# Safe-Dry Quick Start

**1) Download the Apps Service Titan and Groupme**

**Service Titan App**          **Groupme App**

**Service Titan -** The app you will use to see jobs, create invoices, and collect payment. Ultimately the tool to get you paid!

**Groupme -** The app we use for communication. Where you post your eta to jobs, job totals, and see how your sales rank against other reps!

**2) Once downloaded, your manager will provide you with your login information for Service Titan. Refer to the Service Titan Mobile Guide for instructions on using Service Titan (see below). Create a Groupme account if you do not already have one so your manager can add you into the groups. (see group info below)**

**3) Around 5 pm each day you will be texted your first job for the following day including the time and address of the job.**

**4) When on the way each morning to your first job, post your eta in the Groupme group called Schedule Line so that your manager can Dispatch you to the job in Service Titan. Once dispatched, this will allow you to see the job details in Service Titan.**

**5) Once arriving at your first job, click Arrive in Service Titan. Greet the customer, find out their needs, blacklight, & get measurements on the areas we are cleaning. Once you have that information, step out to call your manager and discuss pricing.**

**Notes:**
**Visit https://www.safedryresources.com/ for additional material & videos.**

**Every Friday complete your equipment checklist at:**
**https://www.safedryresources.com/weekly-equipment-checklist**
**This is how we make sure you have all the cleaning supplies you need**

# Service Titan – Mobile Guide

Once logged in you are directed to the **Dashboard** page. From this page you can do the following things:

1) Click **View Job** to see next assigned job. (circle yellow)

2) View your personal stats, including job average (circle blue)

3) Click **Content Portal** to view training material. (circle green)

4) Click **History** to see completed jobs. (circle red)

## Starting A Job

Once Dispatched By Manager, Click **View Job** (Yellow Circle)

To **Dispatch** to a job, call your sales manager so that he can dispatch you. You will not be able to see your job or do anything else in Service Titan until you have been dispatched. Post your ETA to the job in the Groupme group called schedule line. (Customer can see your GPS location when on the way).
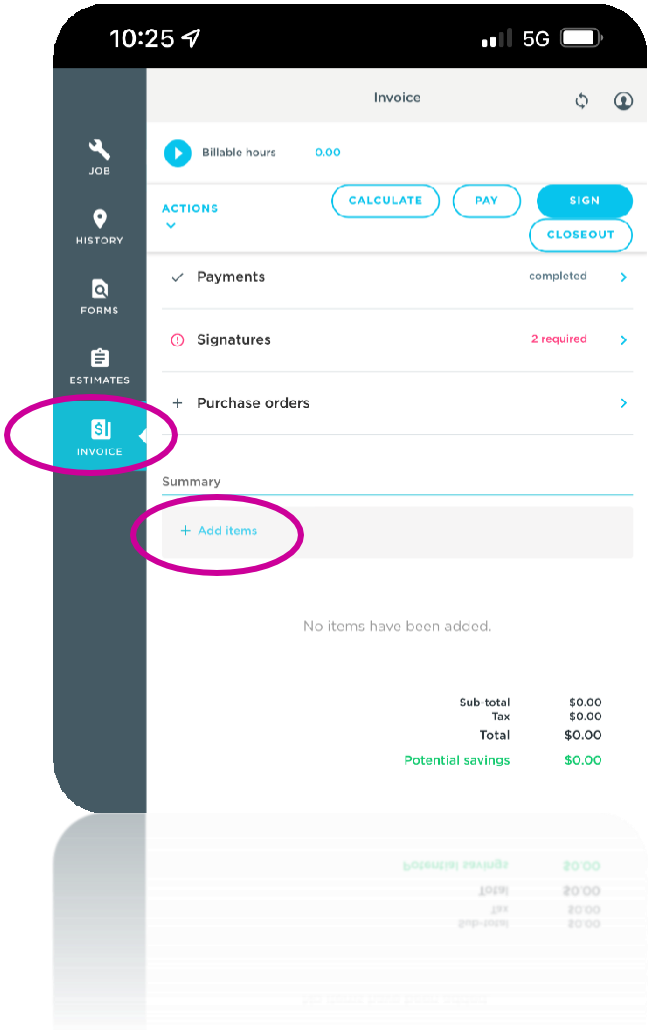
View job notes on what customer is wanting cleaned. Click **Arrive** (Blue Button) once arriving at appointment.
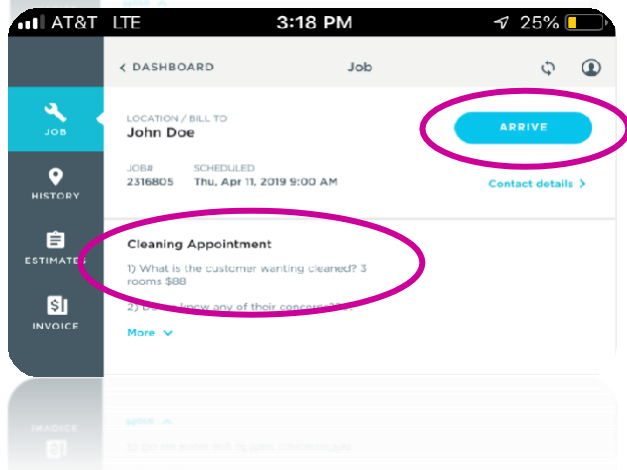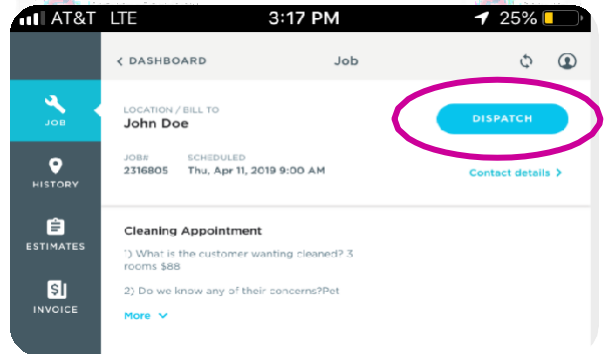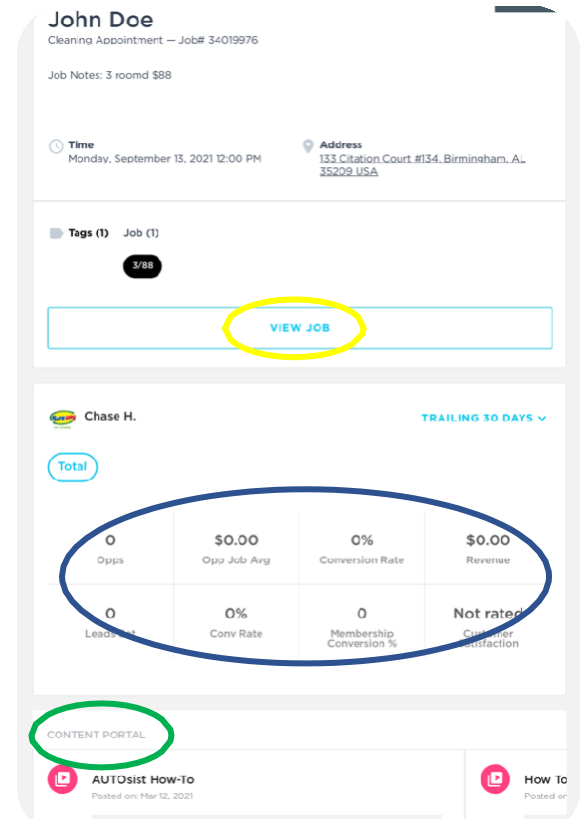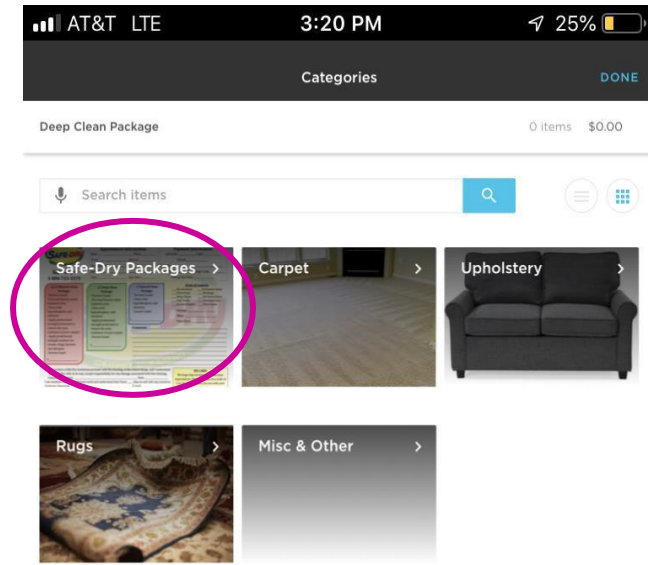
Click **Yes** to Arrive now.
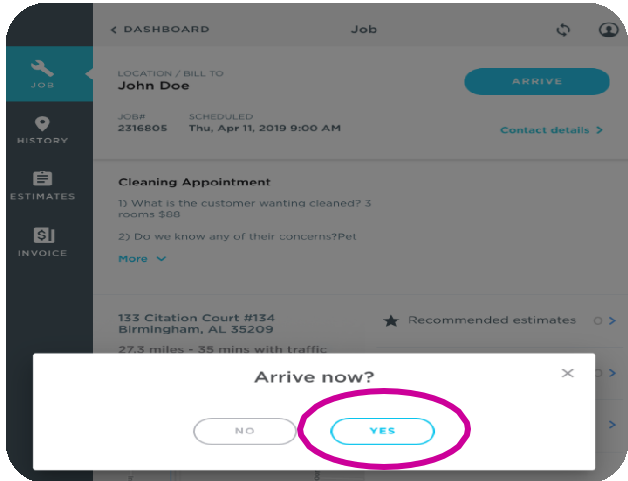
Once getting measurements, customer concerns, and agreeing on a price with the customer, we are ready to create an **Invoice**. Click Invoice on the left task bar and then select **Add Items.**
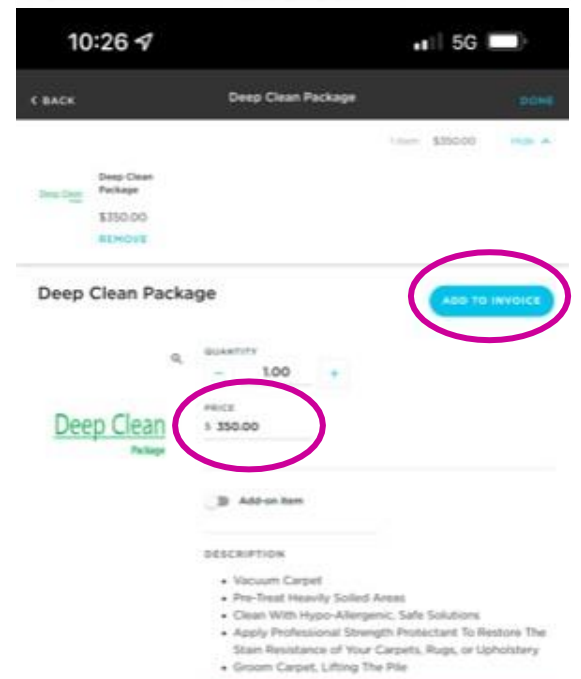
You can select a package to add, individual items, or both. In this example we are going to try to sell the Deep Clean Package, so we will select **Safe-Dry** **Packages**.

Once clicking on Safe-Dry Packages, select **Deep Clean Package**. Click on the Picture of the package you want to add, not the + sign.
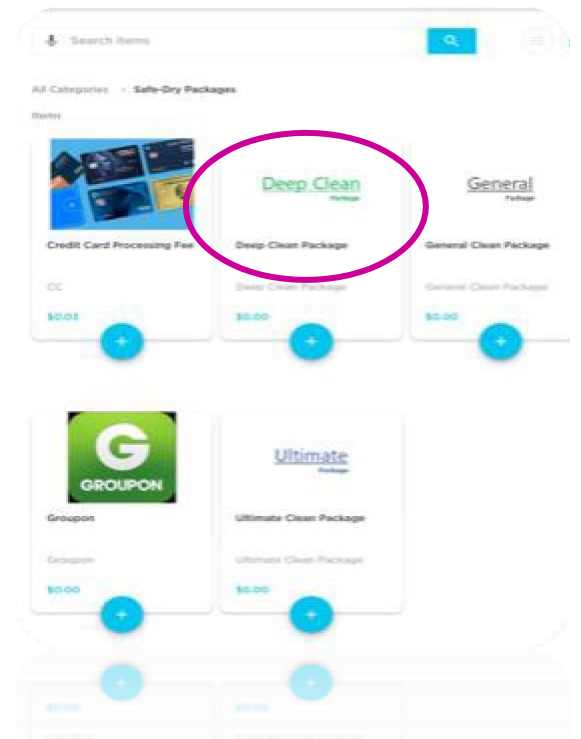
Enter in the total price of the job where it says price. Click **Add To Invoice**.

**Once Finished With Work:**

To collect payment click **Pay**. Select the form of payment and process payment. If Paying with Credit Card **Add 3% Credit Card Processing Fee**

To get final signature click **1-2 Required** to get completion signature.

If customer would like an invoice e-mailed to them click the **Actions Drop Down Arrow** and select **Email Invoice**.

**Once Job is Complete:**

Click **Close Out** Button
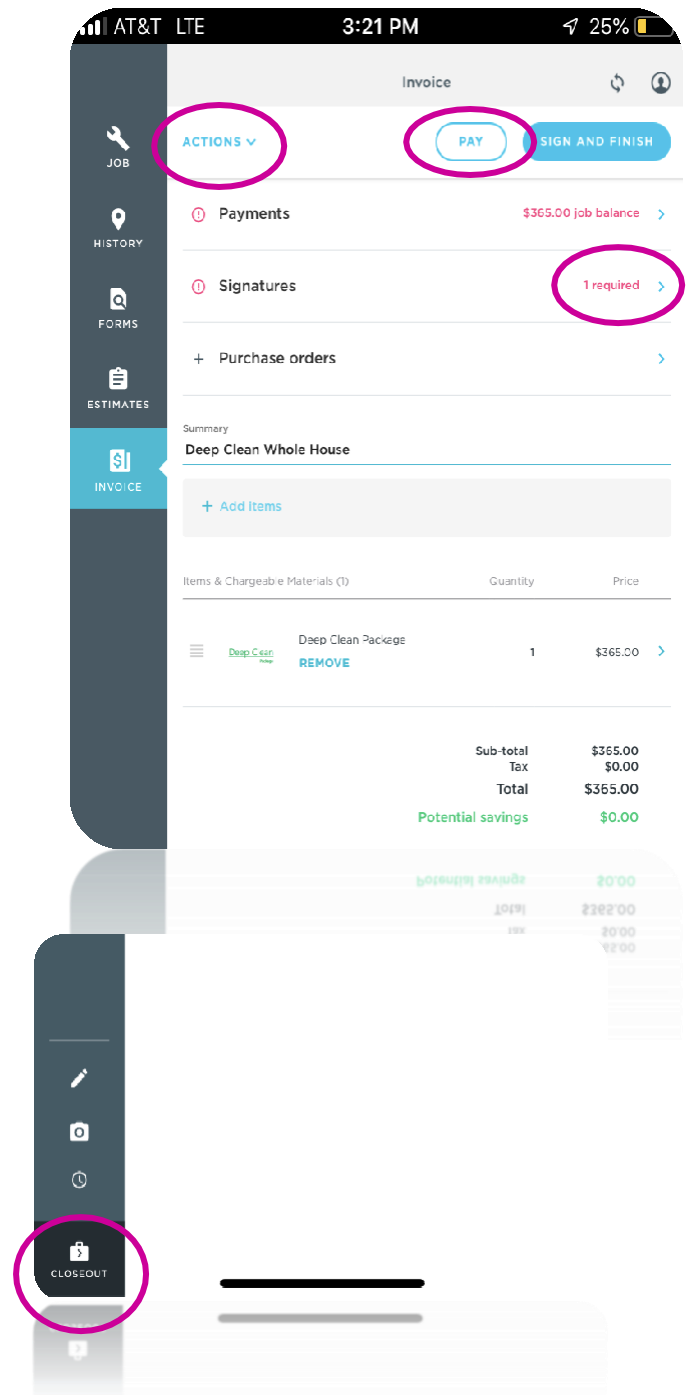
# GroupMe App

You will use the app GroupMe on a daily basis for communicating with the office.

On your smartphone, download the app GroupMe and create a free account if you do not already have an account.

## Different Groups:

*Schedule Line*: Send in your exact ETA when in route to each job. Send in Done when finished with each job to and you will receive your next appointment on Service Titan.

*Total Line:* Once you have agreed on a total with the customer send in the total for the job. Always send in your total before starting to clean.

*Cash Deposit Slips:* We should not be taking cash but in the event that the customer can only pay with cash, we must upload a picture of the cash to the job in Service Titan and deposit the cash into a Regions Bank. The Groupme Line Cash Deposit Slips has the instructions on how to deposit the cash and to what account. Always upload a picture of the deposit slip with the customer's name wrote on the deposit slip so we can give you credit for that job.

*Job Averages*: At the end of each day numbers will be posted in the job averages group so that you can see where you rank for weekly sales.