Basic In-House Training:
Set Up Your Workflow

Use this outline as a reminder of some of the concepts in Basic In-House Training, and for taking notes during class.
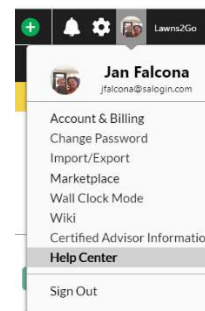
For More Information

Go to our **Help Center** to find additional training materials (articles, videos, and user guides) for the topics we cover.

To see the full Help Center, click on the avatar icon at the top right corner of your screen, then click **Help Center**.

Or

Click the **Help** button at the top right of any SA screen, then type a word or phrase into the Search field.

Quick Links

Click these to go straight to some of our instructional videos:

On Demand Classes

Custom Invoice Email

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Day 1: Basic Setup

1. Employees – Including the correct permissions on the Role

2. Vendors – Two types:

   a. Entity

   b. Sub-Contractor (treated like an employee)

3. Teams – Crews with default typical employees on them

4. Services - (Click on the Settings gear >> then scroll for services)

   a.   Service Mode

   Flat Rate: Rate = Amount

   Per Unit: Qty x Rate = Amount

   Hourly: Time x #Resources = Qty | Qty x Rate = Amount

5. Products (Click **Settings** ⚙ then scroll for products)

6. Create three Fake Clients with real addresses in your service area.
   (This is also number "10." below, just more detail.)

   a. On the three clients, set up different types of jobs and practice with them.

   b. After jobs are scheduled for the practice clients, try routing your jobs.

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7. Master Schedules – for Recurring Jobs – for seasonal jobs

8. Custom Recurring Schedules – for Recurring Jobs – for year around jobs

9. Master Packages

10. Go to your Client's account/profile to begin scheduling jobs.

11. Jobs for each Client

   a. **Recurring**: a Job that occurs regularly based on a **Master Schedule** that can be applied to any Services or Client

   b. **Custom Recurring Job**: a Job that occurs regularly based on a custom schedule you create for a single Job on a single Account

   c. **One Time**: a job that only occurs once and you know when it needs to be scheduled.

   d. **Waiting List Jobs**: a Job that only occurs once but you do not yet know when it needs to be scheduled

   e. **Package Jobs**: a series of Jobs that happen over a specific period of time such as a season's worth of fertilization services, Irrigation, or Fall/Spring Cleanup.

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Note: The **Use Minimum Days Since** option on your Waiting List is essentially a filter. This option exists specifically for chemical services where a certain amount of time must pass between application. Checking this box filters Jobs out of your Waiting List if the next rounds in the Package do not meet the minimum number of days.

f. **Custom Package Job**: You may use this feature to create a package consisting of your choice of services which you can then tailor to individual clients on a yearly basis. Are they are not based on calendar dates but are based on time periods for when a client starts their package. So each client's package can start on a different date. Examples: Gutter cleaning, mosquito control.

12. Invoicing

    a. Invoice Customization

    b. Invoice Email

13. Payments

    a. Credit Card – Clearent

    b. Cash

    c. Check

14. Expenses (unless you sync with QuickBooks—use QuickBooks to track Expenses)

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Day 2: Sales and Estimates

15. Estimate Setup

    a. Estimate Document

        i. Estimate Grid

        ii. Estimate Client Email

        iii. Estimate Confirmation Email

        iv. Estimate Document

    b. Discounts

    c. Service Estimate Descriptions

16. Tickets

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Day 3: Job Costing and Reports

17. Job Costing Setup

18. Reports

    a. Profit and Loss – Cash basis

    b. Job Costing

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Operational (all your setup in action!)

1. Waiting List

2. Dispatch Board

3. Mobile

4. Close Out Day

5. Invoicing

6. Payments

7. Marketing