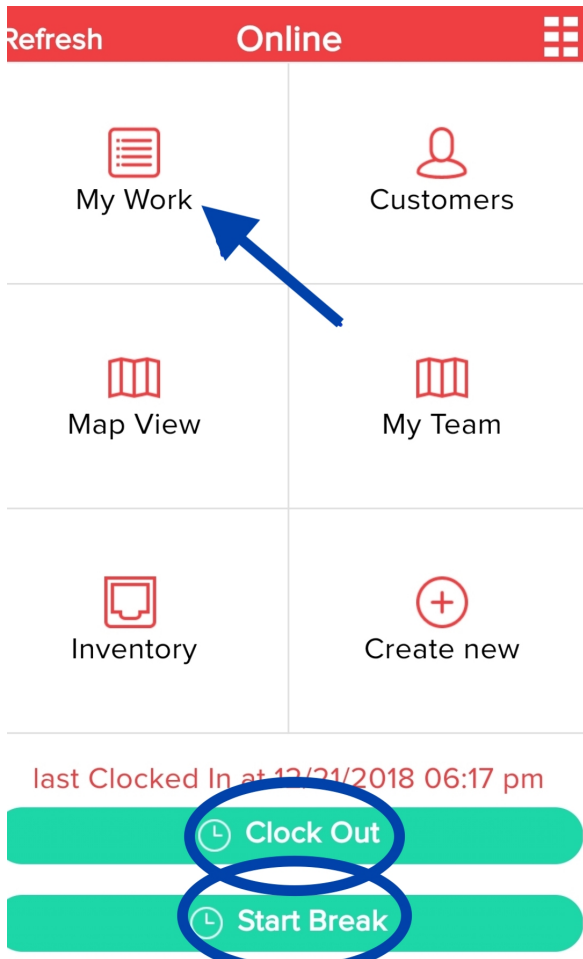




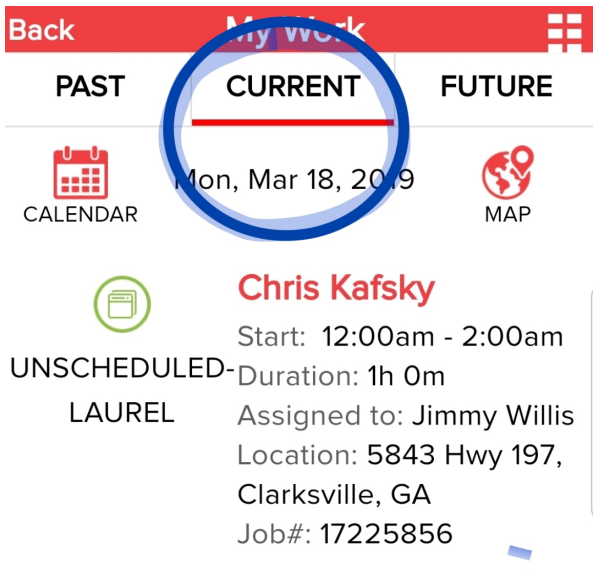
TRAINING FOR SERVICE FUSION

GEORGIA BRUSH MOWING











Tap “ My Work” to see up coming work and Current work




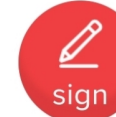


Tap Current / Past /Future to see work that you may want to see assigned to you .

[Back](#)
Laurel Drew
[Edit Job](#)



 Mon, Mar 18
 8:00 am
 9:00 am
 1h 0m
 Sample Customer

 info
  map
  photo
  sign

Location: 5379 Browns Bridge RD,
Gainesville, GA, 31024

Description: No description available >

Custom Fields: Communication History : ... >

Additional Visits: 0 >

Completion Notes: No completion notes available >

Tap here to fill entire screen

This is the main customer page.

From here you have links to all the things you need to do everything needed for the customer.

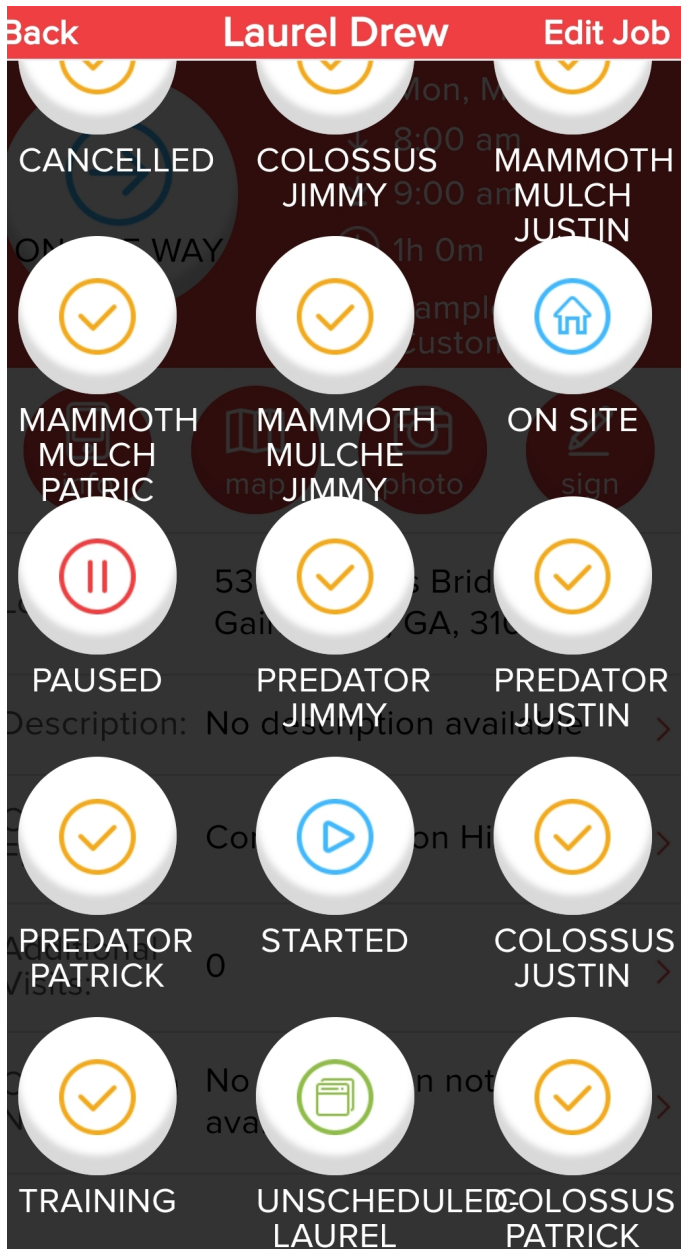
Please note the window between 8-9 A.M. is only a window in case of traffic or unforeseen delays. It is not the goal. The goal is 8:00 A.M.

You can tap the address for GPS directions etc.

The first active thing you want to do for the customer is let them know you are on the way by changing the status of the job.

THIS IS REQUIRED





This is the “Job Status”


From here you have all the statuses available here to change the mode we are in with the customer.






“Started and OnSite” are pretty much the same so choose this status when you arrive and are onsite.





The paused status would be used if we stopped for a reason. For example if it started raining or we had a break down. This alerts the office continually that this customer is an urgent reschedule and would take priority above all others.



Back
Laurel Drew
Edit Job


ON THE WAY

 Mon, Mar 18
 8:00 am
 9:00 am
 1h 0m
 Sample Customer

 info
 map
 photo
 sign

Location: 5379 Browns Bridge RD,
Gainesville, GA, 31024

Description: No description available >

Custom Fields: Communication History : ... >

Additional Visits: 0 >

Completion Notes: No completion notes available >

Tap here to fill entire screen

When you are 30-45 minutes out, you will want to let the customer you are on the way.

Tapping “ON THE WAY” actually alerts the customer in two ways. A text message is sent and a pre-recorded messaged phone call is sent.

Doing this will save time and they will be looking for you. This way you don’t have to wait waking them up or they forgot or whatever the case may be.

THIS IS REQUIRED



1.

Back Laurel Drew Edit Job

STARTED

Mon, Mar 18
8:00 am
9:00 am
1h 0m
Sample Customer

info map photo **sign**

Location: 5379 Browns Bridge Rd, Gainesville, GA, 31024

Description: No description available

Custom fields: Communication History : ...

Additional visits: 0

Completion notes: No completion notes available



Now that you have walked with the customer and have a good picture of the job. You have discussed with him all the variables of the job you think the customer needs to know to be on the same page of what you are thinking.....

It's time to have the customer sign the agrees with and approves to start the job.

1. Tap sign

2. Tap Signature and make sure the top tab is on "PRE WORK"

Have the customer sign with finger.

THIS IS REQUIRED

2.

Back Laurel Drew

Pre-Work Post-Work

Estimated Charges

Fill Dirt Details	\$1.00
Estimated Job Total	\$1.00
Payments/Deposits	\$0.00
Total Due	\$1.00

authorize the work to begin

Laurel Willis

Clear Pad **Save** Cancel



1.

Back
Laurel Drew
Edit Job

STARTED

Mon, Mar 18
8:00 am
9:00 am
1h 0m
Sample Customer

info
map
photo
sign

Location: 5379 Browns Bridge RD, Gainesville, GA, 31024

Description: No description available

Custom Fields: Communication History : ...

Additional Visits: 0

Completion Notes: No completion notes available

Back
Laurel Drew
Edit Job

No images yet

Add new

Take Photo
Pick from Gallery



Your next step is a step that covers all of us with future questions that customers may have about what we cleared and how many hours we did in machine time.

1. Tap “Photo” from the customer page.
2. Tap “Add New”
3. Tap “Take Photo”

Start with Machine start hours and add pics of the vegetation to clear that shows size and thickness.

ALL OF OUR STEPS ARE VERY IMPORTANT AND HAVE A PURPOSE. THESE ARE REQUIRED.

Begin mulching and have an awesome day!

REPEAT THIS STEP UPON COMPLETION
Adding hours picture and job completion pictures.



1.

6:50 LTE

Back Dustin Poole Edit

DISPATCHED 9:00 am 0h 0m Dustin Poole

info map photo sign

Location: 1500 Jones Mill Rd, Whitesburg, GA

Description: No description available

Custom Fields: Communication History : ...

Additional Visits: 1

Completion Notes: PATRICK 586 1 day 4/1

Assigned to: Jimmy Willis

Tasks Notes Docs Eqpt Invoice

No notes available

Add Notes

SHOW ACTIVITY LOG



At this time crucial information is added to help a future technician or to help when a customer calls for more information about their job etc.

2.

6:58 LTE

Search Back Dustin Poole

Add notes to job here...

Be sure your cursor is here and begin to type or depress the microphone icon and speak general information about the job....

I.E. rough terrain, and very thick cause a slight slow down.

4-5" some 10" diameter very smooth ground. Etc.

Save

Begin making generic notes about the property and the job.

Done

I Hey Oh

Q W E R T Y U I O P

A S D F G H J K L

↑ Z X C V B N M

123 space return

😊 → 🎤



[Back](#)
[Laurel Drew](#)
[Edit Job](#)

Description: No description available

Custom Fields: Communication History : ...

Additional Visits: 0

Completion Notes: No completion notes available

Assigned to: Laurel Willis

Tasks

Notes

Docs

Eqpt

Invoice

No tasks created

Add task to job...

Add Task

Tap the invoice when you are ready to close things out.

[Back](#)
[Laurel Drew](#)
[Edit Job](#)

Tasks

Notes

Docs

Eqpt

Invoice

Estimated Charges	expand all
<input checked="" type="checkbox"/> Fill Dirt (1.00)	\$1.00
Drive & Labor Charges	\$0.00
Total Billable Expenses	\$0.00
Estimated Job Total	\$1.00
Payments/Deposits	\$0.00
Total Due	\$1.00

Add Product

Add Service

Add Time

Add Expense

Adjust Current Charges

Email Job

Print Job

1. Add "Service" if you need to add extra hours or anything else.

2. Adjust Current Charges

Should be the only two you have to use

Search...



Land Clearing



Retention Pond



Scaping



Bond Fee

Bond fee

\$0.00



Credit Card

Credit Card "Hand Key" conveni...

\$0.00



Credit Card

Convenience Fee

\$0.00

Tap "Land Clearing" to see all available service to charge



Late Fee

Due upon receipt--over 30 days

\$0.00



Mammoth Mulcher 1/2 Day

CAT 299DXHP / Skid Loader and...

\$1,150.00



Mammoth Mulcher Full Day

CAT 299DXHP Skid Loader / Ma...

\$1,650.00



Mammoth Mulcher Full Day + Travel

CAT 299DXHP Skid Loader / Ma...

\$0.00




Mammoth Mulcher - Land Clearing


Skid Steer Land Clearing CAT 29...

\$0.00

Scroll until through the alphabetical list to find what you want to charge the customer. Tap the appropriate charge icon.

Back Add Service

 Cimaf Mulching head to clear vegetation up to 10" in diameter.

 [Pictures](#)

Mammoth Mulcher Land Clearing

Skid Steer Land Clearing CAT 299D XHP or John Deere 333G / Cimaf Mulching head to clear vegetation up to 10" in diameter.

[Add/Edit description](#)


Regular Rate	0.00
more options	
Quantity	1.00
Sales Tax @ 0.00% \$0.00	NON
TOTAL	\$0.00

Add This Service







Type the amount to charge and make sure the “TOTAL” matches what you want to charge and tap “Add This Service”

Back Laurel Edit

 **COMPLETED**

Tue, Apr 02
3:00 am
4:00 am
1h 0m
Laurel Ginn

Location: No location available

Description: No description available

Custom Fields: Communication History : ...

Additional Visits: 0

Completion Notes: No completion notes available

Assigned to: Laurel Willis

Tasks Notes Docs Eqpt Invoice

Estimated Charges [expand all](#)

☒ Mammoth Mulcher Land **\$0.10**

Make sure the amount looks right and change the job status to “COMPLETED”

Back

Laurel

Edit

Estimated Charges

expand all

☒

Mammoth Mulcher Land Clear...\$0.10

☒

Discount (1.00)(\$0.10)

☒

Mammoth Mulcher Land Clear...\$0.10

Drive & Labor Charges\$0.00

Total Billable Expenses\$0.00

Estimated Job Total\$0.10

Payments/Deposits\$0.00

Total Due\$0.10

Add Product

Add Service

Add Time

Add Expense

Adjust Current Charges

Email Job

Print Job

Finalize Invoice



Now if all looks correct go ahead and finalize.

Back

Job Invoice

Invoice created!

Invoice#
1554

Apply Payment

Email Invoice

Print Invoice

Print PDF Invoice

View Job Details

Next apply payment




Choose the method of payment

A screenshot of the "Payments" screen in the Service Fusion app. The screen has a red header with "Back" and "Payments" text, and a menu icon. Below the header, there are several input fields: "Payment Method" (a dropdown menu currently showing "Cash"), "Received By" (an empty text field), "Check/Ref#" (an empty text field), and "Payment Memo" (an empty text field). Below these fields are two boxes: "Payment Amount" (a grey box) and "0.10" (a white box). At the bottom is a red button labeled "Submit Payment". Below the main form is a modal window with a grey background and a blue border. It contains a list of payment methods: "Cash", "Check", "Credit Card", "Credit Card (Offline)", and "Donation". A blue circle is drawn around the "Check" option in this modal.A screenshot of the "Payments" screen in the Service Fusion app, showing the form after some data has been entered. The "Payment Method" dropdown now shows "Check". The "Received By" field contains "Jw". The "Check/Ref#" field contains "1234" and has a blue text prompt "FILL OUT COMPLETELY" above it. The "Payment Memo" field is empty. The "Payment Amount" box is grey, and the "0.10" box is white, with a blue text prompt "DOUBLE CHECK AMOUNT" to its right. At the bottom is a red button labeled "Submit Payment". A blue arrow points to the "Submit Payment" button.

Fill in the blanks and tap "Submit Payment"

Back

Job Payment



Payment received!

Check/Ref#
1234

Get Customer Signature

Email Invoice

View Job Details

Void Payment

You've Completed when you see this screen. Please note you can get customer final signature on this page if you didn't get it before.

Also you can void the payment if you made a mistake.

If the customer ask you to email let them know I will do it from the office or tap "Email Invoice" and have them type in their email address and hit send.

YOU'RE DONE !!!