

CallAhead Module Setup and Usage

PestPac CallAhead saves time in your office and in the field by automating service reminders and collection calls.

This document outlines how to set up and use the CallAhead module in PestPac.

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- [Enabling CallAhead on Individual Locations](#)
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Setting Up the CallAhead Module

CallAhead can be set up by anyone with the access right Purchasing Rights enabled. During the setup process, you will set the call time zone and preliminary call windows, and then create an account by agreeing to the terms and conditions and setting up a phone number from which the calls will originate.

To set up the CallAhead module, go to *Menu > Settings > CallAhead*.

Here is where you will set up your CallAhead time zones, call windows, phone numbers, SMS numbers, and branch-specific numbers.

CallAhead Setup

1. Pick Your Time Zones - Choose the time zone for each of your physical office locations.
[\[Manage Timezones \]](#)

2. Choose Your Call Window - Enter an acceptable time window for making scheduled calls and sending scheduled text messages. (Uses company time zone from step 1.)
[\[Manage Scheduled Calls \]](#)

3. Verify Phone Numbers - Verify an existing number or provision a new number to use on the caller ID when notification calls go out.
Company Default Voice Number: (908) 219-6616 [\[Choose \]](#) [\[Test \]](#)



4. Provision SMS Number - Provision a new phone number to use on the caller ID when notification text messages are sent. (Existing phone numbers cannot be used.)

Company Default SMS Number: (732) 719-3681 [[Choose](#)] [[Test](#)]

5. Set up Branch-specific Phone and SMS Numbers - Provision phone and SMS numbers for each individual branch office. (Not Required)

Branch	Voice Number	SMS Number	Timezone	CallAhead Account *
A Branch	(908) 403-3292 [Choose] [Test]	(732) 561-4439 [Choose] [Test]	Eastern Standard Time	Company [Create Branch Account]
Bain	[Choose] [Test]	(732) 982-2126 [Choose] [Test]	Eastern Standard Time	Branch
california	(908) 403-3292 [Choose] [Test]	(908) 219-6616 [Choose] [Test]	Eastern Standard Time	Branch
fgfdgfg	(908) 219-6616 [Choose] [Test]	(732) 719-3681 [Choose] [Test]	Eastern Standard Time	Company [Create Branch Account]
Freehold	(908) 403-3292 [Choose] [Test]	(732) 387-6493 [Choose] [Test]	Eastern Standard Time	Branch
holmdel	(908) 219-6616 [Choose] [Test]	(732) 719-3681 [Choose] [Test]	Eastern Standard Time	Company [Create Branch Account]
IshBranch	(908) 219-6616 [Choose] [Test]	(732) 719-3681 [Choose] [Test]	Eastern Standard Time	Company [Create Branch Account]
Lynchburg	(908) 219-6616 [Choose] [Test]	(732) 719-3681 [Choose] [Test]	Eastern Standard Time	Company [Create Branch Account]
Main	(908) 219-6616 [Choose] [Test]	(732) 719-3681 [Choose] [Test]	Eastern Standard Time	Company [Create Branch Account]
new branch	(908) 219-6616 [Choose] [Test]	(732) 719-3681 [Choose] [Test]	Eastern Standard Time	Company [Create Branch Account]
North Brunswick	(908) 219-6616 [Choose] [Test]	(732) 719-3681 [Choose] [Test]	Eastern Standard Time	Company [Create Branch Account]
OAKHURST	(908) 219-6616 [Choose] [Test]	(732) 719-3681 [Choose] [Test]	Eastern Standard Time	Company [Create Branch Account]
ocean	(908) 219-6616 [Choose] [Test]	(732) 719-3681 [Choose] [Test]	Eastern Standard Time	Company [Create Branch Account]
orange county	(908) 219-6616 [Choose] [Test]	(732) 719-3681 [Choose] [Test]	Eastern Standard Time	Company [Create Branch Account]
Picayune - 6105	(908) 219-6616 [Choose] [Test]	(732) 719-3681 [Choose] [Test]	Eastern Standard Time	Company [Create Branch Account]
Riverside County	(908) 219-6616 [Choose] [Test]	(732) 719-3681 [Choose] [Test]	Eastern Standard Time	Company [Create Branch Account]
SENRICON	(908) 219-6616 [Choose] [Test]	(732) 719-3681 [Choose] [Test]	Eastern Standard Time	Company [Create Branch Account]
t'3'a	(908) 386-4089 [Choose] [Test]	(732) 719-3681 [Choose] [Test]	Eastern Standard Time	Company [Create Branch Account]
x	[Choose] [Test]	[Choose] [Test]	Eastern Standard Time	Branch

*If separate billing is needed for each Branch, please use the "Create Branch Account" link to set up a separate CallAhead account for each branch.

Pick Your Time Zones

Click the *Manage Timezones* link to set the time zone for each of your physical branch offices.

Timezone Manager

*Branches assume the timezone of the Company.
You need only to change those which override their parent.*

Company

Walker Professional Service Company [(UTC-05:00) Eastern Time (US & Canada) ▼]

Branches

A Branch [(Inherit From Company) ▼]

CallAhead uses the time zone of the Branch for the Service Order when figuring out what time to send the calls.

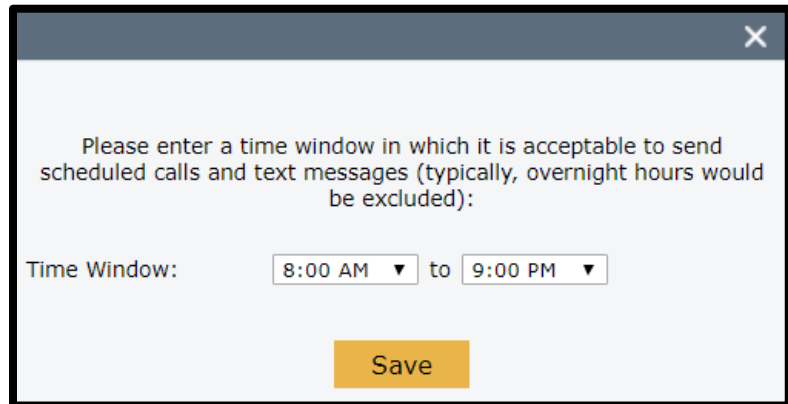
Note: The time zone will default automatically to the settings in the main Timezone Manager. If these settings are correct, you must click *Save* to confirm the settings are correct for CallAhead to be configured properly.



Choose Your Call Window

Click the *Manage Scheduled Calls* link to provide the acceptable time window for making scheduled calls or sending texts.

Time windows allow you to schedule calls in advance and have them automatically go out during the time window that is best for your company and customers.



If you attempt to schedule calls or texts for a time outside the window, CallAhead will alert you that calls cannot be scheduled outside the time window and will cancel the request. If you need to send out calls outside the schedule time windows, you can use the *Send Calls Now* feature.

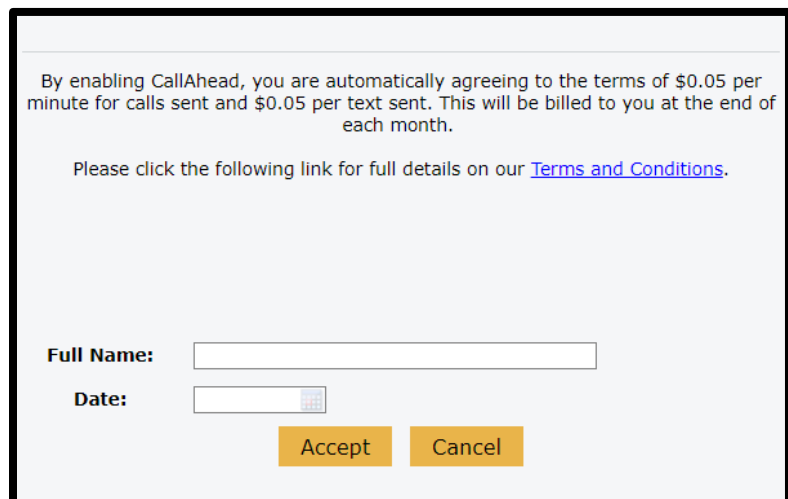
The time window will default to 8:00AM to 9:00PM. Edit the time range for the earliest and latest times you would want calls and/or texts to be sent out, and click *Save*.

Note: If you choose to leave the Time Window at the default times, you must still click *Save* to confirm that the settings are correct for CallAhead to be configured properly.

Verify Phone Numbers

To set up CallAhead phone numbers, you must create an account and verify the phone numbers by completing the following steps:

1. Agree to enable CallAhead and acknowledge the terms and conditions of the service by typing the full company name and the date. The page will refresh with additional setup options.
2. Verify the phone number from which your calls will originate (the phone number your customers will see on their Caller ID).



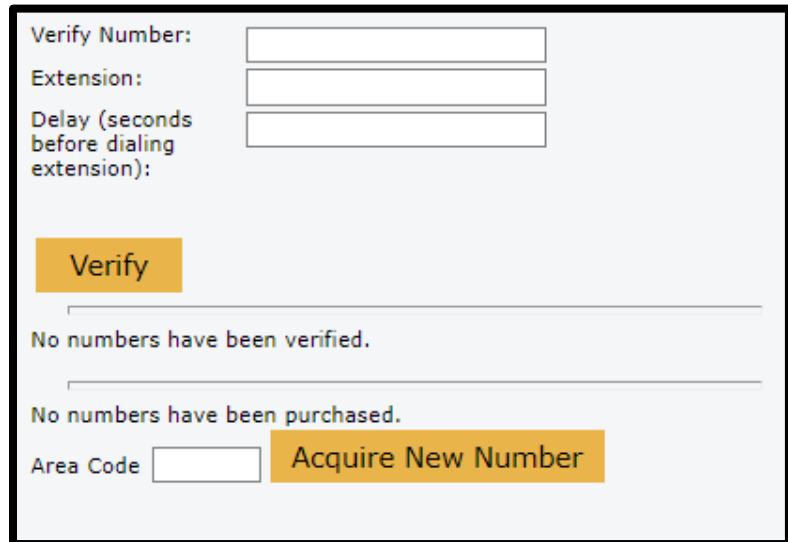
- To select the number, click the *Choose* link for the Verify Phone Numbers option.

[[Choose](#)] [[Test](#)]

- Enter a phone number, including any extension that needs to be dialed.

Note: You can also enter an area code and acquire a new number instead of verifying an existing phone number.

- Enter the number of seconds to wait prior to dialing the extension (if necessary).

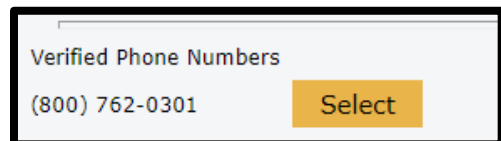


- Click the *Verify* button to receive a verification code that must be entered by the person who answers the phone number you are verifying.

Note: Someone must be available to answer the call to complete the verification process.

- Once the verification call has been answered and the code entered, your screen will automatically refresh.

- Click the *Select* button to choose that phone number as your default companywide number.



- Click the *Test* link to test sending a message prior to using any of these numbers.

[[Choose](#)] [[Test](#)]

Provision SMS Number

To send out text messages, you must acquire a phone number from which to send the text messages.

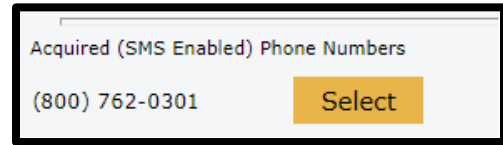
- To select the number that will show when text messages are sent, click the *Choose* link.

[[Choose](#)] [[Test](#)]

2. Enter the local area code you would like the number to have, and click the *Acquire New Number* button. The screen will display an available text phone number in that area code.

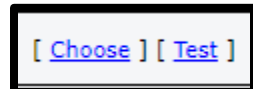
A screenshot of a web interface showing a text input field labeled "Area Code" and a yellow button labeled "Acquire New Number".

3. Click the *Select* button to choose that number as the default companywide number for SMS messages.

A screenshot of a web interface showing a list titled "Acquired (SMS Enabled) Phone Numbers" with the number "(800) 762-0301" and a yellow "Select" button.

Note: If a number in your desired area code is not available, you can choose a different area code or try to acquire an SMS number after a few days (new phone numbers and area codes are added daily based on demand).

4. Click the *Test* link to test prior to using any of these numbers.

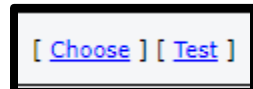
A screenshot of a web interface showing two blue links: "[Choose]" and "[Test]".

Set Up Branch-specific Phone and SMS Numbers

You can use this section to acquire a new number or verify an existing number for each branch.

Note: The companywide default numbers will default for all branches. You can verify a new voice number for each branch or leave the default.

1. If you select the *Choose* link, you will see a pool of all previously-verified and acquired phone numbers.
2. Click the *Select* link to choose a number for that branch.

A screenshot of a web interface showing two blue links: "[Choose]" and "[Test]".

3. Click the *Create Branch Account* link if you require that WorkWave send separate bills for each of your branch offices. If you choose to create separate branch accounts, please note that the same phone number cannot be used across accounts.

A screenshot of a web interface showing a blue link labeled "Company [Create Branch Account]".

Setting Up Phone Notification Defaults

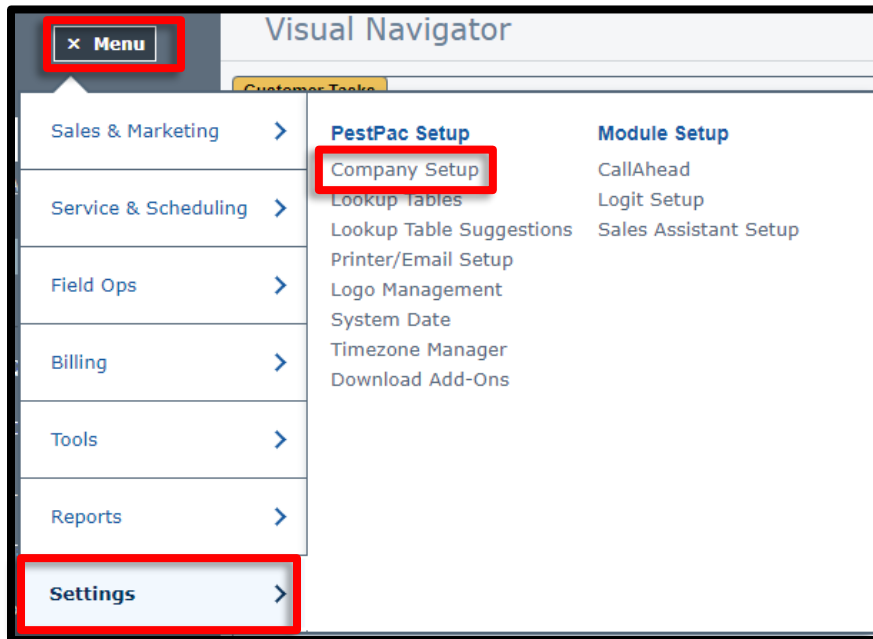
Once CallAhead is activated, defaults for all new accounts entered can be set up for phone notification. Existing customer accounts will need to be set up for phone notifications using the Data Update Tool for Update Notifications (discussed later).

Note: If you need to set up your Customers to receive text messaging, you will need to set that up on the Customer's individual Service Setup, Renewal, Program, or Service Order. This option is not available to default through Company Setup.

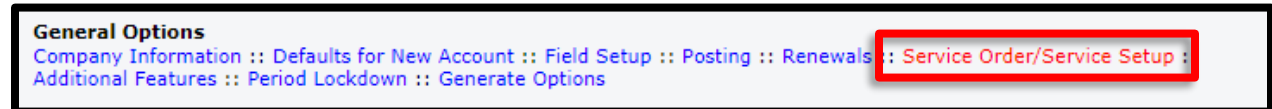


To set up phone notification setting defaults, complete the following steps:

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



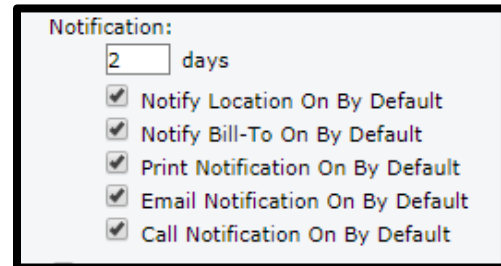
2. Click the *Service Setup/Service Order* link.



3. Under the Notification section, you can enter the number of days prior to the work date to notify your customer and select how you would like to notify your customer.

Notes: If Call Notification On By Default is not enabled, CallAhead will not send calls to any location where this is not checked.

4. These default settings will be applied to all new accounts created going forward.



You can override these settings on individual locations if needed.

Setting Up CallAhead Lookup Tables

CallAhead Messages

CallAhead allows you to customize the messages that are used when sending out notifications. A number of default messages that can be customized are preloaded once CallAhead is enabled. You may also create your own messages.

Typically, messages are customized / added based on several options:

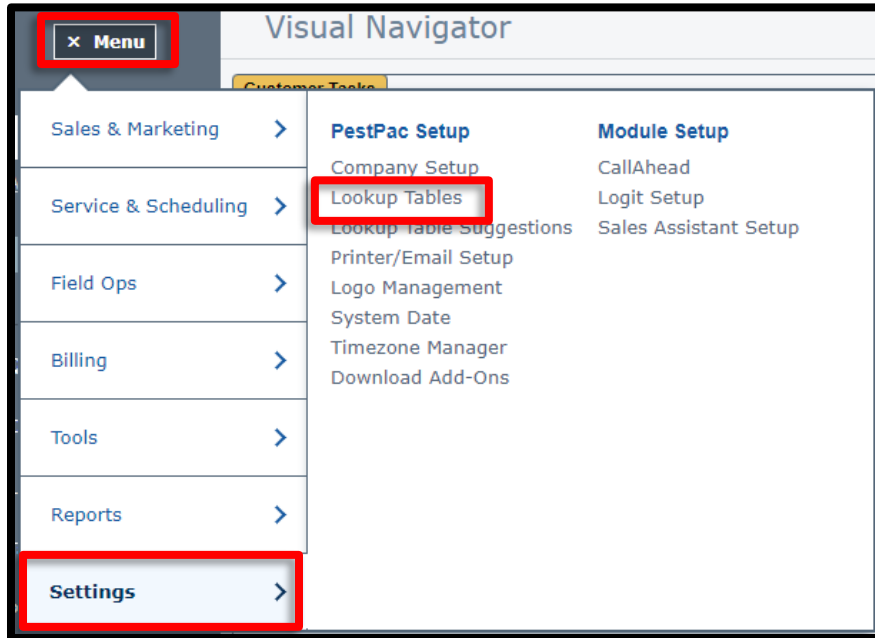
- **Type of service:** Customize messages based on the service the customer is receiving. For example, a monthly standard pest customer could receive a message simply notifying them of their next service a few days before the tech is scheduled. An annual termite inspection may have a different message reminding the customer that someone is required to be at the property for the inspection.
- **Renewal services:** Customize messages for renewal services reminding customers that their coverage period is about to expire and that they need to purchase coverage for the next year.
- **Schedule changes, weather notifications, etc.:** Customize messages for a variety of scenarios, including change of technician (if a tech is ill and a different tech will be servicing those appointments) or if services will not be performed due to inclement weather.
- **Accounts Receivables:** Customize messages for calls to Customers for A/R reasons, including accounts that are past due or being placed in collections.

Lookup Tables

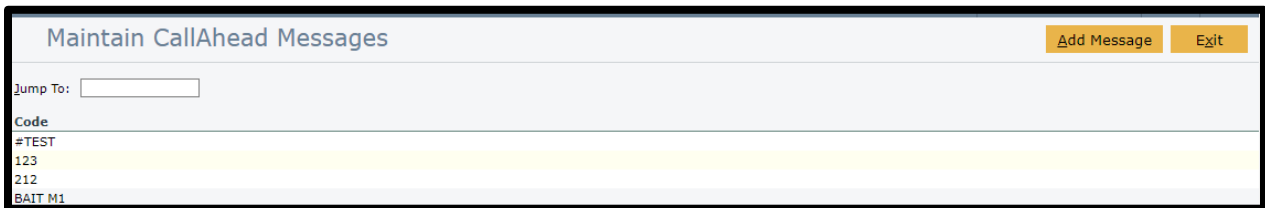
To set up the messages that will be sent (including what options customers hear), complete the following steps:



1. Go to *Menu > Settings > Lookup Tables*.



2. Select the *CallAhead Messages* Lookup Table.
3. Click the existing message you would like to edit or the *Add Message* button if you would like to create a custom message.



You will be presented with the various options.

Maintain CallAhead Messages

Code:

Active

Voice Message:

Action	Voice	User Input	Message
Say ▼	Male ▼	<input type="text"/>	<div style="border: 1px solid gray; padding: 5px;"> Hello, this is ##C.CompanyName## with a courtesy call that our inspector will be at your home ##SO.WorkDate## between ##SO.TimeRange##. Thank you for calling ##C.CompanyName## and for giving us the opportunity to serve you. If you have any questions, please call our office at, ##C.Phone##, once again, that number is </div> <div style="text-align: right; margin-top: 5px;"> Insert Row Below Delete Row </div>

SMS Message:

Action	User Input	Message
Text ▼	<input type="text"/>	<div style="border: 1px solid gray; padding: 5px;"> Our inspector will be at your home ##SO.WorkDate##. To reschedule call ##C.Phone##. </div> <div style="text-align: right; margin-top: 5px;"> Insert Row Below Delete Row </div>

4. Choose a *Code*, a short name for the message used when sending out messages.
5. Choose an *Action*, defining whether a message is *Ask* or *Say*.
 - Ask messages require a response from the customer (e.g., press 1 to confirm your appointment, 2 to reschedule, 3 to repeat).
 - Say messages simply state the message and disconnect the call; the customer cannot respond.
6. Choose a *Voice* (male and female options available).
7. Choose a *Message* that your Customers will hear.

Mail merge codes can be used to include customer-specific information. [Repeat] can also be entered in the message to repeat the information before disconnecting the call.

Available Mail Merge Codes

C = Company	##C.CompanyName##	##C.Phone##	
BR = Branch	##BR.CompanyName##	##BR.Phone##	



L = Location	##L.Address##			
SO = Service Order	##S.Description# #	##SO.WorkDate ##	##SO.WorkTime ##	##SO.TimeRange ##
R = Renewal Date	##R.RenewalDate##			
Repeat Message	[Repeat]			

8. If you are setting up an Ask message so that customers can confirm or reschedule services, you will need to set the initial message, click *Save*, then add the responses.

Maintain CallAhead Messages

Code:

Active

Voice Message:

Action	Voice	User Input	Message	
Ask ▼	Male ▼	<input type="text"/>	Hello, this is a reminder from, ##C.CompanyName##, we will be out, ##SO.WorkDate##, weather permitting, to monitor your termite stations at, ##L.Address##, if you have any questions, please call our office at, ##C.Phone##, once again, ##C.Phone##, and thank you for using ##C.CompanyName##. Please press 1 to confirm your appointment. 2 to reschedule. Or 3 to repeat this message	Insert Row Below Delete Row
Say ▼	Male ▼	<input type="text" value="1"/>	Thank you for confirming your appointment	Insert Row Below Delete Row
			<input checked="" type="checkbox"/> Treat this response as a confirmation	
Say ▼	Male ▼	<input type="text" value="2"/>	A member of our staff will contact you to reschedule	Insert Row Below Delete Row
			<input type="checkbox"/> Treat this response as a confirmation	
Say ▼	Male ▼	<input type="text" value="3"/>	[Repeat]	Insert Row Below Delete Row
			<input type="checkbox"/> Treat this response as a confirmation	

Action	User Input	Message	
Ask ▼		Do you want this service. Type Y to confirm or N to reschedule	Insert Row Below Delete Row
Text ▼	N	The office will contact you	Insert Row Below Delete Row
		<input checked="" type="checkbox"/> Treat this response as a confirmation	
Text ▼	Y	Thank you for your confirmation	Insert Row Below Delete Row
		<input checked="" type="checkbox"/> Treat this response as a confirmation	

9. After setting up the initial message with an action of *Ask*, click the *Insert Row Below* link.

Note: All rows should be added using the *Insert Row* link next to the main message. Do not use the *Insert Row* link next to the response lines.

10. Select an action of *Say* if this is a voice message or *Text* if this is a message that will be used for SMS notifications.

11. In the *User Input* column, type which button you want customers to use for that response (voice calls) or what number or word customers should use (text notifications).

12. Type a message the customer should receive for that response.

13. Check the box for *Treat this response as a confirmation* if you would like PestPac to note that the order is confirmed (displayed on the Service Order and on the CallAhead report).

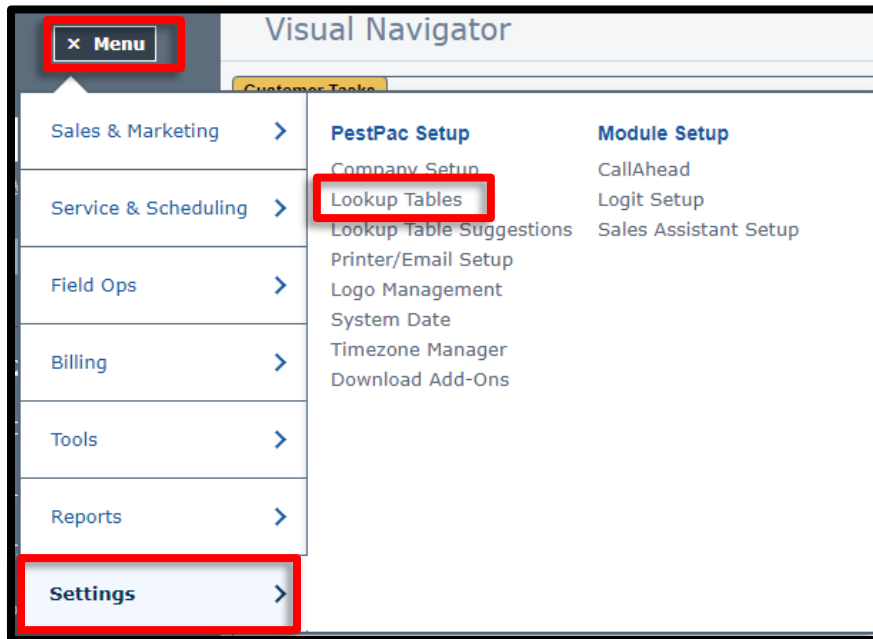
CallAhead Response Codes

After each notification is sent, the system records a status code defining what happened on the call (e.g., customer answered phone – call completed, no answer, voicemail reached).

CallAhead can use the system response codes as appointment confirmations for *Say* messages (*Ask* messages will have responses defined in the message for appointment confirmation). The response codes are system generated and standardized (they cannot be customized); however, you can specify which response codes you would like system to treat as an appointment confirmation.

To do so, complete the following steps:

1. Go to *Menu > Settings > Lookup Tables*.



2. Select the *CallAhead Responses* Lookup Table.
3. Click the response that you wish to change.



Maintain CallAhead Responses		Exit
Description	Treat as Confirmation	
Busy	No	
Completed	Yes	
Completed to Answering Machine	Yes	
Failed	No	
No Answer	No	
Text Message Delivered	Yes	

4. Check or uncheck the box as needed to treat the selected response as a confirmation, and click *Save*.

Maintain CallAhead Responses		Save	Cancel
Completed to Answering Machine			
<input checked="" type="checkbox"/>	Treat this response as an appointment confirmation		

Enabling CallAhead on Individual Locations

When adding a new Service Setup, Renewal, or using the Step Editor within an existing Program, you have the option to select how to notify your customers via SMS (text) or call. If you set up notification defaults, the service will already be set to that default as soon as it is created; however, you can override the default on each individual service.

Note: Locations cannot be defaulted to text message notifications. If a customer would like to receive text messages, the phone number MUST be filled out in the mobile field on the account; it will NOT look at the main phone number field. To use the text messaging functionality, you MUST chose the text check box on the Location within Service Setup/Order.

Edit Location

Account #: 3937 Bill-To Account: 3937 Update Bill-To
Copesan #: Copesan Location:
Company:
Last Name: Walker First Name: Jasper Title: Mr.
Street: 15 3rd St Street Search: 3RD ST
City: Rumson State: NJ Zip Code: 07760-1312 ✓
Country: USA
Salutation: Dear Salutation Name: Mr. Walker
Phone: 123-123-1235 x Alt. Phone: x
Fax: x Mobile: x

The Notify section of the Setup, Renewal, or Program contains a notification line with the defaults for new accounts. You can edit the existing notification line or add new lines for additional notifications.

Notify	Print	Email	Text	Call	Time	Days	Reason 1	Reason 2
<input checked="" type="radio"/> Location <input type="radio"/> Bill-To <input type="radio"/> Other	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	ANYTIME	<input type="text"/>	<input type="text"/>	<input type="text"/> Clear
<input checked="" type="radio"/> Location <input type="radio"/> Bill-To <input type="radio"/> Other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	AFTER 5	<input type="text"/>	<input type="text"/>	<input type="text"/> Clear
<input type="radio"/> Location <input type="radio"/> Bill-To <input checked="" type="radio"/> Other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="text"/>	<input type="text"/>	<input type="text"/> Clear

Last Name: First Name: Phone:
[Add New Notification](#)

1. You must list each notification on its own line item (e.g., to send both a call and a text, you do so on two separate lines using the *Add New Notification* link).
2. Select to notify the Location or Bill-to via call or text or Other (Party) via call only. For calls set to be made to the Bill-to, CallAhead will only call the primary number on the account.
3. For text messages, CallAhead will only use the mobile phone number field.



- The Days column can be filled out with how many days prior to the work date a notification should be sent.

Note: Notification changes made on a Service Order will only apply to that order. To have notification settings apply to all future orders for that Location, make sure you update the Service Setup, Renewal, or Program Step.

Using the Update Service Notifications Tool

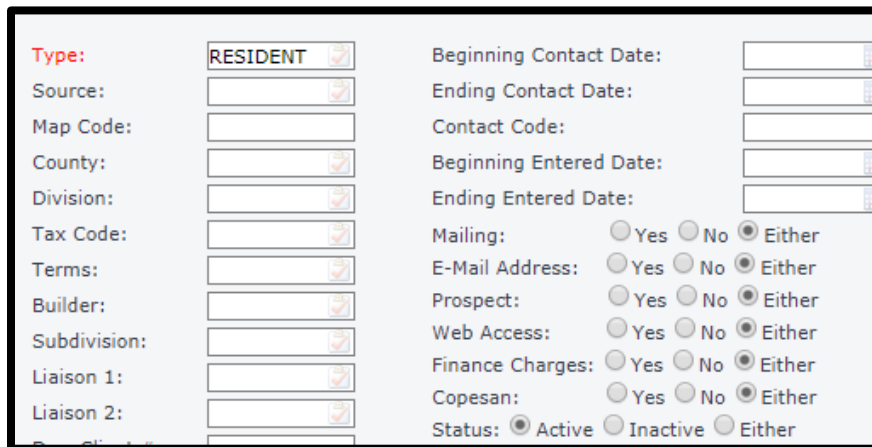
This tool allows you to mass update your existing customers notification fields within Service Setups, Service Programs, Service Orders, and Renewals.

Notes: This tool should be used for phone calls only. Text capabilities should be done individually to ensure the mobile # field is populated for text notification customers.

If you need to update multiple services (e.g., Setups, Orders, Renewals), you will need to run this utility each time.

To use the Update Service Notifications tool, complete the following steps:

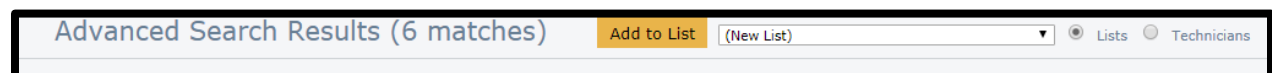
- Go to the Advanced Search Screen and create a Location List based on needed criteria (e.g., Type - Residential, Setup Status - Active, etc.), and click the *Search* button.



The screenshot shows a search form with the following fields and options:

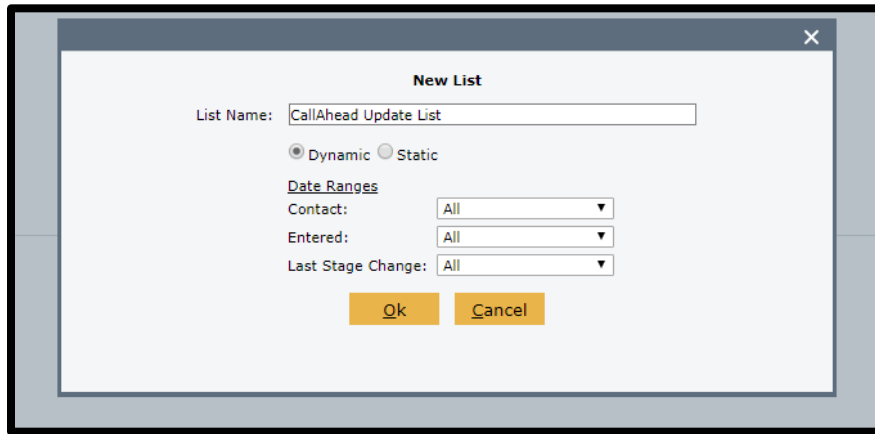
Type:	<input type="text" value="RESIDENT"/>	Beginning Contact Date:	<input type="text"/>
Source:	<input type="text"/>	Ending Contact Date:	<input type="text"/>
Map Code:	<input type="text"/>	Contact Code:	<input type="text"/>
County:	<input type="text"/>	Beginning Entered Date:	<input type="text"/>
Division:	<input type="text"/>	Ending Entered Date:	<input type="text"/>
Tax Code:	<input type="text"/>	Mailing:	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Either
Terms:	<input type="text"/>	E-Mail Address:	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Either
Builder:	<input type="text"/>	Prospect:	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Either
Subdivision:	<input type="text"/>	Web Access:	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Either
Liaison 1:	<input type="text"/>	Finance Charges:	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Either
Liaison 2:	<input type="text"/>	Copesan:	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Either
		Status:	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Either

- Click the *Add to List* button, name your list, and then click the gold *OK* button.



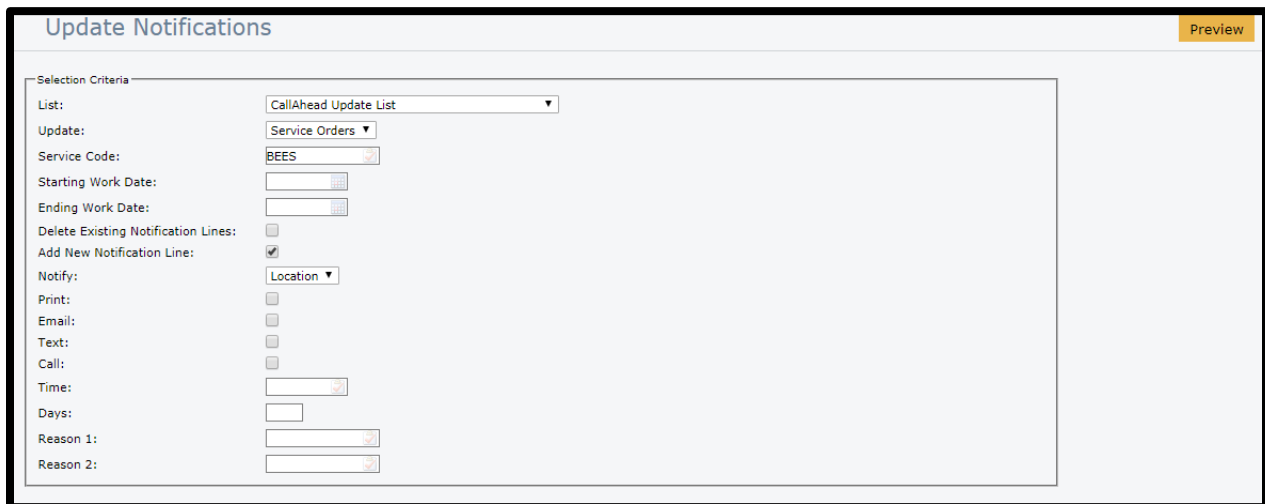
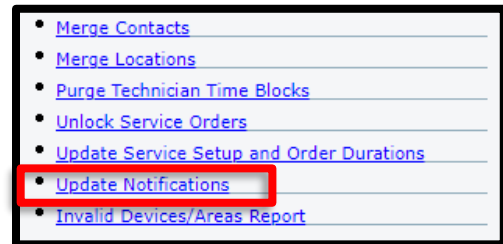
The screenshot shows a search results bar with the following elements:

- Advanced Search Results (6 matches)
- Add to List button
- (New List) dropdown menu
- Lists radio button (selected)
- Technicians radio button



Note: We recommend keeping the list Dynamic to filter customers on and off of that list.

3. Go to *Menu > Tools > Data Update Tools > Update Notifications*.
4. Select your saved list and choose which notification fields you would like to update.
5. If you have already set up notifications on individual locations and would like those replaced during this update, check the boxes for both *Delete Existing Notification Lines* and *Add New Notification Line*.



6. Click the *Preview* button to review the updates to be made. After you have reviewed the accounts to be updated, click the *Update* button to run the update.

Note: This action cannot be undone.

Update Notifications Update

Selection Criteria

List:

Update:

Service Code:

Starting Work Date:

Ending Work Date:

Delete Existing Notification Lines:

Add New Notification Line:

Notify:

Print:

Email:

Text:

Call:

Time:

Days:

Reason 1:

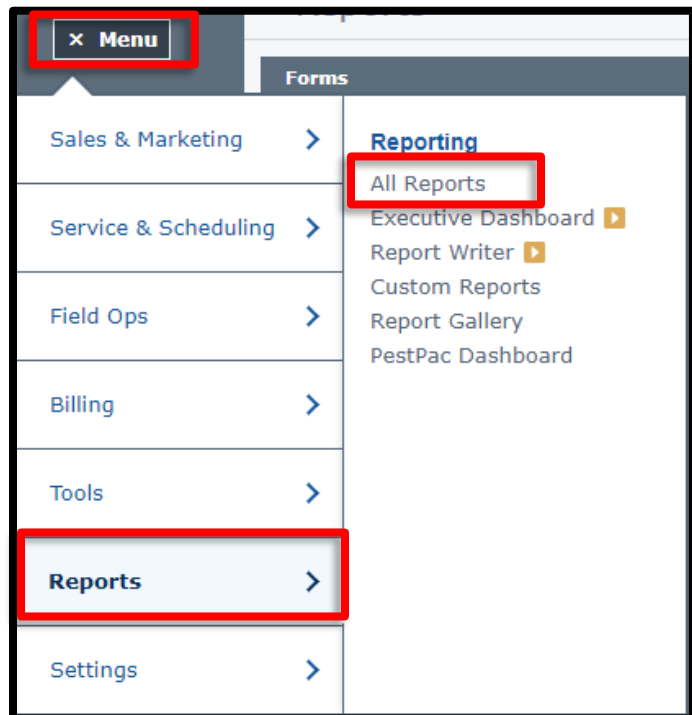
Reason 2:

Type		Add New Notification Line	Delete Existing Notification Lines
Service Order	128061	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Service Order	128062	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Service Order	131292	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Service Order	131293	<input checked="" type="checkbox"/>	<input type="checkbox"/>

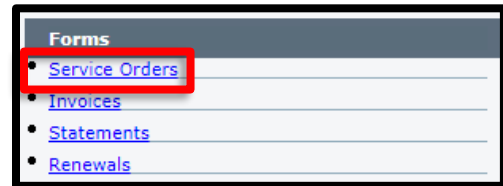
Sending Service Reminders/Texts

CallAhead notifications can be sent by anyone with the access right *Export Calls to CallAhead* enabled. Once you have set up all your Services and are ready to send reminders, complete the following steps:

1. Go to *Menu > Reports > All Reports*.



2. Select the *Service Orders* report.
3. Choose an Output Format of *CallAhead Notification*.



4. Enter the criteria for which notifications should be sent out:

 A screenshot of the "Service Orders" configuration screen. The page title is "Service Orders" and the subtitle is "Order Business Forms". The screen is divided into two main sections: "Selection Criteria" on the left and "Output Format" on the right.

 The "Selection Criteria" section contains the following fields:

- Starting Work Date: [Date Picker]
- Ending Work Date: [Date Picker]
- Starting Order Date: [Date Picker]
- Ending Order Date: [Date Picker]
- Starting Notification Date: [Date Picker]
- Ending Notification Date: [Date Picker]
- Bill-To Code: [Text Input]
- Starting Location Code: [Text Input]
- Ending Location Code: [Text Input]
- Starting Location Name: [Text Input]
- Ending Location Name: [Text Input]

 The "Output Format" section contains a list of radio button options:

- Service Orders
- Appointment List
- Notification Cards
- Notification Emails
- Notification List
- Labels
- Documents
- Site Diagrams
- CallAhead Notification
- Re-Authorize Program Orders
- Sentricon Station Lists
- Update Constraints

 At the bottom of the "Output Format" section, there is a blue link labeled "Appointment Route".

- **Work Date or Notification Date Ranges:**

Work Date: This will look at the actual work date on the order and ignore any notification days you have setup.

Order Date: This will look at the date that the order was created in the system.

Notification Date: Entering a date range in Notification Date will prompt the system to look at the Work Date, subtract the notification days, and include the call if the result matches the day you are sending calls.

For example, sending calls with Tuesday's date in the starting and ending notification date range will pull in any services with a Work Date of Friday and notification days of 3, Work Date of Thursday with notification days of 2, and Work Date of Wednesday with notification days of 1.

- **Include Notifications:** By default, Call and/or Text are both checked. If you wish to choose only one, uncheck the proper action.

Include Notifications

Call

Text

- **Notification Status:** This defaults to *Either*. Select *Not Confirmed* if you want to send notifications only to customers who have not yet received a notification for that service. If you previously notified customers but need to send out calls again (e.g., a tech calls out and you need to send an additional call to let them know of a change in tech), select *Notification Confirmed*.

Notification Status

Notification Confirmed

Not Confirmed

Either

- **Selection Criteria:** Include any other items you would like to use to specify the notifications that go out such as Service Class, a specific branch, etc.

5. Click the *Send* button.

Note: If you have multiple services for which you want to send different messages and they are on the same account, you must run separate reports with different criteria.

6. Select the message you would like to send using the dropdown menu, uncheck any accounts you would like to exclude, and select whether you want to *Send Calls Now* or *Send Calls on a Specific Date and Time*.

If you select to send calls on a specific date, the date/time needs to fall within your Call Window that was created under *CallAhead Setup*.

If you are sending calls to be made in the future, you can make changes up to 15 minutes prior to the send time. The Work Date and Time information is read dynamically at the time the call is placed.

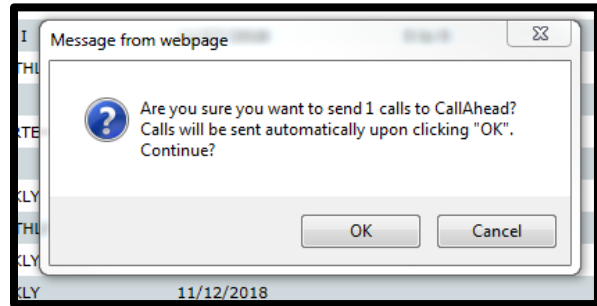
Send To CallAhead [Send](#) [Exit](#)

Message: LAWN M1 Send calls now Send calls on at AM [Update date and time constraints prior to sending calls](#)

Call	Location	Order Number	Method	Service	Work Date	Time Range	Notify	Number	Address
1)	<input type="checkbox"/>	20417	170703	Text	UPGRADE	11/10/2018	Location	918-999-6655	222 Paulison Ave Point Pleasant Boro, NJ
2)	<input checked="" type="checkbox"/>	2691	169508	Text	LCA 3	11/10/2018 8:00AM to 5:00PM	Location	9510021897	23231 CANYON PINES PL CORONA, CA
3)	<input type="checkbox"/>	3210	169853	Text	LIME APPLICATIO	11/10/2018 8:00AM to 5:00PM	Location	9510022429	3635 DIXIE LN RIVERSIDE, CA



7. Click the *Update date and time constraints prior to sending calls* link if you need to adjust any of the constraints on the Orders **prior** to sending the notifications.
8. Click the *Send* button again.
9. Click the *OK* button if ready to continue.
10. You will receive a confirmation of how many calls were sent. CallAhead will attempt to retry for 1 hour before abandoning the call if the line is busy when attempting to make a call.

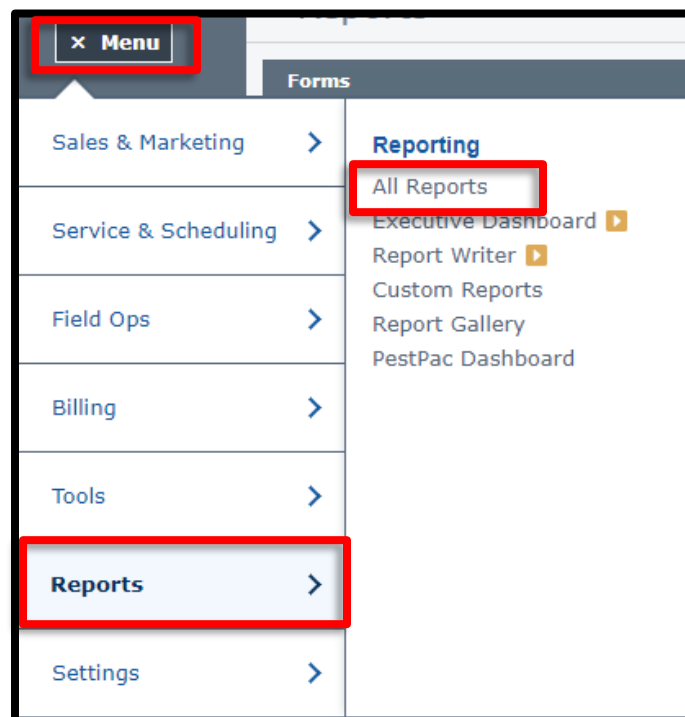


Sending Collection Reminders

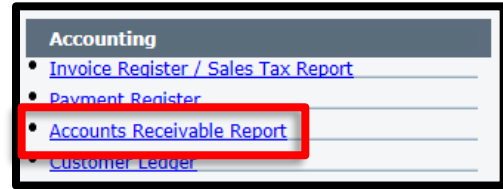
Collection reminders are sent from the Accounts Receivable report and can be sent to any customer who has a past due balance. Only phone calls can be sent; collection reminders cannot be sent through text message.

To send collection reminders, complete the following steps:

1. Go to *Menu > Reports > All Reports*.



2. Select the *Accounts Receivable* report.
3. Choose an Output Format of *CallAhead Notification*.



Accounts Receivable Report

Email Send Clear

Selection Criteria

Bill-To Code:

Corporation Code:

Bill-To Branch:

Invoice Branch:

Customer Division:

Invoice Division:

Technician: Tech 1 ▼

Service:

Output Format

Accounts Receivable

CallAhead Notification

Include Customers Over

Minimum Aging Days:

Maximum Aging Days:

Account Balance

Minimum Balance:

Maximum Balance:

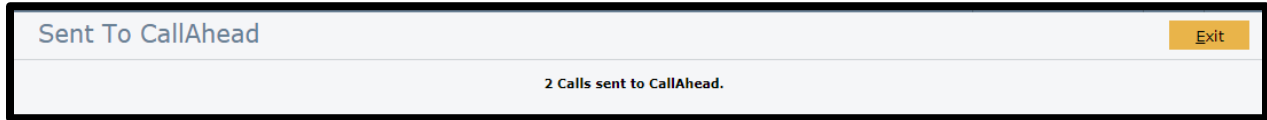
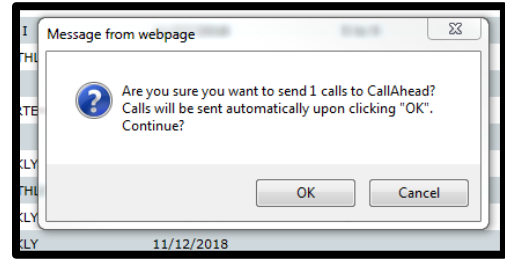
4. Enter the criteria for which collection reminders should be sent out:
 - **Min/Max Aging Days:** This can be used to specify different messages based on how past due the customer is.
 - **Minimum Balance** should always be populated with at least a penny to prevent sending calls to a customer who only has an open credit.
5. Click the *Send* button.
6. Select the message you would like to send using the dropdown menu, uncheck any accounts you would like to exclude, and select whether you want to *Send Calls Now* or *Send Calls on a Specific Date and Time*.

Send To CallAhead

Message: Send calls now Send calls on at AM ▼

	Call	Bill-To	Number	Address
1)	<input checked="" type="checkbox"/>	100000	732-278-7244	531 Smith Dr Point Pleasant Boro, NJ
2)	<input type="checkbox"/>	100003	732-555-5555	456 Beaverdamn Road Point Pleasant, NJ
3)	<input checked="" type="checkbox"/>	100008	732-566-6968	56 Logan Ln Lynchburg, VA

- Click the *Send* button again.
- Click the *OK* button if ready to continue.
- You will receive a confirmation of how many calls were sent.



Sending Renewal Reminders

Renewal reminders are sent using the renewal notices through list management. Only phone calls can be sent, renewal reminders cannot be sent through text message.

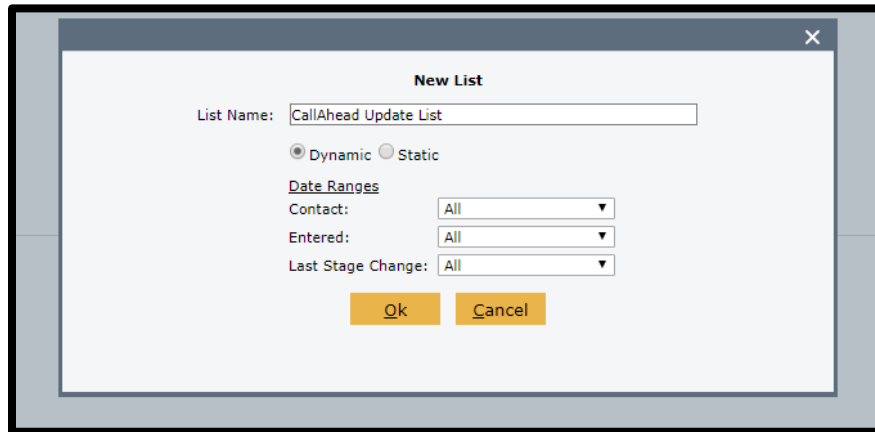
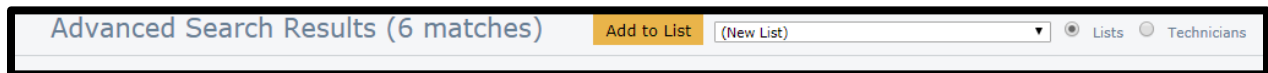
To send renewal reminders, complete the following steps:

- Go to the Advanced Search Screen and choose a Renewal Date Range with a Setup Type of Renewal, and click the *Search* button.

Additional Options - [Hide](#)

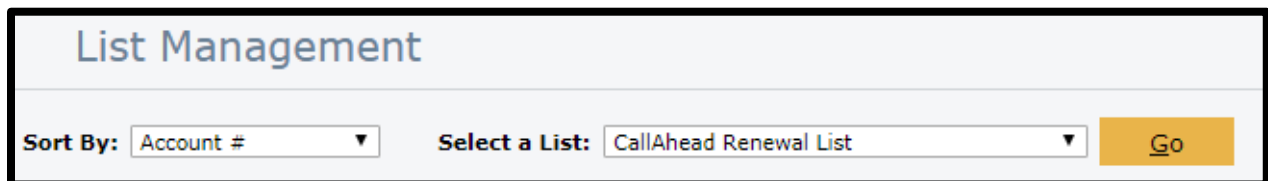
<p>Program Type: <input type="text"/></p> <p>Beginning Renewed Through: <input type="text"/></p> <p>Ending Renewed Through: <input type="text"/></p> <p>Service: <input type="text"/></p> <p>Not Having Service: <input type="text"/></p> <p>Service Class: <input type="text"/></p> <p>Schedule: <input type="text"/></p> <p>Frequency: <input type="text"/></p> <p>Division: <input type="text"/></p> <p>Route: <input type="text"/></p> <p>Tech 1: <input type="text"/></p> <p>Tech 2: <input type="text"/></p> <p>Sales: <input type="text"/></p> <p>Target: <input type="text"/></p> <p>Beginning Start Date: <input type="text"/></p> <p>Ending Start Date: <input type="text"/></p> <p>Beginning Renewal Date: <input type="text"/></p> <p>Ending Renewal Date: <input type="text"/></p>	<p>Beginning Expiration Date: <input type="text"/></p> <p>Ending Expiration Date: <input type="text"/></p> <p>Beginning Canceled Date: <input type="text"/></p> <p>Ending Canceled Date: <input type="text"/></p> <p>Cancel Reason: <input type="text"/></p> <p>Beginning Price Increase Date: <input type="text"/></p> <p>Ending Price Increase Date: <input type="text"/></p> <p>Beginning Credit Card Expiration Date: <input type="text"/></p> <p>Ending Credit Card Expiration Date: <input type="text"/></p> <p>Auto Billing: <input type="radio"/> None <input type="radio"/> Credit Card <input type="radio"/> ACH <input checked="" type="radio"/> Any</p> <p>Setup Status: <input type="radio"/> Active <input type="radio"/> Inactive <input checked="" type="radio"/> Either</p> <p>Program Status: <input type="radio"/> Active <input type="radio"/> Inactive <input checked="" type="radio"/> Either</p> <p>Setup Type: <input type="radio"/> Setup <input checked="" type="radio"/> Renewal <input type="radio"/> Warranty <input type="radio"/> All</p> <p>Eligible for Annual Prepay Discount: <input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Either</p>
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2. Click the *Add to List* button, name your list, and then click the gold *OK* button.

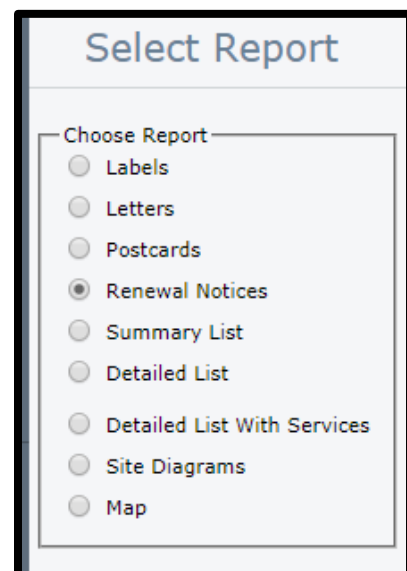


Note: We recommend keeping the list Dynamic to filter customers on and off of that list.

3. Go to *Menu > Sales and Marketing > List Management* and choose your list from the *Select a List* dropdown menu; click the *Go* button.



4. Click the *Print* button.
5. Select the Report of Renewal Notices.
6. Re-enter your renewal date range and select any other search criteria necessary; click the *Call* button.
7. Select the message you would like to send using the dropdown menu, uncheck any accounts you would like to exclude, and select whether you want to *Send Calls Now* or *Send Calls on a Specific Date and Time*.



Order Business Forms [Display](#) [Email](#) [Export](#) [Print](#) [Call](#)

Print Options

Starting Renewal Date:

Ending Renewal Date:

Service:

Service Class:

Program: Yes No Either

Renewal Status: Active Inactive Both

Include: Renewals Annual Prepays Both

Sort By Renewal Due Date

Print On Renewals

Title

Start Date

Service

Renewal Date

Renewal Amount

Renewal Amount on Bottom

Break Out Tax (Start Date & Service will not print)

Renewal Letter:

Enter Renewal Message

Range

Start:

End:

Mailing Options

Log Mailings

Email Subject:

Attachment: No file chosen

[Add Another File](#)

8. Click the *OK* button if ready to continue.
9. You will receive a confirmation of how many calls were sent.

Viewing or Cancelling Scheduled Calls

The CallAhead queue can be accessed through *Menu > Tools > CallAhead Queue*.

This queue will show you any CallAhead messages that are still pending being sent. This allows you to delete any calls scheduled for a future time that are still pending.

Manage CallAhead Queue									
Delete Select All Select None									
Batch #: <input type="text"/>									
Batch #	Account	Name	Phone	Scheduled Date	Scheduled Time	Time Zone	Message	Call / Text	Delete?
73	100299	Jaime DeSantis	732-555-5555	11/30/2018	09:00 AM	Eastern Standard Time	BAIT M1	Call	<input type="checkbox"/>
73	100270	Payments Ghost	800-762-0301	11/30/2018	09:00 AM	Eastern Standard Time	BAIT M1	Call	<input type="checkbox"/>

Reporting on CallAhead

The CallAhead report will display the results of notifications that were sent out, including which customers confirmed their appointment.

To run the CallAhead report, complete the following steps:

1. Go to *Menu > Reports > All Reports* and select the *CallAhead Report*.
2. Select your search criteria for the notifications you would like to report on. For example, you can filter appointments by if they were confirmed and if they were a call or a text.
3. Click the *Display* button.

CallAhead Report

Selection Criteria

Starting Date:

Ending Date:

Branch:

Technician:

Location:

Bill-To:

Order Num:

Message:

Confirmed: Yes No Both

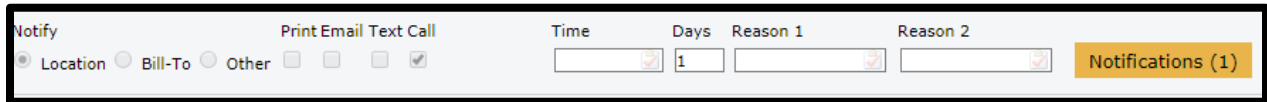
Type: Call Text Both

Contact Time is displayed in users' local time zone						
Account Order Num	Name Tech	Call Date Message	Contact Date Confirmed	Method Call Length	Call Result Branch	
100265	Bubba Gump Shrimp Co.	11/29/2018	11/29/2018 10:15 AM	Call	Call Completed.	
14554	LEAH	BAIT M1	Yes	11 sec / 1 min billed	West Branch	
Report Totals		1 Calls (11 Seconds, 1 Billable Minutes), 0 Text Notifications (0 billable texts), 1 Confirmed, 0 Not Confirmed				



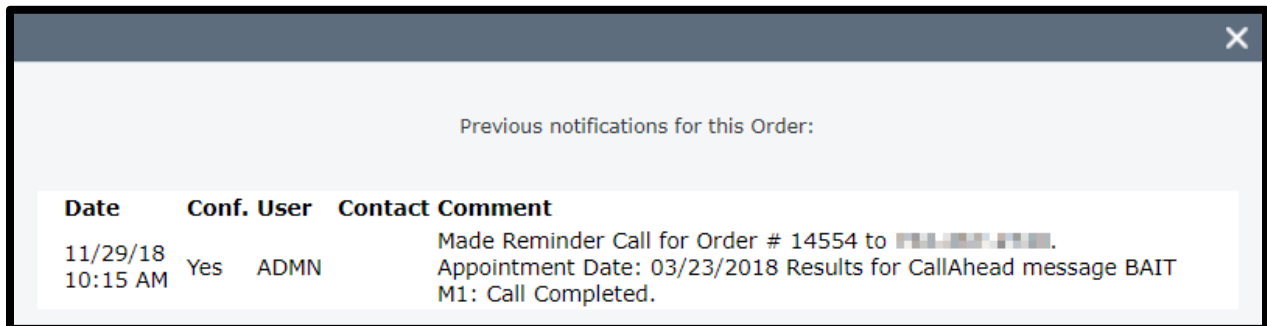
Viewing Notification Outcomes on Individual Service Orders

Once notifications have been made, you will see a gold button at the end of the notification field on the Order with a number in parentheses to show how many calls/texts have been made.



The screenshot shows a notification control bar with the following elements: 'Notify' label, radio buttons for 'Location', 'Bill-To', and 'Other', 'Print Email Text Call' buttons, 'Time' and 'Days' input fields, 'Reason 1' and 'Reason 2' dropdown menus, and a gold button labeled 'Notifications (1)'.

Clicking the button gives you detailed information about the calls/texts and responses made.



The screenshot shows a window titled 'Previous notifications for this Order:' containing a table with the following data:

Date	Conf.	User	Contact	Comment
11/29/18 10:15 AM	Yes	ADMN		Made Reminder Call for Order # 14554 to [REDACTED]. Appointment Date: 03/23/2018 Results for CallAhead message BAIT M1: Call Completed.

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