PestPac Mobile 3.0 App Core Usage

This document covers the following:

- Viewing the Order List Screen
- Menu Options
- Viewing the Calendar
- Adding a New Order
- Adding a New Location
- Searching for and Viewing a Service Order
- Rescheduling a Service Order
- Completing a Service Order

The PestPac Mobile App is an iOS- and Android-based application that allows technicians to service accounts without the use of paper tickets. Some features include timing in and out of appointments, viewing location information, entering material application information, and syncing data in real-time if a connection is available.

This document will cover training and usage for the core version of the PestPac Mobile App 3.x.

Viewing the Order List Screen

After logging into the app, if there are Service Orders assigned to the current date, the default date showing is the current work date. Otherwise, the app will show the next date for which Service Orders are scheduled.

For each Service Order, the app lists the Work Time and/or Time Range (depending on your settings), Company/Customer Name, Address, Service Description, and Service Color.

The orders will be listed in time sequential order for ease of reference. Any orders with blank times will appear at the top of the list.

If a new Order is added for the technician on today's date, that Order will appear on this screen, and the technician will get an additional notification.

Symbols

The Order list screen has four status symbols and an alert icon for quick reference. These symbols will automatically update and change depending on user action in PestPac mobile and desktop.
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Not Started: Displays on all Orders listed in the app that the mobile user has not taken any action on yet, indicating the Order needs to be serviced.

In Progress: Displays on Orders that a mobile user has tapped Start within the Order screen but have not yet been completed.

Paused: Displays on Orders that a mobile user has tapped Start within the Order screen but have been paused.

Complete: Displays when a mobile user has completed the Order. Completed orders will remain this way on the app until the Service Order batch has been released on the desktop.

Alert: Displays as a notification to alert the technicians that the location has an alert note attached.

Menu Options

Hamburger Icon

The Hamburger icon in the top left-hand corner accesses the app menu that has a variety of options. Tap the icon once to access it and again to close the menu. Accessing the icon gives you a menu with options to:

- View the current version of the app installed on the device
- Create new Orders and/or Locations
- Search for existing Orders
- Daily Timesheet and Approve Timesheets options (if using Mobile Timesheets)
- Log Out
This icon is also where you will receive notifications of new Orders added with a Work Date assigned for the current date.

**Calendar Icon**

The *Calendar* icon in the bottom left-hand corner will launch the calendar view of the current month showing service orders for all dates. Tap the icon once to access it, and tap the arrow to close the menu.

See the Viewing the Calendar section of this document for further details.

**Starred Appointment Icon**

The *Starred Appointment* icon will bring you back to Today whenever you are viewing another date. This option is grayed out when you are already viewing the current date. Tap the icon once to access it, and tap the arrow to close the menu.

**Viewing the Calendar**

Once you tap the *Calendar* menu option, you will see the calendar for the month. You can scroll up and down on your device to view previous and future months’ open Service Orders (availability of these months is Access Right controlled from the PestPac desktop version).

Tapping a date will open the Order Listing screen for that date.

To return to the previous Order Listing screen, tap the back arrow in the top left-hand corner.

**Adding a New Order**

If, while out in the field, you need to create a new Service Order for an existing customer, you will be able to do so from the app menu (Access Right controlled from the PestPac desktop version).

1. Tap *New Order*, tap the *magnifying glass* icon to search for the Location to add a new Order, and tap the appropriate Location.
2. Select the appropriate Location.

3. Here you can then indicate the type of service order you are creating: Service Order, Production, Call-Back, Estimate.

   You will also set the date, time, duration, link it to an existing Service Setup or add a different service code later, as well as fill out any order instructions.

   Tap Save once all the necessary information has been added. You will then see the newly-created order.
Adding a New Location

If, while out in the field, you need to create a new Service Order for a customer’s location that does not yet exist in PestPac, you will be able to do so from the app menu (access-right controlled from the PestPac desktop version).

1. Tap *New Order*, and tap *Add*. 
2. Fill in Company/Customer Name, Address, Contact Information, Customer Type, and Source.

To fill in the Address, you have two options:

- Tap the *pencil* icon and type in the address; the app will perform a search to validate the address at that time.
- Tap the *GPS* icon, which will look at the device’s current location and autofill the address.

Tap *Save* once all necessary information has been completed.

3. This will then automatically bring you to the New Order screen where you can indicate the type of service order you are creating (Service Order, Production, Call-Back, Estimate), date, time, duration, link to an existing Service Setup or add a different service code later, as well as fill out any order instructions.
Tap *Save* once all the necessary information has been added. You will then see the newly-created order for the new Location.

Searching for and Viewing a Service Order

If you are looking for a Service Order and cannot find it on the Order List screen or in your Calendar view, you can find an order by searching for the Location Number, Address, or Company/Customer Name.

Tap *Search Order*, and tap the magnifying glass to search for the Order.
Once you are in a single order, the app will pull up the Order screen where you can easily view information about the specific order as well as account information. This screen is also where you will go to begin service for this order.

The Order screen is broken out into sections for ease of reference, including Location, Order Status, Services, Contacts, Notes, Account Balance, and Forms & Attachments.

Location Section
The Location section provides the Location #, Customer/Company Name, Location Address, Location Phone, Location Email Address, Location Instructions, as well as a Google Street View image of the address.

You can tap the Map Marker icon to launch a separate map application and view the location’s address and get turn-by-turn directions to that Location from the technician’s current location. Note that you must have your device’s

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GPS location feature enabled to take advantage of this feature. We also recommend using Google Maps as the mapping application to perform this function.

You can replace this picture with your own by doing a long press on the existing one.

You can also tap the phone and/or the email icon to either send the customer an email or copy the phone number to the dialing screen to call or text the customer.

**Order Status**
The Order Status section provides you with the Scheduled Arrival time, Scheduled Duration, and the Order’s status (Not Started, In Progress, Paused, or Completed).

**Services**
The Services section is where you can view service-specific information for the order.

You will be able to see and edit the service(s), quantity, and price listed on the order to be completed. You will be able to see the order type (Service Order, Production, Call-Back, or Estimate), any Service Instructions, Service Order Attributes, the Service Setups tied to the order, and Service History at that location.

You can also add Services for additional services completed while out in the field by tapping the + icon.

In addition, you can associate any additional orders for that Location to be completed at the same time by tapping the Associate icon.

**Contacts**
The Contacts section is where you can view, add, and edit contact information for this account. You will not be able to edit Bill-to contact information, only Location information can be edited.

You can add Contact information by tapping the + icon and edit Contact information by tapping the pencil icon.
Notes
The Notes section is where you can view any notes from the desktop tied to this Location as well as add your own notes.

If there are pre-existing notes on the Order, the most recently-added note will be visible on the Order screen.

1. By tapping the Notes icon, you can add a new note.

2. Select the respective Note Code in the Note Code section; in the Note section, enter the text for your note. Remember that the Note Code MTO is used for a private note to be sent back to a PestPac office user.

3. Tap Save to add your note once the code and text have been entered.

Alert Notes are added by a PestPac user on the desktop to notify the technician of something for that Location prior to service.

If an Alert Note has been created, you will see the bell icon on the order when viewing the order list.

When going into an order with an HH ALERT, the app will bring you directly to the Alert screen before you are brought to the Order itself.

If you tap the back arrow in the top-left corner, you will return to the Order screen. This alert will continue to pop up each time you access an order for this Location until the Alert Note is removed or has passed its expiration date.

Once viewing the Order, the alert will appear at the top of the Order screen. You can tap again to view the note at any other point.
Location
The Account Balance section is where you will be able to reference both the Location and the Bill-to balance for account. You will also be able to reference the last day/time the balance was updated, the payment terms for the account, as well as any unpaid invoices contributing to the account’s balance. Note that these features are access-right controlled.

Forms & Attachments
The Forms & Attachments section is where you can add any Location-specific attachments/documents as well as reference any documents that have already been attached to this Location.

If there are already any pre-existing documents, the app will list the most recent one on the Order screen. When you tap the + icon, you can both view any pre-existing documents as well as add any new documents as needed.

You can take a picture, video, voice recording, or upload a file that is already stored on your device.

Once you have added your document, you can tap the arrow in the top left-hand corner to leave the screen.

Rescheduling a Service Order

Rescheduling a Service Order is access-right controlled. If you have access to reschedule Service Orders:

1. Tap the Reschedule icon in the bottom left-hand corner of the Order screen.
2. A pop-up window will appear where you can assign a new work date and/or time for that service. Note that there is no way to reschedule Service Orders to be assigned to a different technician.

When you tap the currently-assigned date, you will get a calendar pop-up to select your new date. When you tap the currently-assigned time, you will get a pop-up to assign your new time.
3. Once you have assigned the desired day/time, tap *Save*. This will bring you back to the Order screen for that Service Order on its newly-assigned day/time.

Completing a Service Order

To complete a Service Order, complete the following steps:

1. Tap *Start* in the bottom right-hand corner of the Order screen.

   Once you tap *Start*, the app will update the Status section under *Time Started* with the actual time stamp.
2. You can tap Reset to reset the time started as if you had not yet started the order. You can also pause the order if you need to switch orders, take a break, or come back later.

3. Tap Activities to begin completing your service.

4. On this screen, you will be able to add Material Applications, Service Comments, and any order-specific attachments (in that respective order).

5. Materials
   a. Tap the drop icon and then tap the + icon. If using Material Groups, select from the Groups screen. If you are not using them, tap Ungrouped to access your material options.
b. Once you tap a Group, you will see a consolidated listing of Materials. Tap the name of the Material you need to apply.

c. Populate the Quantity, UOM, Concentration, and Application Information as needed. When you are finished entering the material information, tap **Save** to return to the Activities screen.
d. While adding a frequently-used Material, you can also add it as a Favorite. Material Favorites will populate their own Material Group from which you can later select for future Material applications. To add a Material as a favorite, tap the star icon in the top right-hand corner.

e. Your Material once added will appear listed below and you can tap the + icon to add additional Materials as needed.

6. **Tech Comments**

a. Tap the *comment* icon and then tap the + icon to add a comment.
b. Tap the Comment field to enter the text for your comment, and tap Save when finished.

c. You can also select a comment from Favorites or add the entered text as a new favorite by tapping the star icon.

The Favorites section will pull from that technician’s previously-created comments that were saved as favorites.

The General section will pull from the Instructions lookup table on the desktop for canned comments all technicians will be able to use.

d. Once you tap the comment, you can edit the pre-populated text as needed and tap Save to add the comment.

7. Attachments

a. Tap the attachment icon and then tap the + icon to add an attachment.

b. You can add a photograph, video, voice recording, or select a pre-existing file to record and make note of anything during your service for the customer to view.

If you are using the automated emails feature for Inspection Reports, any attachments added here will be additional attachments when the emails are sent out. The attachments can also be sent when manually emailing Inspection Reports from the app.
8. When you have completed entering all your servicing information tap ‘Done’ to complete the service and be brought to the Completion screen.

9. The Completion screen is where you will be able to either post an order as Not Serviced or complete the order by recording payment (access-right controlled), collecting signatures, as well as printing and/or emailing Service Reports.

   To post an order as Not Serviced, tap Not Serviced in the bottom left-hand corner of the Completion screen.
10. You will then be able to select the specific reason you are not completing the service from the *Not Serviced Reasons* lookup table that was setup in PestPac.

   We recommend adding a comment to provide further details as to why the service is not being completed.

11. To complete an order, you may need to visit the following tabs on the Completion screen: Payment, Signature, Print, and Email.

12. **The Payment tab**

   a. The Payment tab, accessed by tapping the first icon, allows the technician to collect cash, check, or credit card payments while out in the field (access-right controlled).
13. The Signature tab

a. The Signature tab, accessed by tapping the *pen* icon, is where the technician can enter their signature as well as collect the customer’s signature and printed name. You may be required to enter this information for each service based on the settings configured in PestPac Mobile.
b. If the customer is not available to sign the order, you can tap the Customer Available toggle, which will remove the Customer Signature and Customer Name sections for you, and gray the Customer Signature section.

14. The Print tab

a. The Print tab, accessed by tapping the printer icon, is where you can go to print an Inspection Report, Invoice, or Service Order for the current order if you have print capability configured.
You will also be able to print an Inspection Report while the app is offline.

15. The Email tab

a. The Email tab, accessed by tapping the envelope icon, is where you can go to email an Inspection report to the email on the account as well as additional email addresses the technician manually enters.

You will also be able to print an Inspection Report while the app is offline.
b. To select the pre-populated email address, check the checkbox to the right of the email address. To add additional email addresses to be sent the Inspection Report, tap the + icon.

If you have added any attachments under the Activities section while completing the order they can be sent in the email as additional attachments for the customers to review.

16. Once you have completed entering all information on the Completion, tap Complete on the bottom right-hand side to mark the order as completed. This will bring you back to the Order screen and update your end time, tracking the duration for an accurate record of time spent at this location.
17. Completed orders will automatically update in PestPac and go into a posting batch for someone in the office to review and release. All completed orders will remain on the app until the batch in PestPac has been released.

When viewing the Order List screen, completed orders will appear with the Complete icon above the Company/Customer Name.

18. If you forgot to add any information (notes, attachments, materials, signatures, etc.), you can tap Re-Open on the bottom left-hand side to add any additional items as needed. Note that this feature is access-right controlled.
If you need to mail or print the Inspection Report, you can do so by tapping *Report* to email or *Print Report* to print at the bottom of the order; there is no need to re-open the order to access these features.