

Multi-Unit Module Setup and Usage

The Multi-Unit Module provides the flexibility needed to handle larger properties, such as condo associations and apartment complexes.

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

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Terminology

Some important terms to consider when using Multi-Unit in PestPac include:

- **Building:** the largest structure in which service will be performed; contains Units, Areas, and Devices (e.g., apartment complex)
- **Unit:** individual portions of a Building (e.g., an apartment)
- **Area:** individual portions of an Area within a Unit (e.g., kitchen, bedroom)
- **Adjacency:** relationship between Units (e.g., above, below, left, right)

Notes: Multi-Unit Areas can be set up to contain Buildings, Units, Other Areas, and Devices. This document presents the more common usage, but PestPac offers more flexibility.

Setting up more than 300 levels on a Location can cause slowness when trying to access the account or related Areas and Devices in PestPac and PestPac Mobile. Levels include the total number of Buildings, Units, Areas, Other Areas, and Devices on one account.

Adding Location Templates and Areas

For the Multi-Unit Module, you will need to work with Location Templates and Areas to make use of the module. These functions include:

- Creating / Copying a Location Template
- Applying a Location Template to a Location and to Multiple Accounts
- Adding Areas / Subareas to a Location Template
- Adding Multiple Areas



- Adding Multiple Location Templates
- Importing Areas (from a Template, Another Location, or This Location)
- Managing Areas

Please refer to the following documents for guidance:

- [Areas: Setup Using Treemaps](#) (to understand how to set up Location Templates and Areas)
- [Devices: Setup Using Treemaps](#) (if setting up and using Devices)
- [Diagrams](#) (if using the newer Diagrams feature to manage Areas and Devices)

Editing Buildings and Units

Editing Buildings and Units

You can access the Edit Building or Edit Unit screen by right-clicking the Building / Unit and then clicking the *Edit Multi-Unit Properties* option.




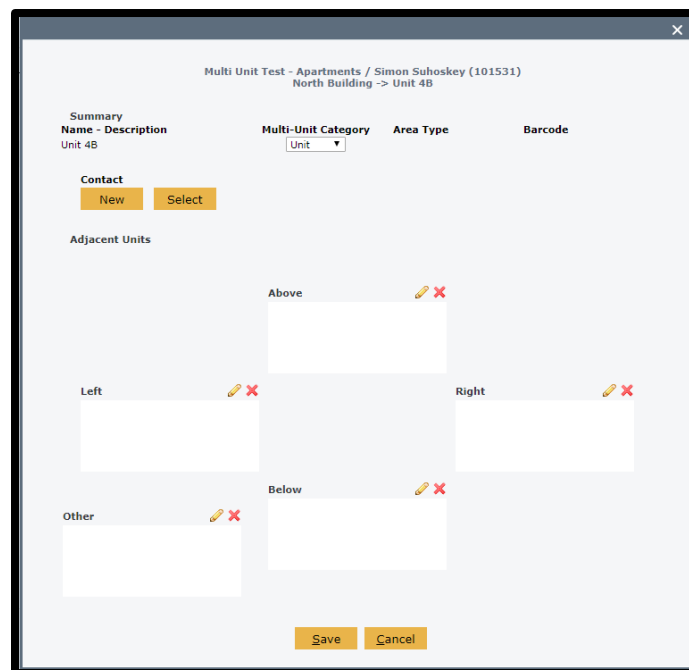
On this screen, you can give the Building a specific address. For Buildings and Units, you can also create a new Contact or search for an existing one.

Adjacent Units

When using Adjacent Units, you can assign Units for Above, Right, Below, Left, or Other from this screen by clicking the *pencil* icon to open the Area Selector window or the *X* icon to remove the adjacency list.

When you access the Area Selector, you can check which Units are in the adjacency to the Unit you are editing. Note that multiple Units can be checked. Also, if you check a Unit as being adjacent to this Unit, the information for the adjacent Unit will automatically be updated.

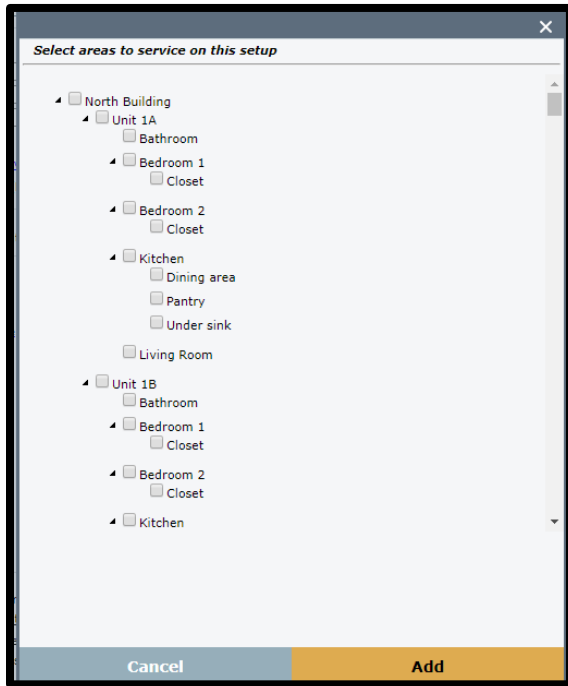
When you click the  icon next to an Area, you can view all the information related to it.



Selecting Areas on Setups and Orders

To select Areas that apply to a Service Setup or Order, click the Select Areas link on the Service Setup or Order screen to see the Area Selector window.

Attributes: (None) [Select Areas](#)

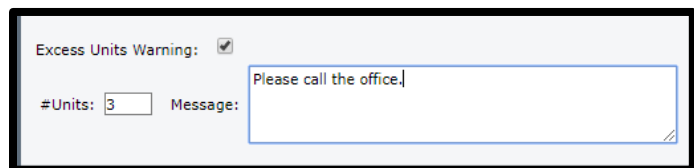


From here, you can check the relevant Areas. Note that checking a parent Areas will automatically check its sub-Areas.

Areas selected on a Service Setup will transfer to Orders created or generated from it. Note that the Select Areas defaulted on an Order can be manually overridden.

Excess Units Warning

The Excess Unit Warning and associated fields display under the Instruction fields. Enabling this warning displays the following fields:



- **#Units:** the number of units to be serviced
- **Message:** message you want to display on Mobile when the number of Units is exceeded

Excess Units settings on the Service Setup will transfer to Orders created or generated from it. Note that these settings can be overridden on the Order.

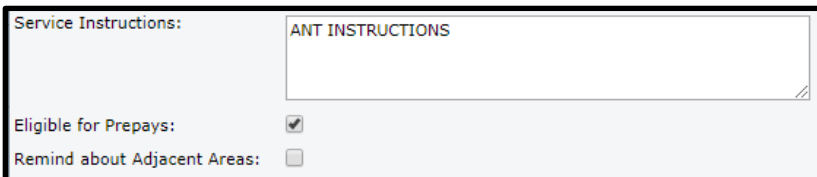
Additional Options for use with Multi-Unit

Services Lookup Table

Adjacent Areas

For any Services you will perform in a Multi-Unit setting, you can select the option to *Remind about Adjacent Areas* on the *Maintain Services* screen. This option enables a warning on Mobile when Areas have not been serviced that are adjacent to the Areas that have been serviced.

Note: Adjacencies must be entered on the Units for the warning to appear.



Service Instructions:	ANT INSTRUCTIONS
Eligible for Prepays:	<input checked="" type="checkbox"/>
Remind about Adjacent Areas:	<input type="checkbox"/>

Materials Lookup Table

Once Multi-Unit is activated additional fields appear in the material documents section for effective dates and EPA registration number. To access Material documents, click a Material in the *Materials* Lookup Table, and click the *Add Document* button on the *Maintain Materials* screen.

Here you can enter the Effective Dates for the document you are adding if it is valid for a specific date range. You can also enter the EPA Registration number for that Material.

Reporting

Once Multi-Unit is enabled and setup additional options for Inspection Reports will appear. When viewing an invoice press the 'Report' button. In addition to the standard options for Inspection Reports you will also see options for "Area Specific" and "Unit Specific".

Area Specific: Selecting this option will allow you to print/email a report with only the areas that you select. You must select the area(s) that you want included on the report and also whether the system should include all selected areas on a single report or create a separate report per area.

Unit Specific: Selecting this option will allow you to print/email a report with only the units you select (only units serviced that visit will be available to select). You must select the unit(s) that you want included on the report and also whether the system should include all selected units on a single report or create a separate report per unit.



Mobile

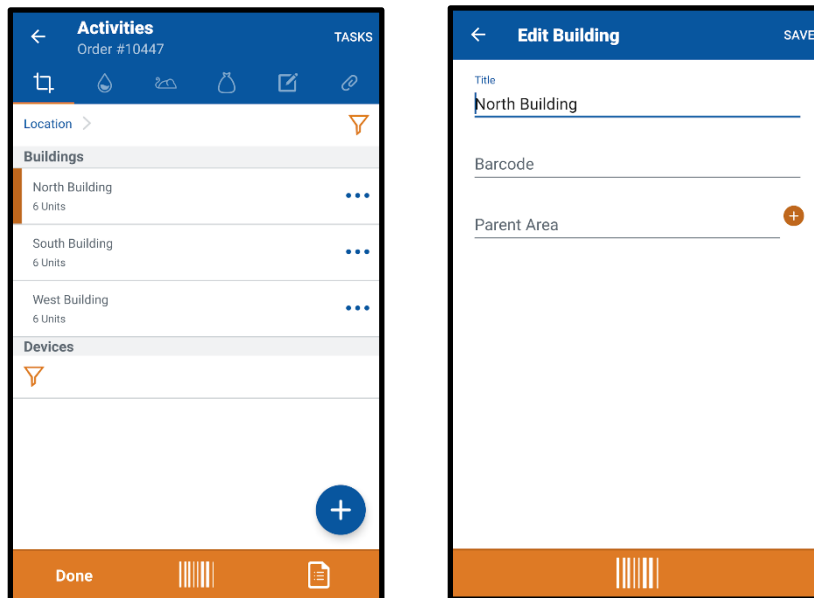
Servicing Orders

Once Multi-Unit is enabled and buildings, units, areas, etc. have been added to locations and service setups, technicians will see new options within the activities section of an order.

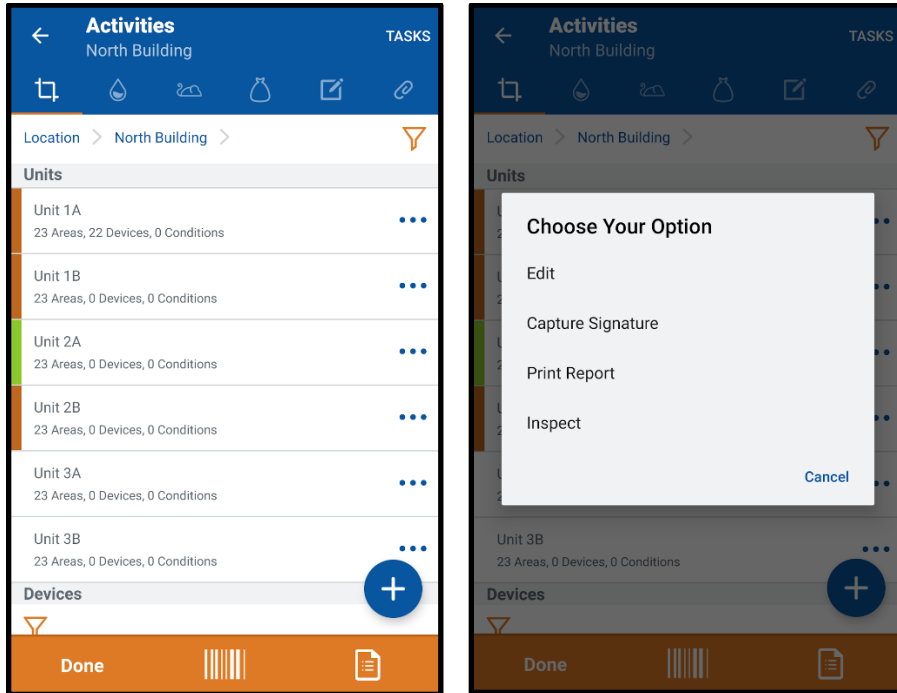
Locations that have Multi-Unit buildings will now display areas as "buildings" with the number of sub-units displayed beneath.

Technicians can click the ellipsis (...) to edit details about specific buildings

- The technician will be able to edit the "Title", add a barcode and select a Parent area for the buildings.

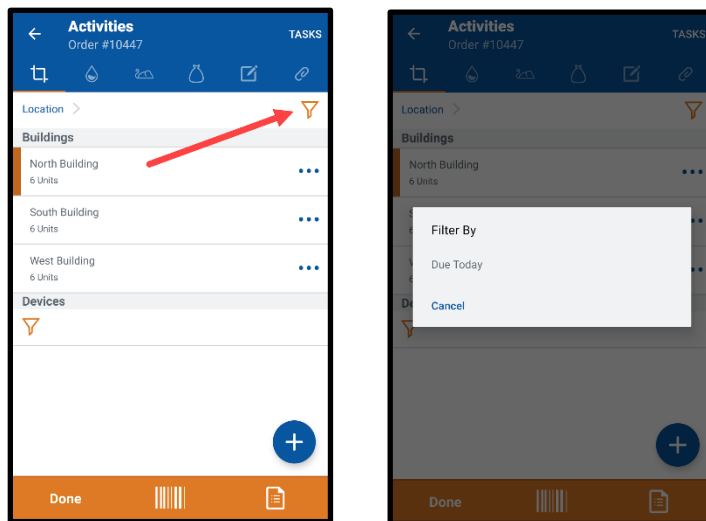


- Clicking into a building will bring up units attached. Each unit will display the number of areas, devices and conditions listed for each.
- Clicking into a Unit will display the areas associated with each unit and can further be broken down to sub areas.
- Clicking the ellipsis will give techs a few area specific options. They can choose to edit the area, capture signatures, print reports or bring up the inspect options. All of these are unit specific options.
 - The Unit-Specific Inspection report will display all inspection details for that unit only, including the customer signature for that unit.
 - Clicking Inspect will automatically mark all sub-areas as inspected.



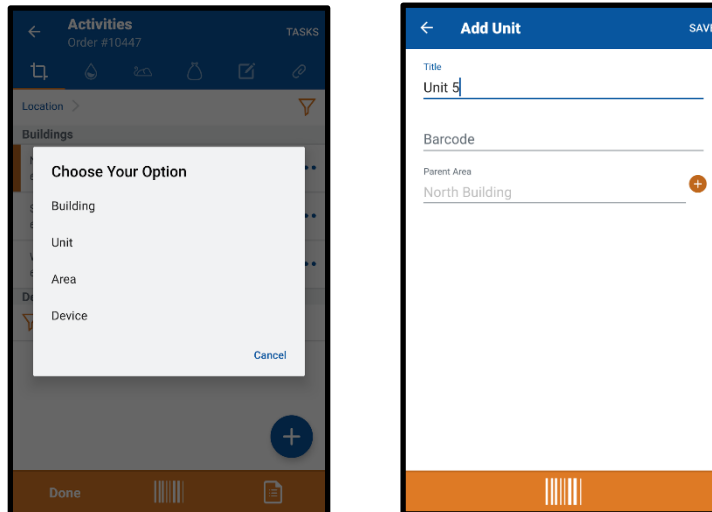
Due Today Filter

- Technicians can now filter area views by whether they were added to a setup/order under the "select areas" link with a due date of today. Techs can click the filter icon and then select the "Due Today" option to see this view.



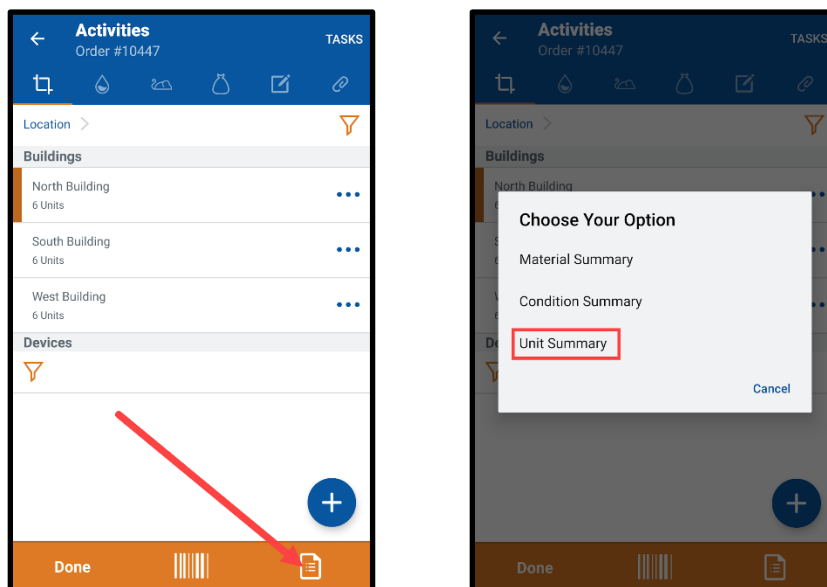
Adding Additional Buildings/Units/Areas

Technicians can add new Buildings/Units/Areas from the activities screen. Clicking the "+" symbol will bring up the option to add new buildings, units, areas or devices. When adding a new area, unit or devices technicians can give them a name, barcode or add them to a parent area.



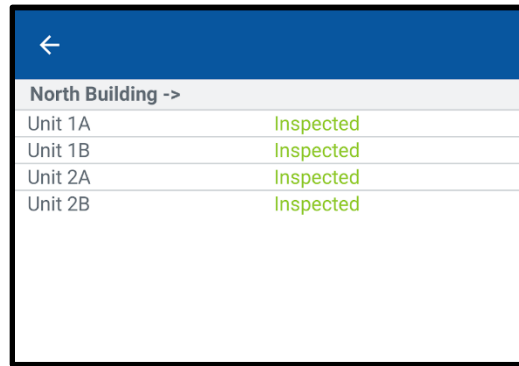
Reporting

Technicians now also have the ability to view a unit summary report as well as email/print the report. A new option has been added when clicking the report button under activities section that will display the "Unit Summary" option.



The Unit Summary report option will bring up a quick summary of which units/buildings have been inspected for technician reference.

- On the Completion screen, the tech can print/email the Unit Inspection Summary Report which contains a list of all units inspected and any signatures that may have been captured for each. It will also include area comments on each unit, as well as a list of materials applied to all unit inspected. If any units were “due for today” but not inspected, they will show under the “not serviced” section.
- This Unit Inspection Summary Report will also connect to PestPac desktop and be viewable in the new Areas and Diagrams screen.



North Building ->	
Unit 1A	Inspected
Unit 1B	Inspected
Unit 2A	Inspected
Unit 2B	Inspected

