

List Management

PestPac allows you to print, email, or export items such as labels, letters, postcards, renewals notices, summary lists, site diagrams, and maps through List Management as well as the Data Update Utility.

This document reviews how to create some of the common lists you may need. Let's start with creating a list of all customers in the database.

Creating a List

To create a list of all customers, complete the following:

1. Perform an Advanced Search of all customers by clicking the *Advanced Search* link under the *Quick Search* and leaving all fields of the Location tab within Search as blank, and click the *magnifying glass*.

Q Advanced Search + Q Clear

Location | Bill-To | Corporation | Contact | Service Order

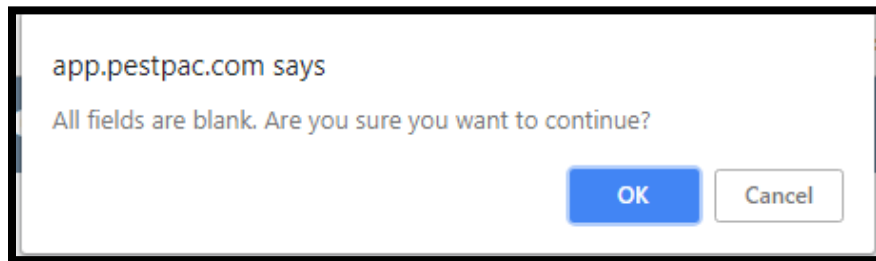
Account #: Bill-To #:
Copesan #: Corporation #:
Order #: Invoice #:
Copesan Ticket #:
Company: Company Search:
Last Name: First Name:
Street: Street Search:
City: State: Zip Code:
Phone: x Branch: (All Branches) ▾
E-Mail: Region:
Country: Sub-Region:
Case #:

Type: Beginning Contact Date: SQ FT:
Source: Ending Contact Date: GARAGE:
Map Code: Contact Code: GATE CODE:
County: Beginning Entered Date: Bill-To 1:
Division: Ending Entered Date:
Tax Code: Mailing: Yes No Either
Terms: E-Mail Address: Yes No Either
Builder: Prospect: Yes No Either
Subdivision: Web Access: Yes No Either
Liaison 1: Finance Charges: Yes No Either
Liaison 2: Copesan: Yes No Either
Dow Client #: Status: Active Inactive Either
Dow Site #: Credit Status: Normal Alert
Contract ID #: Hold Collection
WDO Report #: Begin Last Stage Change Date:
End Last Stage Change Date:

[Search for Attributes:](#) (None) ©2018 WorkWave LLC



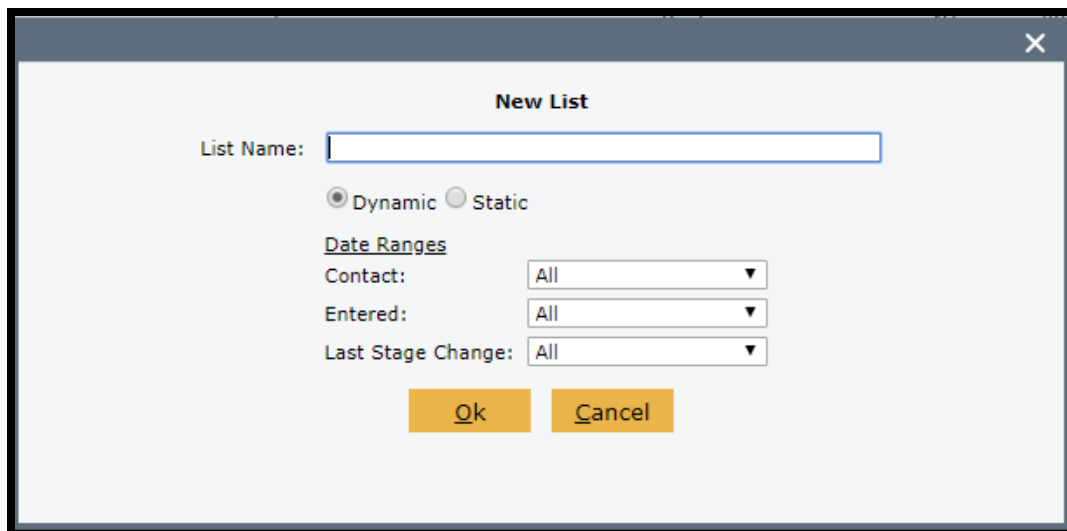
2. Click *OK* on the popup to confirm you want to leave all fields blank.



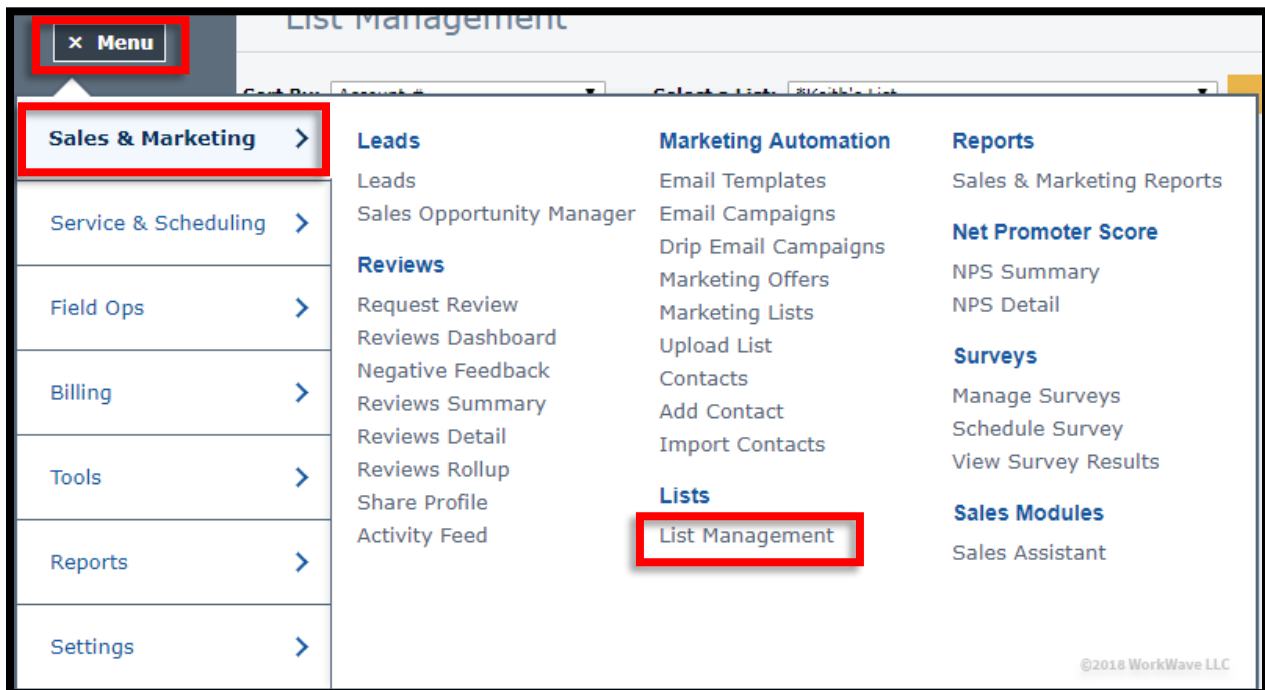
3. On the results screen, click the *Add to List* button. If you are adding your current search results to an existing static list, select the list from the dropdown menu.



4. Name the list, and choose the type of list (Dynamic or Static), and click *OK*.
 - a. **Dynamic:** This list will refresh with any new results that match your search criteria every time you access the list.
 - b. **Static:** This list will remain the same as when you created it.



5. You can access the list from *Menu > Sales and Marketing > List Management*.



Note: Every new list is defaulted to be private; however, you can specify if the list is private, public to everyone, public to my branch, or public to select users.



Please refer to the table below to determine how to select the fields you search to create the list you need.

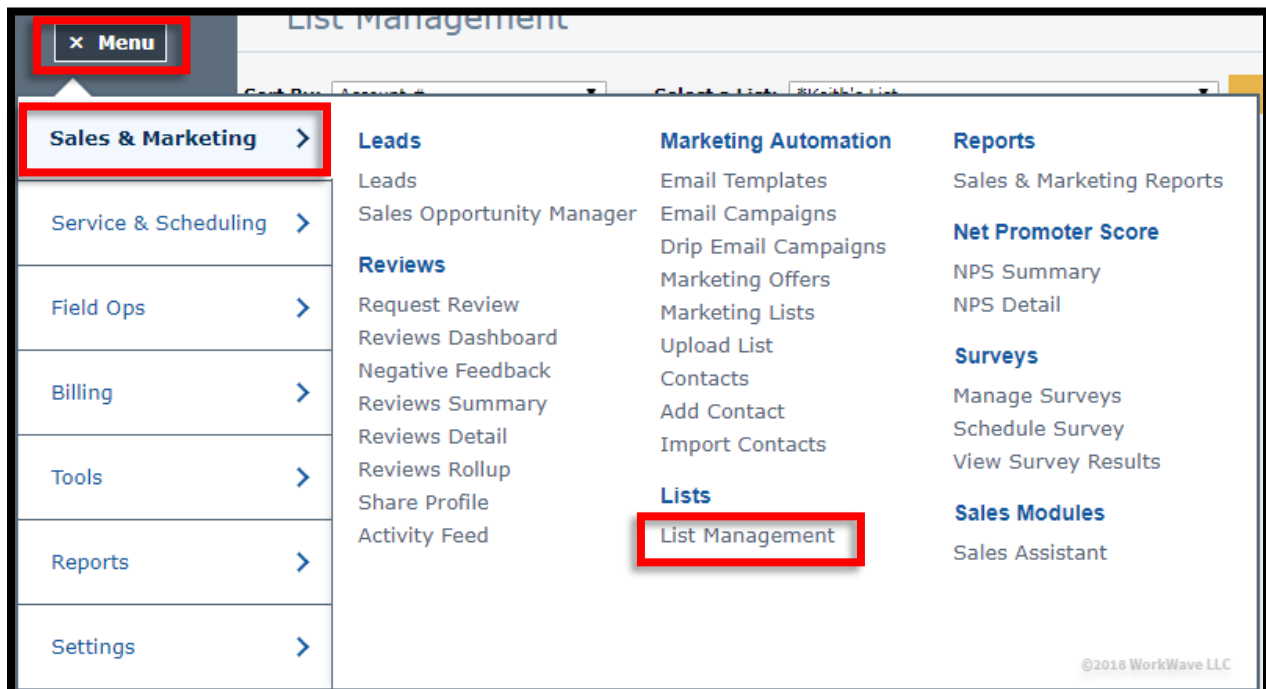
Type of List	Necessary Fields on Location Search Tab
All Customers	Leave all fields blank.
Customers Added Within Specific Date Range	Dates Only <ul style="list-style-type: none"> Beginning Entered Date Ending Entered Date
Customers with a Specific Service and Not Having Another Service	Under Additional Options <ul style="list-style-type: none"> Service Not Having Service
Customers with Specific Renewal Dates if Tracking in a Renewal	Under Additional Options <ul style="list-style-type: none"> Beginning Renewal Date Ending Renewal Date Setup Status as Active

	<ul style="list-style-type: none"> • Setup Type as Renewal
Customers with Specific Renewal Dates if Tracking in a Setup	<p>Under Additional Options</p> <ul style="list-style-type: none"> • Beginning Renewal Date • Ending Renewal Date • Setup Status as Active • Setup Type as Setup

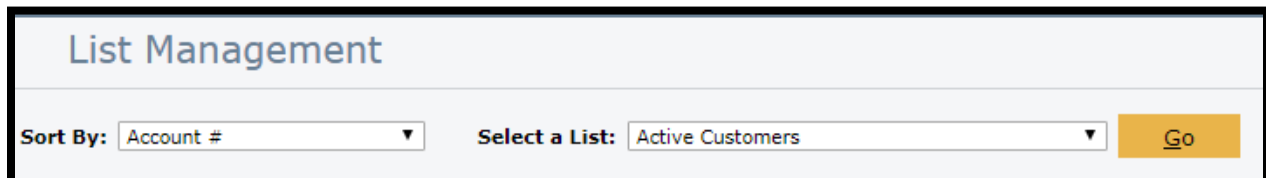
Using a List

You can use lists to print a variety of notices. To use the lists you have created, complete the following:

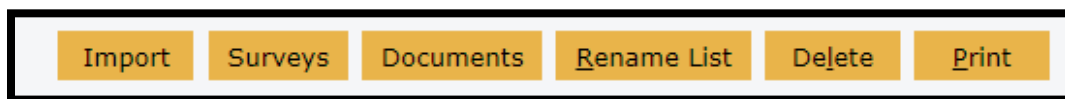
1. You can access the list from *Menu > Sales and Marketing > List Management*.



2. Select the list you want to use, and click the *Go* button.



3. Click the *Print* button.

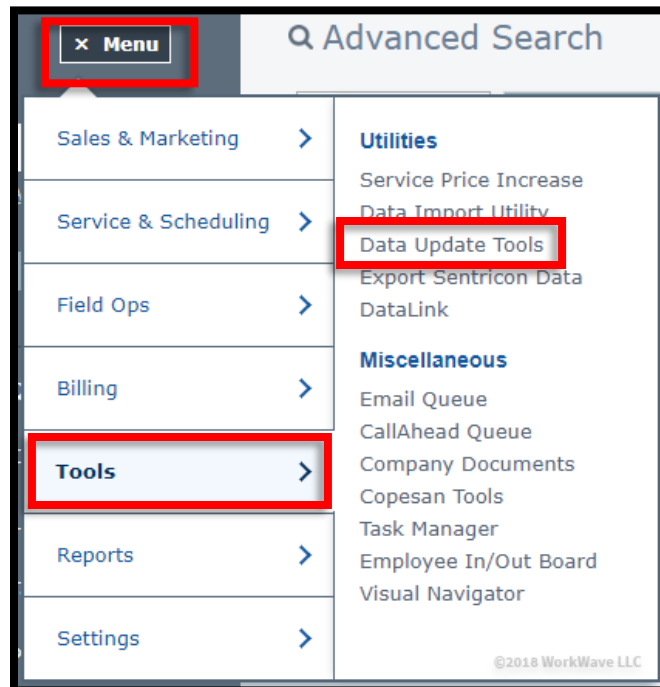


4. Select your options for printing, displaying, emailing, or exporting depending on your selection.

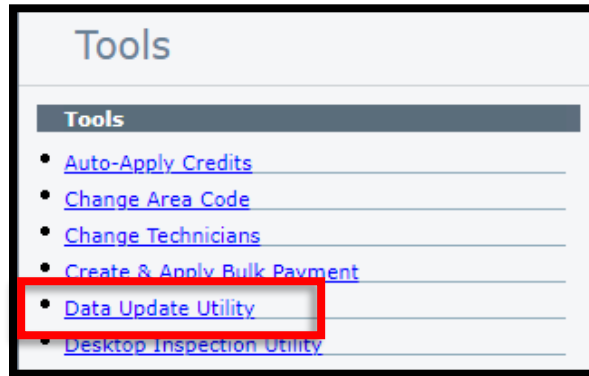
Type of Report	Available Options
Labels	<ul style="list-style-type: none"> • Address: Location or Bill-To • Position: Row and Column • Print Account Number checkbox • Range: Start and End
Letters	<ul style="list-style-type: none"> • Letter (name) • Address: Location or Bill-To • Range: Start and End • Log Mailing checkbox • Email Subject • Attachment
Postcards	<ul style="list-style-type: none"> • Postcard (name) • Address: Location or Bill-To • Range: Start and End • Log Mailing checkbox
Renewal Notices	<ul style="list-style-type: none"> • Starting Renewal Date • Ending Renewal Date • Service • Service Class • Program: Yes, No, Both • Renewal Status: Active, Inactive, Both • Include: Renewals, Annual Prepays, Both • Sort by Renewal Date checkbox • Print On Renewals: Title, Starts Date, Service, Renewal Date, Renewal Amount, Renewal Amount on Bottom, Break Out Tax • Renewal Letter • Renewal Message • Range: Start and End • Log Mailing checkbox • Email Subject • Attachment

Summary List	<ul style="list-style-type: none"> • Header Information • Range: Start and End
Detailed List (customize option to select the Show columns)	<ul style="list-style-type: none"> • Header Information • Range: Start and End
Detailed List with Services	<ul style="list-style-type: none"> • Header Information • Service (with Include Tax checkbox) • Range: Start and End
Site Diagrams	<ul style="list-style-type: none"> • Range: Start and End
Map	<ul style="list-style-type: none"> • NA

5. You can also use a Location list to perform updates using the Data Update Utility by going to *Menu > Tools > Data Update Tools*.



- a. Select *Data Update Utility*.



Please refer to the [Data Update Utility](#) for more information about making mass updates.

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