

PestPac Call Tracking

Overview & Feature Highlights

PestPac Call Tracking enables you to understand the true ROI of marketing campaigns which empowers you to make smarter decisions about advertising and marketing for your business. Call Tracking makes the connection between the trackable phone number on a vehicle or website → to the Lead in PestPac → all the way through to the end sale.

- **Setup** – Add new trackable phone numbers in Company Setup and match them to a campaign and lead source.
- **Leads** – Easily match leads to incoming phone calls from trackable number to populate the **lead source** when adding a lead.
- **Monitor Calls for Quality!** – Each phone call can be recorded to allow for reviewing staff's customer service quality.
- **What's Your ROI?** – Users will be prompted to associate leads to new Orders/Service Setups so you can report on **ROI** for each lead source.
- **Interested?** Contact the PestPac Sales Team to enable Call Tracking

Provisioning Numbers (Company Setup > Call Tracking)

Call Tracking Options Use Call Tracking

Lock lead source field

[Manage Trackable Phone Numbers](#)

- Once WorkWave has enabled Call Tracking for you, Call Tracking Options will appear in Company Setup.
- Locking the lead source will prevent users from changing the lead source on a lead in PestPac or CRM once a match has been made.
- Clicking link for Manage Trackable Phone Numbers will allow you to set up new numbers and map out your lead sources

PestPac

Inbound # / Area Code	Campaign	Forward #	Extension	Pause Before Extension	Source	Record Call
267-563-8331	Print	866-████████	116	8 seconds	NJMIDYP	<input checked="" type="checkbox"/>
215-310-5209	Website	866-████████	116	8 seconds	WEBSITE	<input checked="" type="checkbox"/>
<input type="text"/> Enter Area Code or 800 prefix	Billboard	<input type="text"/>	<input type="text"/>	0 seconds	<input type="text"/>	<input type="checkbox"/>

[Add Number...](#)

Save Close

- Both Local Area Codes and Toll-Free 800 numbers can be provisioned.
- Provision trackable phone numbers based on the total numbers purchased.
- Tie the trackable number to a campaign (hardcoded list) – ie, Billboard, Print, or SEO
- Forward trackable numbers to a direct line or main office line with extension.
- Associate trackable number to a lead source (Set up your sources by going to Company > Lookup Tables > Sources).
 - For instance, if you put the number in a magazine ad, that magazine will be your source.
- Select whether or not to record each incoming call.
- **Please note:** You cannot reuse an existing trackable number from an outside source.

Incoming Call: Answered

The screenshot displays the PestPac software interface. On the left is the 'Add Lead' form with fields for Address, City, State, Zip Code, Phone, Alt. Phone, Fax, Mobile, Email, Latitude, Longitude, and Re-Geocode. Below these are fields for Received Date (02/04/2016), Received Time (10:55 AM), Lead Source (CHAT), and Lead Cost (0.00). A red box highlights the 'Find Lead Source' link, with a red arrow pointing to the 'Unmatched Trackable Call History' window on the right. This window shows a search interface with 'Starting Date' (08/15/2016) and 'Ending Date' (08/29/2016) fields, and a 'Search' button. Below the search fields is a table of call history:

Date/Time	Phone Number	Name	Source
8/23/2016 3:45:07 PM	732-██████	MARATHON DATA S	WWSEO
8/22/2016 4:11:13 PM	732-██████	MARATHON DATA S	WWSEO
8/17/2016 4:25:07 PM	732-██████	MARATHON DATA S	WWSEO
8/16/2016 3:48:51 PM	732-██████	MARATHON DATA S	WWSEO
8/16/2016 3:40:06 PM	732-██████	MARATHON DATA S	WWSEO
		Syngal Rahul	WWSEO
		Syngal Rahul	WWSEO
		Syngal Rahul	WWSEO

Below the table are 'Schedule' and 'Cancel' buttons. In the foreground, the 'Lead Detail' window is open, showing location information for 'Kristen' at '13 Maple St, manassas park, VA 20111, USA'. It also shows Received Date (02/19/2016), Received Time (04:08 PM), Lead Source (WEBSITE), and Lead Cost (0.00). A red box highlights the 'Lead Source' field with the text 'Obtained from a trackable phone number.'.

- After answering the incoming call, use the “Find Lead Source” link on the Add Lead Screen to match up the connected call with the lead.
- The Unmatched Trackable Call History window will list all inbound calls from trackable phone numbers that have yet to be matched up to a lead.
- The prompt will contain the callerID phone number and name (if available) to assist with making the association with the caller.
- Click on the match to the incoming call to populate the lead source.
- **Please note:** This is not currently integrated with the CRM or the Sales Opportunity screen.

Lead Note & Call Recording

Document Name	Date	
Call Recording	04/12/2016	[Edit] [Open]
<input type="checkbox"/> Add a note		
Date	Time	User
Tuesday, 04/12/2016	01:21 PM	ADMN
[Edit]		
Call Start: 04/12/2016 01:21 PM Atlantic Standard Time Call End: 04/12/2016 01:21 PM Atlantic Standard Time Duration: 00:00 Inbound Number: 267- Call Status: Answer Answered By Number: 866- Caller Name: Cell Phone PA Caller Number: 267- Campaign: Billboard Existing Customer: Yes		

- Approximately 15 minutes after the call has been completed, a note with call details (duration, caller ID, etc) and the **Call Recording** will be attached to the lead.
 - This is visible from the Edit Lead screen.
- The call recording will also be attached to the Location as a location document.
- Call details will be included as a note in the lead as well.
- Users that have access to “documents” will be able to download this recording.
- **Please note** that the call recordings are only stored for **6 months** and will not be available for playback after that time.
 - Alternatively, you can download the recording and save it locally if you need to reference it after 6 months.

Incoming Call: Unanswered

- Never miss an opportunity! Even if a call is missed, trackable call info will be automatically tied to an existing open lead if a match is found. Matches are based on the incoming phone number matching the phone number on a lead.
- If no matches are found, a user can still use the link within the lead screen to “Find a Lead Source” and manually find a match.
 - This link will allow the user to view all trackable call history for calls that have yet to be matched up to a lead.
 - Once matched, the Lead source will be set, note added, and call recording attached.

Associate New Orders/Setups to Leads

- Company Setup > Service Order/Service Setup Options > Enable “Prompt to Associate with Lead”
 - This is **required** for the ROI reports to collect any data.
 - Users will receive a prompt to associate a lead when adding a new one-time Order (gold Service Order button), new Service Setup, new Program, or new Renewal.
 - If the lead is not already closed a won, the user will be asked if they want to close the lead as won.

Service Order/Service Setup Options

Services

Lines To Show:

Show More Lines

Show Cost

Initial Service:

Disabled

Prompt

Required

Use 4 Decimal Places In Unit Price

Use Detailed Description

Price Services By Branch

Use Multiple Target Pests

Link Materials To Services

Link Target Pests To Services

Warn When Target Pest Is Not Included Or Is Discounted

Duration Calculation for Associated Orders

Prorated based on price

Prorated based on order estimated duration

Total in parent order

Defaults for New Orders & Setups

Anytime Start Time: AM

Anytime End Time: PM

Notification:

days

Notify Location On By Default

Notify Bill-To On By Default

Print Notification On By Default

Email Notification On By Default

Call Notification On By Default

Enable Annual Prepay Discount

Discount:

Discount Reason:

Include Tax in Discount

Apply Prepayments to Existing Invoices

Prompt to Associate with Lead

PestPac

Location: [123460644] - Attach to Lead?

Service	Received Date	Salesperson	Pending Event	Potential \$
12A-COMM SPCL	04/27/16	01	ESTIMATE	100.00

Mark lead as won?

Reports

Reports > All Reports

- **Lead List Report** and **Lead Statistics Report** - Added “existing customer” as a filter/sort option to determine how many leads are brand new vs. tied to an existing Location in PestPac.
 - The location must have been existing at the time the lead was added.
- Change Logging added for automatic changes to the lead source

Existing Customer: Yes No Either

comp sold:

Date:	02/29/16 06:14 PM	Ace Pest Control 44 yhjhjgj ggfgghfgfgh
System Date:	02/29/16	
Lead List		
Existing Customer: No		
Totals Lead Source: Leads: 1		
Totals Lead Source: 501ATCP Leads: 4		
Totals Lead Source: APPP Leads: 2		
Totals Lead Source: FAPP.COM Leads: 10		
Totals Existing Customer: No Leads: 17		
Existing Customer: Yes		
Totals Lead Source: Leads: 2		
Totals Lead Source: 501ATCP Leads: 2		
Totals Lead Source: FAPP.COM Leads: 5		
Totals Lead Source: FRIEND Leads: 1		
Totals Lead Source: WEBSITE Leads: 2		
Totals Existing Customer: Yes Leads: 12		
Report Totals Leads: 29		

Reports (continued)

- **ROI Report** – Track the value of setups/orders created that were associated with a lead.
 - We have added a Show Column for ROI on the Lead List Report.
 - The ROI column will pull in the value of any one time order and/or annual value (including initial) of a setup that is tied to the lead in question.
 - Multiple setups/orders can be tied to the same lead so it will tally these
 - Annual Value will respect the “Exclude initial period from Upfront Commission Calculations” option in Company Setup.
 - For example: With this option enabled for a quarterly service, the calculation will be (Initial + 3 services)
 - With the option disabled, a quarterly service will calculate as (initial + 4 services)

Report Writer

- **Trackable Call Detail & Summary** – These Report Writer reports track the amount of minutes spent on each call
- **ROI field** added to the Leads and Opportunities Category in Report Writer

Deactivating a Number

The screenshot shows the PestPac interface with a table of numbers and their settings. The 'Deactivate' column is highlighted with a red box. The table has the following data:

Inbound # / Area Code	Campaign	Forward #	Extension	Pause Before Extension	Source	Record Call	Deactivate
732-440-7826	Social	732-██████		0 seconds	501ATCP	<input checked="" type="checkbox"/>	<input type="checkbox"/>
732-852-7117	SEO	732-██████		0 seconds	WEBSITE	<input checked="" type="checkbox"/>	<input type="checkbox"/>
215-989-4190	SEO	732-██████		0 seconds	FRIEND	<input checked="" type="checkbox"/>	<input type="checkbox"/>
732-800-2630	Emails	732-██████		0 seconds	NJMONYPX	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Buttons: Save, Close

- Deactivating a number will release the number after 30 days and **can no longer be used or reactivated.**
- During that 30 day period, callers to the tracking number will hear a message to call the forwarding number directly.
- If a number is accidentally deleted, you will need to provision a brand new number.