

Edit an Existing Service

General

Name*

Active

Description*

Our Traditional Mosquito & Tick Barrier Treatment Program. Service performed on 21 day intervals.

Color

Taxable

Queued?

Self Service?

Track Rework?

Seasonal?

Seasonal services enable the Renewals tool to automate seasonal renewals

Scheduling Mode

Proposal Invoicing Mode

Determines how proposals are invoiced

Open Time Granularity

Optional appointment slot size, in minutes. Leave blank for "first available only."

Service Role*

Accounting Class

Branding Revenue Category*

Finish Action

Auto Invoice?

If enabled, appointments will be automatically invoiced and charged the day of the appointment or earlier according to the Auto Invoice Offset below.

Auto Invoice Offset day(s) before appointment

If Auto Invoice is enabled above, sets the number of days before an appointment to create the invoice and charge the payment

Auto Pay When Complete?



If enabled, invoices will be paid automatically when appointments are completed if the contact has a credit card on file.

Lead Time Hours

Minimum lead time for offering slots, in availability hours.

Lead Time Days

Minimum lead time for offering slots, in availability days.

Drivetime Warning Window

Warn about drivetimes larger than this window.

Alternate Date Window

Provide the next n days as alternate dates for appointments

Income Account

Income account to use if part does not exist in QBO.

Summarize in QBO

When syncing invoices to QuickBooks Online, combine all lines into a single line, with an additional combined line for any taxable items

Messaging

Confirmation

Select an ad hoc message to use for confirmations

Confirmation Reminder

Select an optional ad hoc message to use for confirmation reminders

Completion

Select an optional ad hoc message to use for appointment completions

Proposal

Select an ad hoc message to use for proposals

Proposal Reminder

Select an optional ad hoc message to use for proposal reminders

Pricing and Duration

Base Price*

Base Duration*

How long does this service take? Enter minutes or *n* hours *m* minutes

Unit Duration

If there is also per unit duration, enter minutes or *n* hours *m* minutes



Duration Quantity

Optional quantity for duration measurement

Duration in Man Hours?

Override Duration From

Override the calculated duration with the value from the selected custom field.

Populate Quantity From

Unit Price

Override Unit Price From

Override the unit price with the value from the selected custom field.

Unit of Measure

Optional units for units (e.g., SF, LF, etc.)

Capacity Demand

Amount of demand per unit of capacity

Override Demand From

Override the calculated capacity demand with the value from the selected custom field.

Pricing Bands

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Add...	At Least	Less Than	Price	Formula	Duration	Demand	Ign
Edit Delete	0	0.51	\$728.00		14		
Edit Delete	0.51	1.01	\$847.00		16		
Edit Delete	1.01	1.51	\$973.00		18		
Edit Delete	1.51	2.01	\$1,099.00		22		
Edit Delete	2.01	2.51	\$1,225.00		26		
Edit Delete	2.51	3.01	\$1,351.00		35		

Minimum Charge

Default Expenses

Vendor

Description

Amount

Skills

Skills Gator

Repeating/Chaining Options

Recommended Interval

Value in days

Queue Date?

The date to queue a Drip-triggered service

Repeat Service

Select a followup service to perform after this service is complete

Auto-schedule Follow Up?

Check to automatically create the chained appointment

Subscription Options

Season Start

Season launch service date

Season Expiration

Auto-renew through this date

Total Visits

Total number of subscription visits

Create Appts

Select when to create the chained service appointment.

Align Day of Week?

 day of week

Schedule on the closest or next same day of week.

Carry Forward Add Ons?

For auto-created followups, check this to carry forward any add on lines.

Invoice Mode

Select when to invoice for subscriptions.

Pro-rating?

Task Chaining

Tasks

No data to paginate

Add...	Assigned To	Task Type	Category	Description	Days Offs
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No data to display

Save

