



**Work Smarter, Not Harder
with Utilities**

Work Smarter, Not Harder with Utilities



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Utility Security

Other Security

Sections	View
Customer	<input checked="" type="checkbox"/>
Program/Special	<input checked="" type="checkbox"/>
Call log	<input checked="" type="checkbox"/>

- View/Edit Other User's Call Logs
- User Rules
- Send to WW Printing
- Forms Manager
- Access Form Notifications

Utilities

- Run Customer Utilities
- Run Price Increase Utilities
- Run Mapping/Carrier Route Utilities
- Run Marketing Utilities
- Run Program/Job Utilities
- Run Routing Utilities
- Run Call Log Utilities
- Run Parameter Change Utilities
- Run Product/Inventory Utilities
- Update Journal Limits
- Run Renewals

- In security settings, under 'Other Security'.
- Utility access is assigned by the 'type' of utility and not individually.

SA5 Utilities Landing Page

Service Assistant

- Home
- Customer Search
- Add Customer
- Estimates
- Invoices
- Production
- Payments
- Adjustments
- Statements
- Letters
- Reports
- Call log
- Time Clock
- Scheduler
- Tech Tracking
- Utilities**
- Settings
- Application Extensions

Filter By Utility Name

Utility Name	Description
Change Size Source	Change or update the size source of a customer.
Reverse Payments	Create an adjustment to remove an entire batch of payments from customer accounts.
Merge or Change Customer Accounts	Merge two customer accounts or change the account number of a single account.
Duplicate Customer Flag	This utility will add a selected flag code to older customers where a newer customer record exists...
Standardize Customer Names/Addresses	Utility to update customer names and addresses to proper or upper case.
Apply Unapplied Payments	This utility will take any unapplied payments and allocate them to unpaid services within customer...
Zip/Postal	This utility will update customer accounts to settings within the postal zip settings for branch...
No Call List Import	This utility will take a downloaded no call list and update any account with a matching phone numb...
Correct Prepayment Problems	Correct Prepayment Problems
Validate Customer Balances	Validate Customer Balances

Service Assistant version: 5.3.308.3723

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Request Technical Support

SA5 Utility Search

The screenshot displays the Service Assistant interface for 'Utilities'. At the top, there is a search bar containing the text 'price'. Below the search bar, the results are organized into two sections: 'Year End' and 'Parameter Change'. The 'Year End' section contains three items: 'Price Increase' (with an upward arrow and dollar sign icon), 'Price Chart Increase Utility' (with a dollar sign icon), and 'Correct Renewal Prices' (with an upward arrow and refresh icon). The 'Parameter Change' section contains one item: 'Product Price Increase' (with a circular arrow and dollar sign icon). Each item includes a brief description of its function. The interface also features a sidebar on the left with navigation icons and a footer with version information and copyright details.

Service Assistant

Utilities

price

Year End

- Price Increase**
Increase the price of a service or program.
- Price Chart Increase Utility**
Allows price charts to be increased by amount or percentage, will not affect existi...
- Correct Renewal Prices**
This utility will raise renewal prices that are lower than a current price to at least match..

Parameter Change

- Product Price Increase**
Increase the unit cost and or unit price of products by a percentage or dollar amount

Service Assistant version: 5.3.308.3723 © 2024 RealGreen by WorkWave. Request Technical Support

Customer Utilities

Customer



Update Units of Measure

Change or update the unit of measure of a customer.



Change Size Source

Change or update the size source of a customer.



Reverse Payments

Create an adjustment to remove an entire batch of...



Merge or Change Customer Accounts

Merge two customer accounts or change the account number.



Duplicate Customer Flag

This utility will add a selected flag code to older customers...



Update Customer Since Date

Update the since date of customers to creation, earliest...



Standardize Customer Names/Addresses

Utility to update customer names and addresses to...



Apply Unapplied Payments

This utility will take any unapplied payments and...



Zip/Postal

This utility will update customer accounts to setting...



No Call List Import

This utility will take a downloaded no call list and...



Change Credit Limit

This utility allows you to change the credit limit locate...



Correct Prepayment Problems

Correct Prepayment Problems



Validate Customer Balances

Validate Customer Balances

Change/Merge Customer Account

- Can use to merge two customer accounts into one account
- Merges services, history, contacts, balances, etc.

Merge or Change Customer Accounts

Merge Customer Accounts | Change Customer Account Number

Customer Number : 317

3 317
2235 Sycamore St
Columbus, IN 47201

→ Switch

Merge into Customer Number : 339131705

9 339131705
Sam lam
2235 Chestnut St
Columbus, IN 47201

Cancel Merge Customer Accounts

Change customer account, can only be changed to a number not in use.

Merge Customer Accounts | Change Customer Account Number

Customer Number : 425

9 425
Mike Burlett
9015907168
350 Carrington Ave
Brighton, TN 38011

Change to Customer Number : 156

That Customer Number is Available.

Cancel Change Customer Account Number

Change to Customer Number :

15

That Customer Number is Not Available. Next closest available number is 104

Duplicate Flag Utility

Duplicate Customer Flag

⚠ This utility will add the selected flag code to older customer records where a newer customer record exists with the same address. When trying to remarket to old canceled and rejected estimates, you can then exclude these customers from prepay letters, postcards, etc

Branch: 2002 - MY OTHER COMPANY N... Flag Code: Duplicate Customer

Cancel Update

- Can add a flag code to old customer accounts where a newer account exists for the same address
- You can then exclude those customers from marketing

Update Customer Since Date

- Can change Customer Since Date to a more meaningful date
 - Earliest Transaction
 - Earliest Sold Date
- Use in conjunction with parameter setting in General Setup - Customer

The image shows a screenshot of the WorkWave CRM interface. At the top, there are two columns of checkboxes for field selection: 'Route', 'Subdivision', 'Home Phone', and 'Other Phone Number' on the left; 'Source', 'Directions', 'Business Phone Number', and 'Text Phone Number' on the right. Below these is a section for 'Other Options' with a dropdown menu for 'Set Customer Since Date As' set to 'Creation Date', which is highlighted with a red box. Below that is a 'Name/Address Formatting' section with a dropdown set to 'Proper' and a date format field showing '!!!-!!-!!'. A 'Save' button is visible in the bottom right of this section.

The 'Update Customer Since Date' dialog box is open, showing the following fields:

- Branch: SG1 - Super Green
- Customer Type: Both
- Status: 9 - Active
- New Since Date: Earliest Sold Date

Buttons for 'Cancel' and 'Update' are at the bottom of the dialog box.

Standardize Customer Names/Addresses

General Setup - Customer

Required Information:

<input type="checkbox"/> Title	<input type="checkbox"/> Tax Code	<input type="checkbox"/> Cancel Date
<input type="checkbox"/> Cancel Reason	<input type="checkbox"/> Route	<input type="checkbox"/> Source
<input type="checkbox"/> Size	<input type="checkbox"/> Map Code	<input type="checkbox"/> Territory
<input type="checkbox"/> Zip/Postal Code	<input type="checkbox"/> Request Email	<input type="checkbox"/> Phone Number

Available Fields on Add Customer Wizard:

<input checked="" type="checkbox"/> Title	<input type="checkbox"/> Route	<input type="checkbox"/> Source
<input type="checkbox"/> Territory	<input type="checkbox"/> Subdivision	<input type="checkbox"/> Directions
<input type="checkbox"/> Email Address	<input checked="" type="checkbox"/> Home Phone	<input type="checkbox"/> Business Phone Number
<input type="checkbox"/> Fax Number	<input type="checkbox"/> Other Phone Number	<input type="checkbox"/> Text Phone Number
<input type="checkbox"/> Cell Phone Number		

Address Options:

Prompt to Geocode Customers that don't Geocode Automatically
 Don't Abbreviate Street Addresses
 Enforce Valid Zip/Postal Codes
 Automatically Set Email Prenotify

Other Options:

Set Customer Since Date As:

Name/Address Formatting:

Map Code Format:

- Use if you change parameter setting for Upper/Proper case
- Will make sure addresses are split into separate components (Directionals, Street Name, Suffix)

New in 2025 was to add filters for branch, status and residential or commercial

Standardize Customer Names/Addresses

⚠ Are you sure you want to standardize all customer names and addresses to proper case? This may take a while.

Branch:* Statuses:* Customer Type:*

ZIP/Postal Utility

- Update customer info by ZIP/Postal Code

Zip/Postal

Branch: * 2002 - MY OTHER COMPANY NAME GOES ... [X] Customer Type: Both

Zip Code: * 3 of 3 Zip Codes Selected Options: * Set Customer City

Don't Change the Following Tax Codes: Tax Exempt (0.00%)

[X] Cancel [Update]

Nothing selected

Select All Deselect All

Set Customer Branch
Set Marketing Branch
Set Customer Route
Set Customer Territory
Set Customer City
Set Marketing City
Set Tax Code

Zip/Postal Code Setup

Zip * City State Tax Code 1 Tax Code 2 Tax Code 3

Area Code Route Territory Branch *

Alternate City 1 Alternate City 2 Alternate City 3 Alternate City 4 Alternate City 5 Alternate City 6 Alternate City 7 Alternate City 8 Alternate City 9

[X] Cancel [Add]

If branch is changed, history is also changed so reports will include data as part of new branch.

Change Credit Limit

- Can use this to set different credit limit for Residential vs. Commercial customers or by branch itself.
- Could also use to update all customers that have a limit of \$0.00

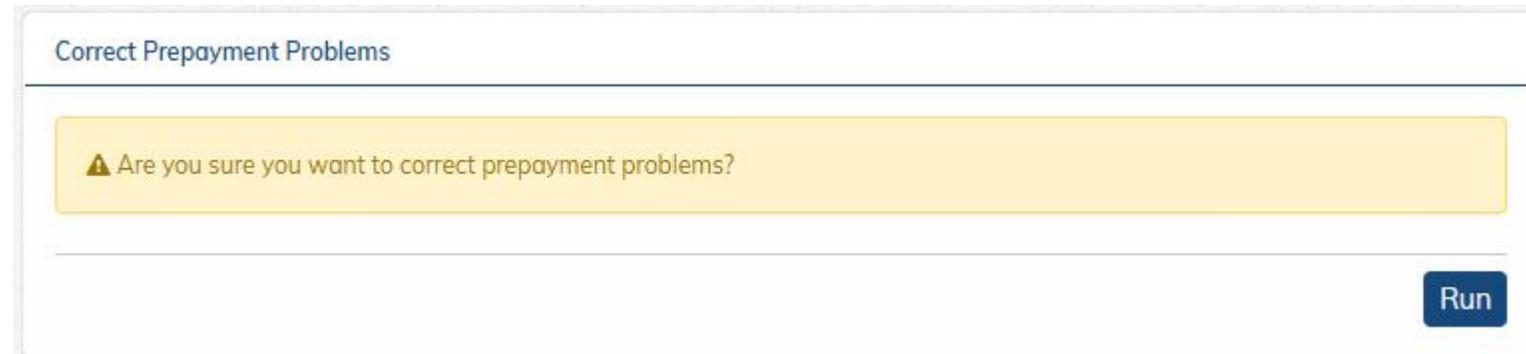
Change Credit Limit

Branch: New Credit Limit: \$

Customer Type: Only change for customers with a credit limit of \$0:

Correct Prepayment Problems

- Sets any prepay balance that is a debit balance back to \$0
- Merges duplicate prepay codes for the same customer
- Deallocate prepay from skipped or cancelled services
- Corrects prepay reserved amounts that don't match the actual reserved amount



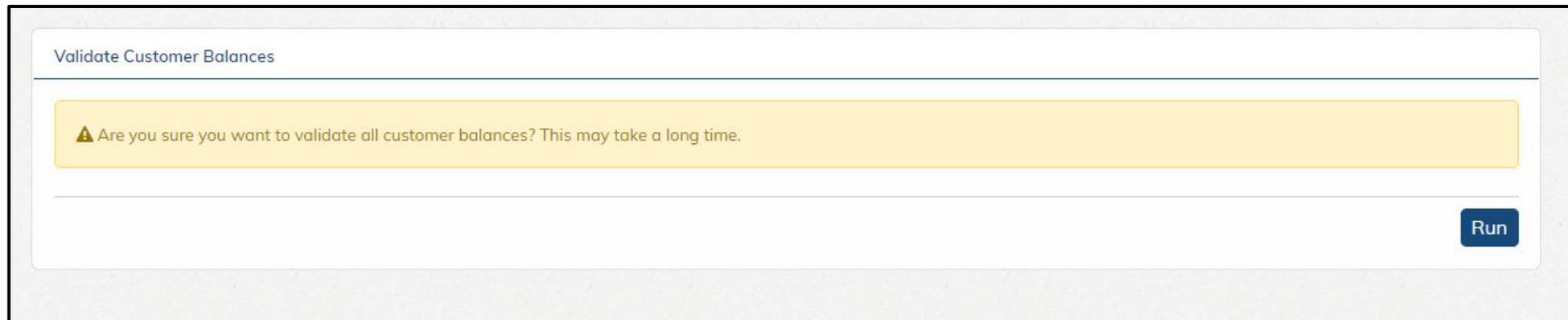
Correct Prepayment Problems

⚠ Are you sure you want to correct prepayment problems?

Run

Validate Customer Balances

- Corrects rounding problems
- Corrects incorrect customer balances
- Makes sure that prepay history adds up to current prepay balance



Program/Job Utilities

Programs/Jobs

 Update Services Recalculate taxes, discounts, and totals for incomplete...	 Update Program Services This utility will update existing programs on accounts with...	 Mass Service Assignment Assign a new service to a group of customers.	 Fix Service Dependencies Update dependencies within an existing program to match..	 Skip Service This utility will allow a service or services to be skipped en...
 Add/Remove Discount/Surcharge This utility will allow a discount or surcharge to be added or...	 Fix Last Service Date Add the last service date to dependent program services.	 Update Estimated and Average Man Hours Use this utility to update estimated or average man...	 Copy Size This utility allows the size to be copied between the customer..	 Date Integrity Utility Ensures consistency for program and job dates

Update Services

Update Services

⚠ This utility will recalculate taxes, discounts, and totals for incomplete services.

Branch:
SG1 - Super Green

Years:
2020

- Use after changing tax rates or discount percentages
- Incomplete services will have their price updated.

Update Program Services

- Can be used to change composition of customer programs
- Make one change at a time
- Verify Price calculation method

Price Added Services By: (None) ▼

|

(None)

Standard Price

Average Price

Service Price

Calculate From Price Table

No Price

Update Program Services

Branch: SG1 - Super Green ✕ ▼

Service Year: 2020 ▼

Program: LC - Lawn Care ▼

Price Added Services By: Standard Price ▼

✕ Cancel

↻ Update

Mass Service Assignment

Use a sent file or select customer.

Mass Service Assignment

⚠ This utility will let you assign a service to all customers based on status and prior history of that service. A program/job will not be given to anyone who had (including cancels) or is scheduled for said service since the cutoff date.

Search: Branch*:

Customer Type*:

Customer Status*:

Cutoff Date for Prior Services:

Service Details

Type: Program Job Service*:

Source: Assign Program/Job Status*:

Employee: Year:

Schedule Date: Do Not Build Repeating:

Billing Type: Exclude if customer already has job:

Charge Amount: Fixed Price: Technician Notes:

Calculate Price: Exclude Customers Without Size

Fix Dependencies Utility

- Ensures that service dependencies are set the same as parameter settings
- New in 2025, we added filters of branch and service year

Program Setup

Program Code: LC Type: L - Lawn Care English Description: Lawn Care

Available: Branch: All 3 items selected French Description:

Min Rounds for CAW Prepay: 0 Min Rounds for Full Program: 5 Spanish Description:

Defaults and Required Fields

Required Information

- Date Sold
- Salesperson
- Source
- Size
- Route
- Cancel Date
- Cancel Reason
- Reject Reason
- Estimated By

Default Information

- Non-Service Year
- Don't Print Invoice If Previous Not Done
- Automatic Renew
- Automatic Renew Date
- Send Confirmation Letter
- Internet Available
- Mobile Device
- Lock Sold / Cancel Dates

Estimate Service: Nothing selected

Initial Service: Nothing selected

Default Billing Type: Regular / Invoice

Units: 1000 sq ft

Service Category: Core

Text Color:

Background Color:

Schedul...

- Lock Schedule by Default
- Days:** Nothing selected
- Repeats:** None

Services

Missing a service? Visit the Services page to add a new service. Please consult Real Green technical support before changing services included within a program.

Round	Code	Service	Do	Dependent Service	Skip After	
1	L01	EARLY SPRING APPLICATION	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1/1/2018	Delete
2	L02	LATE SPRING APPLICATION	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1/1/2018	Delete
3	L03	EARLY SUMMER SLOW RELEASE	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1/15/2018	Delete
4	L04	LATE SUMMER SLOW RELEASE	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1/1/2018	Delete
5	L05	EARLY FALL FEEDING	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	10/1/2018	Delete
6	L06	WINTER DORMANT FEEDING	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1/28/2018	Delete
7	LA	LIME	<input checked="" type="checkbox"/>	<input type="checkbox"/>	12/31/2018	Delete

Cancel Delete Save

Fix Service Dependencies

Branch: 2002 - MY OTHER C... Service Years: 2025

Cancel Run

Skip Service Utility

- Allows you to skip services in mass
- Typically used to close out final rounds if season ends sooner than expected
- Printed services will NOT be skipped

Skip Service

Branch:	2002 - MY OTHER COMPANY NAME GOES HERE <input type="text"/>	Years:	2024 <input type="text"/>
Program/Job Status:	10 of 10 Statuses Selected <input type="text"/>	Customer Type:	Both <input type="text"/>
Services:	Nothing selected <input type="text"/>	Set Skip Code:	(None) <input type="text"/>

More filters

+ Flag Codes

Add/Remove Discount/Surcharge

- Allows you to add/remove discounts/surcharges in mass

Add/Remove Discount/Surcharge

Branch: *	2002 - MY OTHER COMPANY NAME GOES HERE <input type="button" value="x"/>	Service Years: *	2024
Customer Status: *	10 of 10 Statuses Selected	Customer Type:	Both
Program/Job: *	Nothing selected	Flags:	With: <input type="text" value="Select..."/>
			Without: <input type="text" value="Select..."/>
Program/Job Status: *	10 of 10 Statuses Selected	Discount: *	Nothing selected
Don't Add/Remove Discount to Prepaid Services:	<input type="checkbox"/>	Add/Remove Discount/Surcharge: *	<input checked="" type="radio"/> Add <input type="radio"/> Remove

Fix Last Service Date

Utilities > Fix Last Service Date

Fix Last Service Date

⚠ This utility populates the last service date with the most recent "Done Date" for each service of the every customer program if the service is set as dependent. It will also correct schedule date and done-to-date count problems.

Year:

- Use if dependencies were set wrong
- Use if services are renewed before last service is completed

Update Estimated & Average Man Hours Utility

Running the utility for Update Estimated Man Hours

- Must have man hours set up in price chart
- Makes times in Routing Assistant™ directions more accurate
- Updates each service that has a price chart to the estimated minutes within the price chart.
- No size will use the minimum minutes.
- 'Use Actual' looks at history for selected year and updates the service with the actual.
- Running again, without 'use actual' will reset back to price chart sizes.

Update Estimated and Average Man Hours

Branch: *
SG1 - Super Green

Program/Job: *
LC - Lawn Care

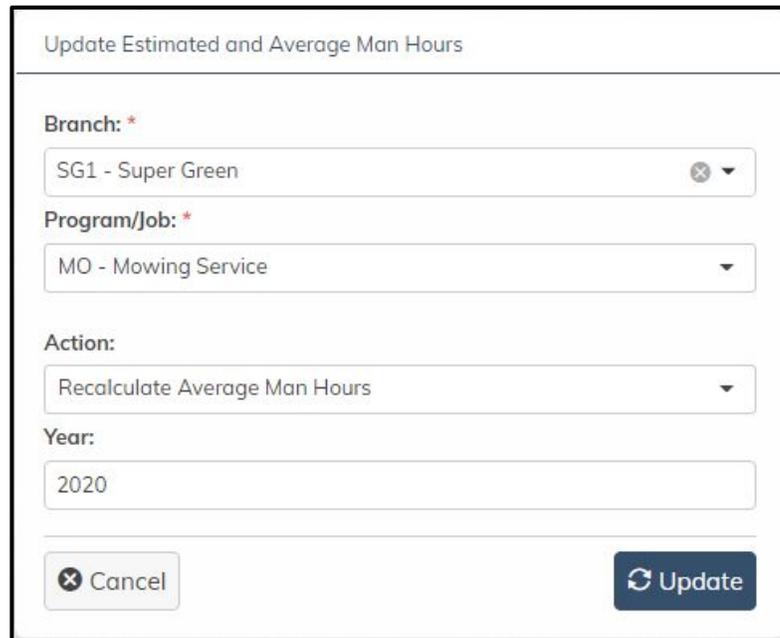
Action:
Update Estimated Man Hours

Year:
2020

Only Replace if Blank
 Use Actual Man hours if Available

Update Estimated and Average Man Hours Utility

Running the utility for Recalculate Average Man Hours



The screenshot shows a web form titled "Update Estimated and Average Man Hours". It contains the following fields and controls:

- Branch: ***: A dropdown menu with "SG1 - Super Green" selected.
- Program/Job: ***: A dropdown menu with "MO - Mowing Service" selected.
- Action:**: A dropdown menu with "Recalculate Average Man Hours" selected.
- Year:**: A text input field containing "2020".
- Buttons:** A "Cancel" button with a close icon and an "Update" button with a refresh icon.

This utility updates history and fixes the man hours if they are incorrect.

Ideally, this version of the utility should not need to be run.

Copy Size

Copy Size

Branch: * 2002 - MY OTHER COMPANY NAME GOES HERE x Customer Type: * Both

Program/Job: * Nothing selected Year: * 2024

Action: Select Action Flags

Only matching units of measure will be copied

Only Replace if Blank:

+ Flag Codes

Cancel Copy

- Copy customer size to service
- Copy property inventory size to service
- Copy Service Size to Customer
- Copy Service Size to Property Inventory

Action: Copy Service Size To Property Inventory Flags

Only matching units of measure will be copied. Property inventory items will be added if they don't exist and any existing quantities updated.

Property Inventory Items: * Kentucky Bluegrass (1000 Sq. Feet)

Only replace Quantity if blank and Inventory Item already exists

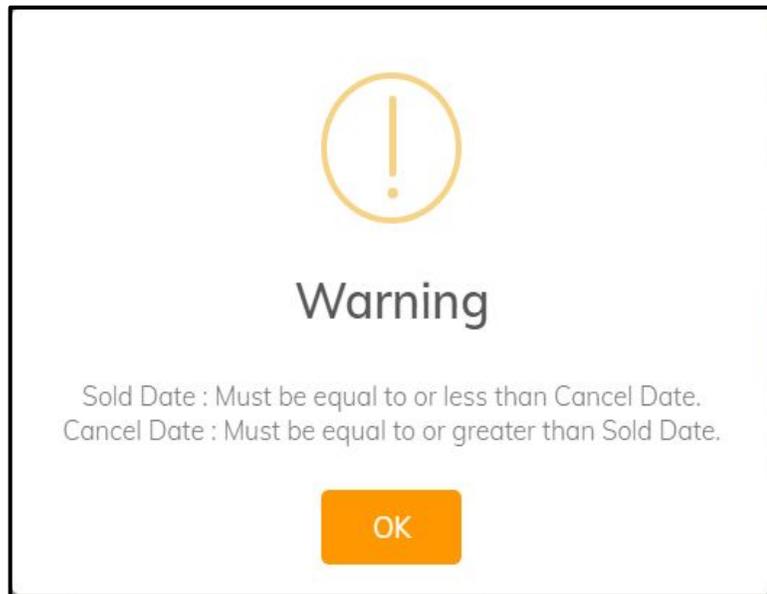
Do not update any existing Inventory Item quantities

Action: Copy Property Inventory Size To Service Flags

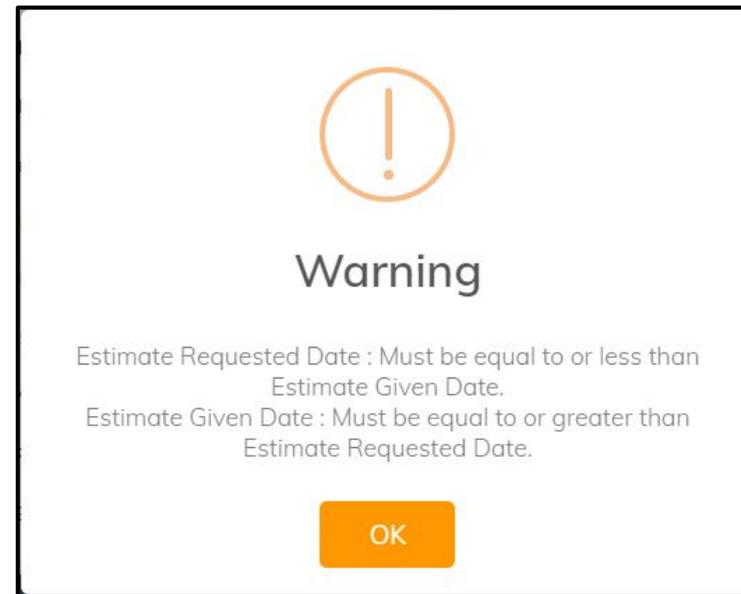
Property Inventory Items: * Kentucky Bluegrass (1000 Sq. Feet)

Date Integrity Utility

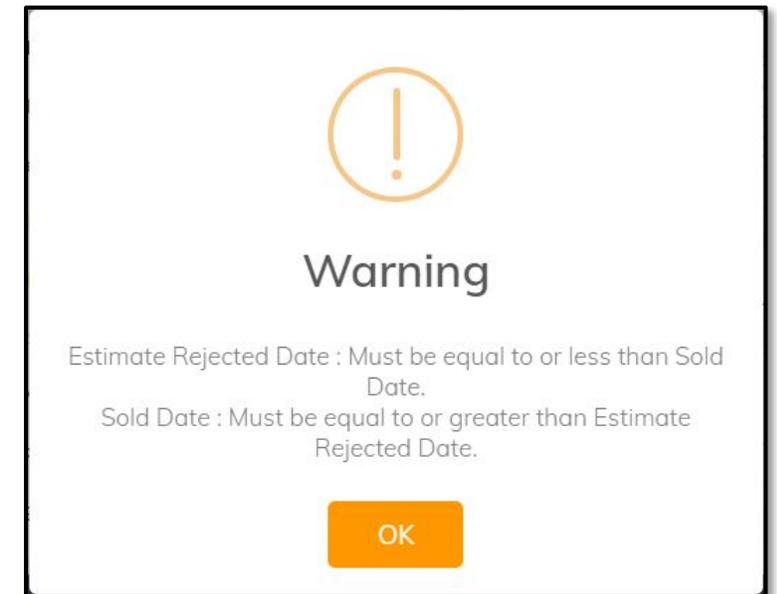
- Fixes these (and other) error messages
- Preserves Sales Dates and Cancel Dates



A warning dialog box with a yellow exclamation mark icon in a circle at the top center. Below the icon is the word "Warning" in a bold, dark gray font. Underneath, there are two lines of smaller gray text: "Sold Date : Must be equal to or less than Cancel Date." and "Cancel Date : Must be equal to or greater than Sold Date." At the bottom center is an orange rectangular button with the text "OK" in white.



A warning dialog box with a yellow exclamation mark icon in a circle at the top center. Below the icon is the word "Warning" in a bold, dark gray font. Underneath, there are two lines of smaller gray text: "Estimate Requested Date : Must be equal to or less than Estimate Given Date." and "Estimate Given Date : Must be equal to or greater than Estimate Requested Date." At the bottom center is an orange rectangular button with the text "OK" in white.



A warning dialog box with a yellow exclamation mark icon in a circle at the top center. Below the icon is the word "Warning" in a bold, dark gray font. Underneath, there are two lines of smaller gray text: "Estimate Rejected Date : Must be equal to or less than Sold Date." and "Sold Date : Must be equal to or greater than Estimate Rejected Date." At the bottom center is an orange rectangular button with the text "OK" in white.

Mapping/ Routing Utilities

Mapping and Routing



Batch Geocoding

This utility will update an accounts longitude and...



Copy And Change Routes

Change routes or copy customer or service routes.



Visual Route Designer

Draw route territory and update routes for customers...



Fill County Utility

Add the county to any customer account that is...

Batch Geocoding

Batch Geocoding

Branch: * 2002 - MY OTHER COMPANY NAME... (x) Status: * 11 Statuses Selected

Subdivision: Nothing selected City:

Zip Code: Nothing selected

Regeocode

‘Process’ will find any customers missing a latitude and longitude and attempt to locate them.

Any account that can't be found, will launch the interactive map with options on finding the location.

> Utilities > Interactive Geocoder

Account #: 566 *
Train Wreck
7451 Roundabout Way
Martinsville IN 46151
Edit Driving Directions

Please select a possible location

- 7451 Roundabout Way, Martinsville, IN 46151
- 201-299 West Indiana Street Martinsville, IN 46151
- 46151**
- Carrier Route R013 RAYMOND RD 46151
- Bing Maps
- Google Maps

Account #: 566 *
Train Wreck
7451 Roundabout Way
Martinsville IN 46151
Edit Driving Directions

46151

Reset

SA5 – Three Utilities in One



Copy And Change Routes

Change routes or copy customer or service routes.

- Copy Customer Route
- Copy Service Route
- Change Route

Copy Customer Route

Two of the options are

- Copy Customer Route to Program/Job
- Copy Program/Job Route to Customer

Copy And Change Routes

Branch: 2002 - MY OTHER COMPANY NAME GOES H...

Customer Type: Both

Action: Copy Customer Route to Program/Job

Program/Job*: (None) Year*: 2024

Only Replace if Blank:

More filters

+ Flag Codes

Copy Service Route

Copy And Change Routes

Branch: 2002 - MY OTHER COMPANY NAME GOES H...

Customer Type: Both

Action: Copy Program/Job Route to Program/Job

Copy From:* (None) Year:* 2024

Copy To:* (None) Only Replace if Blank:

More filters

+ Flag Codes

- Copy routes from one service to another

Change Route Utility

Can help to merge route codes

- Replace Customer Route
- Replace Program/Job Route

Copy And Change Routes

Branch: 2002 - MY OTHER COMPANY NAME GOES H... ✕

Customer Type: Both

Action: Replace Customer Route

Old Route: (None) New Route: * (None)

More filters

+ Flag Codes

Copy And Change Routes

Branch: 2002 - MY OTHER COMPANY NAME GOES H... ✕

Customer Type: Both

Action: Replace Program/Job Route

Program/Job: * (None) Year: 2024 To Year: 2025

Old Route: (None) New Route: * (None)

More filters

+ Flag Codes

Marketing Utilities

Marketing

 <p>Move Marketing Customers</p> <p>Move marketing status customers to status 0-9 with...</p>	 <p>Move Estimate Customers to Marketing</p> <p>Move selected customers without history to Marketing...</p>	 <p>Delete Marketing Data</p> <p>This utility allows you to delete marketing data.</p>	 <p>Customer Import Utility</p> <p>Mass load customers into the database using a list of name...</p>
---	--	--	--

Move Marketing Customers

Move Marketing Customers

Branch: 2002 - MY OTHER COMPANY NAME GOES HE... Source: * No Source

Zip Code: * 3 of 3 items selected Import Date Range: This year

Size: to 9999999

Only Customers With Phone:

Assign Values

Customer Status: * 0 - estimated requested Source: *

Cancel Reason: Cancel Date: 01/25/2025

Route: Use Default Route Send to Mass Service Assignment:

More filters

+ Flag Codes

- Moves a group of customers from marketing to current database
- 'Process' allows you to assign status and customer route
- Optionally a program or job can be added to the customers that are moved

Move Estimate Customer to Marketing

- Cleans up current customer data
- Maintains property size
- Useful for block leads
- Excludes customers with history

Move Estimate Customers to Marketing

Branch:	2002 - MY OTHER COMPANY NAME GOES HE... 	Source:	15 of 15 items selected
Zip Code:	3 of 3 items selected	Route:	6 of 6 items selected
Cust./Program Status:	5 of 5 items selected	Since Date:	 This year-to-date
Size:	<input type="text"/> to <input type="text" value="999999999"/>	Prog. Est. Given Date:	 This year-to-date

 Cancel  Move

Delete Marketing Data

- Remove old marketing list
- Remove list that was imported wrong

Delete Marketing Data

⚠ This utility will delete all of the selected records from the Marketing database. This process cannot be undone. Make a backup before proceeding.

Branch:
SG1 - Super Green ✕ ▾

Import Date:
📅 This year-to-date ▾

Source:
Nothing selected ▾

Zip Codes: ⓘ
Nothing selected ▾

Select only customers without size:

✕ Cancel Delete

Customer Import Utility

Step 1 Select File Step 2 Flag Codes Step 3 Preview Step 4 Duplicates

Customer Import Utility - Select File

Import Type: Marketing

Select Data Source: * Select a file or Drop a file here

Source: * Select... Flag Code: Select...

Divide Property Size by: 1

Use the grid below to map the data from the imported file to the available fields.

Available SA Field	File Field / Data Example
Title	Select...
Company Name	Select...
Whole Name	Select...
Last Name	Select...
First Name	Select...
Whole Street Address	Select...
House Number	Select...

- Upload a list of customer to marketing or active database.
- Assign import values from the list itself, including up to 4 flag codes.
- Duplicate records will be given an option on updating existing, uploading duplicates or deleting the duplicate records.

Import Type: Active

Active Customer import will load the customers into the active database with a selected status of 0 thru 9. This import also allows customer numbers, opening balances and billing information to be transferred over.

Price Increase / Year End Utilities

Year End



Year End Checklist

Checklist and Explanation for all things Year End



Mass Renewals

Renew customer programs and services en masse



Price Increase

Increase the price of a service or program.



Installment Renewals

This utility will renew and setup installments and allow...



Price Chart Increase Utility

Allows price charts to be increased by amount or...



Correct Renewal Prices

This utility will raise renewal prices that are lower than a...



Undo Renewals

If you ran your renewals with mistakes, you can undo your...

Price Increase Utility (Step 1)

- Setting to consider:
 - If you've done manual adjustments, make sure to exclude prices changed On or After Date
 - Use sold date option to exclude new sales
- Click Next to set price increase and view results

1 Step 1 Select Customers

2 Step 2 Price Increase

Price Increase Utility - Select Customers

Branch: 2002 - MY OTHER COMPANY NAME GOES HERE

Customer Type: Both

Program Status: 10 of 10 Selected Statuses

Programs/Jobs: All Programs

1BR - One branch Service
CON - Consultation
GER - German Roach Program
LC - Lawn Care Program 1
LC1 - Lawn renew to
LC2 - Lawn renewed to

Size Range: to 999999.9999

Service Year: 2024 to 2024

Standard Price Range: to 999999.99

Exclude Prices Changed On or After: 01/25/2025

Exclude group billing customers

Include Services: Both

Selected Programs

More filters

+ Flag Codes

+ Advanced Options

Price Increase Utility – SA5 (Step 2)

- Set Increase
 - Renewal only could be used earlier in year in preparation
- Click Calculate Price Increase
- See what results will be before performing increase

✓
Step 1
 Select Customers

2
Step 2
 Price Increase

Price Increase

Increase Price: Percentage Only Renewal prices will be increased for completed or pre-paid services
Increase is on each round, not the program total

Min/Max: to

Update renewal price only

Calculate Price Increase

	Account	Name	Address	Service	Old Std Price	New Std Price	Old Price	New Price	Std Increase	Increase	Renewal Increase		
<input checked="" type="checkbox"/>	15	Kong, King	2151 Ape Ln	LC - Lawn Care Program 1	80.00	84.00	400.00	420.00	4.00	12.00	20.00		
<input checked="" type="checkbox"/>	15	Kong, King	2151 Ape Ln	LC - Lawn Care Program 1	80.00	84.00	400.00	420.00	4.00	12.00	20.00		
<input checked="" type="checkbox"/>	16	Kong, King	2565 Ape Ln	LC - Lawn Care Program 1	70.00	73.50	350.00	367.50	3.50	10.50	17.50		
<input checked="" type="checkbox"/>	16	Kong, King	2565 Ape Ln	LC - Lawn Care Program 1	70.00	73.50	350.00	367.50	3.50	10.50	17.50		
<input checked="" type="checkbox"/>	30	McD's	125 Whopper Rd	LCC - Best Lawn Program	58.75	61.50	411.25	430.50	2.75	16.50	19.25		
<input checked="" type="checkbox"/>	39	, Goofy	526 Disney Dr	LC - Lawn Care Program 1	50.00	52.50	250.00	262.50	2.50	10.00	12.50		
<input checked="" type="checkbox"/>	39	, Goofy	526 Disney Dr	LC - Lawn Care Program 1	50.00	52.50	250.00	262.50	2.50	10.00	12.50		
<input checked="" type="checkbox"/>	46	McD's	1356 Happy Meal Ln	LCC - Best Lawn Program	47.50	50.00	332.50	350.00	2.50	15.00	17.50		
<input checked="" type="checkbox"/>	53	Buck, Donald	8664 Disney Dr	LC - Lawn Care Program 1	60.00	63.00	300.00	315.00	3.00	12.00	15.00		
Programs: 15					Totals:		\$886.25	\$930.50	\$4,738.75	\$5,028.00	\$44.25	\$230.00	\$289.25

Back
After Processing:
Perform
Print

Update Installments Utility

- Run after renewals and Price Increase
- Can change regular billing services to installment billing
- In SA5, it's part of the Installment Renewal Process

The screenshot displays a two-step process for updating utility options. Step 1, 'Select Utility', is completed. Step 2, 'Configure utility options', is the current step. The 'Utility Options' section includes a 'Run the Installment Utility' panel with the following fields:

- Expiration Date:
- Change Start Date:
- Change # of Payments:
- Change Frequency:
- Validate to Services in the Season:
- Change program/Job from Regular to Installment billing type

At the bottom, there are buttons for 'Cancel', 'Back', and 'Process'.

Price Chart – Increase Price Utility

- Changes price chart, NOT your current customers pricing
- Would allow new pricing to go into effect immediately for net new customers, programs, and services moving forward

Price Chart Increase Utility

Rounding Calculated Price
Calculated prices are rounded: Up to the next \$0.01 Interpolated: No

Amount: % Apply to:

Warning: This action cannot be reversed. Update

Price Charts

Showing: 10 Results Search...

Core Aeration
Lawn Care

↑	Size	Estimated Man Hours	Rate (\$)	New Rate (\$)
	4	14	35.00	36.75
	5	15	39.00	40.95
	6	16	43.50	45.68
	7	17	47.50	49.88
	8	18	51.50	54.08
	9	19	55.00	57.75
	10	20	58.50	61.43
	11	21	62.50	65.63
	12	22	66.00	69.30
	13	18	68.00	71.40
	After 13.00		\$3.15 / unit	\$3.15 / unit

Correct Renewal Prices

- Will raise any renewal price that is less than the current price
- Useful if other price increases were done incorrectly

This utility will change any renewal price that is lower than the actual price to match the actual price. This is typically run before the renewal process since the renewal price is what is used for the new season.

Correct Renewal Prices

Branch: COR - Senske Servic...

Season: 2021

Programs/Jobs: All Programs

AER - Full Program A...
CIB - Christmas Insta...
CRI - Decor Reinstall ...
F - Flea & Tick
ICM - 413 Comm Irr
IRC - 416-1 Irr Prg C...

Program Status: 9 - Active

Undo Renewals

If renewals had issues, they can be undone.

- There is a limit of 7 days
- If any history has happened (payment / prepayment) applied, they will not be undone.

The screenshot shows a web interface titled "Undo Renewals". It features several filter fields: "Branch" with a dropdown menu showing "2002 - MY OTHER COMPANY NAME GOES H...", "Date Renewals were Run" with a calendar icon and "Today" selected, "Renewals Run By" with a dropdown menu showing "Nothing selected", and "Option to Remove" with a dropdown menu showing "Both". There are "Cancel" and "Undo" buttons. A callout box highlights the "Option to Remove" dropdown menu, which is open and shows the following options: "Both", "Mass Renewal", and "Individual Renewal".

Parameter Change Utilities

Parameter Change



Setup Merging

A select group of setup types can have the code and descriptions merged to another code.



Program Merge Utility

Merge existing programs to another code



Update Status

This utility performs mass status updates



Product Price Increase

Increase the unit cost and or unit price of products by a percentage or dollar amount

Setup Merge

Setup Merging

Use this utility if you wish to change or merge data points within SA5. Select an option below to make changes

Select a Utility:

- Adjustment Codes
- Call Ahead Reasons
- Call Log Outcomes
- Call Log Statuses
- Call Log Topics
- Cancel Reasons
- Condition Categories
- Condition Codes
- Discount Codes
- Employees
- Flag Codes
- Hold Reasons
- Linked Document Categories
- Payment Types
- Prepay Codes
- Product Codes
- Product Master Categories
- Product Sub-Categories
- Program/Job Types
- Property Categories
- Property Inventories
- Property Locations
- Reject Reasons
- Reunds

- New to 2025
- Allows a variety of parameter settings to be merged.
- Select Old to be changed to the New

Setup Merging

Use this utility if you wish to change or merge data points within SA5. Select an option below to make changes

Select a Utility:

This utility allows you to merge Cancel Reasons by selecting an old Cancel Reason and merging it into a new one.

⚠ This utility is not reversible and will change customer and program cancel descriptions. The old cancel codes selected will be deleted from setup after merging has completed.

Old Cancel Reasons:

New Cancel Reason:

Program Merge Utility

After years of adding programs or acquisitions, there can be a need to move customers that have older programs into new programs. This utility will handle 3 scenarios.

1. The old and new programs have the same number of rounds
2. The old program has more rounds than the new program
3. The old program has less rounds than the new program

Program Merge when rounds match

All scenarios allow the order of 'old' rounds to be re-arranged.

All seasons will be updated however if there are past seasons that have different rounds for the program, they will not be changed.

Program Merge Utility

⚠ Use this utility to merge programs from one to another. To merge programs, they must be of the same type. It is **strongly recommended** to first merge each Program's corresponding Service Codes and/or Rounds Codes before proceeding.

Be aware that merging programs will affect your reporting. It is recommended that this utility be run off hours.

Branch: 2222 - SuperGreen

Old Program Code: LC* - Lawn Program (L)

New Program Code: LNS - Lawn - Non season (L)

• The branch selector is used only for filtering. Any changes made through the merge utility will be applied across **all branches**, regardless of the selected branch(es).

• If using the sales commission report, any programs merged will show up as new sales for the current year.

OLD Program: LC* - Lawn Program (L)			NEW Program: LNS - Lawn - Non season (L)		
	Round	Service		Round	Service
::	1	L01 - EARLY SPRING APPLICATION	→	1	L01 - EARLY SPRING APPLICATION
::	2	L02 - LATE SPRING APPLICATION	→	2	L02 - LATE SPRING APPLICATION
::	3	L03 - EARLY SUMMER SLOW RELEASE	→	3	L03 - EARLY SUMMER SLOW RELEASE
::	4	L04 - LATE SUMMER SLOW RELEASE	→	4	L04 - LATE SUMMER SLOW RELEASE
::	5	L05 - EARLY FALL FEEDING	→	5	L05 - EARLY FALL FEEDING
::	6	L06 - WINTER DORMANT FEEDING	→	6	L06 - WINTER DORMANT FEEDING

Cancel Clear Apply

Program Merge when fewer rounds

When the new program has fewer rounds, the extra rounds of the old will be moved to special jobs.

Program Merge Utility

⚠ Use this utility to merge programs from one to another. To merge programs, they must be of the same type. It is **strongly recommended** to first merge each Program's corresponding Service Codes and/or Rounds Codes before proceeding.

Be aware that merging programs will affect your reporting. It is recommended that this utility be run off hours.

Branch: 2222 - SuperGreen

Old Program Code: LC+ - Lawn Plus (L)

New Program Code: ZET - Elvis Test Lawn Program (L)

• The branch selector is used only for filtering. Any changes made through the merge utility will be applied across **all branches**, regardless of the selected branch(es).

• Old Program rounds that don't match to the new program rounds will be moved to Special Jobs in all seasons that have the additional rounds. In order to proceed, the additional rounds need to be allowed to be Special Jobs in service setup

• If using the sales commission report, any programs merged will show up as new sales for the current year.

OLD Program: LC+ - Lawn Plus (L)				NEW Program: ZET - Elvis Test Lawn Program (L)		
Round	Service			Round	Service	
::	1 L01 - EARLY SPRING APPLICATION		→	1	E01 - Elvis Test First Round	
::	2 L02 - LATE SPRING APPLICATION		→	2	E02 - Elvis Test Second Round	
::	3 L03 - EARLY SUMMER SLOW RELEASE		→	3	E03 - Elvis Test Third Round Benito	
::	4 L04 - LATE SUMMER SLOW RELEASE		→	4	E04 - Elvis Test fourth round	
::	5 L04 - LATE SUMMER SLOW RELEASE		→			

* L04 is not a Special Job. Set as Special Job before merging.

• Merging any Old Program round with an empty row sets that round as a "Special Job."

Cancel Clear Apply

Program Merge when more rounds

When the new program has more rounds, there is an option to move existing special jobs into the program.

Program Merge Utility

⚠ Use this utility to merge programs from one to another. To merge programs, they must be of the same type. It is strongly recommended to first merge each Program's corresponding Service Codes and/or Rounds Codes before proceeding.

Be aware that merging programs will affect your reporting. It is recommended that this utility be run off hours.

Branch: 2222 - SuperGreen

Old Program Code: ZET - Elvis Test Lawn Program (L)

New Program Code: LC+ - Lawn Plus (L)

i

- The branch selector is used only for filtering. Any changes made through the merge utility will be applied across **all branches**, regardless of the selected branch(es).
- To assist merging programs when there are additional rounds, you can select a special job to be moved into the program - if it exists for the customer. If it doesn't exist or no special job is selected, the round of the new program will be added with the status chosen. **Ex.** No special job is added to your old program, assign a 'skip' status to the extra round(s) on your new program. **Or**, if the special job does exist, it will be added to the new program with the existing status.
- Any selected special job will only be moved if the frequency equals '1'
- Moving special jobs into a program will affect reporting. **Ex.** Estimate, Sales, & Cancel details linked to the special job will be lost.
- If using the sales commission report, any programs merged will show up as new sales for the current year.

OLD Program: ZET - Elvis Test Lawn Program (L)

Round	Service
:: 1	E01 - Elvis Test First Round
:: 2	E02 - Elvis Test Second Round
:: 3	E03 - Elvis Test Third Round Benito
:: 4	E04 - Elvis Test fourth round
:: 5	Add Special Job (Optional) ▾

→

NEW Program: LC+ - Lawn Plus (L)

Round	Service	Status
1	L01 - EARLY SPRING APPLICATION	-
2	L02 - LATE SPRING APPLICATION	-
3	L03 - EARLY SUMMER SLOW RELEASE	-
4	L04 - LATE SUMMER SLOW RELEASE	-
5	L04 - LATE SUMMER SLOW RELEASE	Set Status * ▾

Use Standard price instead of Price Chart price.

Cancel Clear Apply

Update Status

Update Status

⚠ This utility performs mass status updates

Branch: 2002 - MY OTHER COM... Update: Customer

Customer Type: Both

More filters

+ Flag Codes

Original Status: 9 - Active New Status: 8 - Waiting for Contract

Cancel Replace

Update Status

⚠ This utility performs mass status updates

Branch: 2002 - MY OTHER COM... Update: Program/Service

Customer Type: Both

More filters

+ Flag Codes

Year: 2025 to: 2025

Programs/Jobs:

All Programs		Selected Programs
1BR - One branch Servi...	➔	A&S - Aeration and Seedi...
1BR - One branch Servi...		
AEF - Fall Aeration		
AER - Spring Aeration		
BED - Bed Maintenance		
CON - Arborist Consult...		

Original Status: 9 - Active New Status: 8 - Waiting for Contract

Cancel Replace

Can select to change customer status or program/service.

Product Price Increase

Product Price Increase

Branch: *

Increase: * Increase: Percentage

Increase New Services Only Service Year:

Filter Products

Showing:

<input type="checkbox"/>	Code	Product	Product Category	Master Category	Unit Of Measure	Cost (\$)	Unit Cost (\$)	Unit Price (\$)	Markup (\$)	New Unit Cost (\$)	New Unit Price (\$)	New Markup (\$)
<input type="checkbox"/>	PO	0-0-62 Water Sol. Potash			Lbs	32.00	2.00	15.00	13.00	0.00	0.00	0.00
<input type="checkbox"/>	Tub J	1 1/2" J-Bend	Plumbing	Plumbing	Each	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<input type="checkbox"/>	Couple 1 C	1" Copper Coupling	Plumbing	Plumbing	Each	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<input type="checkbox"/>	CH1D	1" Dual Check Valve				0.00	72.15	32.47	0.00	0.00	0.00	0.00
<input type="checkbox"/>	P1POLY	1" Poly Pipe				0.00	0.26	0.50	0.00	0.00	0.00	0.00
<input type="checkbox"/>	F1POLY	1" Poly Pipe Fittings				0.00	0.00	2.16	0.00	0.00	0.00	0.00
<input type="checkbox"/>	F1PVC	1" PVC Pipe Fittings				0.00	0.00	1.55	0.00	0.00	0.00	0.00
<input type="checkbox"/>	P1PVC	1" PVC Schd 40 Pipe				0.00	0.00	0.50	0.00	0.00	0.00	0.00
<input type="checkbox"/>	CL1PIN	1" S. S. Pinch Clamp				0.00	-1.10	0.23	0.00	0.00	0.00	0.00
<input type="checkbox"/>	C1WM	1" Weather Matic Cont. Valve				0.00	0.00	26.77	0.00	0.00	0.00	0.00
<input type="checkbox"/>	FSADDLE1	1" x 3/4" Saddle				0.00	0.00	2.75	0.00	0.00	0.00	0.00
<input type="checkbox"/>	BO1/2	1/2" Boiler Drain				0.00	0.00	5.56	0.00	0.00	0.00	0.00
<input type="checkbox"/>	Couple 1/4	1/4" Copper Coupling	Plumbing	Plumbing	Each	100.00	1.00	2.00	1.00	0.00	0.00	0.00

Increase Unit Cost, Unit Price or Both
 Select percent or dollar amount

Miscellaneous



Update Journal Limit Dates

Advance Adjustment, Payment, and/or Production...

Adjustments



Batch Adjustments

Allows customer balances to be adjusted by applying...



Balance Cleanup

Got outstanding balances? This utility will get you back..

Call log



Call Log Management

This utility will allow a group of selected unresolved call logs t...

Product / Inventory Utilities



Product Import Utility

Add new or update existing products using an XML or CS...

Other Reports



Price Discrepancy Utility

Price Discrepancy Utility

Update Journal Limit Dates

General Setup - Financial

Default Credit Limit: Disable Installment Billing Round Calc
 Post Installments During Aging Off to the n
1st Month of Fiscal Year: Non-Autopay Installment Next Statement
 Don't Auto Post CAW/ML Payments Do Not li
Prepay Discount Cutoff: Show Credit Card Security Code Automat

Limit Journal Entry

Days Early: Days Late:

Production Payments
 Adjustments

If you lock down payment, production or adjustment entry dates, the update journal limit dates can be run to move them to the next month

New 2025

- 2 new security options within 'other security' can lock history to the journal limits.
- The other allows users to bypass history locks.

Update Journal Limit Dates

Select which parameter dates to advance by one month:

<input checked="" type="checkbox"/> Adjustments:	1/1/2025 - 1/31/2025
<input checked="" type="checkbox"/> Payments:	1/1/2025 - 1/31/2025
<input checked="" type="checkbox"/> Production:	1/1/2025 - 1/31/2025

Balance Clean-up Utility

Located on Adjustment Landing Page

Balance Cleanup Utility

Adjustment date:	<input type="text" value="12/26/2019"/>	Remove balances ≤:	<input type="text" value="\$ 0.01"/>
Branch:	<input type="text" value="SG1 - Super Green"/>	Customer Type:	<input type="text" value="Both"/>
Status:	<input type="text" value="5 - Cancelled-Bad Debt"/>	Balance Type to Remove:	<input type="text" value="Credit balances"/>
Adjustment Code:	<input type="text" value="None"/>	Prepayment Type:	<input type="text" value="Non-Prepay Customers Only"/>
Aging Category:	<input type="text" value="All"/>	Flags:	With: <input type="text" value="Select.."/> Without: <input type="text" value="Select.."/>

Typically do at end of year.

If do prepay balances, do it first then remove credit balances.

Call Log Management Utility

Search for Calls

Calls Entered: Entered By:

Call Status: Branch:

More filters

+ Flag Codes

Call Log Results Sort By

Employee	Call Count
EH — EBETH	1
PIE — Apple Pie	35

Search

Select All

Acct. #4 Paulie Shoreness
227 Encino Pl, Fictional City, CA 12365
(747) 574-5814
Remit Balance: \$467.67

Collection

- Balance
- Call Status
- Customer Name
- Customer Number
- Date Due
- Date Entered
- Street Address

- Find calls, select who they are assigned to.
- Select how to sort the detail list
- Choose Action
 - Reassign
 - Delete
 - Change Status

Total Calls: 75 Total Selected: 6

Log Actions

This utility allows you to permanently change the selected calls in the call log

Action:

New Outcome: New Status:

Note:

New 2025 is an added branch filter

Product Import



Existing Duplicate Records

There are 381 existing duplicate records from a previous session.

Handle Duplicates

Product Import Utility - Select File

Select Data Source: * or Drop a file ...

Taxable: Yes No

Branch: * 3 of 8 Branches Selected

Uses: * 3 Uses Selected

Use the grid below to map the data from the imported file to the available fields.

Imported Data	File Field / Data Example
Product Code *	Select...
Product Name *	Select...
SKU	Select...
Unit of Measure	Select...
Size/Rate	Select...



Duplicates

Duplicate Products can not be added. Selecting to 'Update Inventory' will update Count, Price or Cost if those fields have been mapped. 'Overwrite' will replace existing data with the imported data. 'Delete' will remove the duplicates and nothing will be updated.

	Product Code	Product Name	SKU	EPANumber	Branch
<input checked="" type="checkbox"/>	106	hard to say			1001 - Your Company Name
<input checked="" type="checkbox"/>	106	hard to say			3003 - My way southside
<input checked="" type="checkbox"/>	106	hard to say			2002 - MY OTHER COMPAN...
<input type="checkbox"/>	12345467.1	tested name			1001 - Your Company Name

You can upload a list of new products or a vendor list and duplicate products can have the count, price or cost updated, overwrite existing or delete the duplicates.

Price Discrepancy Report

Price Discrepancy Utility

Branch: 2002 - MY OTHER COMPANY NAME GOE...

Available Services: Selected Services

1BR - One branch Service

1BR - One branch Service

A&S - Aeration and Seeding

AEF - Fall Aeration

AER - Spring Aeration

BED - Bed Maintenance

Salesperson: 17 of 17 Employees Selected

Source Code: 15 of 15 Sources Selected

Program/Job Status: 10 Statuses Selected

Service Year: 2023

Sold Date: This year

Exclude Prices Changed On or After: 09/15/2023

Customer & Utility Options

Discrepancy Amount: Under Priced - \$

Maximum Price Raise: By - \$

Customer Type: Both Update \$0 Price

Sort By: Customer Number Summary Only

More filters

+ Flag Codes

+ Advanced Options

Send To Mapping Filter

Simple Customer List

Cancel

- Found in Reports
- Look for underpriced or overpriced by % or \$
- Compares customer pricing to price chart
- Can run report and or increase prices upto the price chart.

Questions?

Session Feedback

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