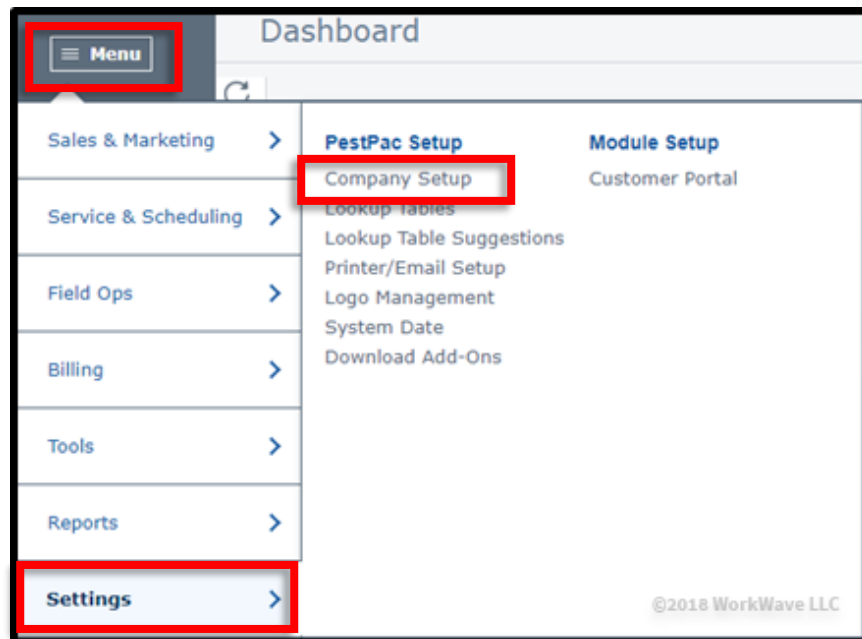


Automated Emailing of Invoices and Inspection Reports

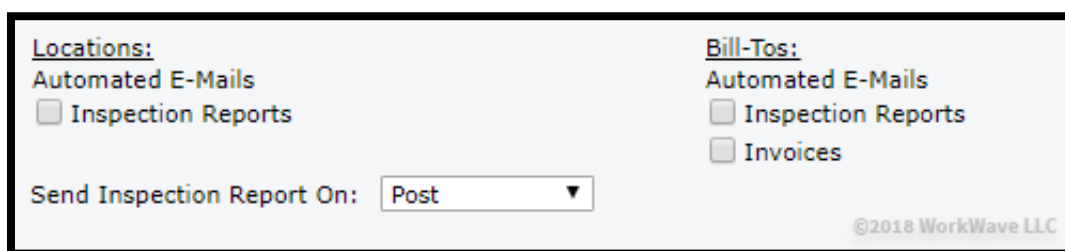
This document reviews setting up automated emailing for Invoices and Inspection Reports upon completion of service.

To set up automated emailing, complete the following steps:

1. Go to *Menu > Settings > Company Setup*.



2. To enable automated emailing for NEW Bill-Tos / Locations, under *Defaults for New Accounts*, you can determine:



- a. If Invoices should be emailed to the email address listed on the Bill To, check the *Invoice* box under Bill-Tos at the bottom of the section.

- b. If Inspection reports should be sent to the email address on the Location, the Bill To, or both, check the *Inspection Report* boxes under Locations and/or Bill-Tos, respectively.
- c. If the email should be sent when a Service Order is posted in a batch, select *Post*; if the email should be sent when the batch is released, select *Batch Release*.

Note: We recommend selecting *Batch Release* since this option allows you time to review the data for accuracy before sending it to the customer.

3. To enable automated emailing for a SINGLE Contact, go to the Contact in PestPac, check the *Inspection Reports* and/or *Invoice* checkbox(es), and click the *Save* button.

4. To enable automated emailing for a SINGLE EXISTING Bill-To / Location, go to the specific Bill-To or Location. In this example, we will look at an existing Location.

Edit Location Duplicate Save Create New Bill-To Assign New Bill-To Delete/Deactivate Cancel

Account #: 3917 Bill-To Account: 101122 Update Bill-To
 Copesan #: Copesan Location:
 Company:
 Last Name: Fernandez First Name: Matthew Title: Mr.
 Street: 3084 Danube Ct Street Search: DANUBE CT
 City: Jacksonville State: FL Zip Code: 32246-5512 ✓
 Country: Salutation Name: Mr. Fernandez
 Salutation: Dear: Alt. Phone: x
 Phone: 800-762-0301 x 139 Mobile: x
 Fax: x Latitude: 30.293513 Do Not Re-Geocode
 E-Mail: dmandzych@workwave.com None Longitude: -81.475851
 Web Site: LogIt:

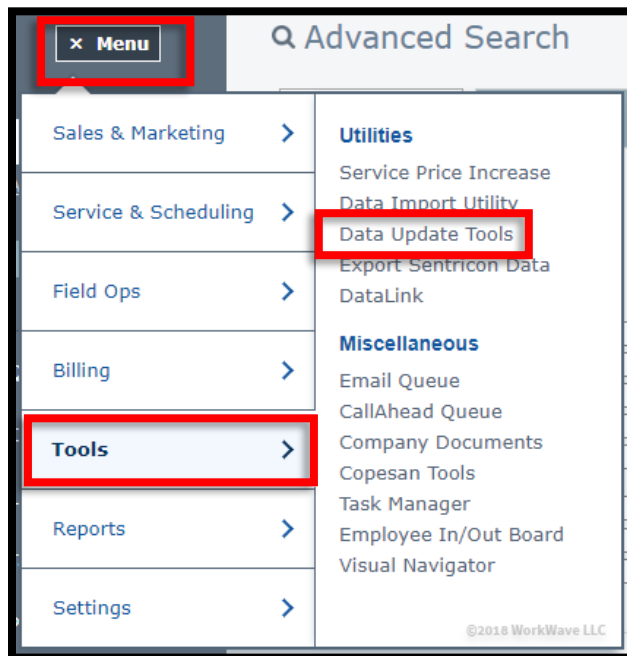
Branch: Main Type: R Contact Date:
 Tax Code: DEF ✓ Source: Contact Code:
 Map Code: County: DUVAL Entered: 10/21/2015
 Division: Prospect: Last Service: 04/06/2017
 Builder: Subdivision: Tax Exempt #:
 PO #: Liaison 1: Liaison 2:
 PO Expiration: GL Code: DEFAULT
 Time In IVR: Time Out IVR:
 Areas Editable By: Copesan Only Office Only Office and Handheld

Internal Comment: Batch Output Re-Authorize:
 Instructions: Print: Email: Printing
 Total on S.O.:
 Balance on S.O.:
 Include Mailings:
 Automated E-Mails
 Inspection Reports

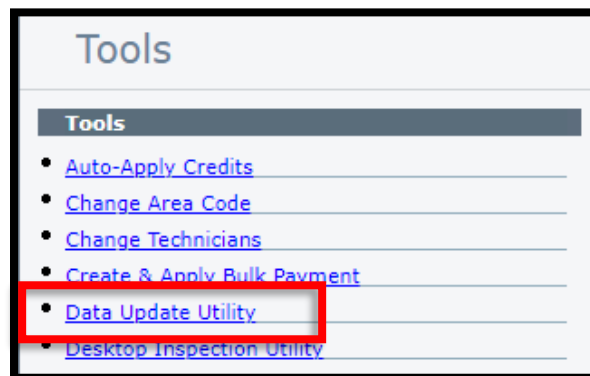
Mobile App
 No Customer Signature Required:
 Attributes: (None)
 Skills: (None)

©2018 WorkWave LLC

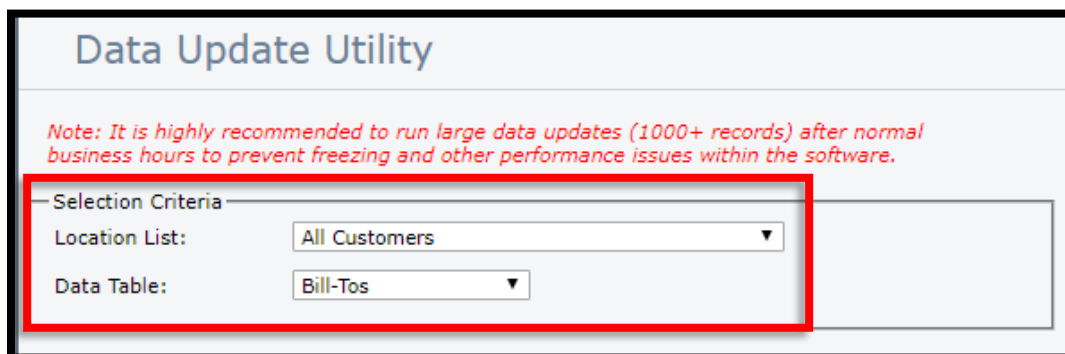
- a. For a Location, click the *Inspection Reports* checkbox. For a Bill-To, click the *Inspection Reports* and/or *Invoices* checkbox.
 - b. For a Location, click the *Save* button. For a Bill-To, click the *Edit* button, and click the *Save* button.
5. To enable automated emailing for a LARGER AMOUNT of EXISTING Bill-Tos / Locations, go to *Menu > Tools > Data Update Tools*.



a. Select *Data Update Utility*.



b. For Selection Criteria, choose the relevant Location List and Data Table (Locations or Bill Tos – you can only select one at a time). Please refer to our *List Management* document for more information.



- c. Under Update Data, choose the Data Field to update (Automated Email Inspection Reports and / or Automated Email Invoice Reports – you can only select one at a time.).

Data Update Utility

Note: It is highly recommended to run large data updates (1000+ records) after normal business hours to prevent freezing and other performance issues within the software.

Selection Criteria

Location List: All customers

Data Table: Bill-Tos

Update Data

Data Field: Automated E-Mail Inspection Reports

Match Old Value On: Any Blank Specified

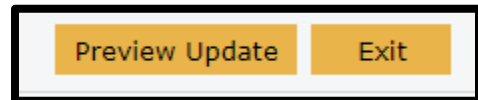
New Value:

- d. For Match Old Value On, select *Any*.

Note that Match Old Value On is set to *Specified* as the default. In this case, you will select *Any* so that the utility will update to a new value regardless of what the old value was.

- e. Check the *New Value* box.

- f. Click the *Preview Update* button, and click the blue link to review the data.



- g. The file will download to your computer where you can open it to view or save it for reference. After you have reviewed the file, click the *Update Data* button.

Data Update Utility -> Bill-Tos -> Automated E-Mail Inspection Reports

Update Data Cancel

4227 Records Found. [Click here](#) to review all data to be updated.

- h. Click *OK* in the popup.



- i. When finished, the screen will refresh and show that the update has been completed.

REMEMBER: For additional setup, training, and usage resources for FREE, including live webinars and a robust video library, please visit [PestPac University](#).