

Recommendations for Getting Started

Welcome to PestPac! There are various settings to configure upfront to streamline your workflow, usage and reporting for your business. The Lookup Tables, Company Setup, Printer Setup and User Profile will be discussed in this Getting Started Guide. These should be set up prior to entering new customers or adding services to your database. The following outline is meant as a guide to help ensure an easy setup. After completion of this guide, please check out New User Training Guide as your next steps.

There are training videos and scheduled training calls available if you need further assistance on these topics after reviewing the documentation. If so, feel free to contact support!

- **Company > Lookup Tables**
 - This section is where you setup and maintain data fields that are used throughout the software. Typically, you will see a faint colored checkbox in a field if it is pulling from the lookups. You can right-click in these fields or use the page down / down arrow key on your keyboard to choose your selection.
 - Examples of things to populate in your lookup tables include services your company provides, the schedules for recurring services, a file for each employee in your office, access right templates to set up for each user and so much more.

- **Company > Company Setup**
 - This area allows you to customize the program for your business based on your workflow, processes and reporting needs. Changes made in here affect the entire company.
 - In this area of the program you are able to set company wide defaults, turn features on or off as well as set required fields on certain screens that will show up in red.
 - Many of these settings can be changed as you become more familiar with the program or if your company processes change.

- **Company > Printer Setup**
 - Printer Setup allows you to establish which types of forms you will be printing to and what information will print out on the forms.
 - Forms are used for Service Orders, Invoices, Statements and Renewals.

- **Tools > Profile**
 - These are user specific settings. Changes made here will only affect the user you make the changes for. Here you can save your general preferences and appointment screen and scheduling options.

Lookup Tables

Below we will go through the recommended settings that you should focus on when populating your lookup tables. The reason this order is recommended is due to the way that certain lookup tables tie in to one another. Your settings may differ based on our company processes and reporting needs. For a more thorough review of each lookup table check out the Help file in the top right corner of your main Lookup Tables screen.

Materials

Before setting up your Materials lookup table there are several related lookup tables that need to be populated first. Once those have all been set up you can begin adding your Materials. Tip: Have your material labels handy when doing this part! For a thorough review of materials use the Materials Setup document located under the Training link in the top right corner of the software.

- **Units of Measure Lookup Table:**
 - This is where you will set up all of the potential units of measure you will need in regard to your material usage.
 - You must setup the Units of Measure you will be using as well as indicate the relationship of that UOM (unit of measure) to the Standard Units of Measure within the lookup table.
- **Application Method Lookup Table** (Optional per state)
- **Application Equipment Lookup Table** (Optional per state)
- **Application Rate Lookup Table** (Optional per state)
- **Material Groups Lookup Table** (Optional)
- **Target Groups and Targets Lookup Tables** (Optional)

Now you can populate your **Materials Lookup Table**.

Please note there is a presentation under the 'Training' link in the upper right hand corner that will walk you through inputting your Materials step by step.

Services

Before setting up your Services lookup table there are several related lookup tables that need to be populated first. Once those have all been set up you can begin adding your Services.

- **Service Classes Lookup Table :**
 - Is for setting up broad categories of the types of services your company may offer to be grouped together for reporting purposes.
 - Example classes can be Pest, Lawn, Bed Bug, Termite, etc.
 - Can be used for setting up commission rules.
- **Targets Lookup Table:**
 - Specific types of pests that you are targeting for treatment get populated here. These can be set up to automatically pre-fill in service setups and service orders based on service code.
 - Note: you will need to enable this feature under Company → Company Setup → Service Order/Service Setup for Link Target Pests to Services in order to be able to link these.
- **Materials Lookup Table:**
 - Enter all of the materials (chemicals) your company uses. These can be set up to automatically pre-fill in service setups and service orders based on service code.
 - Note: you will need to enable this feature under Company → Company Setup → Service Order/Service Setup for Link Materials to Services in order to be able to link these.
- **Divisions Lookup Table:**
 - Is similar to Service Classes in that you can set up broad categories of the types of services your company may offer to be grouped together for reporting purposes.
 - Can be assigned to locations and/or services to specify what division they are tied to for reporting purposes.
 - Consider the reports you will be running since some reports can only run for and grouped/sorted by Service Class and/or Division.
- **GL Codes Lookup Table:**
 - Only populate if using the General Ledger Module which allows you to export transactions to an accounts payable software such as QuickBooks or Peach Tree. See the training link in the top right corner of the software for more info.
- **Price Codes and Price Charts Lookup Tables:**
 - If using Price by Measurement feature for pricing out your services based on property measurements.

Now you can populate your **Services Lookup Table**.

Employees

Before setting up your Employees lookup table there are several related lookup tables that need to be populated first. Once those have all been set up you can begin adding your Employees.

- **Branches Lookup Table:**
 - This allows you to indicate which branch(es) the user, salesperson, technician belongs to and would need access to.
 - Don't forget to check the 'Tech' checkbox under the 'Branch Access rights' section for each of your technicians to indicate which branch(es) they are technicians for.
- **Access Templates Lookup Table:**
 - This is what allows you to control what functions and reports within the program users, technicians and salespeople will or will not have access to.
- **Roles Lookup Table:** (Used for Commissions and Technician Production purposes)
 - This is where you can indicate various different roles your Technicians and Salespeople may have when listed on a service order or service setup.
- **Commission Types Lookup Table:** (If using the Commissions feature)
 - This is where you set up the various different commission rates you offer.
 - Additional training on commission is available under the Training link in the top right corner of your software.
- **Services Lookup Table:** (If using the Commissions feature)
 - This will be needed in indicating the rules in which a sales/technician will/will not be paid commissions.
- **Service Classes Lookup Table:** (If using the Commissions feature)
 - This will be needed in indicating the rules in which a sales/technician will/will not be paid commissions.

Now you can populate your **Employees Lookup Table**.

Additional Suggested Lookup Tables:

- **Sources Lookup Table:**
 - Populate all of the marketing options as well as referral options to be able to track how a customer heard about your company.
- **Tax Codes**
 - Populate any of the needed tax rates for locations you will be servicing

Additional Suggested Lookup Tables Continued:

- **Types Lookup Table:**
 - Populate the different location types that you service. Some customers keep it generic with Residential and Commercial but others have much more specific types; Church, Food Establishment, School, Apartment, Single Family Home, etc.
 - Keep in mind these categories may be used for reporting purposes later on.
- **Terms Lookup Table:**
 - Populate the payment terms you offer your customers.
- **Routes Lookup Table:**
 - Populate what you would use as an indicator to a group of service setups or service orders. This can represent a geographic region or particular area that a technician usually services.
- **Methods of Payment Lookup Table:**
 - Populate the different methods of payment your company accepts.
- **Adjustment Reasons Lookup Table:**
 - Populate the various reasons you would be entering in an accounting adjustment. Example: Coupon, Discount.
- **Credit Reasons Lookup Table:**
 - Populate the various reasons you would be entering in a credit memo. Example: Bad Debt, Error.
- **Not Serviced Reasons Lookup Table:**
 - Populate the reasons you want to track for why a service order would be posted as 'Not Serviced' such as Canceled, Missed, Not Home or Void.
- **Cancel Reasons Lookup Table:**
 - Populate the reasons you want to track for why a service setup would be cancelled permanently. Examples: Competitor, Moved, No Reason.
- **Instructions Lookup Table:**
 - Populate any canned instruction comments that you would like available to select on a service order or service setup so you would not need to re-type it each time.
- **Form Comments Lookup Table:**
 - If you are using the WDI or WDO reports this is where you populate your findings, disclaimers, recommendations, etc.
- **Note Codes Lookup Table:**
 - Populate different categories of notes to be used when handling a customer's account. Examples: COLLECTIONS, SALES, SERVICE, INTERNAL.
- **Letters Lookup Table:**
 - Populate any letters you may be sending out to your customers through the program. Click on Help on this screen for mail merge options.

Company Setup

Here we'll go through the most popular settings that you should focus on when setting up your data. Additional options are available based on your company processes. These defaults can be changed as you become more familiar with the program.

Defaults for New Accounts

- **General Options:**
 - Set defaults to save time when adding new locations.
 - You can set defaults for things such as Terms, Tax Codes or State.
 - 'Blank Branch'
 - If you only have 1 branch, leave this option un-checked so the system will auto-fill the Main Branch for you when adding a new customer.
 - If you have multiple branches, leave this option checked so you can select the proper branch at the time of adding the customer.
- **Locations:**
 - Choose whether you want the batch print and batch email options on by default when adding a location.
- **Bill-Tos:**
 - Choose whether you want the batch print or batch email options on by default when adding a bill to.
 - Options are for printing and/or emailing statements and invoices.
- **Automated E-Mails:**
 - The system allows you to automatically email an invoice or an inspection report when service is completed.
 - Here you will have the ability to say whether you want this option on, and if so, choose if the email gets sent when a service order gets posted into a batch or when it is released.
 - You can send automated invoices to the email address listed on the Bill To.
 - For automated inspection reports, you can select to have these sent to the email address on the location, the bill to or both.
 - Send Inspection Report On: This specifies whether you want the automated emails to go out when the orders are posted into a posting batch or once the posting batch has been released.
 - We typically recommend Batch Release since that allows for time to review the data to ensure its accuracy before it is sent out to customers.

Field Setup

- **User Defined Fields:**
 - These are customizable fields that you can set up to store any additional information that a field does not already exist for in the software.
 - You can add user defined fields to use on the **Location**, on a **Bill-To**, for **Services**, for **Employees**, for **Contacts**, and in **Calls and Leads**.
 - **Service** user defined fields will appear in the service setup and service order.
 - **Technicians/Staff** is for the fields you will use to store your techs and sales people in setups, orders and leads. These fields are also used for commission.
 - They typically are captioned: Tech, Tech 2, Sales, Sales 2, Sales 3
- **Required Fields:**
 - Set specific fields on different pages of the program that your users will be required to enter. Options available are for Add Location, Edit Location, Edit Bill-To, Service Order, Service Setup, Renewal and Leads.
 - To multi select fields on a PC hold down the control key while making your selections.
 - To multi select fields on a Mac hold down the command key while making your selections.

Posting

- These options control what fields and behavior you will see when you go to Customer > Post Service Order.
- If you do not have batch posting turned on then when you post an order as complete it is automatically turned into an invoice and you will not have the ability to review the orders before releasing them.
 - If you are using any of the mobile applications you will want batch posting turned on.
- **Require Entry of Start/End Time:** This will force you to enter in a starting/ending time for each service order to be posted
 - If you are using any of the mobile applications the times will pull in automatically from what was completed on the devices.

Auto Apply

- Auto Apply Credits:
 - Turn this option on if you want the system to automatically apply invoices to outstanding credits that you have at the time the service order is posted. When referring to service, the system is looking at the service code on the invoice and the service code tied to the payment. The auto apply rules will respect the option that you have selected from one of the below:
 - **All Credits / All Services:** any open credit or credit memo out there will get applied to any invoice that gets posted.
 - **All Credits / Same Service Only:** any open credit out there will get applied to an invoice when it gets posted ONLY if the service codes match on the credit and the credit memo/payment.
 - **All Credits / Same Service or No Service:** any open credit out there will get applied to an invoice when it gets posted ONLY if the service codes match on the credit and the credit memo/payment OR if the service code on the payment is blank.
 - **Open Credits Only / All Services:** any open credit out there will get applied to any invoice that gets posted.
 - **Open Credits / Same Service Only:** any open credit out there will get applied to an invoice when it gets posted ONLY if the service codes match on the credit and the credit memo/payment.
 - **Open Credits / Same Service or No Service:** any open credit out there will get applied to an invoice when it gets posted ONLY if the service codes match on the credit and the credit memo/payment OR if the service code on the payment is blank.

Payment Screen

By default you will have the following options checked:

- **Use Batch Payment Posting:** This allows you to add and edit payments in batches so that you can double check yourself or run a Customer Payment Report before releasing the payments to be finalized.
- **Prompt for Services on Cash/Receipt:** Checking this option gives you the ability to tie payments to specific service codes on cash payment entry.
- **Hide Services Not Assigned to Current Bill-To:** This will only give you the ability to select a service code from the drop down for a service that is part of the bill to. If unchecked you can select from all services in your lookup table.
- **Use Discounts and Adjustments:** Leaving this option checked will allow you to enter adjustments, if this is UNCHECKED then you will not have the ability to do so.

Additional options are available for **Auto Apply on Payment Entry**, **Create Finance Charge on Payment Entry** and **Default Payment Date From**.

Printer Setup

First review the following printer setup wiki: <http://fb.marathondata.com/default.asp?W966>

Note: if selecting the option for 'Use Branch Information' for any of your forms be sure to go into your Branches lookup table and populate the address and company information for each of your branches.

Service Order Defaults

- Select the **Service Order Form** you are using.
- Choose which fields you want to **Print On Service Orders**.
- If emailing, choose what to **Print On E-Mail Service Orders**.

Invoice Defaults

- Select the **Invoice Form** you are using.
- Choose which fields you want to **Print On Invoices**.
- If emailing, choose what to **Print On E-Mail Invoice**.
- If using automated emails set up the **Automated E-Mails** section.
- The option **Bill-To Name and Address Source** is for selecting whether the name and address that prints on invoices is from the Invoice or from the Bill-To.

Statement Defaults

- Select the **Statement Form** you are using.
- Choose which fields you want to **Print on Statements**.
- If emailing, choose what to **Print On E-Mail Statements**.
- If using automated emails set up the **Automated E-Mails** section.
- Select whether you want to use Aging Days Message, Billing Message or Collection Stage Message for the **Message to Appear on Bottom of Statements**. Then make sure to set up the appropriate messages below.

Renewal Defaults

- Select the **Renewal Form** you are using.
- Choose which fields you want to **Print on Renewals**. These settings will come into play when you do your Renewal Notices.
- If emailing, choose what subject you want to use under **Print On E-Mail Renewals**.
- **Default Message** will pull into the message section of the renewal form.
- Select what **Default Letter** and **Default Post Card** you would like to use when doing your Renewal Notices, if any. You will need to make sure that your letter and postcard are created in the appropriate lookup tables first.

Additional options exist for **Report, Letter, Label, Post Card, Consolidated Invoice, Inspection Report, Credit Card Receipts** and **Mobile Service Order Defaults**.

Profile

Each user has the ability to set their own Profile settings under Tools > Profile as long as they've been granted proper rights in their Access Template. These settings are specific to the individual user only. We will only cover the recommended settings so be sure to go through all of the additional options available within the profile that are not mentioned here as well.

Basic Information

- Make sure to fill in your **First Name, Last Name** and **Email** so that you can access the community site.
- This is also where you can change your **Password** if needed.

General Preferences

- You can select your **Start Page** when you first log in to be either Location Search, the Today screen or the Visual Navigator.
- **Search Paging, Notes Paging** and **Post/Commit Paging** controls how many results you see on those pages.
- You can select which field your cursor defaults to for **Quick Payment Start Field, Update/Post Search, Payment Entry Screen** and **Location Search**.

Appointment Preferences

- **General Preferences:** Select one or more of these options to use in the software: **Appointment Mover, Appointment Scheduler** and/or the **Quick Scheduler**.
 - **Preferred Technicians** can be populated after you've completed your Employee lookup table and it will allow you to set which technicians you want to see on the scheduler as well as the order they appear. If you would like to see all remaining techs after the preferred make sure to check the box for **Show More Techs**.
 - **Show on Service Order Popup** allows you to choose if you would like any of the available fields to show when you are hovering over an appointment on the appointment scheduler.
- **Common Scheduler Preferences:**
 - **Drag & Drop Pop-Up** refers to moving appointments on the appointment scheduler. If checked, this will prompt you with a pop up asking you to confirm the move info before saving. You can also adjust the work date, work time, tech 1, tech 2, color, time range, duration, drive time or lock the appointment before saving.
 - **Move permanently** allows you to change the day, time, tech 1, tech 2 or all of the above on the setup tied to the order you move on the appointment scheduler. Only appears if Drag & Drop Pop-Up is selected.

Appointment Preferences continued

- **Common Scheduler Preferences:**
 - **Schedule Slot** options are for setting up the time slots you will see on your appointment scheduler. To set up your time slots for A, B or C fill out the following:
 - **Schedule Slot Start Time:** What time you want this slot to start at.
 - **Slot Duration:** How many hours you want the slot to be.
 - EX: For Slot A to be from 9am to 5pm fill out the following:
 - Schedule Slot A Start Time = 09:00 AM
 - Slot A Duration = 8
- **Appointment Scheduler Preferences:**
 - **Preferred View:** here is where you set up how you prefer to see your appointment scheduler by default. You can choose to either see a single day for multiple techs, or you can see a single tech over multiple days. When on the calendar itself you have the ability to toggle views.
 - **Make sure to fill in your Techs to Display on Schedule and Days to Display on Schedule.**
- **Quick Scheduler Preferences:** These will only appear if you have Quick Scheduler enabled.
 - Make sure to fill out **Days Ahead to Search** and **Number of Technicians to Display.**

Location Detail Preferences allows you to customize what you see by default when you are on the Location Detail screen for an account.

- **Show Calendar, Show Contacts, Show Location Calls, Show Sales Leads, Show Tasks:** If any of these are unchecked you can still access them by clicking on the “show” link. It’s recommended to only select the options that will pertain to your usage of the software.
- **Default History View:** Select the option that best fits what you will need to see by default when going into the History of a location. Options are **Billing** (payments and invoices), **Production, Service, Material** or **Call-Backs**.

Common Scenarios and FAQs

Also check out **Help** in the top right corner of the software and the **community site!**

“I added a new employee but it’s not showing on the appointment scheduler.”

- It’s possible that a setting may be missing. Check the following:
 - Company > Lookup Tables > Employees > select the tech who is missing. Make sure User/Tech is selected. Make sure ‘show on appointment screens’ is selected.
 - In the same employee lookup table go to Branch Access Rights. Make sure the tech box is checked next to the branch that the tech belongs to.
 - If still missing go to Tools > Profile > Appointments > General Preferences. Make sure that you have a high enough number entered under ‘Techs to Display on Schedule’ under Appointment Scheduler Preferences. Also check the box ‘Show More Techs’ under General Preferences.

“I created a tech in the lookup table but it’s not showing as an option in my service order under the tech dropdown. Why don’t I see their name in the picklist?”

- Company > Lookup Tables > Employees select the tech who is missing.
- Go to General Options > Basic Information and under Employee Type make make sure Technician/Salesperson is selected.
- Next go to Branch Access Rights in that same employee lookup and make sure the Tech box is checked next to their branch.
- Save – you should be all set!

“I cannot get logged in. I am getting an error that says ERR: Could not find stored procedure 'UserLogin'. in Microsoft OLE DB Provider for SQL Server (Line 0)”

- This means you are not logging into the proper server address.

“When I try printing I am getting an error that says ‘The resource you are looking for has been removed, had its name changed, or is temporarily unavailable’ what does this mean?”

- This means you have ‘custom’ selected in your Printer Setup defaults but do not actually have a custom form.
- Custom should only be selected if you have a custom programmed form implemented from a PestPac representative.
- To correct you can go to Company > Printer Setup > and then choose whichever item you are printing (Service Order, Invoice, Statement, Renewal) – then select the actual form you are printing to.
- More info about forms can be found here: <http://print.workwave.com>