

PestPac User Guide

Pre-requisite: Before going through this document be sure to first complete your Company Setup and Lookup Table settings. You can review how to do so by going to Company > Lookup Tables and clicking on the link at the top that says [View “Getting Started” Guide](#).

Always access this document for new users from the Training link in the top right corner of your software to ensure you are utilizing the latest revisions. It will always list the date for the most recent revisions to ensure you are looking at the most up to date version.

If you need additional assistance please contact support to request a scheduled training call.

Topics covered:

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- Keyboard Shortcuts, Hot Keys and Tips
- Materials
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- Account Setup
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 - Adding Recurring Service Setups
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Keyboard Shortcuts, Hot Keys and Tips

Keyboard and Browser Shortcuts

- ***A Hot Key is any letter on a button within the program that is underlined. Pressing that letter in addition to Alt(in Internet Explorer) Alt + Ctrl (in all other browsers) allows you to select that button without leaving the keyboard.***
 - Ctrl + plus sign (+) will zoom
 - Ctrl + - will zoom out
 - Ctrl + 0 will default to 100% zoom
 - In Internet Explorer Only, Alt + T pulls up the tools menu if your menu bar is hiding.
 - Tab – Allows you to move from one field to the next field.
 - Shift + Tab – Allows you to move back to the previous field.
 - Spacebar – Allows you to select/deselect a checkbox.
 - Alt + H – Allows you to open the “Help” screen for the page currently in view.
 - Ctrl + F (PC) Command Key + F (Mac) – Allows you to search through the entire page for the word/text in question.
 - This comes in handy on reports, lookup tables, the help and company setup screens.
 - T, D, M, Y Keys – When in a Date field you can use any of these shortcut letter keys to populate today’s date, increase the currently entered date by a day, enter a month from now or enter a year from now.
 - You can also use these same keys to advance whatever date is populated in the field by a Day, Month and Year accordingly.
 - Once a date is populated you can also use the up and down arrow keys to increase/decrease the date.
- You can always access more information about whatever screen you are on in the software by clicking Help in the top right corner!
- Enter – On the Location Search screen, selects the “Search” button.
- You can search for full or partial matches. For example, if you know a customer’s name starts with “Wo” but aren’t sure of the rest, you can just search “Wo” in the last name field.
- You can search for letters grouped together. For example, if you know an account has the word Will in it somewhere in the first name field, you can just search for %will and it will find all Williams, Wills and Willies in the database.
- When searching for User Defined Fields in Location Search, Statements or Invoices:
 - Using * will search for instances where the UDF is blank.
 - Using ? will search for instances where the UDF is populated.

General Terminology

Bill To: (Billing Account) Contains billing information for locations such as account balance and credit status. All payments and invoices are tied to a Bill To. Bill Tos can have multiple locations tied to them.

Location: (Customer Account) Service property information for where the services are physically being performed. All service history is tied to the location such as service, price, technician, schedule, notes, etc.

Service Setup: (Schedule, Recurring) Added to Locations for recurring service work. Uses Schedule and Charge Type to create service orders during the generating process if an order is due.

Warranty: A special kind of service that is not necessarily recurring but is guaranteed for a specific period of time.

Renewal: Added to Locations and typically used for Termite services where you don't want orders to generate automatically but need a way to track the renewal date and price for sending out renewal notices.

Renewal Notice: Used when you need to notify your customers of an annual service due to be renewed. Typically a letter or email for them to pay off of in order for you to continue that annual service.

Program: (Service Program) Typically used for lawn, landscaping, bedbug, wildlife or mosquito type services. Allows you to setup a recurring service package/program in which each time you go out you may be doing a different service (for example: mowing, fertilization, shrub service, etc). The servicing is either based upon eligibility dates or offset days.

Service Order: (Job, Work Order, Ticket) Also known as work orders or tickets get created either from a setup, from using the One Time service order button or from the blue order link alongside a setup or renewal. Gets printed out or downloaded to a handheld for the technician to perform the service. When work is completed, it gets posted. After it's been posted and released it can no longer be printed. It is now an invoice. Service order charge types include: Service Order, Estimate, Production, Call-Back or Commission.

Initial Order: For instances when you need to charge more or spend more time the first time you go out for service before the recurring schedule. Can have a different service code, price and duration. Company Setup options control whether you have initial orders shown, hidden or required when you create new service setups.

One Time Service Order: Using the gold service order button on the location detail screen, used for a service or job that is only being done that one time and is not tied to a service setup.

Blue Order Link Service Order: Found on the right side of a Service Setup on a Location. When you click on it you can create an additional order tied to the setup you are creating it from. Examples of when used are call-back orders or an extra service that is not part of the regular schedule.

Materials: (Chemicals) Materials are set up in the Materials lookup table if being tracked on services that technicians perform. They can be set up to calculate your own dilution factor, to be diluted, or as prepackaged. Material usage gets tracked on a service order or invoice and is reported by undiluted quantity.

Service Order Report: Under the Reports menu this is where you go to print your Service Orders after they have been created or generated. You can print as frequently as needed, such as daily, depending on your company processes. You have several search options such as work dates, techs, routes and more. You have primary and secondary sort options that can be grouped by before choosing to print.

Appointment List: (Route Sheet) Under the Reports menu, under Service Orders you can select the Output Format of Appointment list. This will allow you to print out a summary listing of service orders that the technician has to do where they can keep track of mileage and also see any instructions that you need them to see but don't want printed on the actual Service Orders where the customer can see it.

Generating: Typically done at the end of the month for the upcoming month. Generating orders will look at the current system date, the month you are generating for, and the schedules on all service setups to create service orders.

Posting: The process of batching service order work as completed or marked as not serviced.

Invoice: All completed service orders become invoices. It will look at the charge type to determine if it's a billable invoice.

Inspection Report: A detailed completed service report that includes more detailed inspection information based on any inspection features used. It can include product applications, conditions, observations, pest activity, device inspection summary and area comments. Typically used by handheld users.

Statement: These can be sent to customers that have pending invoice balances or credits that have not yet been taken care of. It will print out showing open items broken down by current, over 30, over 60 and over 90 days.

Credit Memo: Think of this as a negative invoice. It is a credit that is issued to a customer for a particular service. A credit memo is denoted as a negative line item in the customer's Billing History and will reduce the total sales value on revenue reports. **Once a credit memo has been applied it cannot be unapplied or voided.

Adjustment: Credit Adjustments can be used to issue the customer a discount without reducing a sale's total value. If created for a positive amount it will credit the customer. If created for a negative amount it will serve as a debit.

Reverse Payment: A payment which is being removed from the customer's account due to a refund, insufficient checking funds, or an erroneous entry. It is denoted as a payment line with a negative amount in the customer's Billing History.

Call: An interaction with a customer that has been entered to a location using the "Add Call" button and assigned to a specific user or technician's technician. Can also be used for non-customers from the "Add Call" button in the left navigation menu.

Lead: A pending sale that is being tracked using the Add Lead option from the left navigation menu or directly from an existing location. If using a more detailed sales tracking process can also utilize **Sales Opportunities**.

Materials

Before setting up your Materials 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. This section will walk you through how to set up, track and report them. Tip: Have your product labels handy when doing this part! A more detailed walk through can be found under the Training link and is called Materials Setup.

Required lookup tables to populate first:

- Units of Measure
 -
- Relationship to Standard Units of Measure

Additional tables to populate if applicable:

- Application Method
- Application Equipment
- Target Pests
- Material Group

Instructions, Comments and Notes

There are options set up for each company to control what Comments/Instructions print on Service Orders, Invoices and Inspection Reports. You can also choose to print the instructions on the Technician's Appointment List under Reports > Service Orders > Output Format: Appointment List.

These Printer Setup options apply to both printing and emailing the forms. If you are using the mobile applications anything printed from the devices will respect the settings in Printer Setup as well.

When adding or editing a Location:

- Internal Comment: Does not print. Shows in red ONLY at the top of location detail.
- Location Instructions: Will pull into all service orders for location.

When adding or editing a Service Setup on a Location:

- Service Instructions: Will populate on every order that generates from that setup or when an order is created using the blue order link.
 - Can also preset popular instruction information in the Instructions Lookup Table to be able to quickly populate this field. Also, you can default the Service Instructions in the Services lookup table for each Service code.

When adding or editing a Service Order on a Location:

- Location Instructions: Pulls in from existing Location Instructions on location detail.
- Service Instructions: Pulls in from Service Instructions in the Service Setup if tied to a Setup or from the services lookup table when creating one time or initial orders, if populated.
- Order Instructions: User entered data that pertains to that individual visit only.
 - Can also preset popular instruction information in the Instructions Lookup Table to be able to quickly populate this field.
- Tech comment: Tech entered servicing notes from handheld or service order posting screen only.

When adding a note to a Location or to a Call or Lead on a Location:

- Notes: Are for internal use. Permanently tied to the account for future reference. If you use a note code of ALERT it can pop up every time you access the location.

Account Setup

It's important that there is consistency throughout your office on how info is being entered to ensure data accuracy. If using required fields, you will see them in **red** and be required to fill that info in when setting up or editing accounts based on your company setup settings. You can control these required fields under Company → Company Setup → Field Setup.

Adding an account where the bills are sent to the location address:

- Location Search
- If no results found from criteria, click "Add this location"
- It will default to "Create New Bill To"
- Enter required information and click on Add.

Adding an account where the bills are sent to a Bill To already in your data:

- Location Search
- If no results found from criteria, click "Add this location"
- Select "Use an existing Bill-To Account"
- Enter the Bill-To information and click Search.
- Enter required information and click on Add.

Adding an account where the bills are sent to a different Billing address but it doesn't exist in your data:

- Location Search
- If no results found from criteria, click "Add this location"
- It will default to "Create New Bill To"
- Enter required information and click on Add.
- Once created, click the blue Bill-to number link and hit Edit in the upper right hand corner. You can then edit the Billing address information to be where the customer would like their bills sent to.

Adding an account where the bills are tied to a Builder or Property Management Company currently, but in the future will need to be sent to the location address:

- Location Search
- If no results found from criteria, click “Add this location”
- Select “Create New Bill To”
- Enter the Bill-To information and click Search.
- Enter required information and click on Add.
- Click on the Location number in the top left to access the Edit Location screen.
- In Edit Location screen go to Assign New Bill To (to change to an existing) and enter the existing builder or property management account.
- Say OK to “Are you sure you want to change this bill-to?”
- That location is now linked to the Builder but has its original Bill-to# saved for once it is a home owner property and not a Builder property.

Changing a Bill To for an existing account:

- From Location Detail click on the blue Location number link
- In Edit Location screen go to either Assign New Bill To (to change to an existing) or Create New Bill To (to change to a brand new)

Seeing what locations are tied to a bill to:

- From Location Detail click on the blue Bill To number link
- Scroll down to see all Locations tied to that Bill To
- It will show both Active and Inactive locations tied to the Bill-to
- All locations are all hyperlinked so you can easily pull it up by clicking on the respective location number.

Account Setup Examples – Based on Recurring Service Setup Charge Types

Service Setups are used for setting up recurring work. It uses the charge type to determine what generates, how production is tracked and how the customer gets billed. Below are example scenarios for each charge type along with what generates based on the charge type.

*“I want to bill my customer for service **after** the service is completed by the tech and the service order is posted and released.”*

Service Order Charge Type:

- A billable service order will generate for the technician to go out and do the work.
- The customer will receive an invoice, for the total amount of the order, every time an order associated with the setup is posted and released.
- If using Element Payment Services and you have the option selected for Auto-Bill Card the credit card transaction will hit the Release Credit Card Billing batch when the order gets posted.

Adding a recurring service that gets billed as work orders are posted:

- From Location Detail click on New Service Setup
- Use Charge Type of Service Order
- Fill in required fields such as Service, Price, Initial Service info if applicable, Schedule, Start Date, Technician, etc

*“The technician will be servicing an account, and should receive production credit, but we **do not** want the customer to receive an invoice.”*

Production Charge Type:

- A non-billable service order will generate for the technician to go out and do the work.
- Posting this order will not create an invoice so a price can be entered if you want the technician to receive production credit.
- No invoices or bills will ever be created.

“I’d like to charge the customer \$100 a month for a general pest control service we perform weekly. Depending on the month, sometimes there are four services and sometimes there are five, but we still only want to charge the customer \$100 regardless of the number of services we perform.”

Split Charge Type:

- The service setup would have a total price of \$100
- Customer will always receive a \$100 invoice each month.
- If the customer is serviced four times a month, each Production order will have a \$25 production value.
- If the customer is serviced 5 times a month, each Production order will have a \$20 production value.
- If using Element Payment Services and you have the option selected for Auto-Bill Card the credit card transaction will hit the Release Credit Card Billing batch when you generate the setup and it will be dated for the same date as the invoice.

“I’d like to charge the customer \$20 per service for a weekly general pest control service, but only send them an invoice once per month.”

Each Charge Type:

- PestPac will take the total price, in this case \$20, and multiply it by the number of service orders generated for each month.
- Customer will receive an invoice for the total value of each service added together.
- Months with four services (or four weeks) will generate an \$80 invoice.
- Months with five services (or five weeks) will generate a \$100 invoice.
- Production orders for the amount of \$20 would generate, 4 or 5 depending on the number of weeks in the month.
- If using Element Payment Services and you have the option selected for Auto-Bill Card the credit card transaction will hit the Release Credit Card Billing batch when you generate the setup and it will be dated for the same date as the invoice.

“I’d like to create a setup that just generates Invoices to bill the customer. I already have their services accounted for in a different setup.”

Invoice Charge Type:

- Allows you to generate invoices without producing any service orders.
- Will use a schedule for creating invoices for the customer.
- If using Element Payment Services and you have the option selected for Auto-Bill Card the credit card transaction will hit the Release Credit Card Billing batch when you generate the setup and it will be dated for the same date as the invoice.

*“I’d like to bill my customer monthly but only service them quarterly.” OR
“I’d like to bill my customer on the 15th of every month regardless of their service frequency (monthly, quarterly, annual, etc)”*

Payment Plan Charge Type:

- Allows you to service on one schedule but bill on another.
- Will use a servicing schedule for creating production orders for the tech.
- Will use a billing schedule for creating the invoices for the customer.
- Will use the billing last gen date field for knowing when to start generating the invoices.
- If using Element Payment Services and you have the option selected for Auto-Bill Card the credit card transaction will hit the Release Credit Card Billing batch when you generate the setup and it will be dated for the same date as the invoice.

Adding a recurring service that gets serviced on one schedule but billed on another:

- From Location Detail click on New Service Setup
- Use Charge Type of Payment Plan
- Fill in required fields such as Service, Price, Initial Service info if applicable, Schedule, Start Date, Technician, etc
- Fill in Billing Schedule, Billing Amount and Billing Last Gen

“I’d like to charge my customer’s credit card prior to their quarterly service being completed.”

Credit Card Charge Type:

- Allows you to service on one schedule but charge the credit card on another.
- Requires integration with Element Payment Services.
- Auto Bill Card must be checked.
- Will use a billing schedule for sending the customer’s credit card information to the Release Credit Card Billing page when generated.
- Will use a servicing schedule for creating service orders for the tech, which will create a billable invoice when posted.
- Once the invoice is posted it will then absorb the open credit on the account from pre-charging the customer’s credit card.

Using Service Programs

Service Programs allow you to keep track of multiple services that need to be done at varying intervals during the course of a year using a range type of either eligibility dates or offset days. If you would like a more thorough review of this feature check out the Service Programs training document. If you do not see an option on your Location Detail screen for New Program contact support to have it enabled. You may use a variation of the process reviewed here depending on your company's practices.

Before You Get Started:

- Make sure access is granted for Read/Add/Edit/Delete Program for anyone needing this feature.
- If using Price by Measurement populate Measurement Types, Price Codes, Price Charts and Services lookup table per the Service Programs training document.
- Set up your Program Types Lookup Table per the training document.
 - If using Eligibility Dates: allows you to enter a starting and ending eligibility date for when each service in the program is eligible to be done.
 - If using Offset Days: allows you to specify how many days apart each service in the program should be done. Work dates will adjust on future orders according to when the last service order is posted.

Create a New Program:

- From the location detail screen click on the link that says New Program
- Select the program you are creating from the list
- By default you will have the options selected for what steps are included, require re-authorization or renewable.
- Enter the Start Date.
- Fill in any necessary or required fields and make adjustments needed based on the service and time of year.
- Click Add
- In the Helper Console confirm that Year to Start the program in and the service and date you'd like to start.
- Click Continue.
- Click Exit to go back to the Location Detail where all orders have been auto created for you. As each service gets posted as complete the next service will get created as long as it's been set to include..

Annual Renewal Services

Renewals are used for tracking annual services that you don't want service orders to automatically generate for. Using a renewal will allow you to track the renewal date and price on the account but will not generate any orders automatically. You can use the renewal dates on the renewals for creating a location list and then sending out renewal notices. Once payments start to come in from those notices you can then enter the renewal payment, create a service order to go out (if applicable) and then advance the renewal date for the following year. You may use a variation of the process reviewed here depending on your company's practices.

Create a New Renewal:

- From the location detail screen click on the link that says New Renewal
- Populate the Service, Price, Start Date, Renewal Date and any other information you'd like to store on this renewal for tracking
- Click Add
- The Renewal is now created

Create a Location List of Renewals:

- From the location search screen scroll down to Advanced Search and click on Show
- Populate the Starting and Ending Renewal Dates you want to send notices for
- On the right side specify Setup Status, Setup Type and any other fields you want to limit your renewal list by
- Click Search at the top
- Once results are displayed click on Add to List
- Give the list a name keeping it set to Dynamic and click OK
- Your list is now created

Send Renewal Notices:

- From the location list of renewals you created click on Print in the top right (if you need to get back to your list simply go to Customer > List Management)
- Select Renewal Notices under 'Choose Report'
- Enter the starting and ending renewal dates again and any other information you need to limit the location list to for the notices
- The information that defaults under 'Print On Renewals' is pulling from your settings under Company > Company Setup > Renewals as well as from Company > Printer Setup > Renewal
- You can Display to check out your notices first and then Print or Email them out

Renewal Payments:

- When a renewal payment comes in you will enter the payment in as usual with the following additional steps:
 - Check the 'Renewal Prepayments' box, this will show you renewals tied to the account
 - Check the Renew Box next to the renewal being paid
 - The section for Advance Renewal Date, Create Invoice and Create Service Order will be defaulted from your settings under Company > Printer Setup > Renewals
 - If you've selected to create an invoice the payment will be applied once released
 - If you've selected to create a production service order this will be created once the payment is released
 - Save the payment and continue the payment posting process as usual
- Now that the renewal date has been advanced it will drop from your list
- You can send second notices for anyone remaining on your list who has not renewed yet
- You may want to have different letters created in your Letters lookup table if sending multiple notices

What Generates – Based on Charge Type

Charge Types	Service Order	Invoice	Production Order (Non-Billable)	Credit Card Transaction (In Release Credit Card Billing)
Service Order	X			
Production			X	
Split		X One Monthly	X	
Each		X One Monthly	X	
Payment Plan		X	X	
Invoice		X		
Credit Card	X			X

Generate Service Orders

Generating is a process typically done at the end of the month for the upcoming month. It looks at the current system date, the month you are generating for and the schedules on all active service setups to create service orders that are due for service. Additional items may generate such as invoices or production service order tickets depending on the service setup charge type. (see chart above) Generating only creates the orders and/or invoices, printing is then done separately.

Generating:

- **The Help file in the top right corner of this screen goes into more detail on the generate service order fields. You can also view the video called "Generating Service Orders" within PMP Campus. Contact support if you need your login.*
- When ready to generate for next month go to Company > Generate Service Orders.
- It will default to the upcoming month's date range.
- Setup Type will default to all, only change this if you need to generate for only certain setup types.
- Set Invoice Date field is used to determine what dates to use if you have any setups that will be creating invoices. (Invoice, Split, Each or Payment Plan) Even if you don't use those charge types it will require you to make a selection.
- The right column under Last Generate shows the last time a generate was done as well as the parameters used to generate for your reference.
- Leaving the Report Only box checked will allow you to run a report to review what will generate before you actually generate.
- Checking Conflict report allows you to display a report see any orders that are trying to be generated that have the same work date, work time and technician. If you generate with conflicts then the conflicting order will have the work time removed but still be generated.
- Unchecking the Report Only checkbox will now reveal the Generate button in the top right corner.
- Once you click generate it will ask if you've backed up your data. If hosted on the online hosted server then we do this nightly for you. If you need to perform a backup go to Company > Backup Database > Backup Database.
- Once you generate this cannot be undone. You will now have all orders, invoices, etc created for the month that you selected based on the criteria you entered.

Scheduling

Your profile settings and company setup options can control how you see and use the standard scheduling features such as the Appointment Scheduler and the Quick Scheduler. To view and adjust your personal settings go to Tools > Profile > User Preferences > Appointments. For company wide settings go to Company > Company Setup > Additional Features > Appointment Scheduler.

Appointment Scheduler:

- Accessed by clicking on the Appointment option from the top main menu.
- Can also be accessed from within a service order by clicking on the Schedule button.
- Used for viewing, scheduling and rescheduling service orders.
- To see more info about an order double click on it.
- To move an order click on it once to highlight it then click where you want to move it to and Click Save.
- Graphically shows appointments with a **technician, date, time and duration**.
- Adjusting your user profile settings can make the screen easier to use under Tools > Profile > User Preferences > Appointments. There you can specify things such as preferred technicians, schedule slot times (A,B,C), preferred view and additional options to show on the service order popup.
- Can also choose to show sales leads, invoices and projected service setups under Company > Company Setup > Additional Features > Appointment Scheduler.
- Appointments are viewable for one tech over several days or one day for several technicians. You can toggle back and forth between these views by clicking on the Tech or Day button respectively.
- The “Show Distance” link within an order will color code based on its distance to other orders already on the schedule.
- Appointments in *Italics* are locked.
- Appointments showing an “(A)” are anytime orders.
- Appointments that show as a faint gray line mean they are missing a duration.
- Appointments showing an “(SS)” are projected service setups that have not yet been generated.
- Appointments showing an “(P)” are orders that are currently sitting in a posting batch that has not yet been released.
- If the tech’s name is maroon they have unscheduled and/or overlapping appointments.
- If the tech’s name has an asterisk (*) appointments are scheduled outside the time

Quick Scheduler:

- Must be turned on under Tools > Profile > User Preferences > Appointments > Use Quick Scheduler.
- Graphically shows appointments with a **technician, date, time and duration**
- Accessed by clicking on the bolded calendar icon alongside the work date of a service order on the location detail screen or from within the service order itself.
- Also accessed by clicking on the bolded calendar icon alongside the schedule field or when creating an initial order in a service setup.
- Used for scheduling and rescheduling individual service orders and service setups.
- Additional options to configure the Quick Scheduler settings available under Tools > Profile > User Preferences > Appointments > Quick Scheduler Preferences.
- You can also specify things such as days ahead to search, number of technicians to display, default adjacency type, latitude and longitude thresholds and coloring, result grouping and choosing to search for the same service, service class or technician for the service order you are scheduling.
- The colors will show based on your Quick Scheduler preferences and either based off of Distance Gradient Coloring or Standard Green/Yellow/Red.
- Appointments in *Italics* are locked.
- Appointments showing an "(A)" are anytime orders.
- Appointments that show as a faint gray line mean they are missing a duration.
- Appointments showing an "(SS)" are projected service setups that have not yet been generated.
- Appointments showing an "(P)" are orders that are currently sitting in a posting batch that has not yet been released.
- If the tech's name is maroon they have unscheduled and/or overlapping appointments.
- If the tech's name has an asterisk (*) appointments are scheduled outside the time range you are viewing.

Printing Service Orders

Printing Service Orders:

- The settings you have selected under Company > Printer Setup > Service Order is what controls the format of what prints for your service orders as well as which items should either print or not print.
- When ready to print service orders for your technician's go to Reports > Service Orders.
- Enter the criteria you are printing for, such as starting and ending work dates.
- *The Help file in the top right corner of this screen goes into more detail on the report fields on this screen.
- Additional options are available for sorting with Primary and Secondary options at the bottom. Selecting 'Group By' will make sure that the results will print separately for each sorted result. Example – if you did primary sort by Tech and selected group by, then all of the service orders for tech 1 would print together, then tech 2 would print together, etc.

Printing Appointment Lists

Printing Appointment Lists:

- After printing your Service Orders you can leave the selection criteria used, and on the right hand side change the output format to Appointment List. This is also sometimes referred to as a route sheet.
- The right column has options for what you'd like to include and have shown on the printed form
- Additional options are available for sorting with Primary and Secondary options at the bottom. Selecting 'Group By' and 'Page Break' will make sure that the results will print separately for each sorted result. Example – if you did primary sort by Tech and selected group by and page break, then the appointment list for tech 1 would print separate, then tech 2 would print separate, etc.

Posting Service Orders

The process of batching service orders as completed or marked as not serviced is called service order posting. This process is done after a service order is completed. If you use classic PestPac Mobile or Marathon Mobile, as the techs complete their work the orders will appear in a posting batch for review and release. If not using handhelds follow the options below for manually posting once you have the completed service orders back from the technicians. If using materials during posting please reference the training document called "Materials Setup" under the training link to make sure your Materials are setup properly for you to post them.

Quick Batches:

- Allows you to save each order's posting data before moving on to the next order
- Under Customer > Post Service Order > Create New Quick Batch
- Enter the first service order number to be posted filling in your company specific requirements such as start and end time, work date and invoice date if different from what defaults and tech comment.
- The show / hide section on the right allows you to control what fields show on this screen based on your needs. If you don't use specific options, such as Materials or Payment Entry, you can control what shows under your Company Setup> General > Posting options.
- The pre-filled values option allows you to specify a tech, date or material that you want to pre-fill on every order you are about to post.
- When finished entering posting information click save.
- It will now show the order information saved at the bottom of the screen in a summary and you can continue to post.
- After saving the final order, click on Exit.
- Click Report to view the information in the batch and when ready click on Release.
- Additional options on the batch screen are for adding to, editing, locking or reviewing inspection reports for the orders in the batch before you release.
- If you need to stop and continue working at a later time, to access this batch again go to Customer > Post Service Order and then click on Quick alongside the batch.
- When using Quick Batching – do not use the Add or Edit options. Selecting Quick will allow you to do both.
- After releasing you will see the posting report of all of the invoices created from that batch.
- You can also run the Invoice Batch Report from the Report link in the bottom right of this screen.

Regular Batches:

- Used when you prefer to search based off of selection criteria and then post orders only from those search results.
- Under Customer > Post Service Order > Create New Batch
- Enter the search criteria you want to post for, for example starting and ending work date and a specific tech for a day you are ready to post.
- The pre-fill fields allow you to specify a tech, date or material that you want to pre-fill on every order you are about to post. When ready click Search.
- Scroll through each order on the page as you enter the posting information and click on the Post checkbox when done for all orders ready for posting.
- If you need to omit an order, simply leave the Post checkbox for that particular order unchecked.
- If you need to stop and continue working at a later time, to access this batch again go to Customer > Post Service Order and then click on Edit or Add alongside the batch.
- Continue with all orders to be posted and click on Next page if there are additional pages of orders to post, when finished click Done.
- You can then click Report to view the information in the batch and when ready can click on release.
- After releasing you will see the posting report of all of the invoices created from that batch.
- You can also run the Invoice Batch Report from the Report link in the bottom right of this screen.
- You can Control how many orders per page you see under Tools → Profile → General: Post/Commit Paging. It is defaulted to 5. We do not recommend viewing more than 5 orders per page for data entry accuracy purposes.

Printing Invoices

Printing Invoices:

- The settings you have selected under Company > Printer Setup > Invoice is what controls the format of what prints for your invoices.
- When ready to print invoices go to Reports > Invoices.
- To see what options you have for purchasing forms check out the link at the top called “Order Business Forms”
- To print invoices, enter the criteria you are printing for, such as starting and ending invoice dates.
- *The Help file in the top right corner of this screen goes into more detail on the report fields on this screen.
- Additional options are available for selecting customers to print or email, and whether to include all invoices, unprinted invoices, voided invoices, zero dollar invoices and more.

Printing Inspection Reports

Printing Inspection Report:

- The settings you have selected under Company > Printer Setup > Inspection Report is what controls the format of what prints for your inspection report.
- When ready to print inspection reports go to Reports > Invoices.
- To print inspection reports instead of invoices, enter the criteria you are printing for, such as starting and ending invoice dates.
- *The Help file in the top right corner of this screen goes into more detail on the report fields on this screen.
- When ready to print you will click on “Report” instead of print and this will give the output format of the inspection report for the criteria entered.
- You can also print an individual inspection report from a Location by bringing that location up, clicking on Show History, clicking on the Invoice and then choosing the Report button.
- Inspection Reports can also be emailed upon posting or batch release if using the option for automated emails.

Entering Payments

Payments can be entered from the Location or from the Customer Menu. For using credit cards, if integrated with Element, please see the document called "Element Hosted Payments" under the Training link within the program.

Entering payments individually from a location:

- Use location search to find your account.
- Once you have the Location up scroll down and click on Payment.
- Click Create New Batch.
- You are now at the payment entry screen
- **There is a Quick Payment Entry training guide also available on this screen under "Training for this Screen" or by clicking on Training in the top right corner of the program.*
- Enter the Invoice number for your first payment, the Bill To number is already defaulted for you.
- Clicking on the gold ... button  next to the Invoice will bring up the search screen.
- The payment date will default to today.
- Fill in the Method of Payment, Reference, Amount.
- Also available are the Service code and GL (General Ledger) code fields if applicable.
- Click Save when finished.
- When done entering and saving payments click on Exit.
- You can then click Report to view the information in the batch and when ready can release.
- Additional options on the batch screen are for adding to, editing, locking or reviewing payments in the batch before you release.

Entering payments from a batch:

- Go to Customer > Enter Payment.
- Click Create New Batch
- You are now at the payment entry screen
- **There is a Quick Payment Entry training guide also available on this screen under “Training for this Screen” or by clicking on Training in the top right corner of the program.*
- Enter the Invoice or Bill To number for your first payment.
- Clicking on the gold ... button  next to the Invoice or Bill To field will bring up the search screens for those fields.
- The payment date will default to today.
- Fill in the Method of Payment, Reference, Amount.
- Also available are the Service code and GL (General Ledger) code fields if applicable.
- Click Save when finished.
- When done entering and saving payments click on Exit.
- You can then click Report to view the information in the batch and when ready can release.
- Additional options on the batch screen are for adding to, editing, locking or reviewing payments in the batch before you release.

Printing Statements

Ideally customers would pay at the time of service or be on auto pay. If not, they would pay off the invoice. If not, then it's time to send a Statement! Statements include outstanding invoices or open credits and is broken down by current, 30, 60, or 90+ days overdue. Statements can have billing messages based on the aging days. Prior to running statements review your Statement settings under Company > Printer setup and adjust if necessary.

Sending Statements Based on Aging Days:

- Go to Reports > Statements
- Fill in the Minimum Aging Days of 30.
- You may also fill in the Minimum Balance if you only want to send statements with a balance over a certain dollar amount.
- Review additional options and utilize them based on your company's processes.
- You can display to review the statement results first and then close the display window and use the gold Print button when ready to print to your forms.

Apply Finance/Late Charges:

- This option can be used if you are NOT using the feature to generate finance charges under Company > Generate Finance Charges. You would select one or the other.
- Using this option on the Statements screen under Display Options is beneficial if you want to print what the finance/late charge would be on the statement for the customer to see without it actually adding the charge to the account.
- Then, if the customer does pay the fee you can generate the charge at the time of payment entry.
- Be sure to set up the following Company Setup settings if you follow this process:
 - Additional Features > Finance Charges
 - Payment Screen Options > Create Finance Charge on Payment Entry (you will need to create and designate a service code for the charge)

Accounting Corrective Transactions – Cheat Sheet

Use this cheat sheet as a guide for cleaning up accounting transactions in your data. Feel free to print this out separately as a cheat sheet if your company uses these processes. If you require additional training or support please do not hesitate to contact us!

Originating Transaction	Corrective Transaction
Adjustment	<p>Negative Adjustment:</p> <ul style="list-style-type: none"> • Used to correct an adjustment applied in error to an invoice • Also used to correct an annual pre-payment discount entered in error
Payment	<p>Reverse Payment:</p> <ul style="list-style-type: none"> • Used to remove a payment erroneously entered into an account, or to remove a payment returned for insufficient funds • A payment reversal in the only means through which a payment can be eliminated in PestPac.net <p>Unapply Payment:</p> <ul style="list-style-type: none"> • Used to unapply a payment from an incorrect invoice • Only use if the payment was entered on the right account but against the wrong invoice
Posted Invoice or Finance Charge	<p>Void Invoice:</p> <ul style="list-style-type: none"> • To remove the Invoice from sales and invoice registers • Used if Invoice was created in error within current period • Used to void non-billable invoices in which there is erroneous information • NOTE: You may not void an invoice from a closed period
Posted Invoice or Finance Charge	<p>Credit Memo:</p> <ul style="list-style-type: none"> • To subtract the transaction from the sales and invoice registers • Used to write off a portion of a service or an entire sale • Used to remove invoice balances from a closed period

<p style="text-align: center;">Posted Invoice or Finance Charge</p>	<p>Payment Adjustment:</p> <ul style="list-style-type: none"> • Does not subtract the transaction from sales or invoice registers • Applies the amount of the adjustment to the payment register • Considered a discount and used by companies that do not want the accounting correction to be reflected on any of the invoice reports or in the GL sales account • Affects the discount account
<p style="text-align: center;">Unapplied Reverse Payment</p>	<ul style="list-style-type: none"> • Apply the Payment Reversal to an invoice • If there is no invoice, enter a payment and leave the payment unapplied; use the “apply credits” feature to apply the unapplied reverse payment to the open credit

Basic Steps for Common Practices – Cheat Sheet

These are basic steps to guide users through common practices. Feel free to print this out separately as a cheat sheet if your company uses these processes. If you require additional training or support please do not hesitate to contact us!

Leads

Adding a Lead for an existing Customer/Location:

- Location Search
- Enter criteria to search for
- Click Search
- Click on the Location
- Click on Show Leads, Add Lead or New Lead (depending on settings)
- Fill in Salesperson, Service, any other required info and click Add
- If you want it emailed make sure the email addresses are filled in the employee lookup

Adding a Lead for a NEW Customer/Location:

- After using Location search to confirm they aren't in your data already...
- Click the Add Lead button on the left navigation menu
- Fill in Salesperson, Service, any other required info and click Add
- If you want it emailed make sure the email addresses are filled in the employee lookup

**May also use Sales Cycles or Sales Opportunities*

New Accounts

Adding a Customer/Location:

- Location Search
- Search for Address, Name or identifying information
- Click Search
- If no results found click "Add this location" and it will prefill the values you originally searched for
- It will default to "Create New Bill To"
- Enter in all of the required information and click on Add

**Can also tie to an existing Bill To depending on needs*

New Services

Creating a New Service Setup/Recurring Contract:

- Location Search
- Search using identifying information
- Click Search
- Click on correct result to pull up Location Detail screen
- Click New Service Setup
- Fill in required fields making sure to include recurring service and price, initial service information if applicable, schedule, start date, price increase date if applicable, technician, salesperson and any other required fields
- Click Add
- Your service orders will now generate for future months and the initial order will automatically be on the location detail after you add the setup
- **Can also use the Search option within the Service Setup to utilize the Service Setup Smart Route feature. This will allow you to select a schedule based on the technician, service, frequency or day of the week and schedule it around that.*

Creating a One-Time Service Order:

- Location Search
- Search for Address and/or Name
- Click Search
- Click on correct result to pull up Location Detail screen
- Click the Service Order button in the top right
- Fill in the required fields
- If you want to use the Quick Scheduler click the calendar icon alongside the Work Date
- Click Add
- You can then click on the Schedule button to access the Appointment Scheduler if needed
- **In order to show on the Appointment Scheduler an order must have date, tech, time and duration*

Rescheduling Services

Rescheduling a Service Order:

- Can use the Quick Scheduler icon next to the Work Date field
- From within a Service Order click on the Schedule button to use the Appointment Scheduler
- Can click Edit and manually adjust the date and time if using the Appointment Scheduler in a separate window
- *If signed up for RouteOp you can also use Best Fit icon next to the Work Date field
- *Can also go to Tools > Reschedule Service Orders to search for and reschedule Service Orders using selection criteria
 - Once you have your search results up you can either advance results by # of days, or manually adjust the work date, work time, duration, tech 1, tech 2 or color.

Rescheduling a Service Setup:

- From Location Detail click into the Service Setup
- Click on Edit
- Can click on the gold Search button to use the Smart Route feature
- Can click into the Schedule field to change the recurring schedule based on the new dates
- Make sure to adjust any open service orders if needed
- Make sure to adjust the “Last Gen” field if needed

Posting Service Orders

Posting a single Service Order from a Location:

- Location Search to locate account
- Search for Address and/or Name or just use the Service Order number
- Click Search
- Scroll down to the service order and click on it
- Click on Post button
- Click on Post to new quick batch
- Finish entering in the service info
- Click Save
- Click Exit
- Click Release (or run the report first to double check)

Posting multiple Service Orders in a Quick Batch:

- Go to the Customer Menu
- Select Post Service Orders
- Click on Post to new quick batch
- Enter your first service order number
- Finish entering the service info
- Click Save
- Repeat above for each additional service order to post to this batch and after last save,
- Click Exit
- Can run the report if you choose then click Release

Voiding an Invoice:

- Go to the Customer Menu
- Select View/Void Invoice
- Search for the Invoice you are looking to void using any of the search criteria options available; Invoice #, Location Code, Last Name, etc.
- Click Search
- Click the Void button in the upper right hand corner
- The invoice will then refresh and show in red to the right of the Invoice Number, 'Void'

Entering Payments

Entering a single Payment from a Location:

- Location Search to locate account
- Search for Address and/or Name or just use the Service Order number
- Click Search
- Scroll down and click on the gold Payment button at the bottom
- Create new batch
- Fill in the payment fields
- If you have open invoices you can enter the invoice number or click on the ... button next to the Invoice field to apply this payment to
- If being left as an open credit make sure to fill in the service field
- If doing a prepayment do not apply it to an invoice, instead check the prepayment box
- When done with the type of payment you are doing click Save
- Click Exit
- Can run the report or click Release

Entering multiple Payments in a batch:

- Go to the Customer Menu
- Click Enter Payment
- Click Create New Batch
- Fill in the payment fields
- If you have open invoices you can enter the invoice number or click on the ... button next to the Invoice field to apply this payment to
- If being left as an open credit make sure to fill in the service field and check your auto apply options if you want the payment to apply to the same service
- If doing an annual prepayment do not apply it to an invoice, instead check the prepayment box
- When done with the type of payment you are doing click Save
- Click Exit
- Can run the report or click Release

Accounting Transactions

Unapplying a Payment:

- Location Search to locate account
- Click on Show History
- Click on the date of the payment that you need to unapply from an invoice
- Scroll to the bottom and click on Unapply
- Click on OK
- The payment has now been unapplied and is an open credit on the account
- Make sure to apply it to the correct invoice or reverse the payment out as needed

Reversing a Payment:

- Make note of the Bill To and payment information that you need to reverse
- Go to Customer > Reverse Payment > Create New Batch
- Enter the Bill To or Location information and then click Search
- Enter the Payment Date, Amount, Method of Payment, Reference, Service
- Click Apply next to the payment you are reversing or use Auto Apply
- Click Save
- Release

Entering a Credit Memo from an Invoice:

- Location Search to locate account
- Click on Show History
- Click on the date of the Invoice you want to use a Credit Memo for (the invoice must have it's full balance in order to use this method)
- Click on Credit
- Enter Date
- Select Credit Reason
- Click OK

Entering a Credit Memo from a Location:

- Location Search to locate account
- Scroll to the bottom of the Location Detail screen and click on Credit Memo
- Fill in the Service Code, Description, Price and any required fields
- Enter Credit Reason
- Enter Tech (can use the tech from the original job or an internal office tech)
- Populate Order Instructions if you'd like info for future reference
- Click Post
- Click OK
- Apply the credit to the invoice this is for and click Save

Entering a Credit Memo from the Customer Menu:

- Go to Customer > Create Credit Memo
- Click Create New Credit Memo
- Use Location Search to locate account
- Fill in the Service Code, Description, Price and any required fields
- Enter Credit Reason
- Enter Tech (can use the tech from the original job or an internal office tech)
- Populate Order Instructions if you'd like info for future reference
- Click Post
- Click OK
- Apply the credit to the invoice this is for and click Save

Entering a Tax Only Credit Memo:

- Select one of the Credit Memo scenarios above except make sure to check the Tax Only Credit Memo option in the top left of the Credit Memo screen instead of filling in the service info.
- Fill in the Tax Total to credit
- Enter Credit Reason
- Enter Tech (can use the tech from the original job or an internal office tech)
- Populate Order Instructions if you'd like info for future reference
- Click Post
- Click OK
- Apply the credit to the invoice this is for and click Save

Entering an Adjustment from a Location:

- Make sure the option is on for using Discounts and Adjustments under Company > Company Setup > Payment Screen > Use Discounts and Adjustments > Standalone Adjustment Type: Payment Adjustment
- Location Search to locate account
- Scroll to the bottom of the Location Detail screen and click on Adjustment
- Enter the Amount, Reference, Adjustment Reason and Service code
- Click Save
- Click Apply if you need to apply the adjustment to an existing transaction
- Apply the credit and click Save
- Release the Batch
- If you do not apply the adjustment it will remain as an open credit for the account, an open debit for negative adjustments.
- **Here is where you can also create a negative adjustment. You would follow all the same steps as above however in the amount field you will need to enter it in as a negative value, for example -50.00.

Entering an Adjustment from the Customer Menu:

- Go to Customer > Adjustments
- Click Create New Batch
- Search for the account you want to do an Adjustment for either by Bill-To or Invoice and click Search
- Locate the transaction you want to adjust and enter the adjustment amount.
- Fill in the Credit Reason up top and Credit Service if you do not want the service to pull from the invoice being adjusted.
- Click Done when finished
- Release the batch

Cancellations, Deactivations, Posting as Not Serviced and Reactivations

Canceling a Service Setup (deactivating):

- From Location Detail click into the Service Setup
- Click on Edit
- Uncheck the Active Box, say yes to prompt
- Fill in Cancel Date
- Fill in Cancel Reason (from your Cancel Reasons lookup table) and Save
- If there are open orders tied to the setup being cancelled / deactivated you will receive an additional prompt of "Would you like to cancel all open Orders associated with this Service Setup?" Select Yes or No as needed.

Canceling a Service Order (posting as not serviced):

- From Location Detail click into the Service Order
- Click on the gold Post button
- Post to New Quick Batch
- Under Order Type select an NS reason (from Not Serviced Reasons lookup table)
- Fill out remaining posting fields as needed, such as comment or instruction if needed
- Scroll down and click Save
- Click Exit and Click Release

Canceling all Service Orders and Service Setups for an account / location: **access right controlled*

- From Location Detail click on the blue Location Number to get to Edit Location
- Scroll down and click on Cancel Services, say yes to the prompt
- Select Cancel Reason, Cancel Date and Not Serviced Reason
- This will inactivate all service setups and cancel all open orders for this location

Deactivating an entire account / location:

- First have to make sure there are no open setups, orders, leads, balances or credits – if so those have to be taken care of first
- Then from Location Detail click on the blue Location number
- Click on the gold Delete/Deactivate button (if no history or notes at all it will be deleted completely otherwise it will be deactivated)
- Say yes to prompt and it will now show in red “This location is inactive”
- In order to search for this account in Location Search you must search for Status of Inactive or Either

Reactivating an entire account / location:

- Use Location Search to search for Inactive with the location criteria
- Once result is up, click on the gold Activate button, say yes to the prompt

Reactivating a Service Setup:

- From Location Detail click on the Service Setup
- Click Edit and Check the Active Box
- Clear out the Cancel Date and Cancel Reason fields
- Make sure that the Schedule and Last Gen / Next Gen Dates are correct and click Save
- If you need to create an order now for this Setup use the blue Order link