preferred Phone (Home): (555) 555-5555
- Size: 3
- Customer Type: Residential

**Appointment Details:**

- Route \*: A8 -
- Temporary Route \*: A8 -
- Last Service Date: [Calendar icon]
- Start Date/Time \*: 12/31/2024, 8:00 AM [Calendar icon]
- End Time \*: 9:00 AM [Clock icon]
- Original Duration: 60
- Time Window Start: 12:00 AM [Clock icon]
- Time Window End: 12:00 AM [Clock icon]
- Assign To: Select...
- Is Promised:
- Service Confirmed On: [Text field]

**Right Panel (Appointment Actions):**

- Send to Workpool:
- Skip Service:
- Skip Reason \*: Select...
- Notes: [Text area]
- Service: IRH - Irrigation - Repair Heads
- Invoice/Worksheet Notes: [Text area]
- Technician Program Notes: [Text area]
- Technician Program Notes Exp.: [Text area] [Calendar icon]
- Technician Round Notes: [Text area]
- Technician Round Notes Exp.: [Text area] [Calendar icon]
- Customer Program Notes: [Text area]
- Customer Program Notes Exp.: [Text area] [Calendar icon]
- Customer Round Notes: [Text area]
- Customer Round Notes Exp.: [Text area] [Calendar icon]

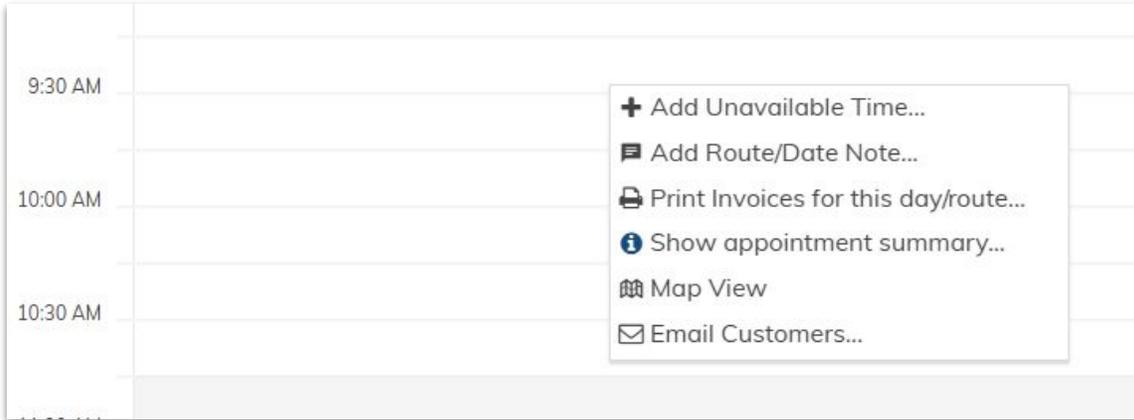
A green button labeled 'Mark Service as Confirmed' is located at the top right of the right panel.

Within the Edit Appointment window, you can update the date and time of the service, in addition to the duration of the job.

We can permanently update the Route for this job or assign a Temporary Route for this one appointment. We can modify the appointment Start Date/Time, we can define the Duration of the appointment, and, if we don't need to arrive at a specific time, we can assign a start and end Time Window.

If we are placing services on the scheduler pending confirmation, we can mark the appointment as confirmed here by clicking on the green "Mark Service as Confirmed" button, we can send this back to the workpool, and we can add any applicable Technician or Customer notes. Once we have updated the appointment, we will click "Done" to save our changes.

# Modifying the Schedule



If you right click in an empty area on the schedule, a pop up will appear with additional options.

Add Unavailable Time will give you the ability to populate time that is not allowed to be booked with an appointment.

Add Route/Date Note will populate a note for all services on this route for this date.

Show an Appointment Summary will give you a listing of the services for that day, including the total.

# Quick Fit Scheduler

# How To

The screenshot displays a service management interface. At the top, there are input fields for 'Last Served', 'Hold Reason' (a dropdown menu), 'Hold Start Date', 'Hold End Date', and 'Exp. Date'. Below this is a 'Services' section with a table of service details. The table has columns for '#', 'Description', 'Extra...', 'Status', 'Size', 'Renewal Si...', 'Price', 'Renewal Pri...', 'Discount', and 'Production Val.'. A single service is listed: '1 IRS - Irrigation Startup' with a size of 5.0000, price of 100.00, and status 'Y - Do every year'. To the right of the table, a dropdown menu is open, listing several actions: 'Send to Scheduler', 'Add a Payment', 'Send to Production Entry', 'Print Invoice', 'Work Order', 'Text Message', and 'Quick Fit Scheduler'. The 'Quick Fit Scheduler' option is highlighted with a red border.

#	Description	Extra...	Status	Size	Renewal Si...	Price	Renewal Pri...	Discount	Production Val.
1	IRS - Irrigation Startup		Y - Do every year	5.0000	5.0000	100.00	100.00	-No Discount-	100.00

1. To start, visit the service on the customer's account you would like to add into the scheduler in an available time slot.
2. Click on the kebab menu on the right of the service, and select Quick Fit Scheduler.

# Quick Fit Scheduling Options

Y IRS - Irrigation Startup Quick Fit Scheduling

Days of the Week: Monday, Tuesday, Wednesday, Thursday, Friday Selected Dates: Next 5 days

Desired Time Window: PM Time Window: 12:00pm to 10:00pm

Show multiple options per day

Use Routes: Any Route Route: NET

Find Nearby: 5 miles

Now you will configure the options for the Quick Fit Scheduling tool.

- Days of the Week
- Desired Time Window
- Show Multiple Options Per Day
- Use 'Any Route' or 'Current Route'
- Find Nearby: Mile radius
- Selected Dates
- Time Window
- Route(s)

Once configured, click on 'Find a Quick Fit'.

# Available Routes

You will now be given the options that meet the criteria you selected. If more options are needed, click on 'Get Next Five'.

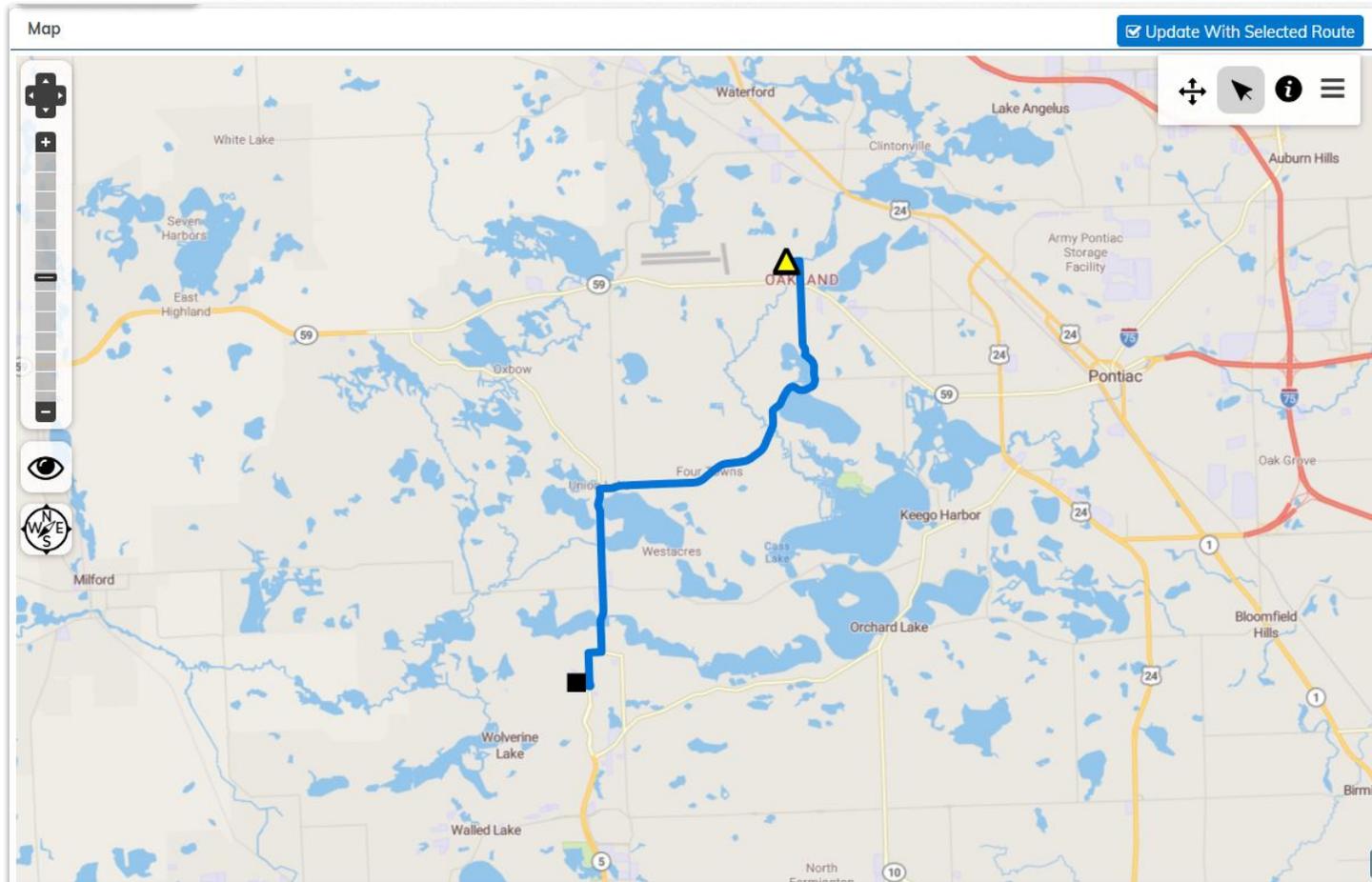
Available Routes																		
	Route	Day	Date	Est Arrival	Stops	Prod Value	Total Time	New Total Time	Prod Time	Miles	Drive	Add Miles	Addl Drive	Completed Pr...	New Total Size	# Confirmed	# Promised	
	MRT	Thursday	1/30/2025	08:15 AM	0	\$0.00	0.00	91.00	0	0.00	0	19.60	31.00	\$0.00	5.00	0	0	<a href="#">Choose and Update</a>
	NET	Thursday	1/30/2025	07:00 PM*	0	\$0.00	0.00	89.00	0	0.00	0	19.60	31.00	\$0.00	15.57	0	0	<a href="#">Choose and Update</a>
	MRT	Friday	1/31/2025	08:15 AM	0	\$0.00	0.00	91.00	0	0.00	0	19.60	31.00	\$0.00	5.00	0	0	<a href="#">Choose and Update</a>
	NET	Friday	1/31/2025	09:45 AM	0	\$0.00	0.00	91.00	0	0.00	0	19.60	31.00	\$0.00	5.00	0	0	<a href="#">Choose and Update</a>
	MRT	Monday	2/3/2025	08:15 AM	0	\$0.00	0.00	91.00	0	0.00	0	19.60	31.00	\$0.00	5.00	0	0	<a href="#">Choose and Update</a>

[Get Next 5](#)

The system will highlight if other considerations need to be taken into account based on your branch setup.

Available Routes								
	Route	Day	Date	Est Arrival	Stops	Prod Value	Total Time	New Total Time
	MRT	Thursday	1/30/2025	08:15 AM	0	\$0.00	0.00	91.00
	NET	Thursday	1/30/2025	07:00 PM*	Estimated Arrival Time is outside of branch business hours			
	MRT	Friday	1/31/2025	08:15 AM	0	\$0.00	0.00	91.00

# Map



If you highlight a row in the Available Routes, the route will appear in the Map view.

Once you have selected a time, you can click 'Choose and Update' under Available Routes or 'Update with Selected Route' to add to the Scheduler.

# Update Schedule

A new screen will pop up to confirm your Scheduled time you selected.

Here you can update the time window, add in any notes, or mark the service with a permanent route, promised or confirmed.

Clicking Update will schedule the service, and the Quick Fit Scheduler window will close.

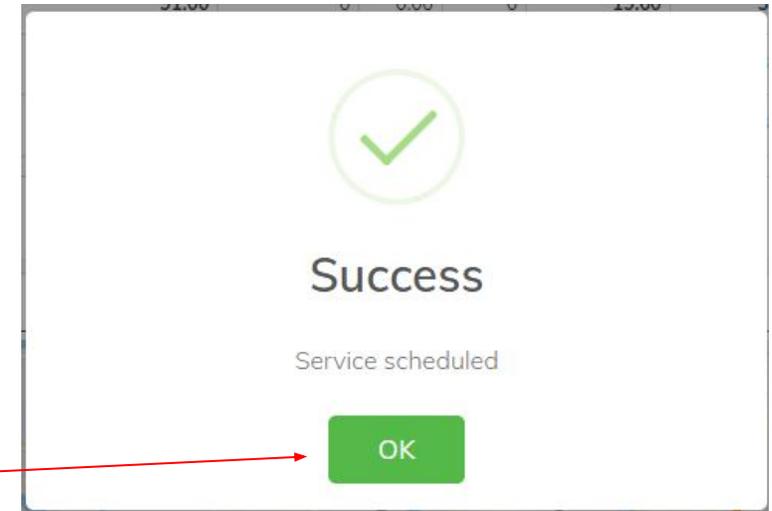
Update Schedule

Route: MRT    Schedule: 1/30/2025    Time: 08:15 AM     Set Permanent Route     Promised     Confirmed

Time Window: [ ] to [ ]    Set Time Window (+/-): 30 Minutes

Directions: [ ]    Invoice/Worksheet Notes: Note Here

Program Notes: [ ]    Job Notes: [ ]



# Scheduler

Scheduler will now be updated with the time you chose.

Selected: 01/30/2025 8:15 AM Route: (MRT) Assigned To: () Customer: Mike Bowen Address:

Icon Key:        

< 30 January 2025 >

Day Week Work Week Month Flex

MRT

All day

8:00 AM

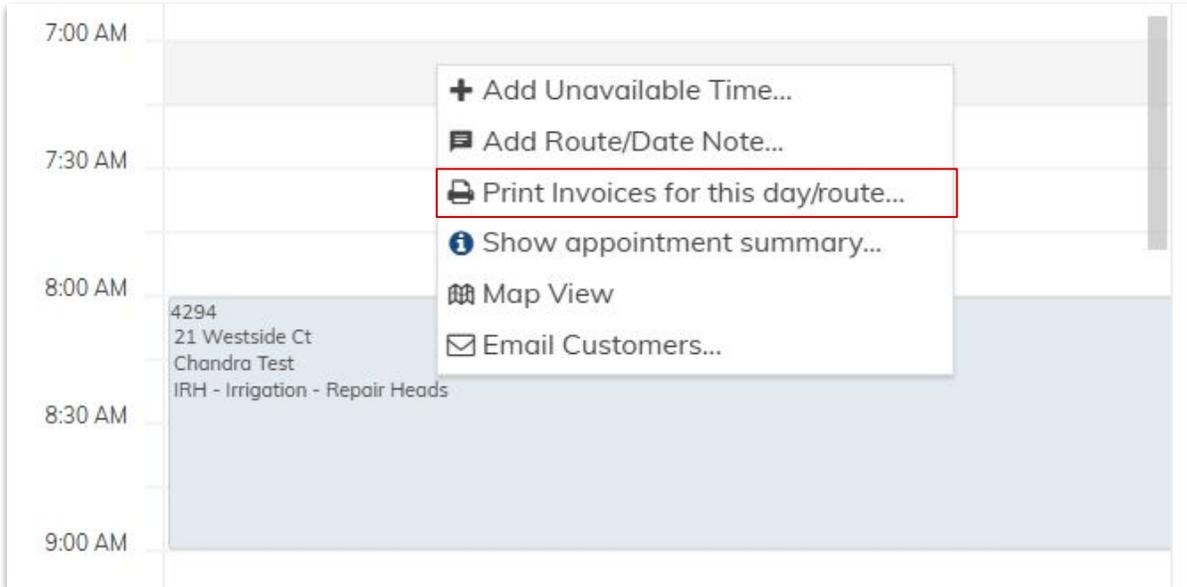
8:30 AM 215  
Mike Bowen  
IRS - Irrigation Startup

9:00 AM

9:30 AM

# Generating Work & Invoices

# Generating Work & Invoices

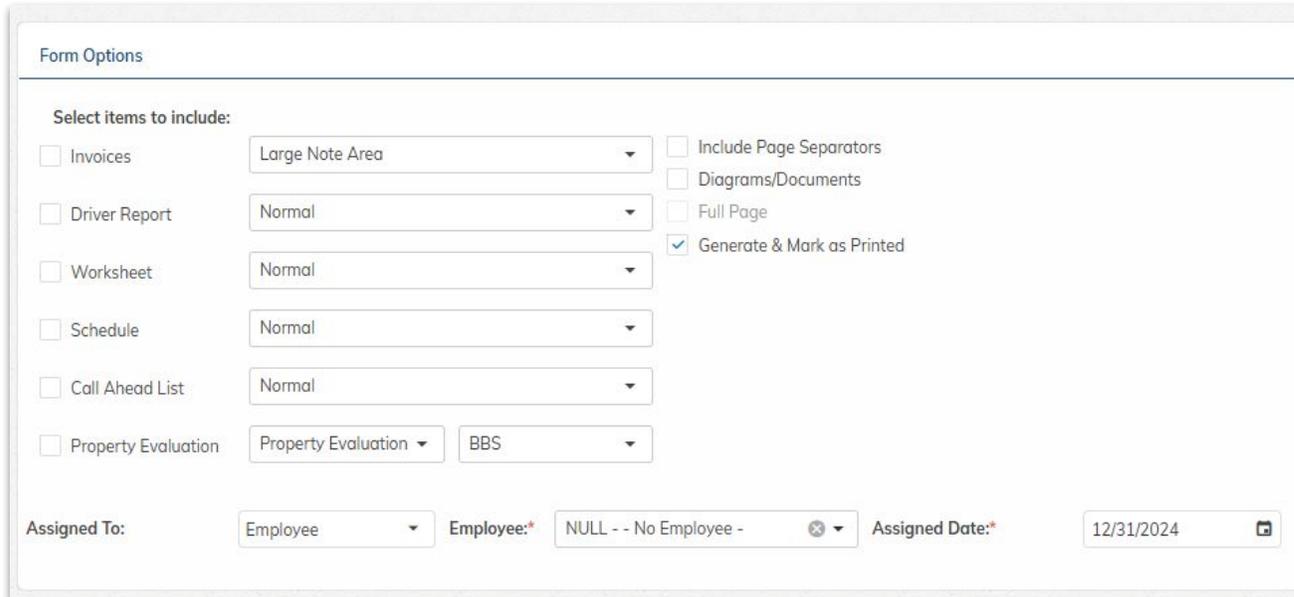


Generating work and processing Invoices in the Scheduler is very similar to that of Step 3 in the Invoice Printing wizard.

First you will right click on the day and route you want to generate work for, then choose the option for Print Invoices for this day/route.

*Please note* that you do not need to print an invoice as a part of this process. You can email an invoice or simply bypass the invoice to just generate the work for the route.

# Form Options



Form Options

Select items to include:

- Invoices Large Note Area
- Driver Report Normal
- Worksheet Normal
- Schedule Normal
- Call Ahead List Normal
- Property Evaluation Property Evaluation BBS

Include Page Separators  
 Diagrams/Documents  
 Full Page  
 Generate & Mark as Printed

Assigned To: Employee Employee\* NULL - - No Employee - Assigned Date\* 12/31/2024

The first form option on this page is the Invoices. This is where you will choose which invoice to generate, if needed. If an invoice is not needed, you can simply check the box to 'Generate & Mark as Printed" to generate the work without an invoice.

Next is the Driver Report and Worksheet. These documents are designed to be used by the technicians when an invoice is not needed. These documents give the technicians in depth information about the customers they are to service that day. The difference between the two is that Driver Report includes pricing, while the worksheet does not.

The Schedule is a high level outline of the stops for the route in the appropriate order as created on the Scheduler.

The Call Ahead List generates a list of customers who need to be notified ahead of performing the service.

Fill out the Employee that is to do the work, and the date the work is scheduled to be completed.

# Sales Messages

Sales Messages

Sales Message 1:	Sales Message 1	Sales Message 2:	Lawn Care Check List
Sales Message 3:	Sales Message 2	Sales Message 4:	Nothing selected

In the Sales Messages section, you can choose to include an upsell Sales Message on the Invoice. If you want to use one, you will first need to set it up under Settings > Invoice/Statement Message Gallery.

Upsell messages can be tied to specific services. If the customer already has the service within this area, the invoice will not show on the Invoice.

You can also use this area as a request to have your customer review your company on your preferred review site.

# Invoice Options

Invoice Options

**Include:**

<input checked="" type="checkbox"/> Logo	<input type="checkbox"/> Print Driver Initials Box
<input checked="" type="checkbox"/> URL	<input checked="" type="checkbox"/> Print Payment Request Message
<input checked="" type="checkbox"/> Name	<input checked="" type="checkbox"/> Print Continuous Service Message
<input checked="" type="checkbox"/> Phone	<input checked="" type="checkbox"/> Hide Payment, NPS, Adjustments and Installments
<input checked="" type="checkbox"/> Address	<input checked="" type="checkbox"/> Print "Please have technician call me"
<input checked="" type="checkbox"/> Print Remit Barcode	<input checked="" type="checkbox"/> Assign To Technician
<input checked="" type="checkbox"/> Print Credit Card Panel	<input type="checkbox"/> NPS
<input checked="" type="checkbox"/> Print Overdue Message	<input type="checkbox"/> Print Property Dimensions
<input checked="" type="checkbox"/> Print Email	<input type="checkbox"/> Print Customer Signature
<input checked="" type="checkbox"/> Include Service Feedback on Reprints	

Do not print remit amount unless it is at least:

Previous Balance:

History Cutoff:  

Print Products:

Days Until Due:

Printer Offset:  Inches

In the next section are the options for what will show on the invoice. A few areas to highlight...

- Override settings for whether the remit balance should appear if below a certain threshold.
- Whether products should be printed and if they should be printed on the technician portion of the invoice and/or for the customer.
- You can override the default for days until the payment is due.
- If printing, make adjustments to how printed elements align vertically on the invoice paper.

# Linked Documents & Generate

Linked Documents

Save Linked Documents

Description:

Category: \*

File Name: \*

Email Documents

Reply Email Address:

Subject Line Text:

Message Body Text:

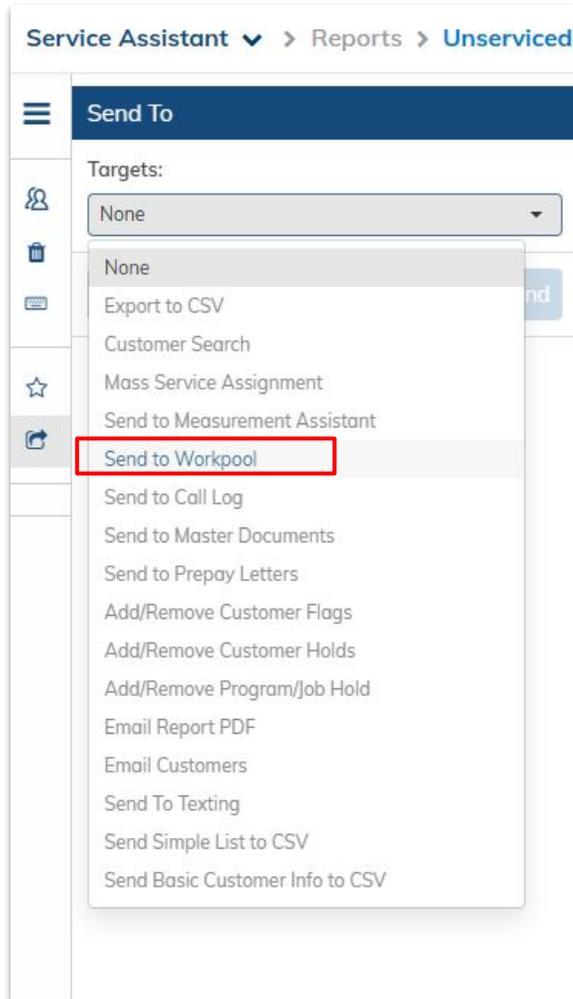
In the Linked Documents Section, you can decide to save a copy of the Invoice to the customer's account, or email the invoice to the customer once you click Generate.

Please note that if you choose to email the invoice, it will use the Basic Invoice template found under the Form Options section.

Once you are ready to generate the work/invoice, you will click the Generate button. From this page you can click the Printer icon to print the invoice or additional forms. 'More settings' will give you the option to specify the paper size you are printing on.

# Reports

# Reports



These Scheduling Reports can send jobs to the Workpool:

- Unserviced List
- Skipped Services
- Services On Hold
- Service Call Pending
- Scheduled Services Report
- Discount/Surcharges Remaining
- Call Ahead Customer Report

# 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

