

RealGreen Forms

Digital Forms Right From Service Assistant® 5

SA5 users can create and send custom, signable PDFs to customers for proposals, contracts and more – without having to use a third-party application.

HOW IT WORKS

RealGreen Forms makes it easy to create sleek, professional documents directly in SA5.



KEY FEATURES

- ✓ Create and standardize the exact documents you need
- ✓ Automatically pre-fill customer-specific information
- ✓ Digitally capture employee and customer signatures
- ✓ Track all documents directly with Form Tracker
- ✓ Streamline your processes

Streamline Your Forms Process

Skip the clunky third-party forms apps and create exactly what you need without having to leave Service Assistant®. There are lawn care and maintenance proposals, contracts, surveys, checklists and more.

Forms as Professional as You Are

No more sloppy, hard-to-read, easy-to-ignore handwritten forms. RealGreen Forms lets you quickly create documents that look and feel professional, while making it easy for your staff and your customers to follow up.

Better Customer Experience

Digitally customize and complete detailed forms, estimates, contracts and more with advanced data mapping that pulls from your SA5 database. Customers can sign any time, anywhere.

More Efficient Workflows

With Forms, you can accept signed contracts and track every form from draft to completed status. Set up the documents you need in the Form Manager, then easily add customer-specific information. Right in SA5, your entire team can have visibility into all outstanding forms and quickly take action – editing, completing, downloading, emailing, sending or resending notifications.

To get started, contact your account manager or fill out the form at realgreen.com.