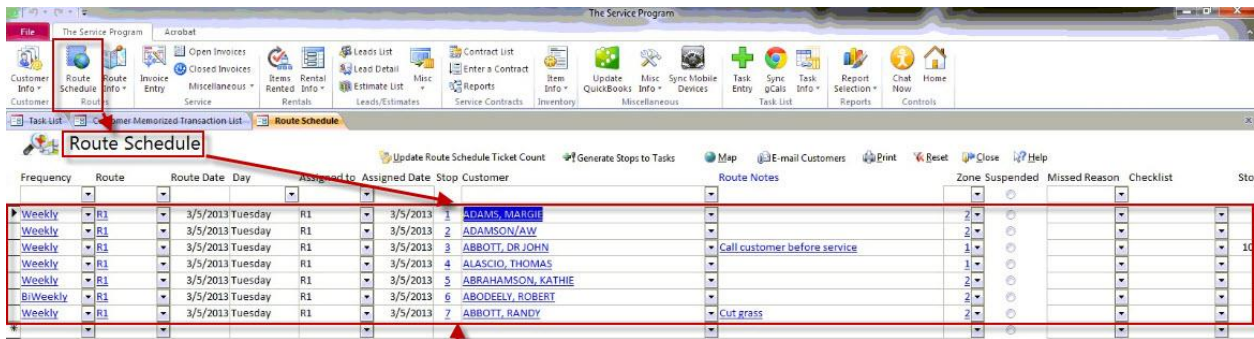


How to Setup Per Service Monthly Billing



To get to the Memorized Transaction List click on Customer Info -> Memorized Transaction



You should start setting up the memorized transaction list by going to your Route Schedule. It is recommended that you start with the top customer and setup a memorized transaction for each customer one the route schedule that needs one.

Customer Memorized Transaction List

Enter Beginning Date: 3/5/2013
Enter Ending Date: 3/5/2013
Calculate # of Route Stops

Customer	Item	Description	QTY	Rate	Total Group	# of Stops	Last Posted Date	Entered Date	Class Selection
ADAMS, MARGIE	Monthly Cleaning	Monthly Pool Service	1					admin	3/5/2013

As you can see, we are starting with the top customer from our "Route Schedule" as shown in the previous screenshot.

You should select a Customer and the "Item" that is needed for the memorized transaction. Please make sure that you enter a quantity.

Customer Memorized Transaction List

Customer	Item	Description	QTY	Rate	Total Group	# of Stops	Last Posted Date	Entered Date	Class Selection
ADAMS, MARGIE	Monthly Cleaning	Monthly Pool Service	1	\$25.00	\$25.00			admin	3/5/2013

You must input the "Flat Rate Monthly Charge" OR the "Per service/Stop Amount" under the "Rate" column.

Customer Memorized Transaction List

Customer	Item	Description	QTY	Rate	Total Group	# of Stops	Last Posted Date	Entered Date	Class Selection
ADAMS, MARGIE	Monthly Cleaning	Monthly Pool Service	1	\$25.00	\$25.00			admin	3/5/2013

Enter a Billing "Group" if you need one. We recommend that you create 2 "Billing Groups".

1. Flat Rate
2. Per Stop

** if you do not have any Billing Groups yet then they can be created very easily. You can double click in the open area (inside of the box) directly under the word "Group" to create the billing groups.

Group Maintenance

Task Type

Flat Rate
PerStop

Close

Once inside of the "Group Maintenance" you can enter whatever group names you would like and then click on the "Close" button to save.

Customer Memorized Transaction List

Enter Beginning Date: 3/5/2013
Enter Ending Date: 3/5/2013

Customer	Description	QTY	Rate	Total Group	# of Stops	Last Posted Date	Entered Date	Class Selection
ADAMS, MARGIE	Monthly Pool Service	1	\$25.00	\$25.00	PerStop		admin	3/5/2013

We now have 1 customers "Monthly Billing" Allocated/Created. Continue this process to setup all of your customers from the Route Schedule onto the "Memorized Transaction List".

Customer Memorized Transaction List

Enter Beginning Date: 3/5/2013
Enter Ending Date: 3/5/2013

Customer	Description	QTY	Rate	Total Group	# of Stops	Last Posted Date	Entered Date	Class Selection
ADAMS, MARGIE	Monthly Pool Service	1	\$25.00	\$25.00	PerStop		admin	3/5/2013
ADAMSON/AW	Monthly Pool Service	1	\$50.00	\$50.00	PerStop		admin	3/5/2013
ABBOTT, DR JOHN	Monthly Pool Service	1	\$55.00	\$55.00	PerStop		admin	3/5/2013
ALASCIO, THOMAS	Monthly Pool Service	1	\$40.00	\$40.00	PerStop		admin	3/5/2013
ABRAHAMSON, KATHIE	Monthly Pool Service	1	\$45.00	\$45.00	PerStop		admin	3/5/2013
ABODELY, ROBERT	Monthly Pool Service	1	\$60.00	\$60.00	PerStop		admin	3/5/2013
ABBOTT, RANDY	Monthly Pool Service	1	\$35.00	\$35.00	PerStop		admin	3/5/2013

As you can see, Your Memorized Transaction list is complete you should have all customers from your "Route Schedule".

The Service Program

File The Service Program Acrobat

Customer Info Customer Route Schedule Invoice Miscellaneous Items Rental Estimate Misc Leads/Estimates Service Contracts Inventory Miscellaneous Task Entry Sync gCals Task List Report Selection Chat Now Home

Task List Customer Memorized Transaction List Route Schedule

Route Schedule Update Route Schedule Ticket Count Generate Stops to Tasks Map E-mail Customers Print Reset Close Help

Frequency	Route	Route Date	Day	Assigned to	Assigned Date	Stop	Customer	Route Notes	Zone Suspended	Missed Reason	Checklist	Sto
Weekly	R1	3/5/2013	Tuesday	R1	3/5/2013	1	ADAMS, MARGIE					
Weekly	R1	3/5/2013	Tuesday	R1	3/5/2013	2	ADAMSON/AW					
Weekly	R1	3/5/2013	Tuesday	R1	3/5/2013	3	ABBOTT, DR JOHN	Call customer before service				10
Weekly	R1	3/5/2013	Tuesday	R1	3/5/2013	4	ALASCIO, THOMAS					
Weekly	R1	3/5/2013	Tuesday	R1	3/5/2013	5	ABRAHAMSON, KATHIE					
BiWeekly	R1	3/5/2013	Tuesday	R1	3/5/2013	6	ABODEELY, ROBERT					
Weekly	R1	3/5/2013	Tuesday	R1	3/5/2013	7	ABBOTT, RANDY	Cut grass				

The Service Program

File The Service Program Acrobat

Customer Info Customer Route Schedule Invoice Miscellaneous Items Rental Estimate Misc Leads/Estimates Service Contracts Inventory Miscellaneous Task Entry Sync gCals Task List Report Selection Chat Now Home

Task List Customer Memorized Transaction List Route Schedule

Customer Memorized Transaction List Post to Route Tickets Post To QuickBooks Grouping Posting Date 3/5/2013 Recalculate an Item Print Reset Close

Enter Beginning Date 3/5/2013 Calculate # of Route Stops Enter Ending Date 3/5/2013

Customer Base on Route Schedule Item

Monthly Pool Service 3/1-3/31 Update Description

Customer	Item	Description	QTY	Rate	Total	Group	# of Stops	Last Posted Date	Entered Date	Class Selection
ADAMS, MARGIE	Monthly Cleaning	Monthly Pool Service	1	\$25.00	\$25.00	PerStop			admin 3/5/2013	
ADAMSON/AW	Monthly Cleaning	Monthly Pool Service	1	\$50.00	\$50.00	PerStop			admin 3/5/2013	
ABBOTT, DR JOHN	Monthly Cleaning	Monthly Pool Service	1	\$55.00	\$55.00	PerStop			admin 3/5/2013	
ALASCIO, THOMAS	Monthly Cleaning	Monthly Pool Service	1	\$40.00	\$40.00	PerStop			admin 3/5/2013	
ABRAHAMSON, KATHIE	Monthly Cleaning	Monthly Pool Service	1	\$45.00	\$45.00	PerStop			admin 3/5/2013	
ABODEELY, ROBERT	Monthly Cleaning	Monthly Pool Service	1	\$60.00	\$60.00	PerStop			admin 3/5/2013	
ABBOTT, RANDY	Monthly Cleaning	Monthly Pool Service	1	\$35.00	\$35.00	PerStop			admin 3/5/2013	

The "Description" box allows you to update the "Item Descriptions" for your monthly billing with 1 click.

Just input whatever text you would like to show on the description for ALL memorized transactions and then click on "Update Description".

The Service Program

File The Service Program Acrobat

Customer Info Customer Route Schedule Invoice Miscellaneous Items Rental Estimate Misc Leads/Estimates Service Contracts Inventory Miscellaneous Task Entry Sync gCals Task List Report Selection Chat Now Home

Task List Customer Memorized Transaction List Route Schedule

Customer Memorized Transaction List Post to Route Tickets Post To QuickBooks Grouping Posting Date 3/5/2013 Recalculate an Item Print Reset Close

Enter Beginning Date 3/5/2013 Calculate # of Route Stops Enter Ending Date 3/5/2013

Customer Base on Route Schedule Item

Monthly Pool Service 3/1-3/31 Update Description

Customer	Item	Description	QTY	Rate	Total	Group	# of Stops	Last Posted Date	Entered Date	Class Selection
ADAMS, MARGIE	Monthly Cleaning	Monthly Pool Service	1	\$25.00	\$25.00	PerStop			admin 3/5/2013	
ADAMSON/AW	Monthly Cleaning	Monthly Pool Service	1	\$50.00	\$50.00	PerStop			admin 3/5/2013	
ABBOTT, DR JOHN	Monthly Cleaning	Monthly Pool Service	1	\$55.00	\$55.00	PerStop			admin 3/5/2013	
ALASCIO, THOMAS	Monthly Cleaning	Monthly Pool Service	1	\$40.00	\$40.00	PerStop			admin 3/5/2013	
ABRAHAMSON, KATHIE	Monthly Cleaning	Monthly Pool Service	1	\$45.00	\$45.00	PerStop			admin 3/5/2013	
ABODEELY, ROBERT	Monthly Cleaning	Monthly Pool Service	1	\$60.00	\$60.00	PerStop			admin 3/5/2013	
ABBOTT, RANDY	Monthly Cleaning	Monthly Pool Service	1	\$35.00	\$35.00	PerStop			admin 3/5/2013	

Once you have added the description and clicked on the "Update Description" button you will have to click Yes on the popup.

Update Item Descriptions

Are you sure you want to Update the Item Descriptions?

Yes No

The Service Program

Customer Memorized Transaction List

Enter Beginning Date: 3/5/2013
Enter Ending Date: 3/5/2013

Calculate # of Route Stops

Customer: Base on Route Schedule Base on Route Tickets

Customer	Item	Description	QTY	Rate	Total Group	# of Stops	Last Posted Date	Entered By	Date Entered	Class Selection
ABBOTT, DR JOHN	Monthly Cleaning	Monthly Pool Service 3/1-3/31	1	\$55.00	\$55.00	PerStop		admin	3/5/2013	
ABBOTT, RANDY	Monthly Cleaning	Monthly Pool Service 3/1-3/31	1	\$35.00	\$35.00	PerStop		admin	3/5/2013	
ABODEELY, ROBERT	Monthly Cleaning	Monthly Pool Service 3/1-3/31	1	\$60.00	\$60.00	PerStop		admin	3/5/2013	
ABRAHAMSON, KATHIE	Monthly Cleaning	Monthly Pool Service 3/1-3/31	1	\$45.00	\$45.00	PerStop		admin	3/5/2013	
ADAMS, MARGIE	Monthly Cleaning	Monthly Pool Service 3/1-3/31	1	\$25.00	\$25.00	PerStop		admin	3/5/2013	
ADAMSON/AW	Monthly Cleaning	Monthly Pool Service 3/1-3/31	1	\$50.00	\$50.00	PerStop		admin	3/5/2013	
ALASCIO, THOMAS	Monthly Cleaning	Monthly Pool Service 3/1-3/31	1	\$40.00	\$40.00	PerStop		admin	3/5/2013	

All of the description fields have now been updated with the words, "Monthly Pool Service 3/1 - 3/31".

The Service Program

Customer Memorized Transaction List

Enter Beginning Date: 3/1/2013
Enter Ending Date: 3/31/2013

Calculate # of Route Stops

Customer: Base on Route Schedule Base on Route Tickets

Customer	Item	Description	QTY	Rate	Total Group	# of Stops	Last Posted Date	Entered By	Date Entered	Class Selection
ABBOTT, DR JOHN	Monthly Cleaning	Monthly Pool Service 3/1-3/31	1	\$55.00	\$55.00	PerStop		admin	3/5/2013	
ABBOTT, RANDY	Monthly Cleaning	Monthly Pool Service 3/1-3/31	1	\$35.00	\$35.00	PerStop		admin	3/5/2013	
ABODEELY, ROBERT	Monthly Cleaning	Monthly Pool Service 3/1-3/31	1	\$60.00	\$60.00	PerStop		admin	3/5/2013	
ABRAHAMSON, KATHIE	Monthly Cleaning	Monthly Pool Service 3/1-3/31	1	\$45.00	\$45.00	PerStop		admin	3/5/2013	
ADAMS, MARGIE	Monthly Cleaning	Monthly Pool Service 3/1-3/31	1	\$25.00	\$25.00	PerStop		admin	3/5/2013	
ADAMSON/AW	Monthly Cleaning	Monthly Pool Service 3/1-3/31	1	\$50.00	\$50.00	PerStop		admin	3/5/2013	
ALASCIO, THOMAS	Monthly Cleaning	Monthly Pool Service 3/1-3/31	1	\$40.00	\$40.00	PerStop		admin	3/5/2013	

The next step is to have the software automatically calculate a customers total monthly charge based on the number of services.

First, you will have to select the date range that you are billing for in the top left hand corner.

*** You can base the number of services "Count of Services" 2 different ways. These will be shown in the next few steps.

The Service Program

Customer Memorized Transaction List

Enter Beginning Date: 3/1/2013
Enter Ending Date: 3/31/2013

Monthly Pool Service 3/1-3/31

Customer: Base on Route Schedule

Customer	Item	Description	QTY	Rate	Total Group	# of Stops	Last Posted Date	Entered Date	Class Selection
ABBOTT, DR JOHN	Monthly Cleaning	Monthly Pool Service 3/1-3/31	1	\$55.00	\$55.00	PerStop		admin	3/5/2013
ABBOTT, RANDY	Monthly Cleaning	Monthly Pool Service 3/1-3/31	1	\$35.00	\$35.00	PerStop		admin	3/5/2013
ABODEELY, ROBERT	Monthly Cleaning	Monthly Pool Service 3/1-3/31	1	\$60.00	\$60.00	PerStop		admin	3/5/2013
ABRAHAMSON, KATHIE	Monthly Cleaning	Monthly Pool Service 3/1-3/31	1	\$45.00	\$45.00	PerStop		admin	3/5/2013
ADAMS, MARGIE	Monthly Cleaning	Monthly Pool Service 3/1-3/31	1	\$25.00	\$25.00	PerStop		admin	3/5/2013
ADAMSON/AW	Monthly Cleaning	Monthly Pool Service 3/1-3/31	1	\$50.00	\$50.00	PerStop		admin	3/5/2013
ALASCIO, THOMAS	Monthly Cleaning	Monthly Pool Service 3/1-3/31	1	\$40.00	\$40.00	PerStop		admin	3/5/2013

If you use "Base on Route Schedule" then it count up the total number of services for the customers based on their "scheduled history" for the dates that you have selected.

The Service Program

Customer Memorized Transaction List

Enter Beginning Date: 3/1/2013
Enter Ending Date: 3/31/2013

Monthly Pool Service 3/1-3/31

Customer: Base on Route Schedule

Customer	Item	Description	QTY	Rate	Total Group	# of Stops	Last Posted Date	Entered Date	Class Selection
ABBOTT, DR JOHN	Monthly Cleaning	Monthly Pool Service 3/1-3/31	1	\$55.00	\$55.00	PerStop		admin	3/5/2013
ABBOTT, RANDY	Monthly Cleaning	Monthly Pool Service 3/1-3/31	1	\$35.00	\$35.00	PerStop		admin	3/5/2013
ABODEELY, ROBERT	Monthly Cleaning	Monthly Pool Service 3/1-3/31	1	\$60.00	\$60.00	PerStop		admin	3/5/2013
ABRAHAMSON, KATHIE	Monthly Cleaning	Monthly Pool Service 3/1-3/31	1	\$45.00	\$45.00	PerStop		admin	3/5/2013
ADAMS, MARGIE	Monthly Cleaning	Monthly Pool Service 3/1-3/31	1	\$25.00	\$25.00	PerStop		admin	3/5/2013
ADAMSON/AW	Monthly Cleaning	Monthly Pool Service 3/1-3/31	1	\$50.00	\$50.00	PerStop		admin	3/5/2013
ALASCIO, THOMAS	Monthly Cleaning	Monthly Pool Service 3/1-3/31	1	\$40.00	\$40.00	PerStop		admin	3/5/2013

After you click on Calculate # of Route Stops, Click YES on this popup

Update Number of Route Stops

Are you sure you want to Update the Number of Route Stops?

The Service Program

Customer Memorized Transaction List

Enter Beginning Date: 3/1/2013
Enter Ending Date: 3/31/2013

Customer: [Dropdown]
Item: Monthly Pool Service 3/1-3/31

Customer	Item	Description	QTY	Rate	Total	Group	# of Stops	Last Posted Date	Entered By	Date Entered	Class Selection
ABBOTT, DR JOHN	Monthly Cleaning	Monthly Pool Service 3/1-3/31	5	\$55.00	\$275.00	PerStop	5		admin	3/5/2013	
ABBOTT, RANDY	Monthly Cleaning	Monthly Pool Service 3/1-3/31	5	\$35.00	\$175.00	PerStop	5		admin	3/5/2013	
ABODEELY, ROBERT	Monthly Cleaning	Monthly Pool Service 3/1-3/31	3	\$60.00	\$180.00	PerStop	3		admin	3/5/2013	
ABRAHAMSON, KATHIE	Monthly Cleaning	Monthly Pool Service 3/1-3/31	5	\$45.00	\$225.00	PerStop	5		admin	3/5/2013	
ADAMS, MARGIE	Monthly Cleaning	Monthly Pool Service 3/1-3/31	4	\$25.00	\$100.00	PerStop	4		admin	3/5/2013	
ADAMSON/AW	Monthly Cleaning	Monthly Pool Service 3/1-3/31	5	\$50.00	\$250.00	PerStop	5		admin	3/5/2013	
ALASCIO, THOMAS	Monthly Cleaning	Monthly Pool Service 3/1-3/31	4	\$40.00	\$160.00	PerStop	4		admin	3/5/2013	

You will notice that the QTY, Total and the "# of stops" fields have now updated with the appropriate numbers.

The Service Program

Customer Memorized Transaction List

Enter Beginning Date: 3/1/2013
Enter Ending Date: 3/31/2013

Customer: [Dropdown]
Item: Monthly Pool Service 3/1-3/31

Customer	Item	Description	QTY	Rate	Total	Group	# of Stops	Last Posted Date	Entered By	Date Entered	Class Selection
ABBOTT, DR JOHN	Monthly Cleaning	Monthly Pool Service 3/1-3/31	5	\$55.00	\$275.00	PerStop	5		admin	3/5/2013	
ABBOTT, RANDY	Monthly Cleaning	Monthly Pool Service 3/1-3/31	5	\$35.00	\$175.00	PerStop	5		admin	3/5/2013	
ABODEELY, ROBERT	Monthly Cleaning	Monthly Pool Service 3/1-3/31	3	\$60.00	\$180.00	PerStop	3		admin	3/5/2013	
ABRAHAMSON, KATHIE	Monthly Cleaning	Monthly Pool Service 3/1-3/31	5	\$45.00	\$225.00	PerStop	5		admin	3/5/2013	
ADAMS, MARGIE	Monthly Cleaning	Monthly Pool Service 3/1-3/31	4	\$25.00	\$100.00	PerStop	4		admin	3/5/2013	
ADAMSON/AW	Monthly Cleaning	Monthly Pool Service 3/1-3/31	5	\$50.00	\$250.00	PerStop	5		admin	3/5/2013	
ALASCIO, THOMAS	Monthly Cleaning	Monthly Pool Service 3/1-3/31	4	\$40.00	\$160.00	PerStop	4		admin	3/5/2013	

You can now select the group that we are billing for and the date that we want to appear on the QuickBooks invoice.

Now you will be able to click on the "Post To QuickBooks" button to have our software automatically create invoices in quickbooks for all of the customers listed on your "Memorized Transaction List".

Click YES on the popup to send to Quickbooks

Are you sure you want to post these transactions to QuickBooks??

The Service Program

Customer Memorized Transaction List

Enter Beginning Date: 3/1/2013
Enter Ending Date: 3/31/2013

Customer: [Dropdown] Item: [Dropdown] Description: Monthly Pool Service 3/1-3/31

Customer	Item	Description	QTY	Rate	Total Group	# of Stops	Last Posted Date	Entered By	Date Entered	Class Selection
ABBOTT, DR JOHN	Monthly Cleaning	Monthly Pool Service 3/1-3/31	5	\$55.00	\$275.00 PerStop	5		admin	3/5/2013	
ABBOTT, RANDY	Monthly Cleaning	Monthly Pool Service 3/1-3/31	5	\$35.00	\$175.00 PerStop	5		admin	3/5/2013	
ABODEELY, ROBERT	Monthly Cleaning	Monthly Pool Service 3/1-3/31	3	\$60.00	\$180.00 PerStop	3		admin	3/5/2013	
ABRAHAMSON, KATHIE	Monthly Cleaning	Monthly Pool Service 3/1-3/31	5	\$45.00	\$225.00 PerStop	5		admin	3/5/2013	
ADAMS, MARGIE	Monthly Cleaning	Monthly Pool Service 3/1-3/31	4	\$25.00	\$100.00 PerStop	4		admin	3/5/2013	
ADAMSON/AW	Monthly Cleaning	Monthly Pool Service 3/1-3/31	5			5		admin	3/5/2013	
ALASCIO, THOMAS	Monthly Cleaning	Monthly Pool Service 3/1-3/31	4			4		admin	3/5/2013	

The Service Program - Posting Complete

OK

Once all of the invoices have been sent to QuickBooks you will receive a message that says, "Posting Complete". Click OK on this message.

The Service Program Lawn Care - QuickBooks Pro 2010

Customer Center: Invoices

Filter By: Open Invoices Date: This Month 03/01/2013 - 03/31/2013

Customer	Num	Date	Due Date	Amount	Open Balance
ASALBO, MICHELLE	JANClean23	03/31/2013	03/31/2013	100.00	100.00
ABBOTT, DR JOHN	JANClean24	03/31/2013	03/31/2013	45.22	45.22
ADAMS, MARGIE	JANClean28	03/31/2013	03/31/2013	100.00	100.00
ADAMSON/AW	JANClean29	03/31/2013	03/31/2013	250.00	250.00
ABBOTT, DR JOHN	JANClean30	03/31/2013	03/31/2013	275.00	275.00
ALASCIO, THOMAS	JANClean31	03/31/2013	03/31/2013	160.00	160.00
ABRAHAMSON, KATHIE	JANClean32	03/31/2013	03/31/2013	225.00	225.00
ABODEELY, ROBERT	JANClean33	03/31/2013	03/31/2013	180.00	180.00
ABBOTT, RANDY	JANClean34	03/31/2013	03/31/2013	175.00	175.00
				1,510.22	1,510.22

You can now go into QuickBooks and verify that all of the appropriate numbers and information carried over properly.

The Service Program

Customer Memorized Transaction List

Enter Beginning Date: 3/1/2013
Enter Ending Date: 3/31/2013

Customer: [Dropdown] Item: [Dropdown] Description: Monthly Pool Service 3/1-3/31

Customer	Item	Description	QTY	Rate	Total Group	# of Stops	Last Posted Date	Entered By	Date Entered	Class Selection
ABBOTT, DR JOHN	Monthly Cleaning	Monthly Pool Service 3/1-3/31	5	\$55.00	\$275.00	5		admin	3/5/2013	
ABBOTT, RANDY	Monthly Cleaning	Monthly Pool Service 3/1-3/31	5	\$35.00	\$175.00	5		admin	3/5/2013	
ABODELY, ROBERT	Monthly Cleaning	Monthly Pool Service 3/1-3/31	3	\$60.00	\$180.00	3		admin	3/5/2013	
ABRAHAMSON, KATHIE	Monthly Cleaning	Monthly Pool Service 3/1-3/31	5	\$45.00	\$225.00	5		admin	3/5/2013	
ADAMS, MARGIE	Monthly Cleaning	Monthly Pool Service 3/1-3/31	4	\$25.00	\$100.00	4		admin	3/5/2013	
ADAMSON/AW	Monthly Cleaning	Monthly Pool Service 3/1-3/31	5	\$50.00	\$250.00	5		admin	3/5/2013	
ALASCIO, THOMAS	Monthly Cleaning	Monthly Pool Service 3/1-3/31	4	\$40.00	\$160.00	4		admin	3/5/2013	

Post to QuickBooks

Are you sure you want to post these transactions to QuickBooks?

Yes No

Load Memorized Transaction List from Customer Info

Total: \$1,365.00

Record: 8 of 8 | v.10.5.5 REGISTERED TO - HVAC Test Company, Currently Logged in as admin

The Service Program

Customer Memorized Transaction List

Enter Beginning Date: 3/1/2013
Enter Ending Date: 3/31/2013

Customer: [Dropdown] Item: [Dropdown] Description: Monthly Pool Service 3/1-3/31

Base on Route Tickets

Customer	Item	Description	QTY	Rate	Total Group	# of Stops	Last Posted Date	Entered By	Date Entered	Class Selection
ABBOTT, DR JOHN	Monthly Cleaning	Monthly Pool Service 3/1-3/31	1	\$55.00	\$55.00			admin	3/5/2013	
ABBOTT, RANDY	Monthly Cleaning	Monthly Pool Service 3/1-3/31	1	\$35.00	\$35.00			admin	3/5/2013	
ABODELY, ROBERT	Monthly Cleaning	Monthly Pool Service 3/1-3/31	1	\$60.00	\$60.00			admin	3/5/2013	
ABRAHAMSON, KATHIE	Monthly Cleaning	Monthly Pool Service 3/1-3/31	1	\$45.00	\$45.00			admin	3/5/2013	
ADAMS, MARGIE	Monthly Cleaning	Monthly Pool Service 3/1-3/31	1	\$25.00	\$25.00			admin	3/5/2013	
ADAMSON/AW	Monthly Cleaning	Monthly Pool Service 3/1-3/31	1	\$50.00	\$50.00			admin	3/5/2013	
ALASCIO, THOMAS	Monthly Cleaning	Monthly Pool Service 3/1-3/31	1	\$40.00	\$40.00			admin	3/5/2013	

If you "Base on Route Tickets" then the route tickets are either auto generated from the desktop on the day of service OR created on the mobile devices.

The Service Program

File The Service Program Acrobat

Customer Info - Route Schedule - Route Info - Invoice Entry - Open Invoices - Closed Invoices - Miscellaneous - Leads List - Lead Detail - Estimate List - Misc - Contract List - Enter a Contract - Reports - Item Info - Update QuickBooks - Misc Info - Sync Mobile Devices - Task Entry - Sync gCals - Task Info - Report Selection - Chat Now - Home

Task List - Customer Memorized Transaction List

Customer Memorized Transaction List

Enter Beginning Date: 3/1/2013
Enter Ending Date: 3/31/2013
Calculate # of Route Stops: Monthly Pool Service 3/1-3/31

Customer: Base on Route Schedule

Customer	Item	Description	QTY	Rate	Total Group	PerStop	# of Stops	Last Posted Date	Entered By	Entered Date	Class Selection
ABBOTT, DR JOHN	Monthly Cleaning	Monthly Pool Service 3/1-3/31	5	\$55.00	\$275.00	PerStop	5		admin	3/5/2013	
ABBOTT, RANDY	Monthly Cleaning	Monthly Pool Service 3/1-3/31	5	\$35.00	\$175.00	PerStop	5		admin	3/5/2013	
ABODEELY, ROBERT	Monthly Cleaning	Monthly Pool Service 3/1-3/31	3	\$60.00	\$180.00	PerStop	3		admin	3/5/2013	
ABRAHAMSON, KATHIE	Monthly Cleaning	Monthly Pool Service 3/1-3/31	5	\$45.00	\$225.00	PerStop	5		admin	3/5/2013	
ADAMS, MARGIE	Monthly Cleaning	Monthly Pool Service 3/1-3/31	4	\$25.00	\$100.00	PerStop	4		admin	3/5/2013	
ADAMSON/AW	Monthly Cleaning	Monthly Pool Service 3/1-3/31	5	\$45.00	\$225.00	PerStop	5		admin	3/5/2013	
ALASCIO, THOMAS	Monthly Cleaning	Monthly Pool Service 3/1-3/31	4	\$45.00	\$180.00	PerStop	4		admin	3/5/2013	

The Service Program

Posting Complete

OK

Load Memorized Transaction List from Customer Info

Total: \$1,365.00

Record: 4 of 8 | Unfiltered | Search

v.10.5.5 REGISTERED TO - HVAC Test Company. Currently Logged in as admin

The Service Program Lawn Care - QuickBooks Pro 2010

File Edit View Lists Favorites Company Customers Vendors Employees Banking Reports Online Services Window Help

Home Company Snapshot Customer Center Vendor Center Employee Center Online Banking Doc Center Report Center App Center Add Payroll Cards & eChecks Services Live Community Help Feedback

Customer Center Invoices

Filter By: Open Invoices | Date: This Month | 03/01/2013 - 03/31/2013

Customer	Num	Date	Due Date	Amount	Open Balance
ABALBO, MICHELLE	JANClean23	03/31/2013	03/31/2013	100.00	100.00
ABBOTT, DR JOHN	JANClean24	03/31/2013	03/31/2013	45.22	45.22
ADAMS, MARGIE	JANClean28	03/31/2013	03/31/2013	100.00	100.00
ADAMSON/AW	JANClean29	03/31/2013	03/31/2013	250.00	250.00
ABBOTT, DR JOHN	JANClean30	03/31/2013	03/31/2013	275.00	275.00
ALASCIO, THOMAS	JANClean31	03/31/2013	03/31/2013	160.00	160.00
ABRAHAMSON, KATHIE	JANClean32	03/31/2013	03/31/2013	225.00	225.00
ABODEELY, ROBERT	JANClean33	03/31/2013	03/31/2013	180.00	180.00
ABBOTT, RANDY	JANClean34	03/31/2013	03/31/2013	175.00	175.00
				1,510.22	1,510.22