RealGreen®
by WORKWAVE®

Service Assistant Scheduler 101

BEYOND SERVICE
CUSTOMER CONFERENCE '26

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.

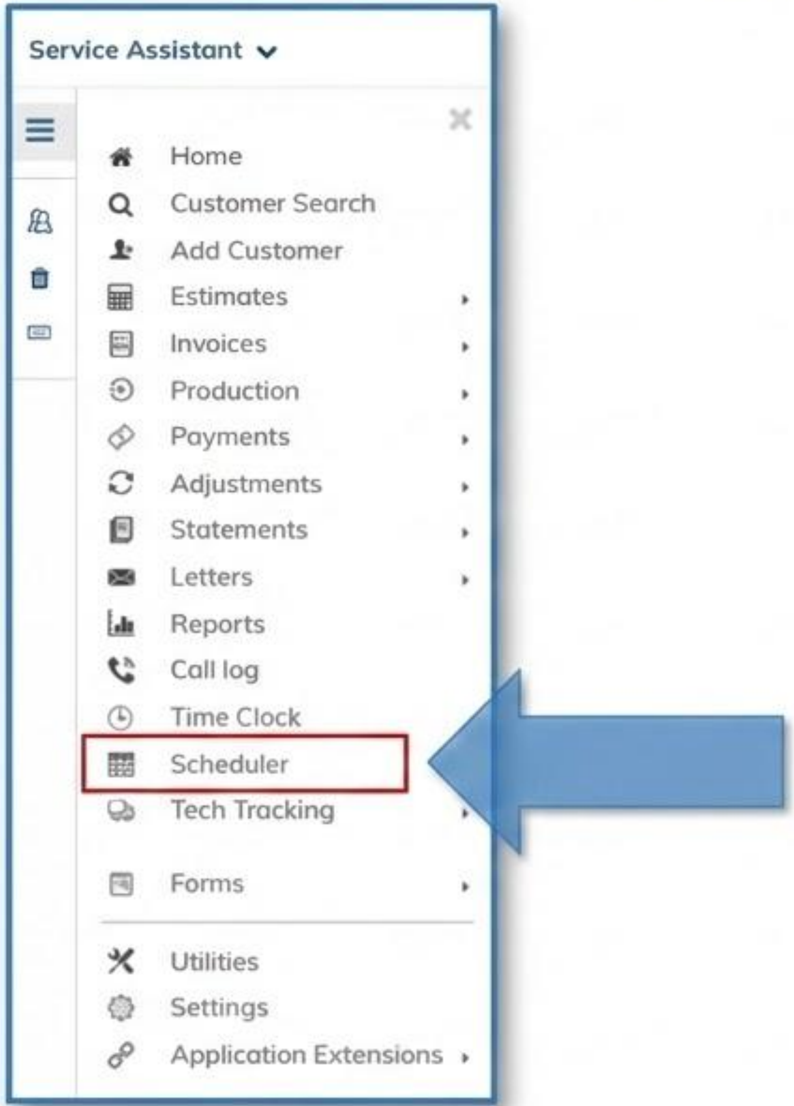
This tool is beneficial for those who provide services where the customer is required for access to the property or where customers are needed to authorize work or sign off on the completion of the service.

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

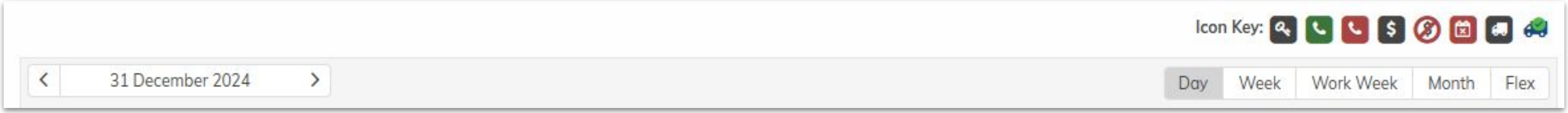
Accessing Scheduler



To access Scheduler:

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

Scheduler Views Top Bar



Scheduler View

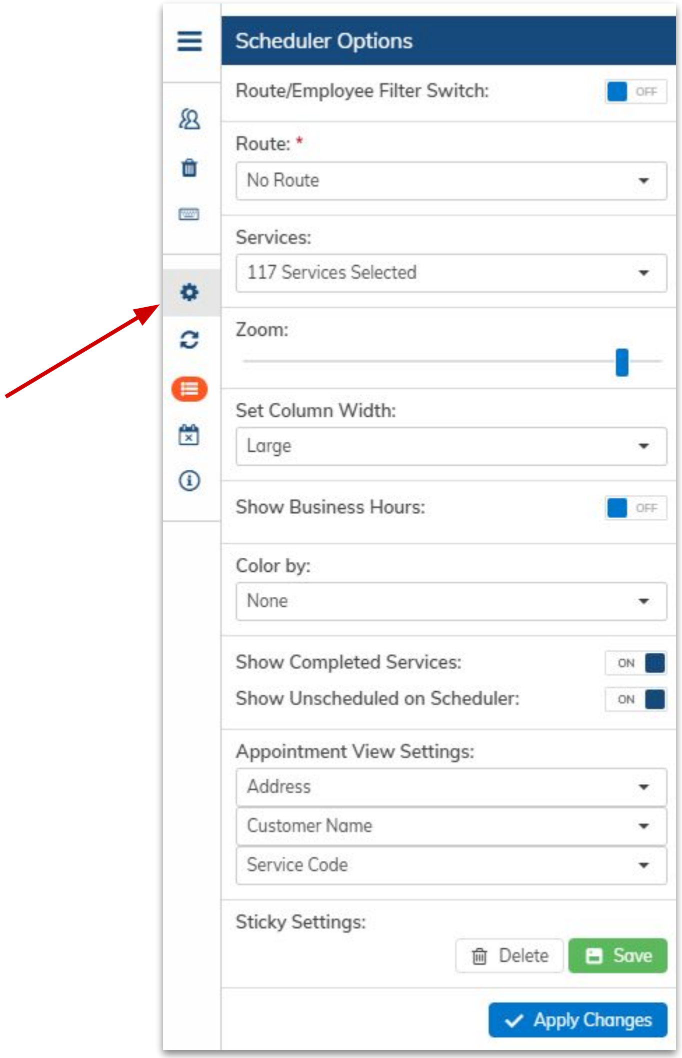
- Day
- Week
- Work Week
- Month
- Flex: View appointments by route for variable days based on a range or manually selected days.

The date picker on the left will 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

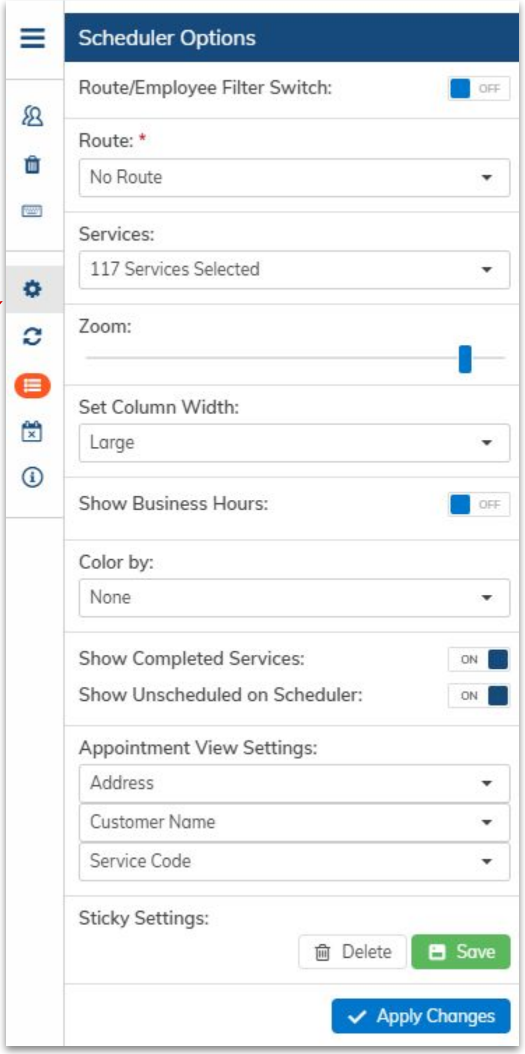


Filters

- **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.

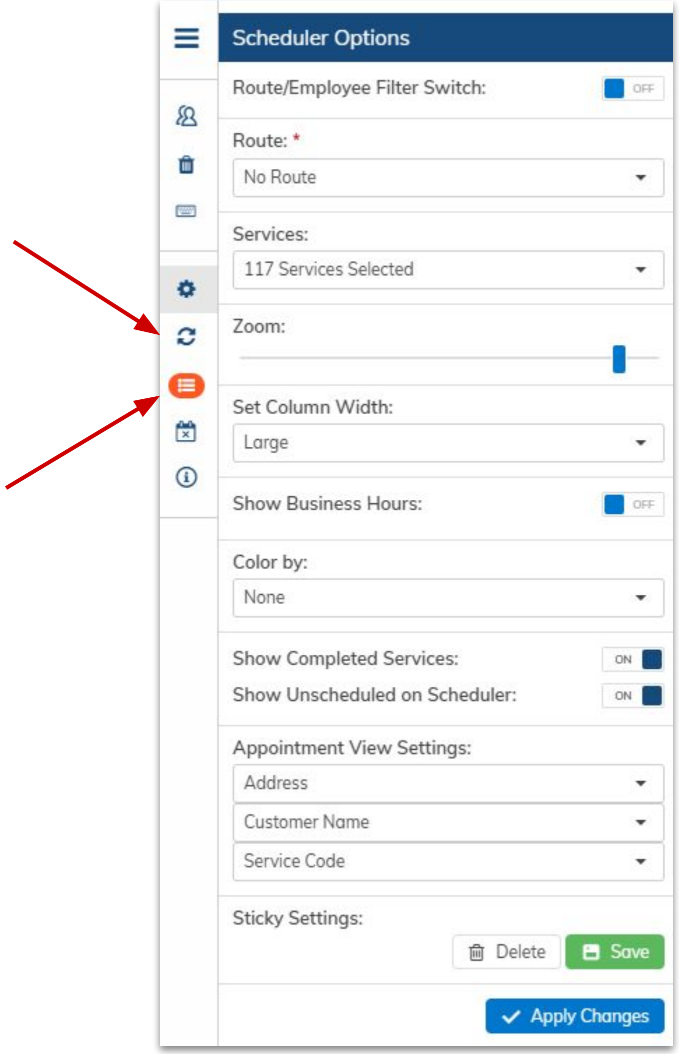
Scheduler Options



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.

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

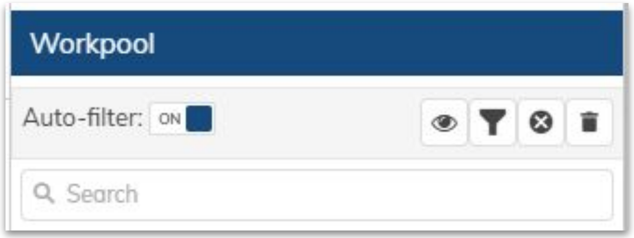
Auto-filter: Toggle the switch on or off to filter by the selected appointment's route/employee.

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.



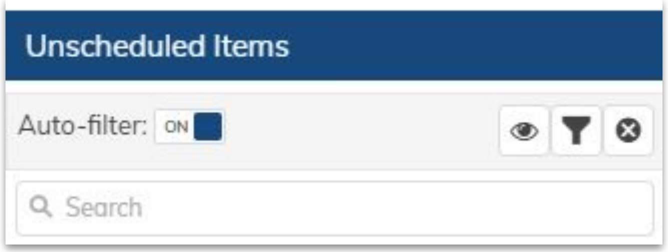
Unschedule Items

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.

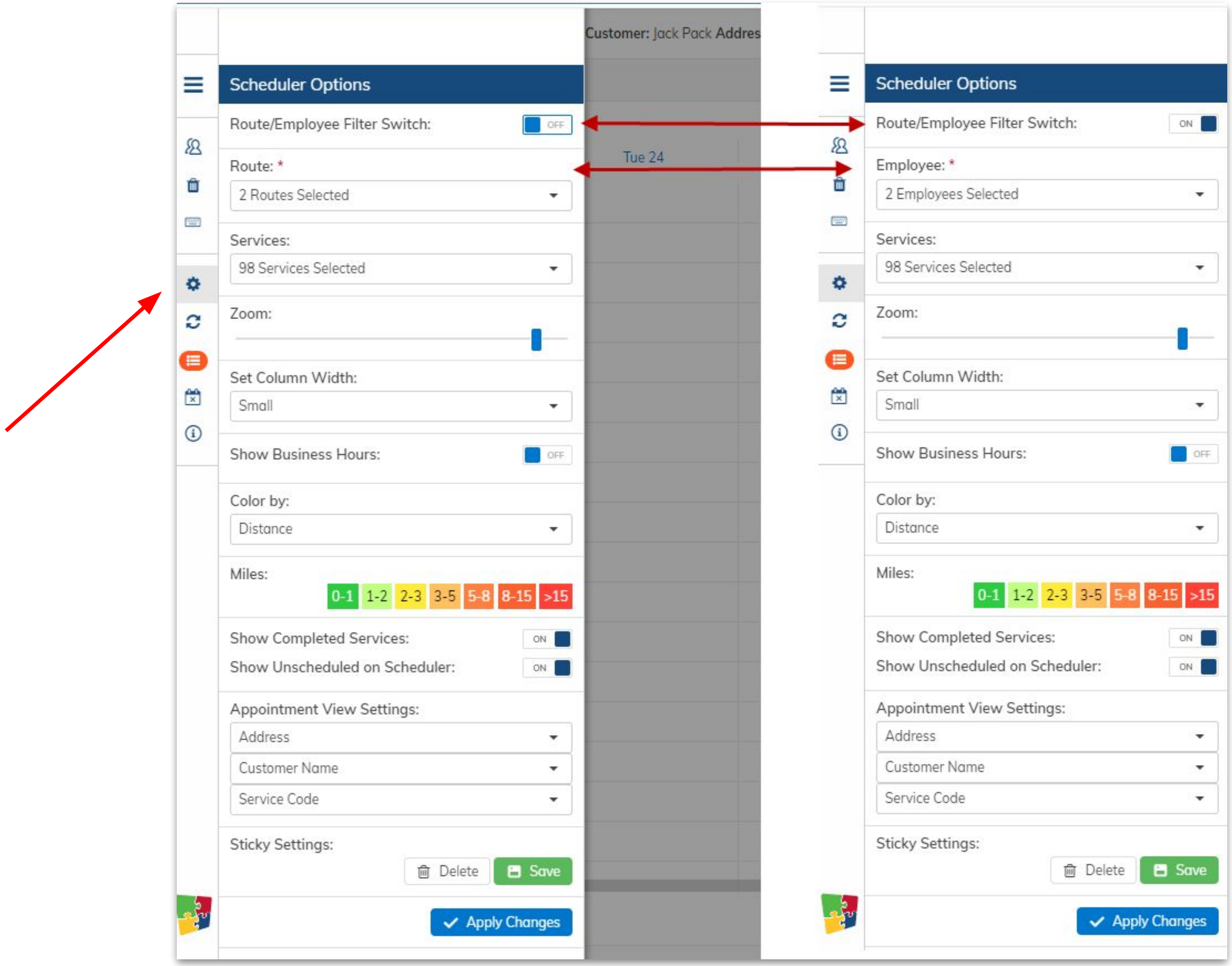
Manual Associations: At least one of the services needs to have the employee assigned.

Scheduler by Employee

To view scheduled work
by employee instead of route

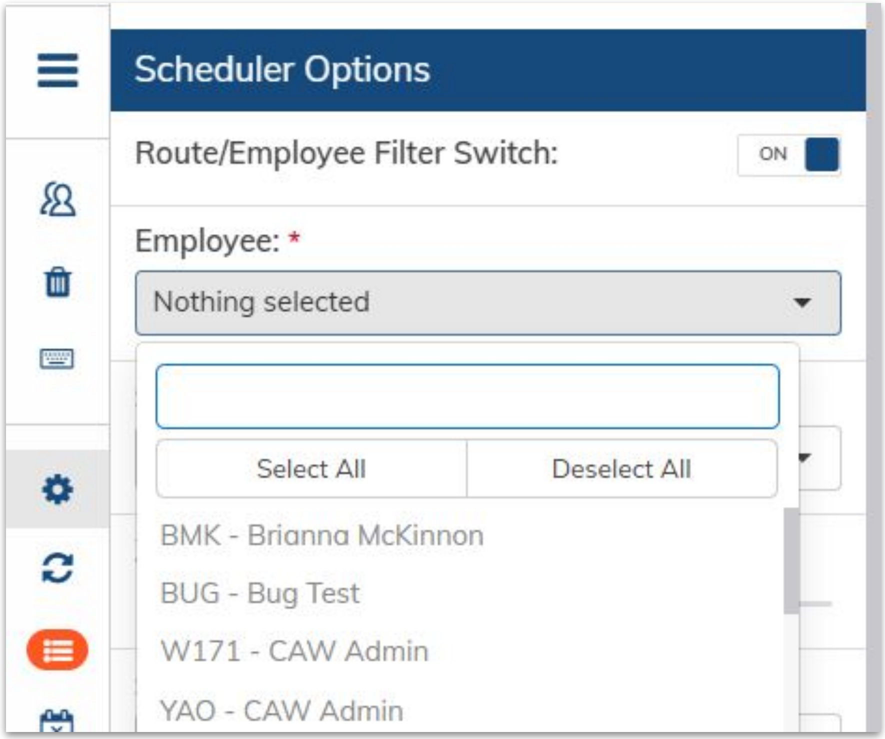
Viewing Scheduler by Employee

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



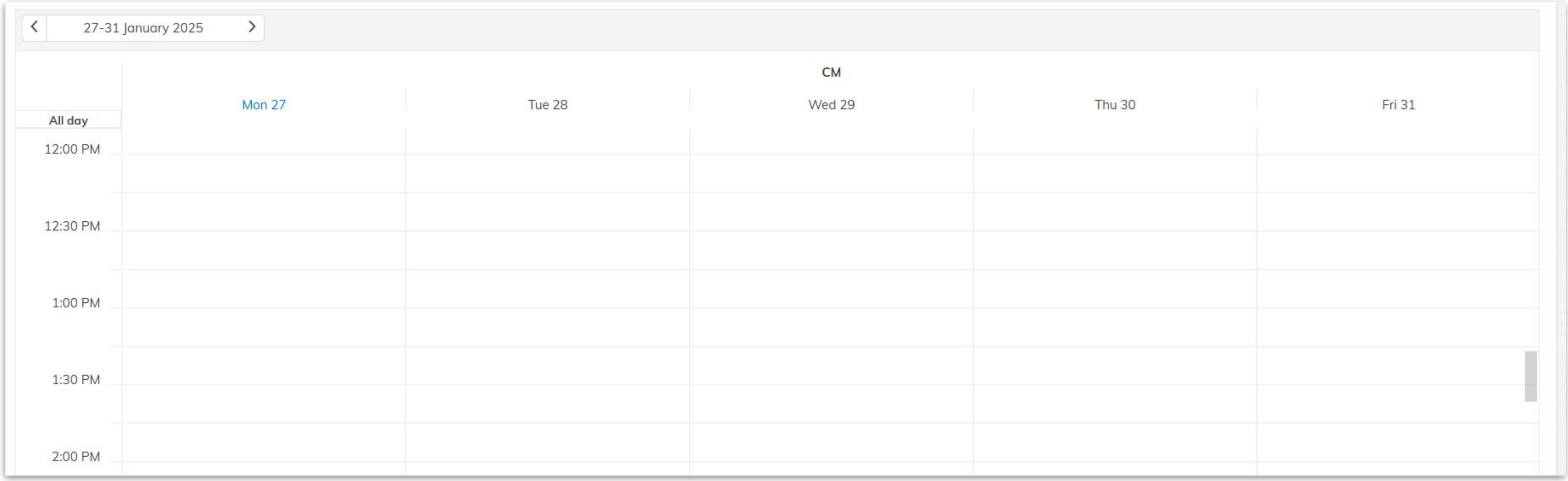
Viewing Scheduler by Employee

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



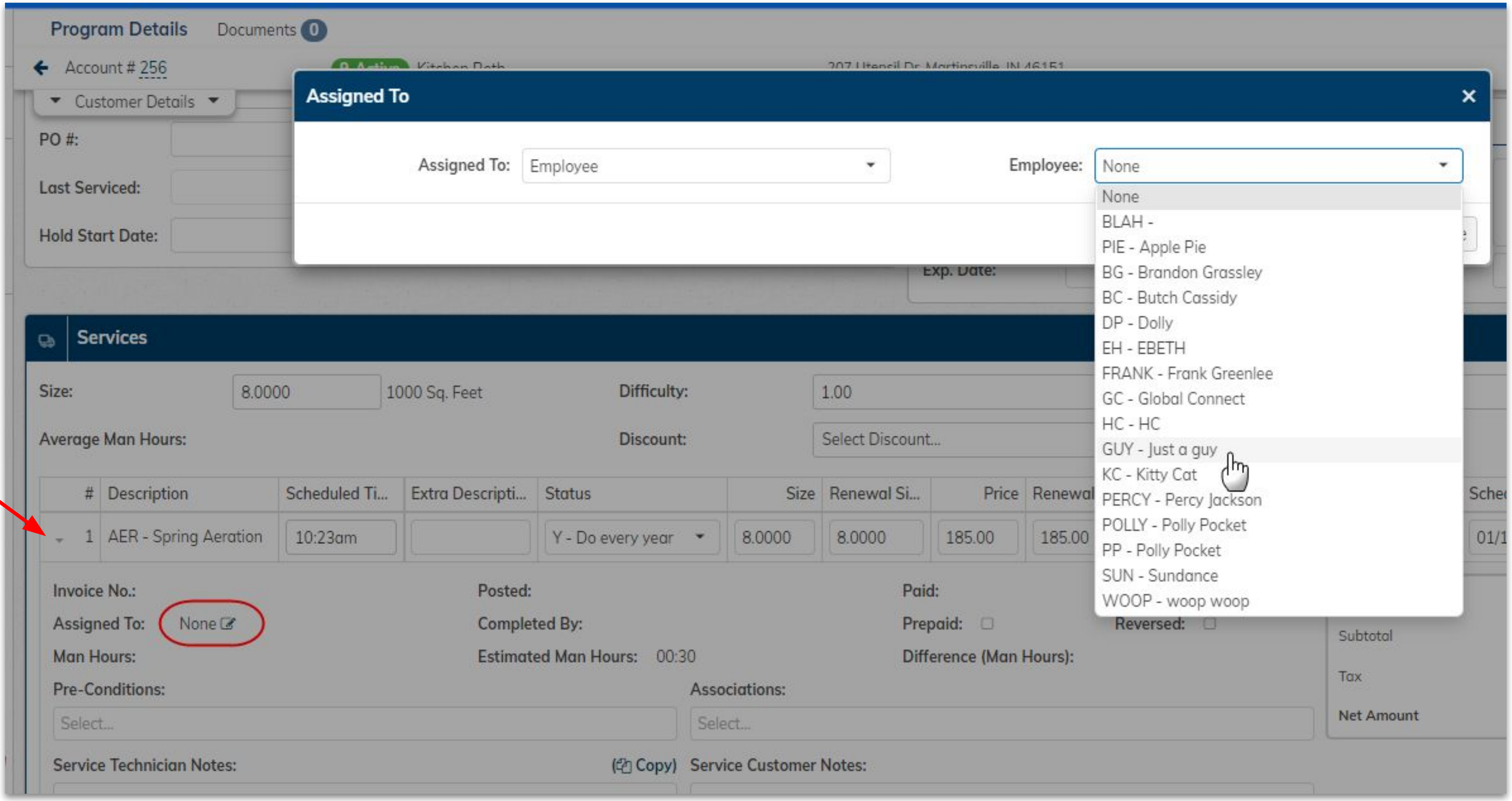
Viewing Scheduler by Employee

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



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.



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

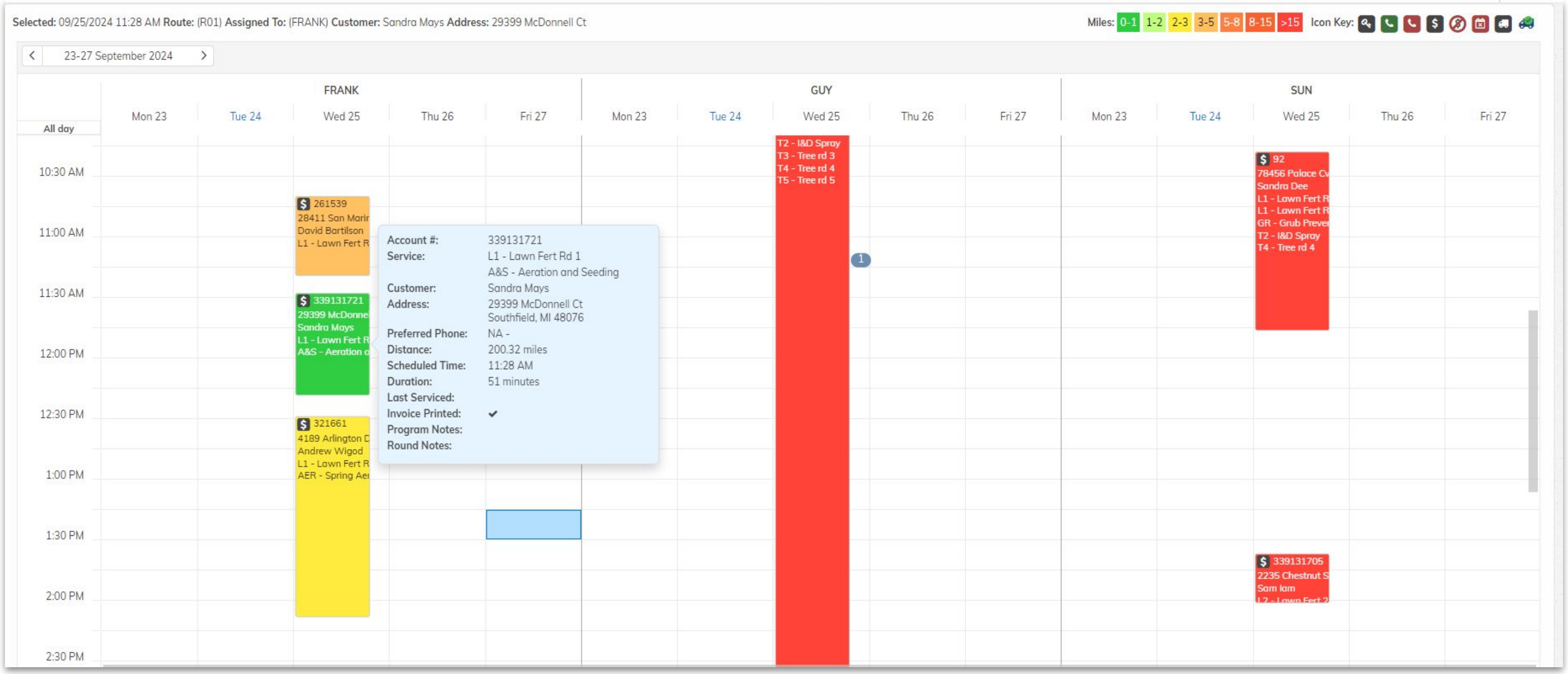
Work completed can be shown under scheduler options.

Branch Access Control

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

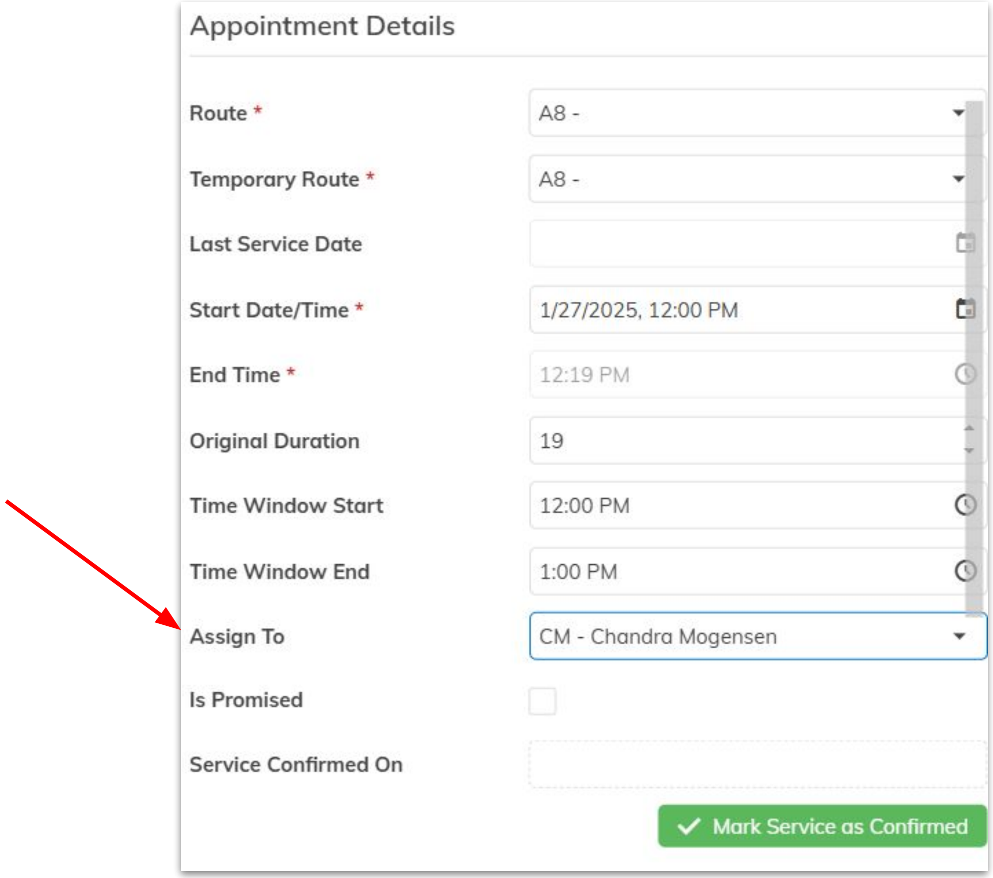
Scheduler by Employee Usage

Hover information will match what is shown by route.



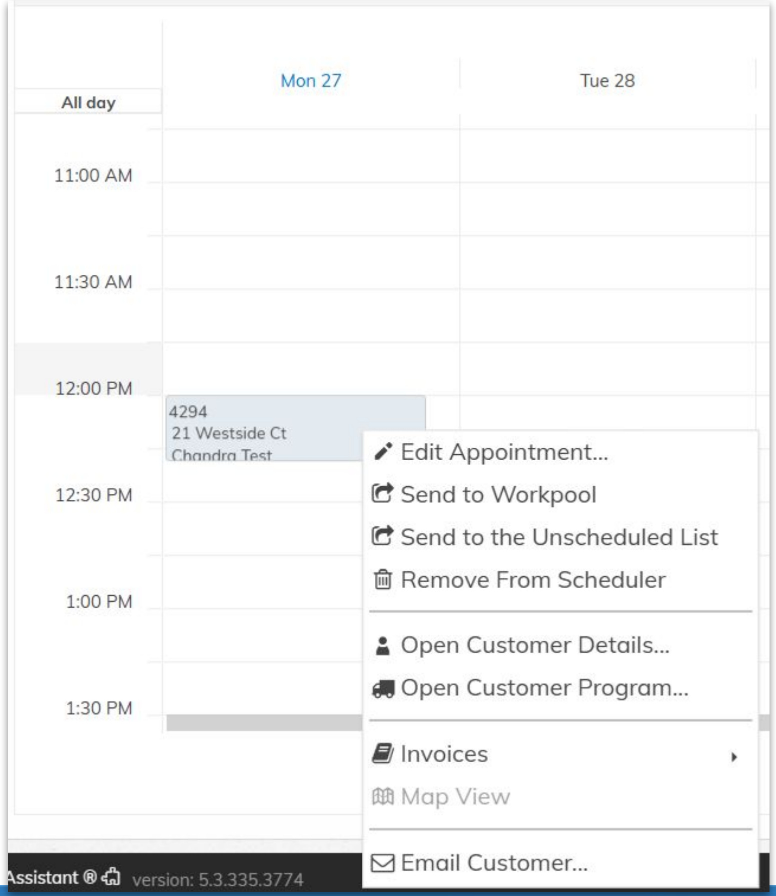
Scheduler by Employee Usage

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



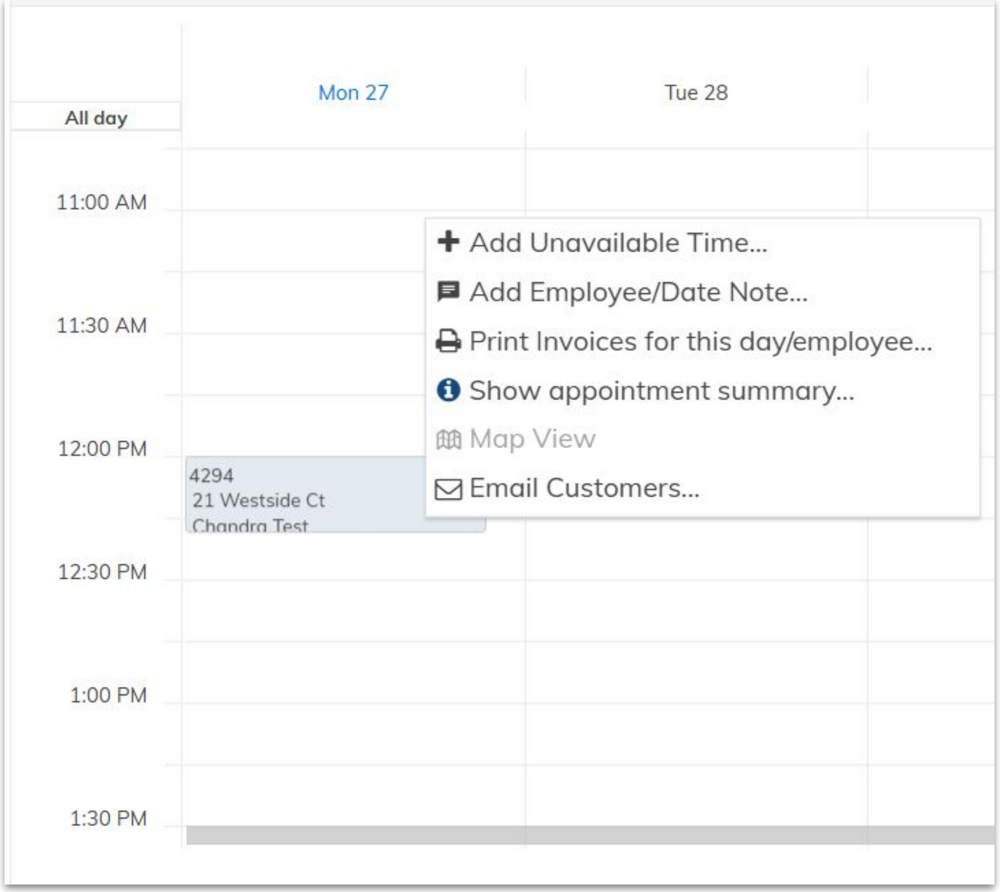
Scheduler by Employee Usage

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

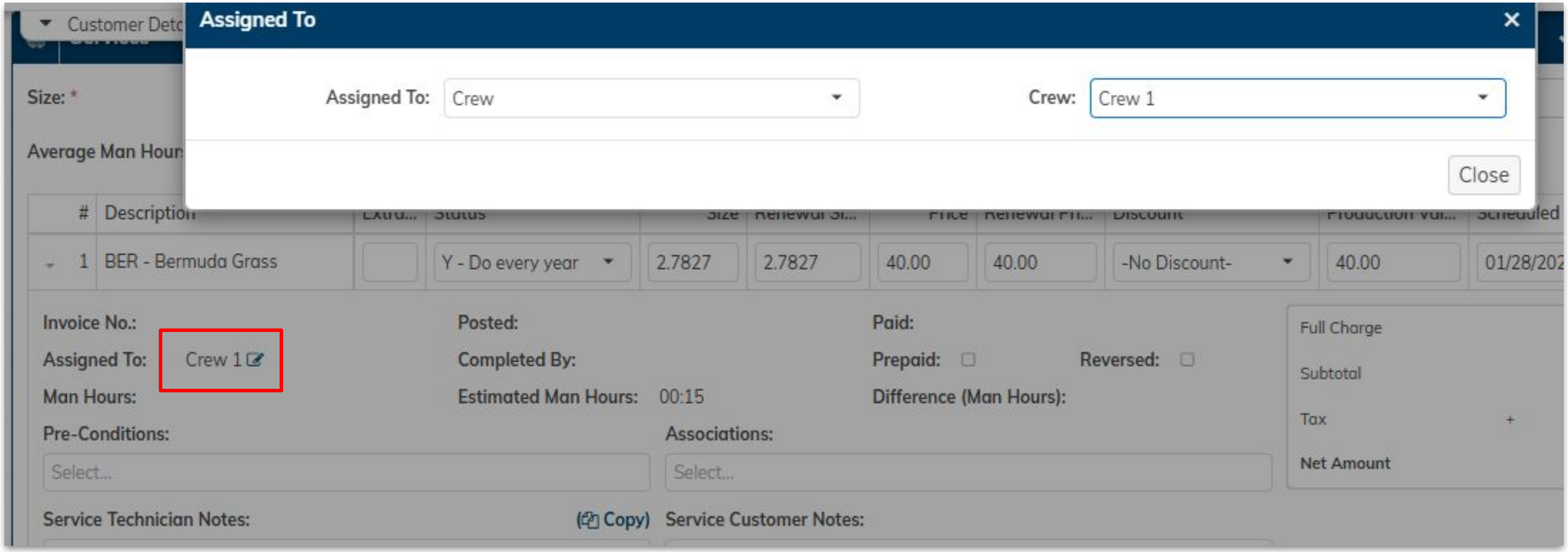
By right clicking on the scheduler, all options will show, minus ‘Map View’. Note that instead of adding a note to the route/date, you will add a note to the employee/date.



Scheduler with Crews

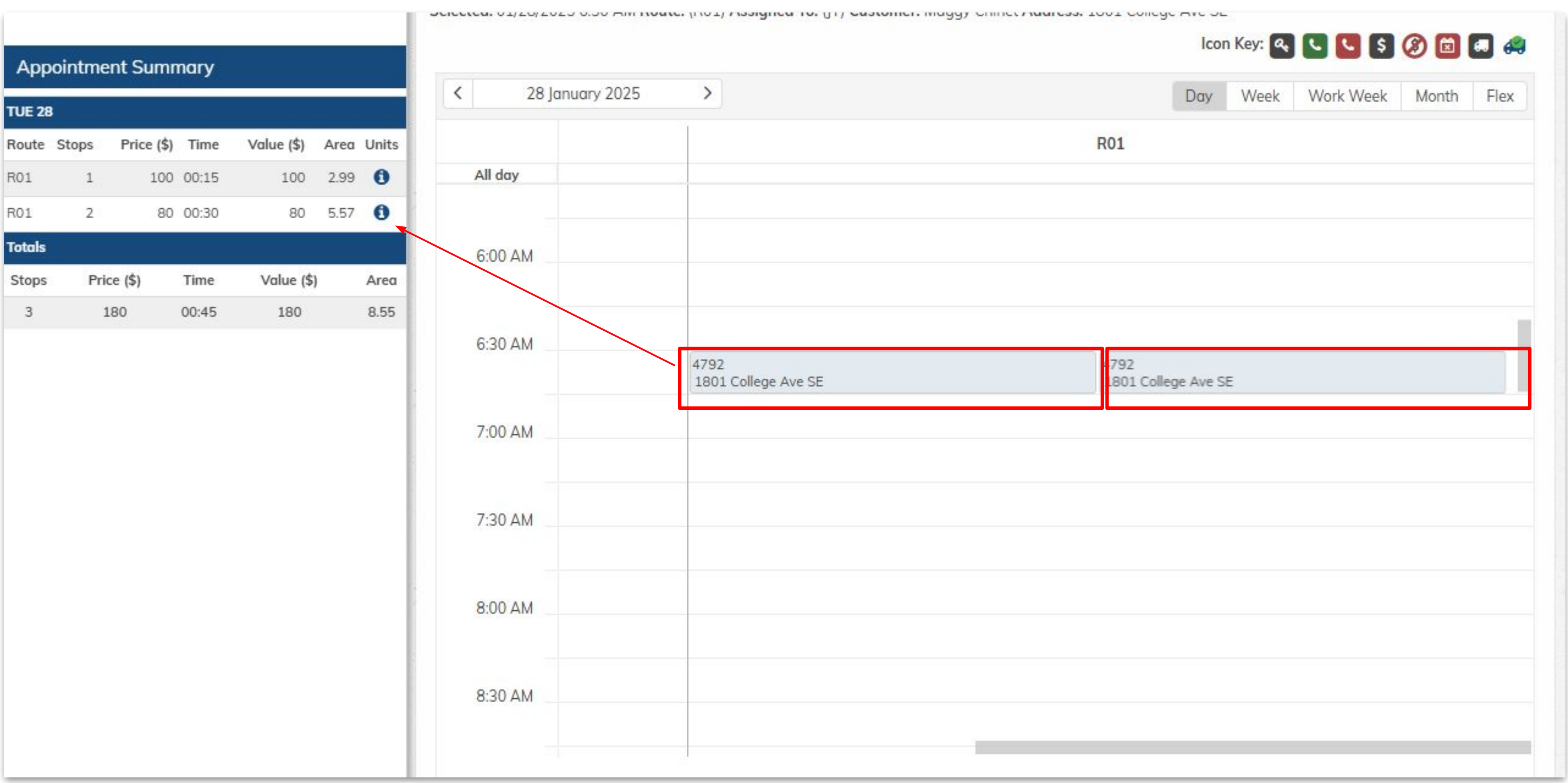
Scheduler with Crews

Crews can also be assigned to a service within Scheduler.



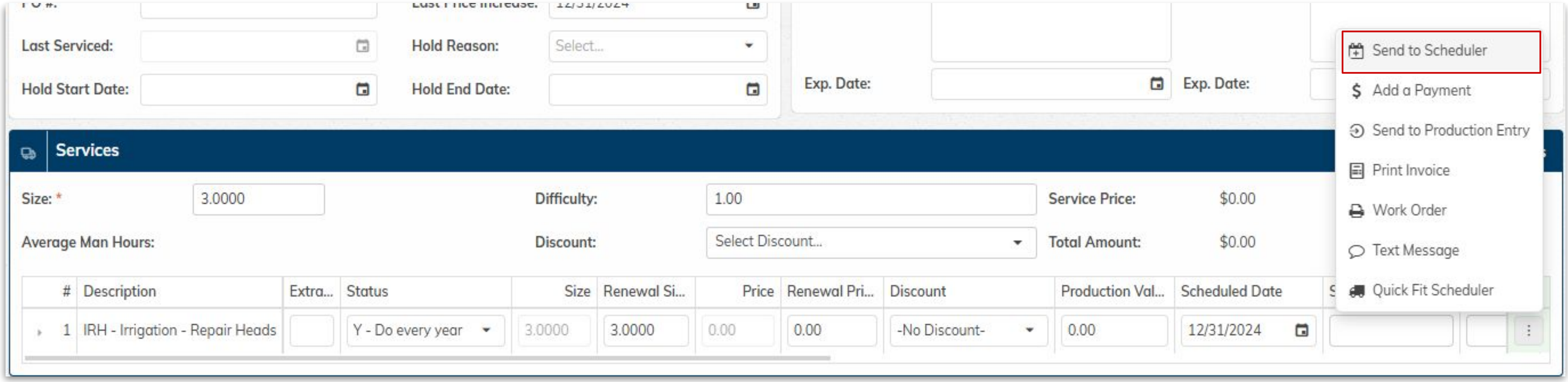
Scheduler with Crews

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.



Adding Services & Modifying Appointments

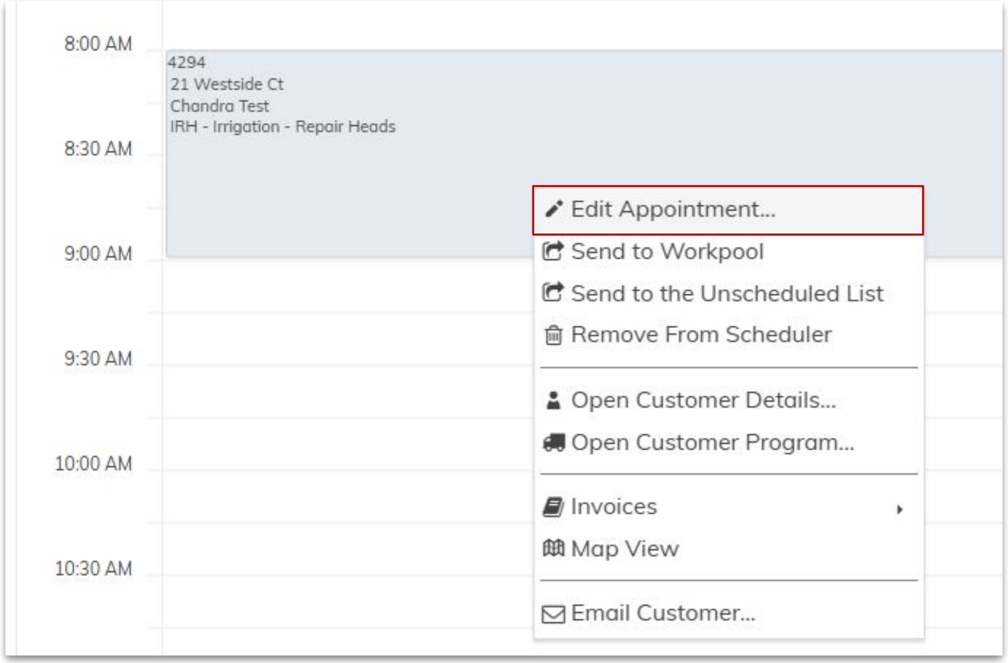
Sending Services to the Scheduler



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'.

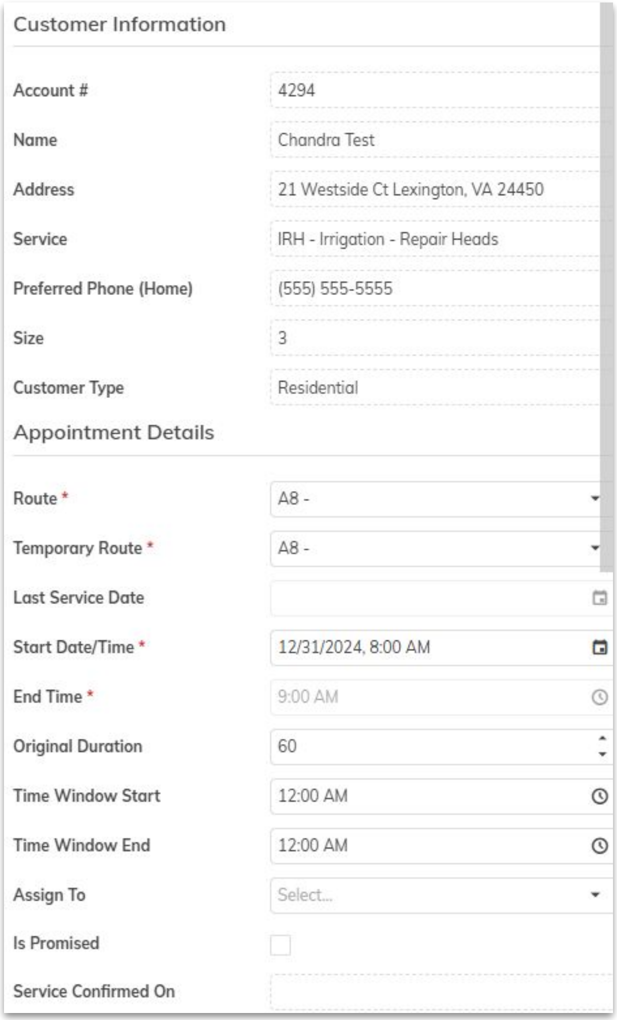
Modifying Scheduled Services

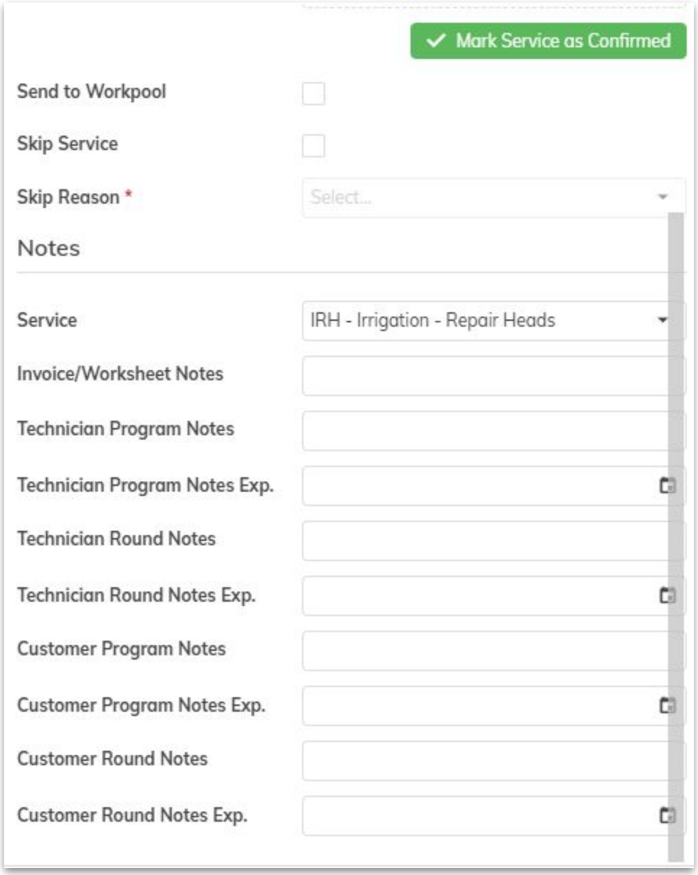


If you ever need to edit the details of an existing appointment, you can right click on the appointment and select "Edit Appointment…".

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



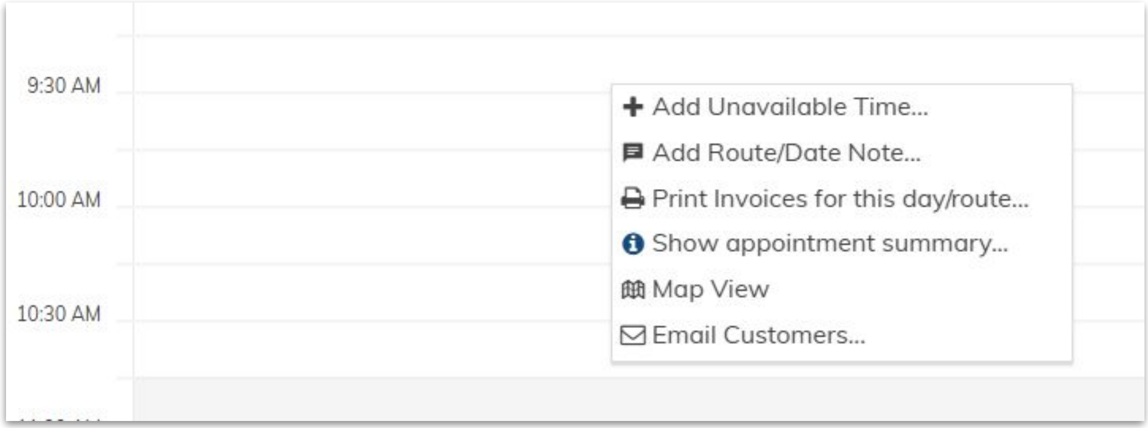


Within the Edit Appointment window, you can update the date and time of the service, in addition to the duration of the job.

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.

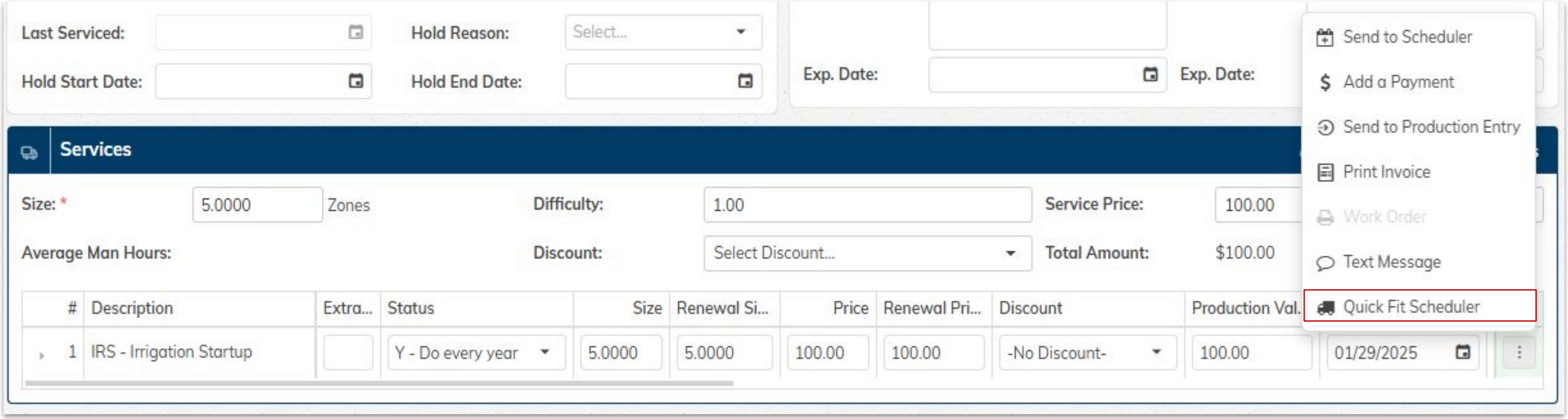
Add Unavailable Time will give you the ability to populate time that is not allowed to be booked with an appointment.

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.

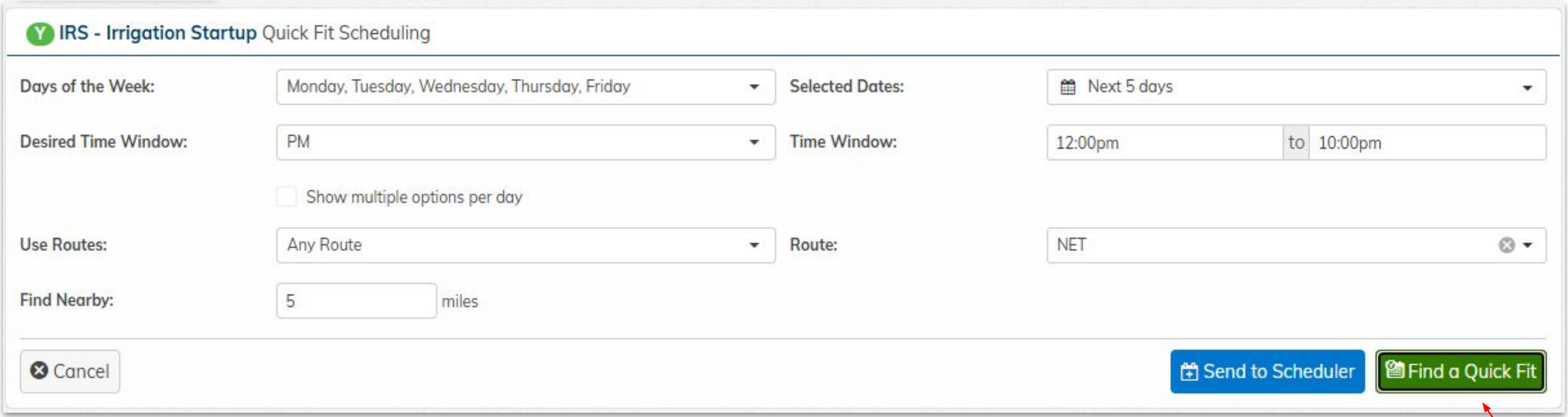
Quick Fit Scheduler

How To



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



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	Addl 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	Choose and Update
	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	Choose and Update
	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	Choose and Update
	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	Choose and Update
	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	Choose and Update

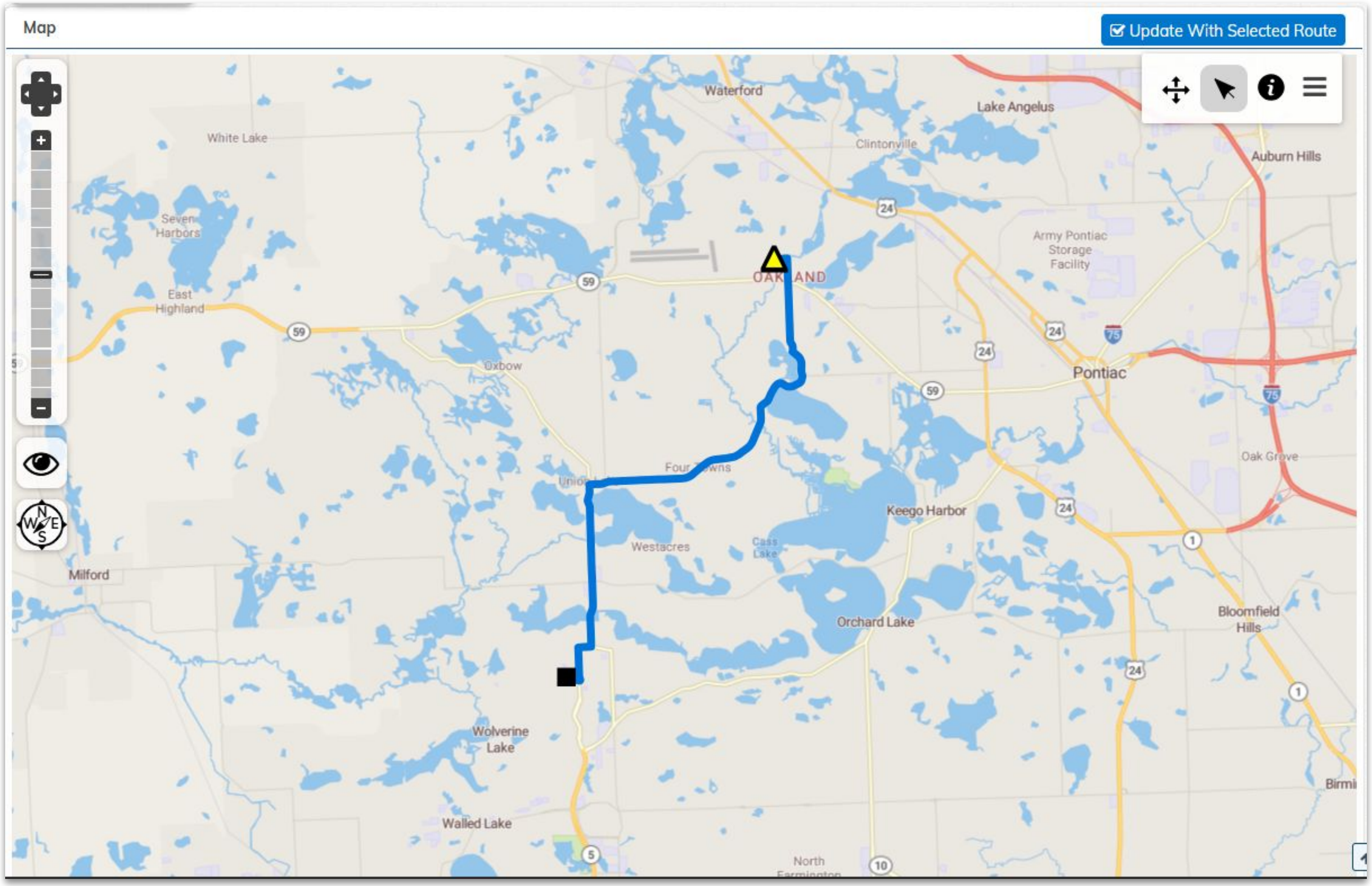
Get Next 5

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.

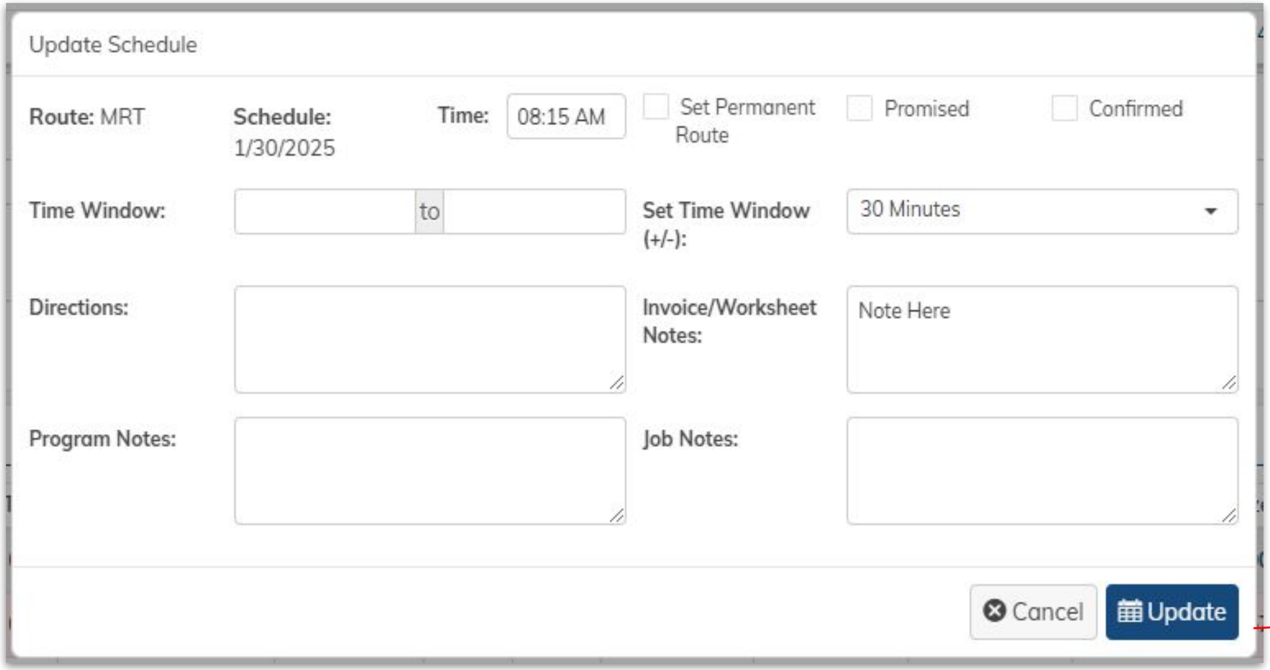
Once you have selected a time, you can click 'Choose and Update' under Available Routes or 'Update with Selected Route' to add to the Scheduler.

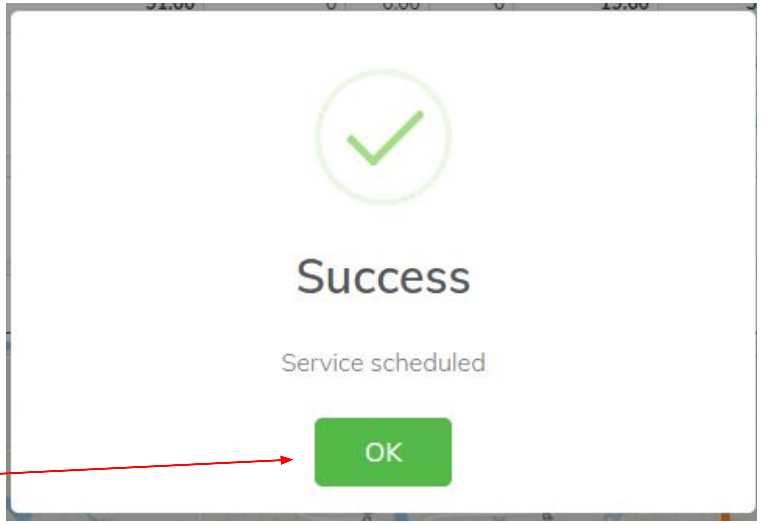
Update Schedule

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.

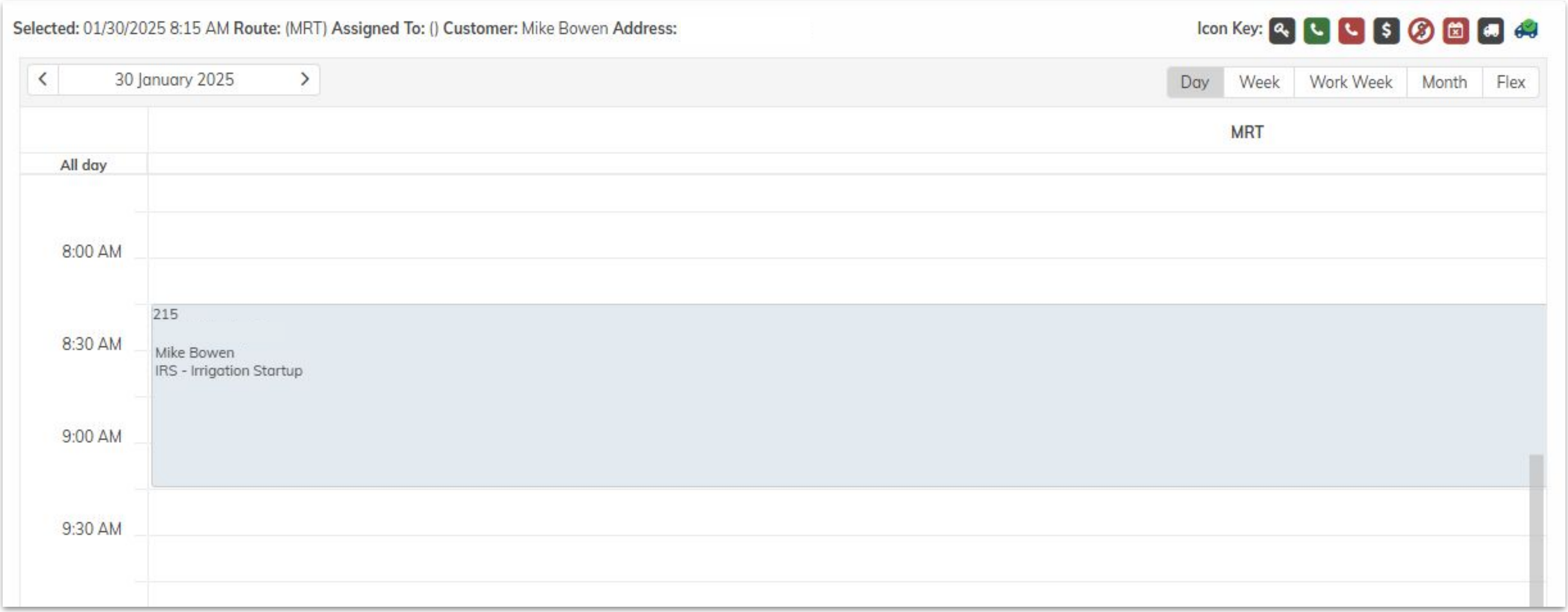
Clicking Update will schedule the service, and the Quick Fit Scheduler window will close.





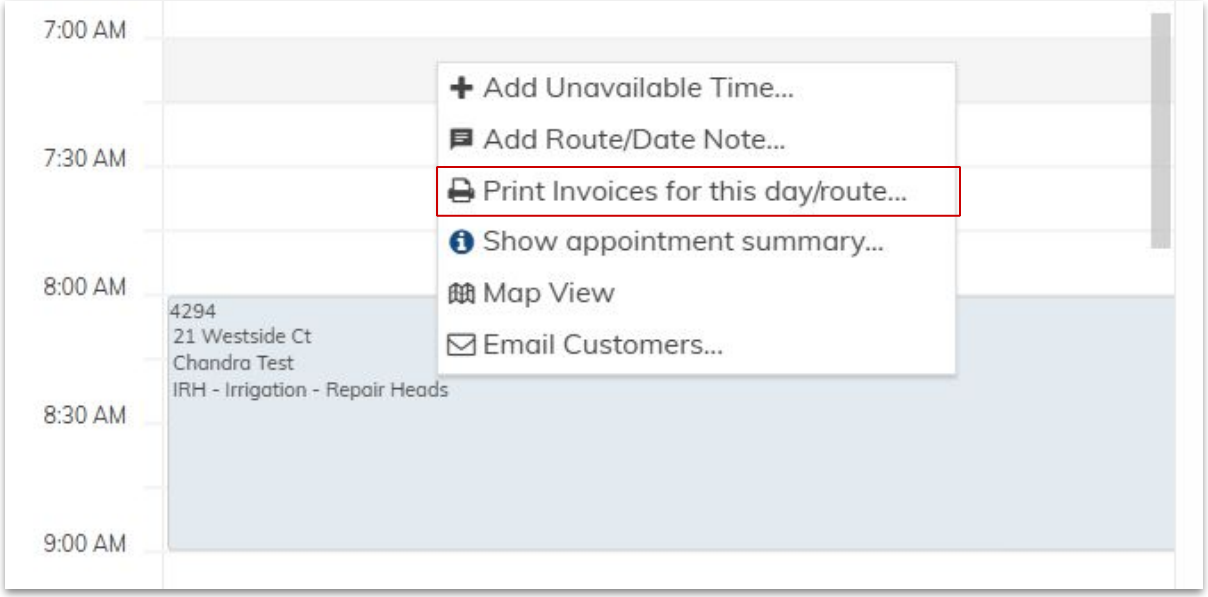
Scheduler

Scheduler will now be updated with the time you chose.



Generating Work & Invoices

Generating Work & Invoices

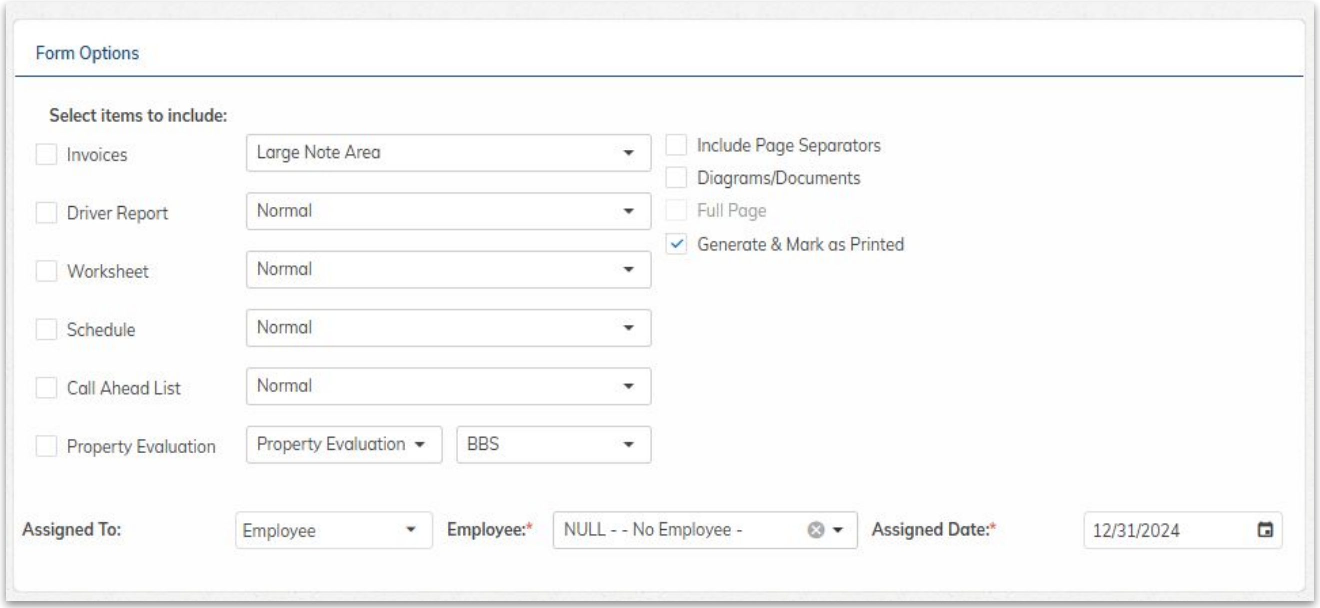


Generating work and processing Invoices in the Scheduler is very similar to that of Step 3 in the Invoice Printing wizard.

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



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.

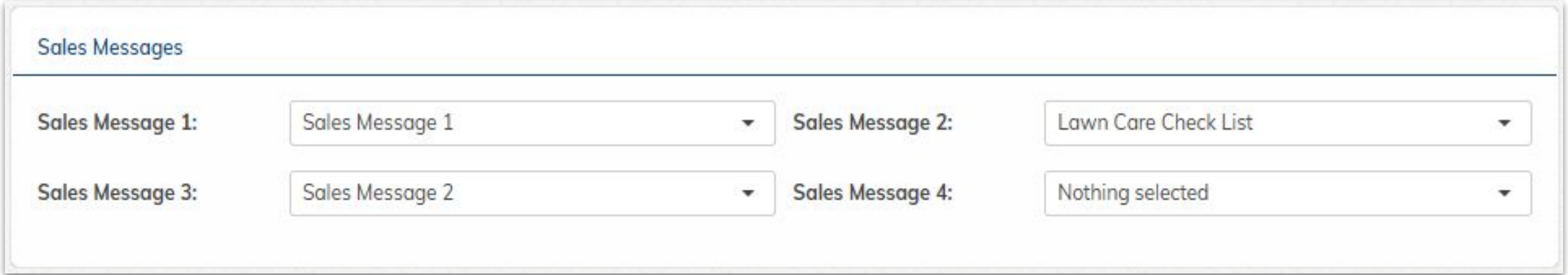
Next is the Driver Report and Worksheet. These documents are designed to be used by the technicians when an invoice is not needed. These documents give the technicians in depth information about the customers they are to service that day. The difference between the two is that Driver Report includes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

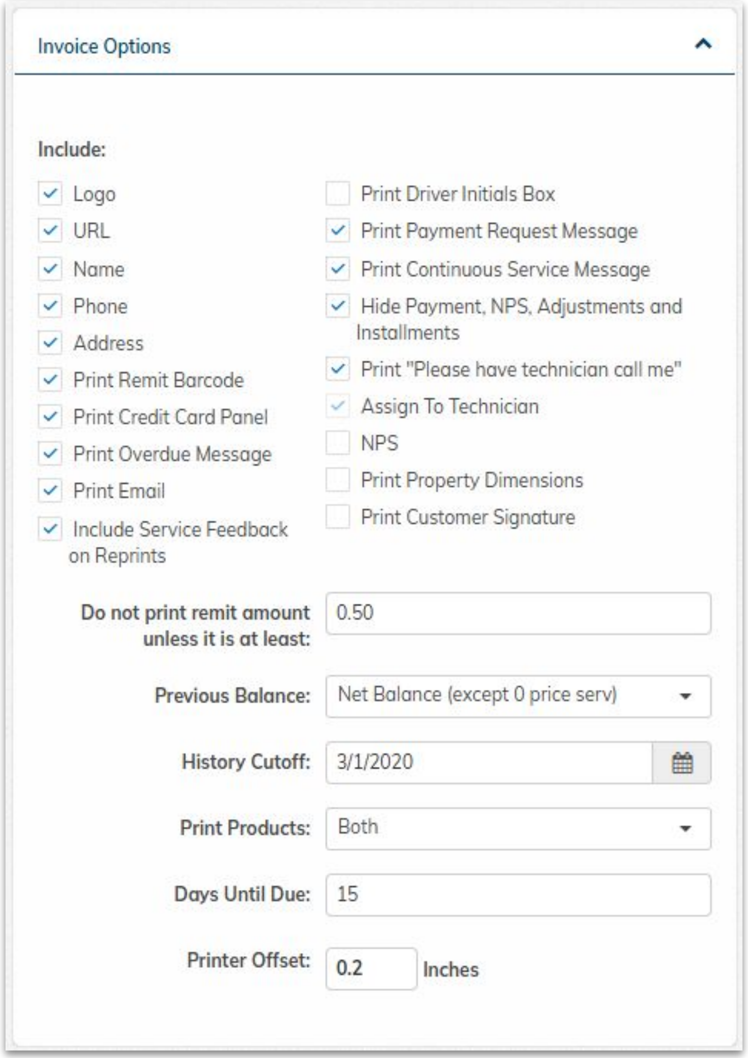


In the Sales Messages section, you can choose to include an upsell Sales Message on the Invoice. If you want to use one, you will first need to set it up under Settings > Invoice/Statement Message Gallery.

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.

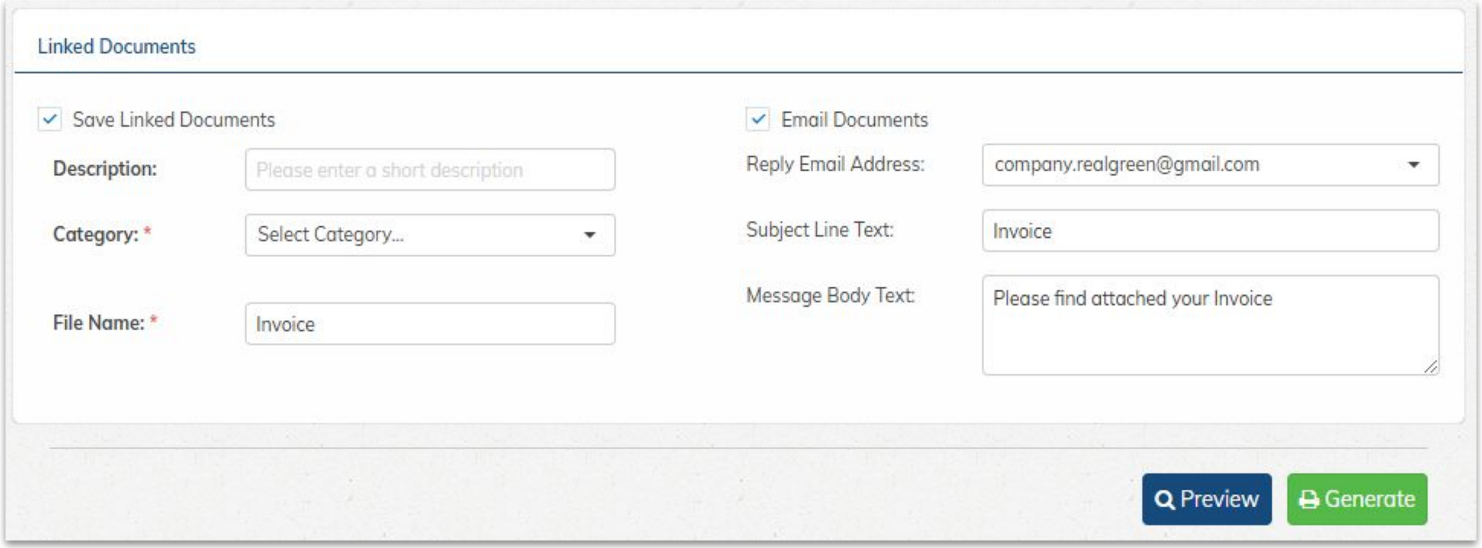
Invoice Options



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



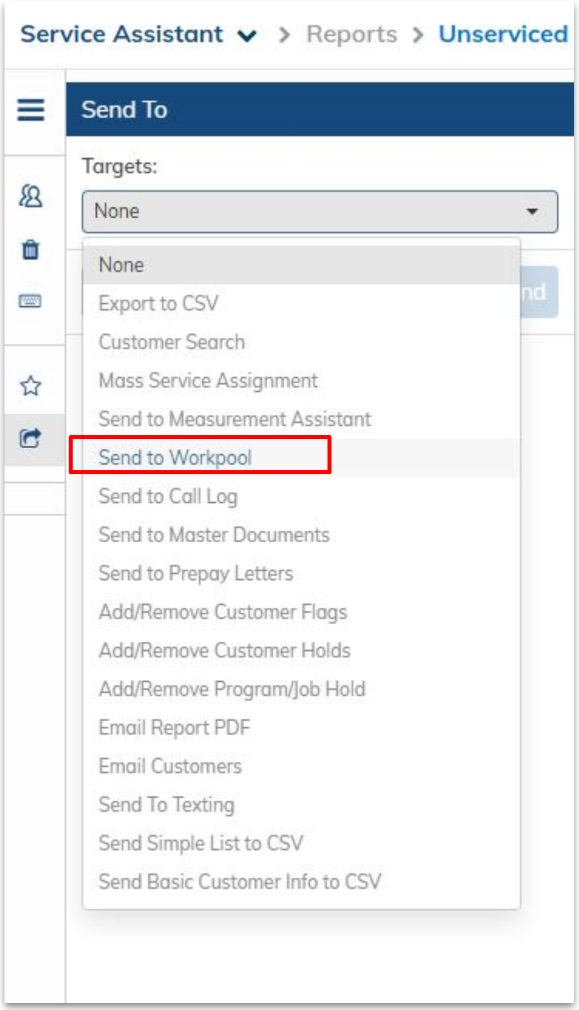
In the Linked Documents Section, you can decide to save a copy of the Invoice to the customer's account, or email the invoice to the customer once you click Generate.

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