

Requirements

The Service Programs feature allows 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 additional training on the setup or usage of this module after reviewing this documentation please contact support to request additional assistance.

Before Getting Started:

- The Service Program feature must be turned on for you by Support if not already enabled.
 - To confirm if it's enabled go to Company > Lookup Tables > Frequently-Used Lookup Tables. If you see Program Types then it's on.
 - If you do not see the Program Types lookup table please contact support to have it enabled for you.
- Must be on PestPac version 1.41.6 or higher however being on the latest version of the software is always recommended.
- You can search for keywords you're looking for in the document:
 - From a PC: Use the Control key + F key and type what you're looking for.
 - From a Mac: Use the Command key + F key and type what you're looking for.

Settings in PestPac

Company Setup

- There are no Company Setup options tied to this feature.

Lookup Tables

- **Access Templates Lookup Table**
 - Make sure the appropriate access rights are assigned to each user as needed:
 - Read/Add/Edit/Delete Program need to be selected to be able to utilize all parts of the Programs feature.
 - Read: will allow the user to see existing programs
 - Add: will allow the user you to create new programs
 - Edit: will allow the user to edit and save existing programs
 - Delete: will allow the user to delete existing programs
 -
- **Measurement Types Lookup Table (skip if not using price by measurement)**
 - Enter all measurement types used for pricing out jobs by clicking **Add Measurement Type** and entering the measurement and description and clicking **Save**.
 - When finished entering all measurement types click **Exit**.
- **Price Codes Lookup Table (skip if not using price by measurement)**
 - Enter all price codes used for pricing out jobs by clicking **Add Price Code** and entering the price code and description. You can also choose to round to the nearest dollar for calculated prices before clicking on **Add**.
 - Rounding to the nearest dollars can be entered as dollars or cents.
For example: 1.00, 5.00, .25 or .50.
 - When finished entering all price codes click **Exit**.

(continued)

Lookup Tables

- **Price Charts Lookup Table (skip if not using price by measurement)**
 - Enter a Price Code.
 - If the price chart you are adding is branch specific enter a Branch otherwise leave blank to be for all.
 - If the price chart you are adding is specific to a Location Type enter it in otherwise leave blank to be for all.
 - If the price chart is only valid between certain dates, select a Start and End Effective Date otherwise leave blank to be for all dates.
 - The bottom portion of the screen is to specify the Measurement Type, Minimum and Maximum measurements, Base Price, Per Unit Price, Minimum Price and Duration.
 - Click **Add** when finished entering this specific price chart.
 - Click **Exit** when finished entering in all price charts.

- **Services Lookup Table (skip if not using price by measurement)**
 - For every service that you want to use Price By Measurement for you need to do the following:
 - Go to Company > Lookup Tables > Frequently-Used Lookup Tables> Services > and click on the service code you want to price by measurement.
 - Scroll down and check the box for **Price By Measurement**.
 - You will now have a drop down for Price Code.
 - Select the Price Code to use for this service and click Save.
 - Repeat these steps for all services you want to price by measurement.

(continued)

Notes:

Lookup Tables**• Program Types Lookup Table**

- Enter a code for the **Program Type** as well as a Description
- You can specify whether this program will be **Eligible for Prepays** by checking that box if you use that feature.
- You can specify whether this entire program is **Renewable** by checking that box. This means that every step within this program will be done every year.
- The **Total Price** field will calculate on its own based on the service prices entered below.
- Select **Range Type**
 - If using **Eligibility Dates** this option will allow you to enter a starting and ending date for when each service in the program is eligible to be done.
 - Fill in a **Service** and **Price**, check **Auto-Include** if this service should always be included for this program every year, and enter the **Start** and **End** eligibility date for this service.
 - Repeat for all services that are a part of this program by clicking on **Add New Service**.
 - Save when finished.
 - If using **Offset Days** this option will allow you to enter the number of days apart each service will be done.
 - For Offset Days you will also need to fill in the **First Work Date** field. This will determine the start on date when a program using Offset Days gets added to a location. If left blank, then when you add a new program it will default to the current date.
 - Fill in a **Service** and **Price**, check **Auto-Include** if this service should always be included for this program every year, and enter the number of offset days in the **Start** and **End** field for this service. The offset days are for the number of days that the service should be done after the previous service.
***Note that the very first service in the program should have a 0 in the **Start** and **End** fields when using offset days.
 - Repeat for all services that are a part of this program by clicking on **Add New Service**.
 - Click **Save** when finished.

Workflow & Usage by Program Type

Programs can be used for when you have multiple services that need to be done at varying intervals throughout the course of the year. These can be set up using eligibility dates or offset days. It allows for multiple service codes, varying prices and different technicians within one program. Programs do not need to be generated because all services for the year get created when you add the program to the location. You will see a full year's worth of services on the account at all times. As service orders get posted it will create the order for the following year.


This section is broken down into segments by program type. It covers creating and editing programs based on the program types and price by measurement settings as you have them configured in your lookup table.

Program Type: Eligibility Dates

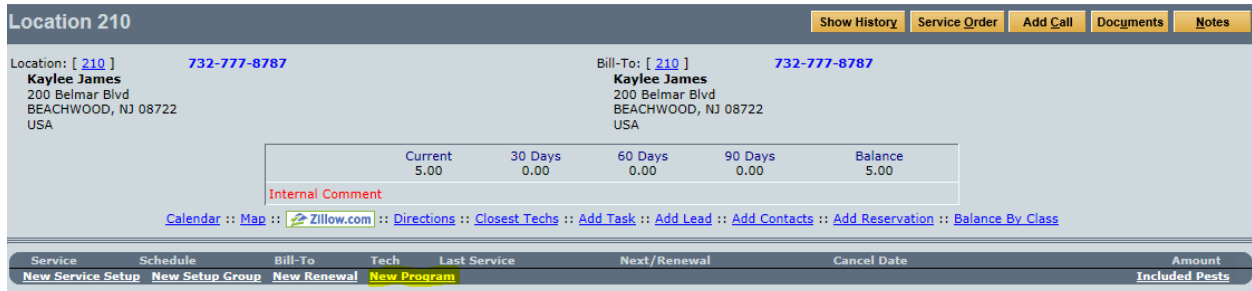
Used if the services always need to be performed during a specific date range each year but cannot be rescheduled outside of the given dates. Work dates will NOT get adjusted when each service order is posted.

Creating a Program using Eligibility Dates

- From the Location you want to create a program for click on **New Program**.
- Select the **Program** you are using from the dialog box.
- **Adding the Program**
 - The **Service, Description, Date Range, Duration** and **Price** default from the Program Type lookup table.
 - The **Include** box will also be preset based on your lookup. This will create orders for all services that are checked.
 - The **Renewable** box should be checked for all steps to include each year.
 - **Req Re-Auth** should be selected for any steps that you want an order to be created for but may not be automatically included each year. Marking to require re-authorization will allow you to get confirmation from your customer first. Checking this box will mark the corresponding service order for Re-Authorization.
 - Enter **Start Date, Expiration Date** and **Commission Start** fields as needed.
 - **Charge** Type options are either Service Order or Production.
 - **Notify** fields are for if you use any of the notification features.
 - If using Element you can enter the Credit Card / ACH info as applicable.
 - **Terms** will default from the location but can be edited.
 - Route and Tech fields can be populated to have this info pull into all steps/orders for this program.
 - **Program Instructions** can be populated to pull into every step/order tied to this program.
 - **Exclude From Mass Eligibility Updates** can be checked if you never want the eligibility dates updated when changes are made in the program type lookup table.

- **The Helper Console** will now appear.
 - It will look at the current date and the settings within the program to guess the **Start Program in Year** date, the **service that the customer will be starting with for** that year, as well as the **start** date for that service based on the eligibility dates. You can manually adjust if needed.
- Click **Continue**.
- You will see  in the top right corner when the program is finished adding. These options will appear based on your access rights.
- Clicking Exit will bring you to the Location Detail screen where you can now see your new program and the corresponding service orders for the year.

Step by Step!



Location 210 Show History Service Order Add Call Documents Notes

Location: [210] [732-777-8787](tel:732-777-8787) Bill-To: [210] [732-777-8787](tel:732-777-8787)

Kaylee James
200 Belmar Blvd
BEACHWOOD, NJ 08722
USA

Kaylee James
200 Belmar Blvd
BEACHWOOD, NJ 08722
USA


Current	30 Days	60 Days	90 Days	Balance
5.00	0.00	0.00	0.00	5.00

Internal Comment

[Calendar](#) :: [Map](#) :: [Zillow.com](#) :: [Directions](#) :: [Closest Techs](#) :: [Add Task](#) :: [Add Lead](#) :: [Add Contacts](#) :: [Add Reservation](#) :: [Balance By Class](#)

Service	Schedule	Bill-To	Tech	Last Service	Next/Renewal	Cancel Date	Amount
New Service Setup	New Setup Group	New Renewal	New Program				Included Pests

Click on **New Program** from the Location Detail screen.



PestPac - Select Program -- Webpage Dialog

Programs

Search:

Program	Description
BEDBUGS	BB
COMPLETE	Complete Lawn Care
FALL/WINTER	Fall-Winter lawn/pest
FLEA SERVICE	2 services
PEST CONTROL	
PREMIUM LAWN	Lawn 8 step program

Select the Program from the Dialog box.

Program Type: **PREMIUM LAWN**
 Range Type: **Eligibility Dates**

Include	Service	Description	Date Range	Req Re-Auth	Renewable	Duration	Price
<input checked="" type="checkbox"/>	CLEANOUT	Initial Clean Out	03/14 to 04/30	<input type="checkbox"/>	<input checked="" type="checkbox"/>	00:00	65.00 ↓
<input checked="" type="checkbox"/>	FERTILIZER S	Spring Fertilizer ↓	04/01 to 04/30	<input type="checkbox"/>	<input checked="" type="checkbox"/>	00:00	49.00 ↓
<input checked="" type="checkbox"/>	XFP-LSP	Late Spring Fertilization ↓	04/15 to 05/31	<input type="checkbox"/>	<input checked="" type="checkbox"/>	00:30	49.00 ↓
<input checked="" type="checkbox"/>	XFP_EFA	Early Fall Fertilization	05/31 to 08/15	<input type="checkbox"/>	<input checked="" type="checkbox"/>	00:30	49.00 ↓
<input checked="" type="checkbox"/>	XFP-LSU	Late Summer Fertilization	06/01 to 07/31	<input type="checkbox"/>	<input checked="" type="checkbox"/>	00:30	49.00 ↓
<input checked="" type="checkbox"/>	XFP-LFA	Late Fall Fertilization	08/15 to 09/30	<input type="checkbox"/>	<input checked="" type="checkbox"/>	00:30	49.00 ↓
<input checked="" type="checkbox"/>	FERTILIZER	Summer Fertilizer ↓	08/15 to 09/30	<input type="checkbox"/>	<input checked="" type="checkbox"/>	00:00	49.00 ↓
<input checked="" type="checkbox"/>	FERTILIZATION	Lawn Fertilization Package	10/01 to 11/30	<input type="checkbox"/>	<input checked="" type="checkbox"/>	00:30	49.00 ↓
<input checked="" type="checkbox"/>				<input type="checkbox"/>	<input checked="" type="checkbox"/>		SubTotal: \$408.00

Active: Start Date: Comm. Start:
 Charge: **Service Order** Expiration Date:
 Cancel Date:
 Cancel Reason:

Notify Location Bill-To Other
 Print Email Text Call
 Time: Days: Reason 1: Reason 2: Delete

[Add New Notification](#)

Credit Card ACH
 Credit Card #: [Add] Credit Card Expiration: 01 2014
 Credit Card Type: Auto-Bill Card Through:
 Name on Card: Auto-Bill Card:

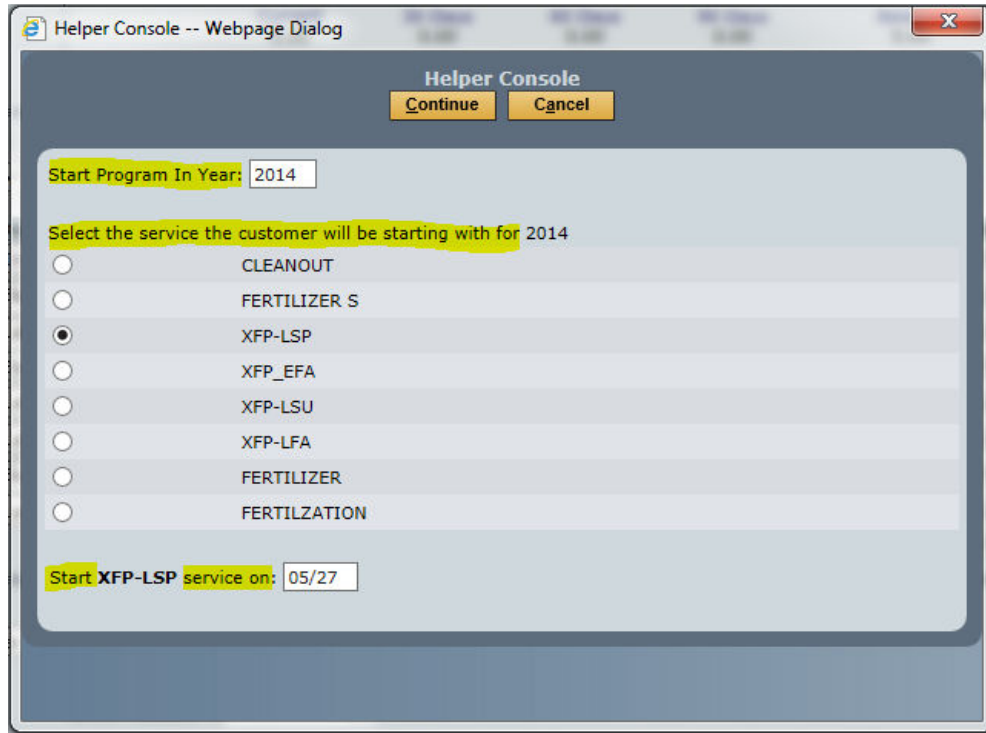
Terms: **NET 30**
 Net: 30
 Discount: 0.000 Days: 0

Route:

	Bonus	Commission	Share
Tech 1: <input checked="" type="checkbox"/>	0.00	0.00	1.000
Tech 2: <input checked="" type="checkbox"/>	0.00	0.00	1.000
Sales: <input checked="" type="checkbox"/>	0.00	0.00	1.000
tech 4: <input checked="" type="checkbox"/>	0.00	0.00	1.000
Bonus: <input checked="" type="checkbox"/>	0.00	0.00	1.000

Program Instructions:
 MISC

Fill in the necessary fields for creating the new program and click on Add in the top right.



Confirm the information in the Helper Console and click Continue.



You will see **Adding...** in the top right corner until it is finished adding the program.



You will see **Edit**, **Delete**, and **Exit** when finished. Click on Exit to get back to Location Detail.

Service	Schedule	Bill-To	Tech	Last Service	Next/Renewal	Cancel Date	Amount	
PREMIUM LAWN		210			05/27/2014		408.00	
New Service Setup New Setup Group New Renewal New Program								
Included Pests								
Branch:	North Branch	Type:		Contact Date:				
Tax Code:	DEF	Source:		Contact Code:				
Map Code:		County:	OCEAN	Entered:	05/19/2014			
Division:		Prospect:	<input type="checkbox"/>	Last Service:	05/23/2014			
Builder:		Subdivision:		Tax Exempt #:				
Liaison 1:		Liaison 2:						
PO #:		Internal:						
PO Expiration:								
Order #	Date		Time	Duration	Bill-To	Tech	Service	Total
90680	Tue 05/27/14	04/15-05/31		00:30	210		PREMIUM LAWN / XFP-LSP	49.00
90681	Sat 05/31/14	05/31-08/15		00:30	210		PREMIUM LAWN / XFP_EFA	49.00
90682	Sun 06/01/14	06/01-07/31		00:30	210		PREMIUM LAWN / XFP-LSU	49.00
90683	Fri 08/15/14	08/15-09/30		00:30	210		PREMIUM LAWN / XFP-LFA	49.00
90684	Fri 08/15/14	08/15-09/30		00:00	210		PREMIUM LAWN / FERTILIZER	49.00
90685	Wed 10/01/14	10/01-11/30		00:30	210		PREMIUM LAWN / FERTILIZATION	49.00
90678	Sat 03/14/15	03/14-04/30		00:00	210		PREMIUM LAWN / CLEANOUT	65.00
90679	Wed 04/01/15	04/01-04/30		00:00	210		PREMIUM LAWN / FERTILIZER S	49.00

You now see the new program you created along with the open service orders for the year.

Program Type: Offset Days

Used if you need services to happen a certain number of days apart throughout the year. Work dates will adjust on future orders according to when the last service order is posted.

Creating a Program using Offset Days

- From the Location you want to create a program for click on **New Program**.
- Select the **Program** you are using from the dialog box.
- **Adding the Program**
 - The **Service, Description, Date Range, Duration** and **Price** default from the Program Type lookup table.
 - The **Include** box will also be preset based on your lookup. This will create orders for all services that are checked.
 - The **Renewable** box should be checked for all steps to include each year.
 - **Req Re-Auth** should be selected for any steps that you want an order to be created for but may not be automatically included each year. Marking to require re-authorization will allow you to get confirmation from your customer first. Checking this box will mark the corresponding service order for Re-Authorization.
 - Enter **Start Date, Expiration Date** and **Commission Start** fields as needed.
 - **Charge** Type options are either Service Order or Production.
 - **Notify** fields are for if you use any of the notification features.
 - If using Element you can enter the Credit Card / ACH info as applicable.
 - **Terms** will default from the location but can be edited.
 - Route and Tech fields can be populated to have this info pull into all steps/orders for this program.
 - **Program Instructions** can be populated to pull into every step/order tied to this program.
 - **Exclude From Mass Eligibility Updates** can be checked if you never want the eligibility dates updated when changes are made in the program type lookup table.

Location 211 Show History Service Order Add Call Documents Notes

Location: [211] 732-887-9393 Bill-To: [211] 732-887-9393
James Dean
 160 Cable Ave
 BEACHWOOD, NJ 08722
 USA

Current	30 Days	60 Days	90 Days	Balance
0.00	0.00	0.00	0.00	0.00

Internal Comment

Calendar :: Map :: [Zillow.com](#) :: Directions :: Closest Techs :: Add Task :: Add Lead :: Add Contacts :: Add Reservation

Service	Schedule	Bill-To	Tech	Last Service	Next/Renewal	Cancel Date	Amount
New Service Setup	New Setup Group	New Renewal	New Program				Included Pests

Click on New Program from the Location Detail screen.

PestPac - Select Program -- Webpage Dialog

Programs

Search:

Program	Description
BEDBUGS	BB
COMPLETE LAWN	Complete Lawn Care
FALL/WINTER	Fall-Winter lawn/pest
FLEA SERVICE	2 services
PEST CONTROL	
PREMIUM LAWN	Lawn 8 step program

Select the Program from the dialog box.

Program Type: **COMPLETE LAWN**
 Range Type: Start on:

Include	Service	Description	Date Range	Req Re-Auth	Renewable	Duration	Price
<input checked="" type="checkbox"/>	AERATION	White Grub & Billbug Control	0 - (Infinity) days	<input type="checkbox"/>	<input type="checkbox"/>	00:30	85.00
<input checked="" type="checkbox"/>	FERTILIZER S	Spring Fertilizer	14 - 21 days	<input type="checkbox"/>	<input type="checkbox"/>	00:15	49.00
<input checked="" type="checkbox"/>	BROADLEAF	Broadleaf Weed Control	15 - (Infinity) days	<input type="checkbox"/>	<input type="checkbox"/>	00:15	49.00
<input checked="" type="checkbox"/>	FERTILIZER	Summer Fertilizer	14 - (Infinity) days	<input type="checkbox"/>	<input type="checkbox"/>	00:30	49.00
<input checked="" type="checkbox"/>	LAWN GRUB	White Grub & Billbug Control	30 - (Infinity) days	<input type="checkbox"/>	<input type="checkbox"/>	00:45	49.00
<input checked="" type="checkbox"/>	FERTILIZER	Summer Fertilizer	30 - (Infinity) days	<input type="checkbox"/>	<input type="checkbox"/>	00:30	49.00
<input checked="" type="checkbox"/>	FERTILIZER	Summer Fertilizer	30 - (Infinity) days	<input type="checkbox"/>	<input type="checkbox"/>	00:00	49.00
<input checked="" type="checkbox"/>	BROADLEAF	Broadleaf Weed Control	45 - (Infinity) days	<input type="checkbox"/>	<input type="checkbox"/>	00:15	49.00
<input checked="" type="checkbox"/>	FERTILIZER	Summer Fertilizer	15 - (Infinity) days	<input type="checkbox"/>	<input type="checkbox"/>	00:00	49.00
							SubTotal: \$477.00

Active: Start Date: Comm. Start:
 Charge: Expiration Date:
 Cancel Date:
 Cancel Reason:

Notify: Location Bill-To Other
 Print Email Text Call
 Time: Days: Reason 1: Reason 2: Delete

[Add New Notification](#)

Credit Card ACH
 Credit Card #: [Add] Credit Card Expiration:
 Credit Card Type: Auto-Bill Card Through:
 Name on Card: Auto-Bill Card:

Terms:
 Net:
 Discount: Days:

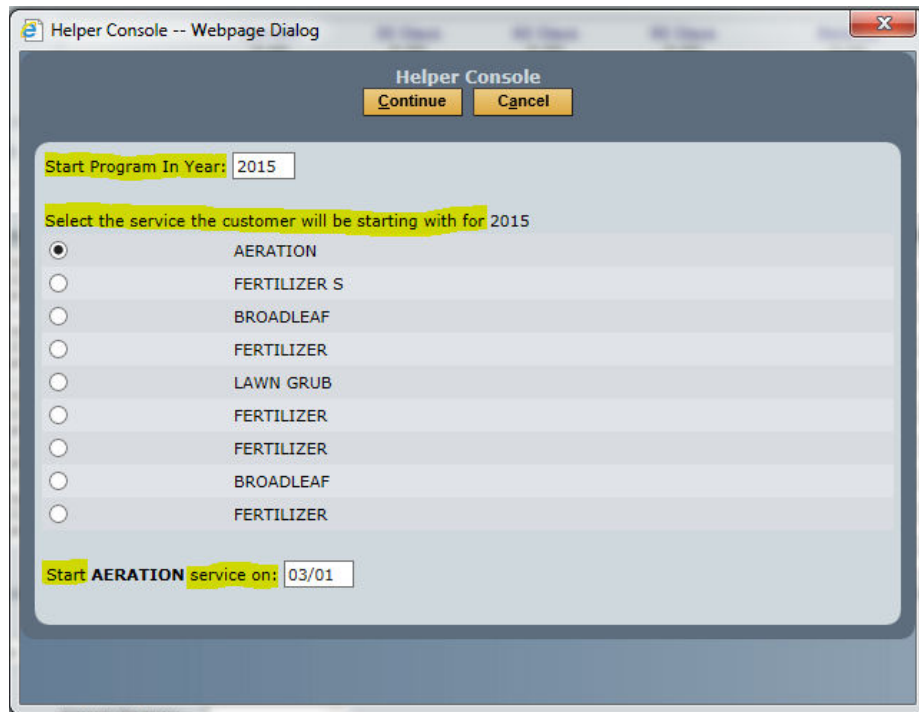
Route:

	Bonus	Commission	Share
Tech1: <input type="checkbox"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="1.000"/>
Tech 2: <input type="checkbox"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="1.000"/>
Sales: <input type="checkbox"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="1.000"/>

	Bonus	Commission	Share
tech 4: <input type="checkbox"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="1.000"/>
Bonus: <input type="checkbox"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="1.000"/>

Program Instructions:


Fill in the necessary fields for creating the new program and click on Add in the top right.



Confirm the information in the Helper Console and click Continue.



You will see **Adding...** in the top right corner until it is finished adding the program.



You will see **Edit**, **Delete**, and **Exit** in the top right corner when finished. Click on Exit to get back to Location Detail.

Service	Schedule	Bill-To	Tech	Last Service	Next/Renewal	Cancel Date	Amount																								
COMPLETE LAWN		211			03/01/2015		477.00																								
<div style="display: flex; justify-content: space-between;"> New Service Setup New Setup Group New Renewal New Program </div>																															
<table border="0" style="width: 100%;"> <tr> <td>Branch: North Branch</td> <td>Type: <input type="text"/></td> <td>Contact Date: <input type="text"/></td> </tr> <tr> <td>Tax Code: DEF</td> <td>Source: <input type="text"/></td> <td>Contact Code: <input type="text"/></td> </tr> <tr> <td>Map Code: <input type="text"/></td> <td>County: OCEAN</td> <td>Entered: 05/27/2014</td> </tr> <tr> <td>Division: <input type="text"/></td> <td>Prospect: <input type="checkbox"/></td> <td>Last Service: <input type="text"/></td> </tr> <tr> <td>Builder: <input type="text"/></td> <td>Subdivision: <input type="text"/></td> <td>Tax Exempt #: <input type="text"/></td> </tr> <tr> <td>Liaison 1: <input type="text"/></td> <td>Liaison 2: <input type="text"/></td> <td></td> </tr> <tr> <td>PO #: <input type="text"/></td> <td>Internal: <input type="text"/></td> <td></td> </tr> <tr> <td>PO Expiration: <input type="text"/></td> <td></td> <td></td> </tr> </table>								Branch: North Branch	Type: <input type="text"/>	Contact Date: <input type="text"/>	Tax Code: DEF	Source: <input type="text"/>	Contact Code: <input type="text"/>	Map Code: <input type="text"/>	County: OCEAN	Entered: 05/27/2014	Division: <input type="text"/>	Prospect: <input type="checkbox"/>	Last Service: <input type="text"/>	Builder: <input type="text"/>	Subdivision: <input type="text"/>	Tax Exempt #: <input type="text"/>	Liaison 1: <input type="text"/>	Liaison 2: <input type="text"/>		PO #: <input type="text"/>	Internal: <input type="text"/>		PO Expiration: <input type="text"/>		
Branch: North Branch	Type: <input type="text"/>	Contact Date: <input type="text"/>																													
Tax Code: DEF	Source: <input type="text"/>	Contact Code: <input type="text"/>																													
Map Code: <input type="text"/>	County: OCEAN	Entered: 05/27/2014																													
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Builder: <input type="text"/>	Subdivision: <input type="text"/>	Tax Exempt #: <input type="text"/>																													
Liaison 1: <input type="text"/>	Liaison 2: <input type="text"/>																														
PO #: <input type="text"/>	Internal: <input type="text"/>																														
PO Expiration: <input type="text"/>																															
Order #	Date	Time	Duration	Bill-To	Tech	Service	Total																								
90688	Sun 03/01/15	03/01-03/01	00:30	211		COMPLETE LAWN / AERATION	85.00																								
90689	Sun 03/15/15	03/15-03/22	00:15	211		COMPLETE LAWN / FERTILIZER S	49.00																								
90690	Mon 03/30/15	03/30-	00:15	211		COMPLETE LAWN / BROADLEAF	49.00																								
90691	Mon 04/13/15	04/13-	00:30	211		COMPLETE LAWN / FERTILIZER	49.00																								
90692	Wed 05/13/15	05/13-	00:45	211		COMPLETE LAWN / LAWN GRUB	49.00																								
90693	Fri 06/12/15	06/12-	00:30	211		COMPLETE LAWN / FERTILIZER	49.00																								
90694	Sun 07/12/15	07/12-	00:00	211		COMPLETE LAWN / FERTILIZER	49.00																								
90695	Wed 08/26/15	08/26-	00:15	211		COMPLETE LAWN / BROADLEAF	49.00																								
90696	Thu 09/10/15	09/10-	00:00	211		COMPLETE LAWN / FERTILIZER	49.00																								

You now see the new program you created along with the open service orders for the year.

Editing a Program

- From the Location you want to edit a program for click on the program and then click on **Edit**.
 - To edit the overall program click on **Edit**.
 - Make any necessary changes and click Save.
 - To edit an individual step click on the blue **Service** name and then click on **Edit**.
 - Make any necessary changes and click Save.
 - Click Exit to go back to the program.
 - To edit multiple steps or orders at once scroll down and click on **Step Editor**
 - At the top of the Step Editor screen check the boxes on the left for the steps you want to edit.
 - Check the boxes to the right for orders you want to update.
 - At the bottom of the Step Editor Screen is where you can select which fields you are updating. See below for those options.
 - Check the box for what you want to edit and fill in the corresponding box for what you want changed.
 - Click **Save** when finished.

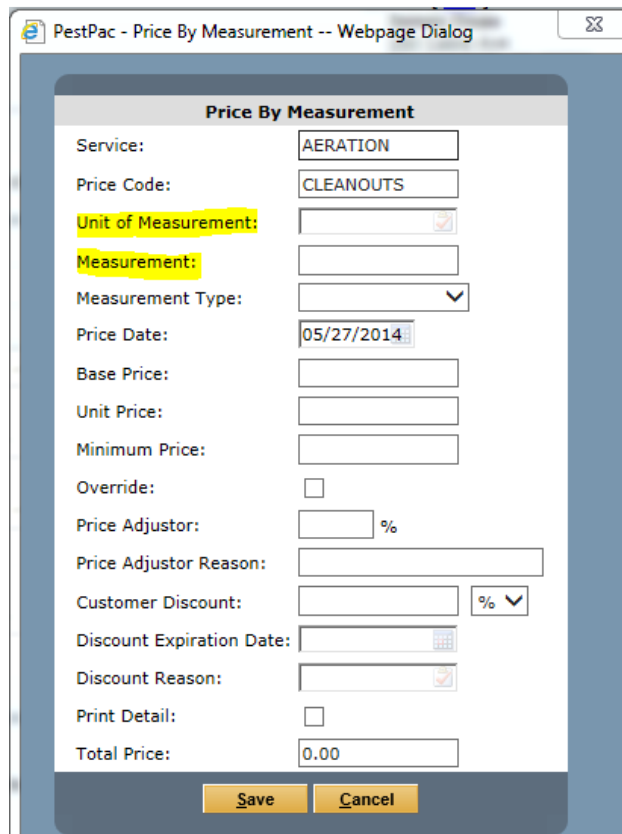
Step Editor Field Options

Fields to Update											
<input type="checkbox"/>	Route	<input type="text"/>	<input checked="" type="checkbox"/>								
<input type="checkbox"/>	Measurement	0	<input type="text"/>	<input checked="" type="checkbox"/>							
<input type="checkbox"/>	Time	<input type="text"/>	AM	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
<input type="checkbox"/>	Time Range	<input type="text"/>									
<input type="checkbox"/>	Duration	<input type="text"/>	<i>Multiple</i>								
<input type="checkbox"/>	Start Date	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
<input type="checkbox"/>	Increase Date	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
<input type="checkbox"/>	PO#	<input type="text"/>									
<input type="checkbox"/>	PO Expiration	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
<input type="checkbox"/>	Division	<input type="text"/>	<input checked="" type="checkbox"/>								
<input type="checkbox"/>	Source	<input type="text"/>	<input checked="" type="checkbox"/>								
<input type="checkbox"/>	Commission Start Date	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
<input type="checkbox"/>	Commission End Date	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
<input type="checkbox"/>	Tech1 (Bonus/Share)	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
<input type="checkbox"/>	Tech 2 (Bonus/Share)	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
<input type="checkbox"/>	Sales (Bonus/Share)	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
<input type="checkbox"/>	tech 4 (Bonus/Share)	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
<input type="checkbox"/>	Bonus (Bonus/Share)	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
<input type="checkbox"/>	C-PR	<input type="checkbox"/>									
<input type="checkbox"/>	RE Agent	<input type="text"/>	<input checked="" type="checkbox"/>								
<input type="checkbox"/>	RE Company	<input type="text"/>	<input checked="" type="checkbox"/>								
<input type="checkbox"/>	Service 4	<input type="text"/>									
<input type="checkbox"/>	test bldg	<input type="text"/>									
<input type="checkbox"/>	Service Instructions	MISC	<input checked="" type="checkbox"/>								
<input type="checkbox"/>	Print Prices	<input checked="" type="checkbox"/>									
<input type="checkbox"/>	Print Order	<input checked="" type="checkbox"/>									
<input type="checkbox"/>	Terms	NET 30	<input checked="" type="checkbox"/>								
<input type="checkbox"/>	Setup / Order Type	Service Order	<input type="text"/>								
<input type="checkbox"/>	Color	<input type="text"/>	<input type="text"/>								
<input type="checkbox"/>	Add Notification	Notify	Print	Email	Text	Call	Time	Days	Reason 1	Reason 2	
		<input checked="" type="radio"/> Location	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	0	<input type="text"/>	<input type="text"/>	
		<input type="radio"/> Bill-To									
		<input type="radio"/> Other									

Save Exit

Using Price By Measurement

- If you have a service configured to use Price By Measurement you will see a calculator icon alongside that service/step when adding a program.
 - Click on the Calculator icon.
 - Fill in the **Unit of Measure** and **Measurement**.
 - After clicking or tabbing out of those fields it will pull in the info from your price chart and calculate the **Total Price**.
 - If you need to override anything you can check the **Override** box and manually enter the **Base Price** and **Unit Price** information.
 - Fill in any other necessary fields you are using.
 - Click **Save** when finished.
 - This will update the price you see for that step of the program.
 - To edit again click on the calculator icon.
 - If you need to copy that measurement information to additional steps of the program click on the blue arrow next to the price.
 - You can choose to **Copy to Next** step or **Copy to All** steps.
 - Click **Add** when finished entering in everything for this program.




The screenshot shows a web browser window titled "PestPac - Price By Measurement -- Webpage Dialog". The dialog box contains the following fields and controls:

- Service:** AERATION
- Price Code:** CLEANOUTS
- Unit of Measurement:** (highlighted in yellow)
- Measurement:** (highlighted in yellow)
- Measurement Type:** (dropdown menu)
- Price Date:** 05/27/2014
- Base Price:** (text input)
- Unit Price:** (text input)
- Minimum Price:** (text input)
- Override:**
- Price Adjustor:** (text input) %
- Price Adjustor Reason:** (text input)
- Customer Discount:** (text input) % (dropdown menu)
- Discount Expiration Date:** (calendar icon)
- Discount Reason:** (text input)
- Print Detail:**
- Total Price:** 0.00

At the bottom of the dialog box are two buttons: **Save** and **Cancel**.

Terminology

Programs Terminology

- **Program:** Also referred to as service programs or lawn programs allow for multiple services to be done throughout the year at varying intervals.
- **Step:** One of the services that makes up the overall program.
- **Eligibility Dates:** A program range type that schedules services based on the need to do service during a certain time of the year. It uses starting and ending eligible dates as specified in your Program Types lookup table. If you try scheduling outside of the eligible dates you will receive a warning that the date is ineligible.
- **Offset Days:** A program range type that schedules service based on how many days apart the program steps are to be done. Future work dates gets adjusted based on the work date that the previous service orders are posted for.
- **Include:** Option for each step within a program that you check to specify which services are being done for that particular account. Can also be defaulted in the Program Type lookup table to always be included based on the program.
- **Require Re-Authorization:** should be selected for any steps that you want an order to be created for but may not be automatically included each year. Marking to require re-authorization will allow you to get confirmation from your customer first. Checking this box will mark the corresponding service order for Re-Authorization. This symbol  will appear on the Location Detail screen alongside any orders marked as Req Re-Auth.
- **Re-Authorize button:** Appears on a location when there are orders marked as Req Re-Auth. Clicking this button brings you to the Bulk Re-Authorization Utility for re-authorizing all orders or doing them individually.
- **Renewable:** Option for each step within a program to specify if it is always included each year. If unchecked for a specific step it will not generate future orders for that service.
- **Step Editor button:** Click the button found at the bottom of a program to access this screen. It allows you to update fields within multiple steps or orders tied to the program instead of having to edit them individually.

Common Scenarios and FAQs

“How do I do an **initial order** for programs?”

- Since programs allow for multiple services and prices you can use the first step of the program as your initial.
- You would use a special initial code to differentiate that service as your initial.
- Note that it will not get flagged the way a service setup initial does so you would need to report off of the service code if needed.

“How do I include a step **this year but not in future years?**”

- You can leave the Renewable box unchecked on that service line item in the program. This will exclude it from future years.

“How do I add a **step that doesn’t occur every year?** It needs to be done every 3 years.”

- In your services lookup table you can tell it to generate every X number of years.
- Under Company > Lookup Tables > Services, go into the service you want done every 3 years and scroll down to the generate field.
- Enter Generate Every 3 year(s) and save.
- All programs that have this service will now only generate it every 3 years.

“What’s **req re-auth** mean and how/why/when should I use it?”

- This stands for require re-authorization.
- It’s used for steps within the program that aren’t automatically included every year but you want to give your customer the option of receiving that service.
- Marking a step as req re-auth will flag the corresponding order so that it can be included when doing re-authorizations.

“What does the **calculator** icon mean next to a service when I’m adding a program?”

- This means that service is set up to be priced by measurement.
- Clicking that icon will bring up the Price By Measurement dialog for you to enter the measurement info for calculating the price.

“What is **Price by Measurement?**”

- This is a feature that allows you to price your services based on measurements.
- It uses the Price Charts, Measurements and Services lookup tables to set up. See the **Lookup Table** section of this document for more info.


“Why am I receiving this message when trying to copy Price By Measurement information from one step to the next? It says: **FERTILIZER is not configured as “Price By Measurement”**. **Would you like to copy just the price down? Measurements will not be copied.**”

- This means that the service step that you are trying to copy to does not have the Price By Measurement field selected in the Services Lookup Table.
- Saying yes will just copy the price.
- Saying no will not copy anything.
- If you meant to set up rules for that particular service you can do so by selecting that service code under Company > Lookup Tables > Services and checking the box for Price by Measurement as well as selecting the Price Code to use.
- See the Lookup Tables section of this document for more info.


“How do I **edit just one of the steps** within the program?”

- After you’ve clicked into the program from the location detail you would click the blue service name of the step to get to the Program Step screen.
- Click on Edit.
- Make any necessary changes and click on Save.
- Click Exit to go back to the main program detail screen.

“How can I **change information for multiple steps** after I already added the program?”

- Click into the program from the location detail screen.
- Click Edit in the top right.
- Scroll down and click on .
- Here you can choose to edit **steps, orders** or both by checking the appropriate options.
- Enter the **Fields to Update** and click on **Save** when finished.

“How can I **change information for multiple orders** after I already added the program without having to click into each order individually?”

- Click into the program from the location detail screen.
- Click Edit in the top right.
- Scroll down and click on .
- Here you can choose to edit **steps, orders** or both by checking the appropriate options.
- Enter the **Fields to Update** and click on **Save** when finished.

“How do I deactivate a program?”

- Click into the program from the location detail screen.
- Click Edit in the top right.
- Scroll down and uncheck the Active box.
- A prompt will appear asking “ Do you want to make this Program inactive?” Click **Yes**.
- Click Save.
- If there are still open orders you will receive a prompt asking “Post Service Orders?”
 - Select Yes to move forward with posting the open orders as Not Serviced and select a Not Serviced (NS) Reason. This will finish deactivating the program as well as post the related orders as not serviced.
 - Select No if you do not want to post the service orders as Not Serviced. This will finish deactivating the program but the orders will still be open.

“How do I reactivate a program?”

- Click into the program you want to reactivate from the location detail screen.
- Click Edit in the top right.
- Under the **Include** column, check the box next to each service step you want to include when reactivated. To select all you can uncheck the bottom checkbox and recheck it again.
- Check the **Active** Box.
- Adjust any additional information as needed and click on Save.
- Click Save.
- You will be prompted with “Would you like to add orders for the included steps?”
Note: Duplicate orders will not be added for a step if a non-voided order or invoice already exists for the program year.
 - Select **Yes** to move forward with reactivating the program and creating the orders for the year.
 - Select **No** if you want to reactivate the program without automatically creating the orders. You will have to manually click the blue order link alongside each service step of the program for the ones you needed an order for.

“How do I generate my program orders?”

- You don't!
- Orders get automatically created for the year when the program gets added.
- Orders for the following year get created as this year's orders get posted.
- Additional orders can be created as needed using the blue order link alongside the program step within the program.


“How do I delete a program?”

- Click into the program from the location detail screen.
- Click Delete in the top right.
- The Helper Console will appear with an option checked that says “Post Open Orders as Not Serviced?”
 - If you want to post as NS select a Not Serviced Reason for the orders and click Continue.
 - If you do NOT want to post the orders as NS then uncheck the option and click Continue.
- Once it finished the Program is now deleted and orders are posted as NS if you selected that option.

“After adding a program I realized I need to remove one of the steps, how do I do that?”

- Click into the program from the location detail screen.
- Click Edit in the top right.
- Uncheck the Include box for the step you want to remove and click on Save.
- If you also want to get rid of the open order for that step, say Yes to “Post Open Service Orders?” and select a Cancel Reason.
- The step and


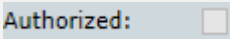
“What is the difference between Require Re-Authorization and Renewable?”

- Re-Authorize is used to indicate that an individual program step (or entire program) must receive customer confirmation prior to the service being performed.
 - Re-Authorize can be defaulted on a per location basis from the Edit Location Screen.
 - If selected then you will see a yellow exclamation icon  next to the open orders for the corresponding steps.
- Renewable is used to indicate that an individual program step is eligible to be performed in a subsequent year and does not require customer confirmation.
 - An example of when renewable may be unchecked when adding a setup where it’s marked as Included would be if you had an initial cleanout or something that is only done the first year and never again.
 - Renewable can be defaulted on a per service or per program type basis.

“When using **Offset Days** how do I figure out what number of days to put in the Start and End if I just want to make sure all of the services are spread evenly throughout the year?”

- First confirm how many steps (services) you are going to have within your program.
- Next take that number and divide it into 365.
 - Example: A 7 step lawn program would be 365 divided by 7 giving you a number of approximately 52. This will be your end date.
- For the start date select a number for the closest you would want each service done after the previous was done.
 - Example: If they can be done after 30 days then you can select 30. If you prefer to keep the number closer to 52 but still have some wiggle room for rescheduling the order you can select a higher number like 45. Whatever is decided will be your Start number.

“How do I **manage the orders I have marked as Req Re-Auth?**”

- To manage them in bulk you can do so from either the Call List Utility or the Service Orders Report
 - Using Call List Utility:
 - Go to Tools> Call List
 - Enter the start and date
 - Select Yes next to ‘ Needs Re-Authorization’
 - Click Search.
 - As you call each result you would check the Authorized box and click Next to mark them as now being authorized.
 - Using the Service Orders Report:
 - Go to Reports > Service Orders
 - Under Output Format on the right choose Re-Authorize Program Orders
 - Enter the starting and ending Work Date info and click Re-Authorize
 - From here you can Re-Authorize All in the top right corner or do them one at a time by clicking the Re-Authorize blue link next to each order.
 - You can also mark an entire location to be authorized by clicking the  button from the Location Detail.
 - You can also mark an individual order to be authorized by checking the  box from within the service order itself.

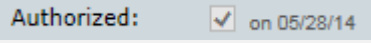

“Will an order still auto-create for next year if I post the open service order as **Not Serviced?**”

- Yes, posting an order as NS will still auto create the next service order.
- Deleting a service order will not. If you need an order for next year after deleting an order you will need to create it using the blue order link alongside the step within the program.

“If a customer calls in now to **schedule the work date of a future service** how do I do that?”

- From the Location Detail of the account, locate the service order they want to adjust the date for.
- After clicking on the order you can select Edit in the top right and adjust the work date and save to have it out there for the future date requested.
- Note that if using Offset Days the work dates of orders due

“How can I tell if a service order has been **re-authorized?**”

- From the Location Detail of the account, locate the service order and click into it.
- Scroll down below the Order Date and you will see an Authorized checkbox and the date it was authorized. 
- If not yet Authorized you should still see the  symbol on the Location Detail alongside the service order if it was marked as Req Re-Auth.

“How do I create a **call-back order** for one of my program services?”

- From the Location Detail of the account, click into the program you need to create a call-back for.
- Click the blue Order link alongside the step/service you need to create a call-back for.
- Under Order Type select Call-Back and enter any additional info needed before clicking on Save.

“How do I do an **additional billable service** tied to the program without it creating additional orders for the future?”

- From the Location Detail of the account, click into the program you need to create a billable order for.
- Click the blue Order link alongside the step/service you want to use.
- Under Order Type select Service Order and enter any additional info needed before clicking on Save.

“How many **invoices** does the customer receive?”

- If you have the program steps set with an Order Type of Service Order then an invoice will be created for each order after it’s posted.

“Can I set up programs to be eligible for **annual prepayments?**”

- Yes. When setting up each program in your Program Types Lookup Table there is an option called Eligible for Prepays.
- If checked, then this field will appear and be checked when adding a new program and will look at your Company Setup default for calculating the discount.
- If you do not check this option in the lookup, then you are not able to use this when adding a program.
- On the other hand, if you have it checked in the Program Type lookup table but want to disable it for a particular account you can simply uncheck the “Eligible for Annual Prepay Discount’ box within the program on the location itself.

“How do I do an **additional billable service** tied to the program without it creating additional orders for the future?”

- From the Location Detail of the account, click into the program you need to create a billable order for.
- Click the blue Order link alongside the step/service you want to use.
- Under Order Type select Service Order and enter any additional info needed before clicking on Save.

“Will using the **Step Editor** on a location affect other accounts?”

- No, when you access the Step Editor from a specific program on a location, it is only making changes to the selected steps and/or orders for that one location.

“How do I **mass change the offset or eligibility dates** for a particular step in a program for all locations?”

- Go to Company > Lookup Tables > Frequently-Used Lookup Tables > Program Types and click into the Program you want to update.
- Adjust the Start and End fields as needed and click on Save.
- Click Yes when asked “Update eligibility on existing programs?”
- NOTE: This will update all existing programs EXCEPT any that have the option checked for “Exclude From Mass Eligibility Updates” within the program on the location.

“Can I set **required fields** for usage with Programs?”

- Yes. The required fields for Service Setups get respected on Programs.
- Go to Company > Company Setup > General Options > Field Setup > and check ‘Use Required Fields’ if not already enabled.
- Under Service Setup select the program fields you want required and then Save.
- Required fields will now appear in red.