

# Service Notifications

Service Notifications are used to communicate with your customers about upcoming service dates and times via email, postcard, or phone (based upon your company's processes). **Note:** Service Notifications require an open Service Order on the account to send them.

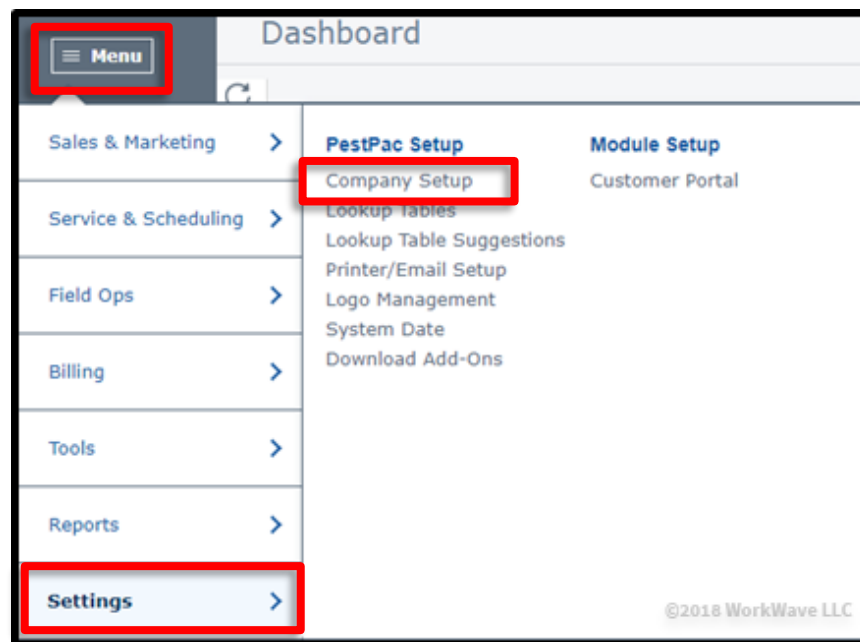
This document outlines how to set up service notifications.

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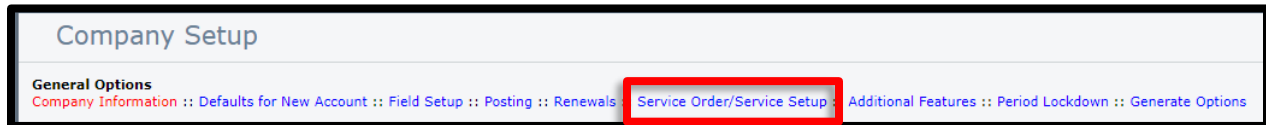
## Setting up Defaults on New Accounts

To set up the notification defaults for new accounts, complete the following steps:

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



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



3. Within the Notification section, you can determine if you want to notify the Location or Bill-to and if you want to print, email, or call with the notification.

If you plan to send notifications based on work date and not notification date, the days field does not matter and can remain at 0.

Notification:  
2 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

**Note:** These settings only apply to new accounts, not existing accounts. You can update current accounts on an individual basis or as part of a mass update.

## Updating Current Accounts

### Individually

To update current Service Setups, Renewals, Programs, and Service Orders on individual Locations, you can do so in those specific areas of the software.

**Note:** Call, Email, and Print notifications can be listed on the same line, but Text must be a separate notification line.

Notify  
 Location  Bill-To  Other

Print  Email  Text  Call

Time

Days

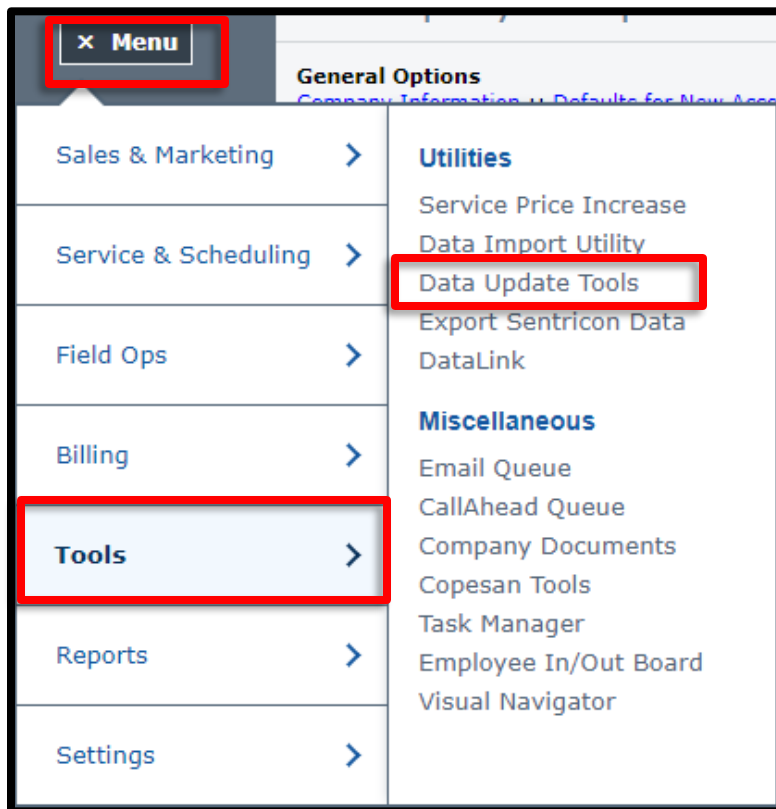
Reason 1

Reason 2

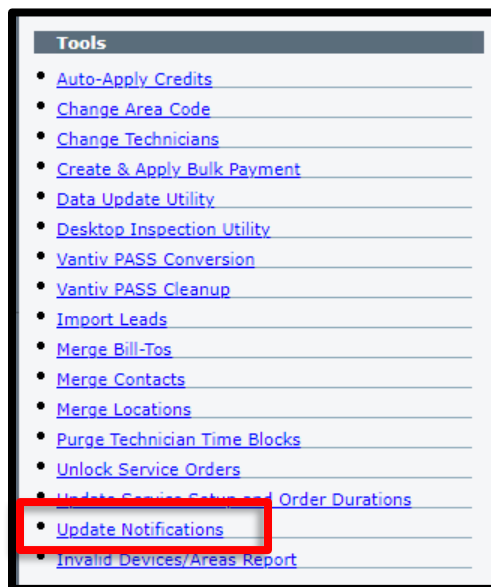
### Data Update

To update current accounts in bulk, complete the following steps:

1. Make sure you have a Location List created under List Management for all the customers you want to update.
2. Go to *Menu > Tools > Data Update Tools*.



3. Click the *Update Notifications* link.



4. Under this link, complete the following options:

### Update Notifications

**Selection Criteria**

List: (None) ▼

Update: Service Orders ▼

Service Code:  

Starting Work Date:  

Ending Work Date:  

Delete Existing Notification Lines:

Add New Notification Line:

Notify: Location ▼

Print:

Email:

Text:

Call:

Time:  

Days:  

Reason 1:  

Reason 2:

- a. Select the Customer List from the dropdown menu.
- b. Select if you want to update Service Orders, Service Setups, Program Steps, Renewals, or Leads. **Note:** You will need to repeat these steps for each type you want to update.
- c. Select if you are deleting existing notification lines and/or adding new ones. In this example, we are not deleting any lines and only adding new ones.
- d. Select if you are notifying the Location, Bill-To, or Other.
- e. Finish selecting the information you need to update, and click the *Preview* button.
- f. You will see the results at the bottom of the page. You can make adjustments before clicking the *Update* button.
- g. When the update is complete, PestPac will display how many records were added / deleted.

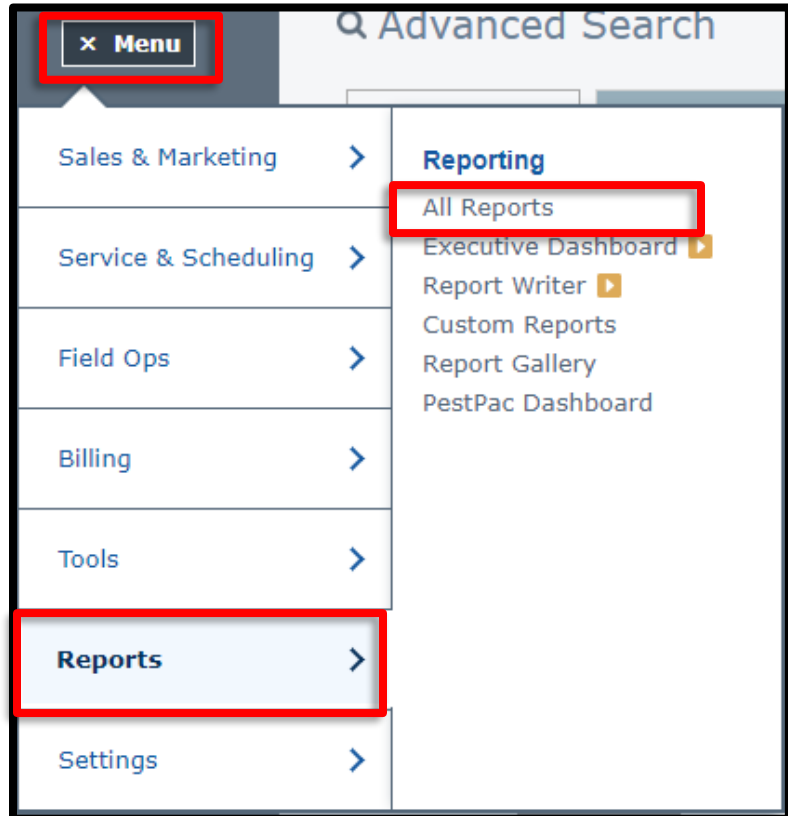
# Using the Service Order Report

For Service Notification emails, postcards, and CallAhead, you will need to use the Service Order Report found via *Menu > Reports > All Reports* and then clicking the *Service Order* link.

For emails, make sure you have a letter created in your Letters Lookup Table that you will send.

For postcards, make sure (1) you have a postcard created in your Postcards Lookup Table that you will send and (2) your settings are configured in the Postcard section of Printer Setup.

For CallAhead, make sure you have the module set up.



## Sending Emails

To send Service Notification emails, complete the following steps after accessing the Service Orders Report:

1. Under *Selection Criteria*, choose the dates you want to use for your notifications, including:
  - a. Starting/Ending Work Date (date for which the Service Order is scheduled)
  - b. Starting/Ending Order Date (date the Service Order was created)
  - c. Starting/Ending Notification Date (if notification dates are set up in the Service Order Notification line)

A screenshot of the 'Selection Criteria' form in the WorkWave application. The form contains six date selection fields, each with a calendar icon to its right: Starting Work Date, Ending Work Date, Starting Order Date, Ending Order Date, Starting Notification Date, and Ending Notification Date.

2. Under the *Output Format* section, complete the following items:

- a. Select *Notification Emails* and choose the letter you want to use.
- b. Check the option to *Log Mailings* to track the notification email information in the Location Documents on the Customer's account.
- c. If you do not want to respect the notification line item settings from Company Setup and the Service Setup / Service Order screens, check the box for *Inc. Orders with No Notif. Defined*.
- d. If you want to send the notifications using an email address that differs from what is set in your defaults, enter it in the *Override Email From Address* field.

Output Format

- Service Orders
- Appointment List
- Notification Cards
- Notification Emails

Log Mailings

Inc. Orders with No Notif. Defined

Override Email From Address:

[See rules for email From address](#)

- Notification List
- Labels
- Documents
- Site Diagrams
- CallAhead Notification
- Re-Authorize Program Orders
- Sentricon Station Lists
- Update Constraints
- [Appointment Route](#)


- i. If this field is populated, this address will be used.
- ii. If this field is not populated and the Letter Printer Setup options are configured to print the company header from the branch information, PestPac will use the branch email address.
- iii. If this field is not populated and the Letter Printer Setup options are configured to print the company header, PestPac will use the company email address.
- iv. If this field is not populated and the Letter Printer Setup options are not configured to print the company header information or the company/branch email is empty, PestPac will use the user's email address.

3. Under *Select Customer To*, enter an *Email Subject* (which helps prevent emails going to Spam folders).

Select Customers To

- Print
- Email

Email Subject

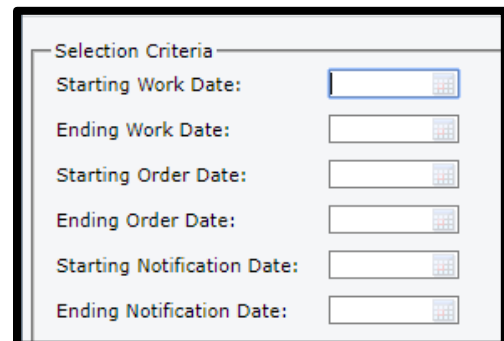
4. By default, all Order Types are included. Uncheck any ones for which you do not want an email notification.
5. Click the *Email* button, and click *OK* on the popup. 
6. PestPac displays a list of what emails were sent, including the Location, Bill-To, Name, Email, Reply-To, and Sent (Yes/No).

## Printing Postcards

To send Service Notification postcards, complete the following steps after accessing the Service Orders Report:

1. Under *Selection Criteria*, choose the dates you want to use for your notifications, including:

- a. Starting/Ending Work Date (date for which the Service Order is scheduled)
- b. Starting/Ending Order Date (date the Service Order was created)
- c. Starting/Ending Notification Date (if notification dates are set up in the Service Order Notification line)

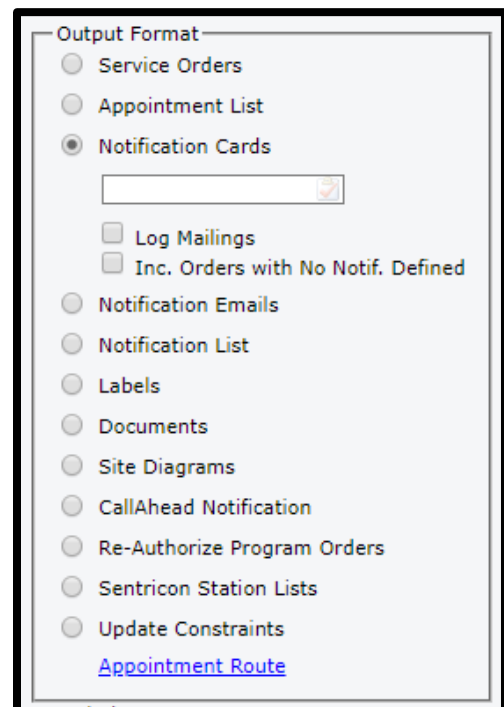


The screenshot shows a dialog box titled "Selection Criteria" with the following fields:

- 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]

2. Under the *Output Format* section, complete the following items:

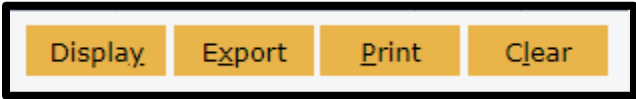
- a. Select *Notification Cards* and choose the postcard template you want to use.
- b. Check the option to *Log Mailings* to track the notification postcard information in the Location Documents on the Customer's account.
- c. If you do not want to respect the notification line item settings from Company Setup and the Service Setup / Service Order screens, check the box for *Inc. Orders with No Notif. Defined*.



The screenshot shows a dialog box titled "Output Format" with the following options:

- Service Orders
- Appointment List
- Notification Cards
  - [Dropdown Menu]
  - Log Mailings
  - Inc. Orders with No Notif. Defined
- Notification Emails
- Notification List
- Labels
- Documents
- Site Diagrams
- CallAhead Notification
- Re-Authorize Program Orders
- Sentricon Station Lists
- Update Constraints
- [Appointment Route](#)

- By default, all Order Types are included. Uncheck any ones for which you do not want postcards.
- By default, the notification cards are sorted by Technician and then by Work Date. You can adjust these settings and/or include additional sort options.
- Before printing, make sure you have the correct postcard loaded in your printer and the proper setting configured in Printer Setup.
- Click the *Print* button, and click *OK* on the popup.



## Using CallAhead

**Note:** This section applies to those companies who have set up the CallAhead module.

To use CallAhead to make your service notification calls, complete the following steps:

- Under *Selection Criteria*, choose the dates you want to use for your notifications, including:
  - Starting/Ending Work Date (date for which the Service Order is scheduled)
  - Starting/Ending Notification Date (if notification dates are set up in the Service Order Notification line)
- Under the *Output Format* section, select *CallAhead Notifications*.
- Under *Include Notifications*, select whether you want to call or text. For this example, we have selected *Call*.

 A screenshot of a dialog box titled "Selection Criteria". It contains six date selection fields, each with a calendar icon to its right: "Starting Work Date", "Ending Work Date", "Starting Order Date", "Ending Order Date", "Starting Notification Date", and "Ending Notification Date".


 A screenshot of a dialog box titled "Include Notifications". It contains two radio button options: "Call" (which is selected) and "Text".


 A screenshot of a dialog box titled "Output Format". It contains a list of radio button options: "Service Orders", "Appointment List", "Notification Cards", "Notification Emails", "Notification List", "Labels", "Documents", "Site Diagrams", "CallAhead Notification" (which is selected), "Re-Authorize Program Orders", "Sentricon Station Lists", and "Update Constraints". At the bottom, there is a blue hyperlink labeled "Appointment Route".

- Under *Notification Status*, select if you want to make calls for Service Orders with Notification Confirmed, Not Confirmed, or Either.



**Notification Status**

Notification Confirmed

Not Confirmed

Either

5. Click the *Send* button to advance to the CallAhead screen.

Send
Clear

6. On the CallAhead screen, you have the following options:

**Send To CallAhead** Send Exit

Message: CUSTOM  Send calls now  Send calls on 11/27/2018 at 10:00 AM [Update date and time constraints prior to sending calls](#)

Note: These records with invalid / missing phone numbers will not be sent to CallAhead.

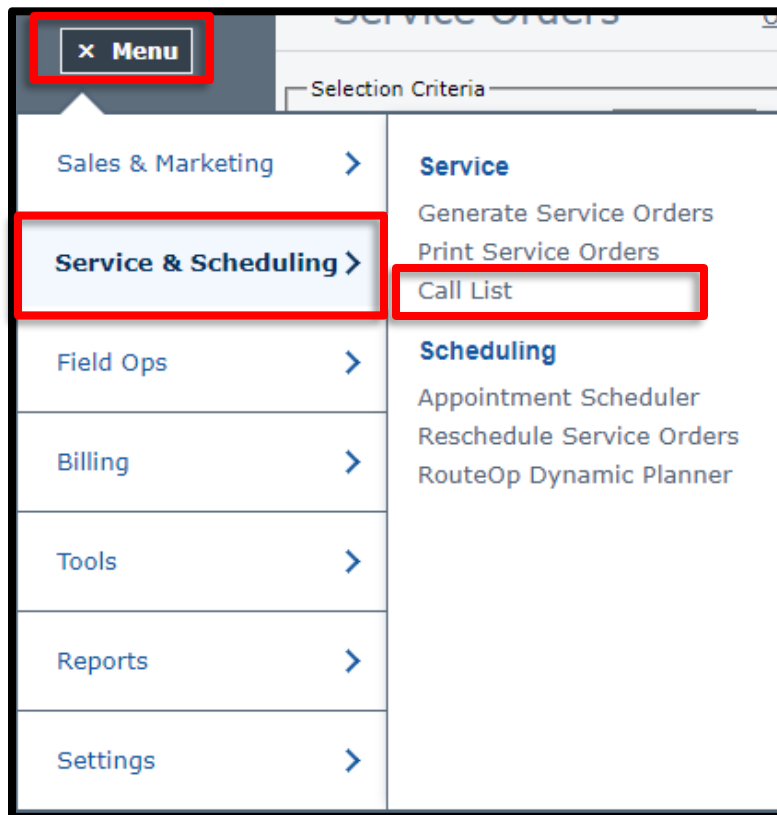
Call	Location	Order Number	Method	Service	Work Date	Time Range	Notify	Number	Address
1) <input type="checkbox"/>	<a href="#">694</a>	<a href="#">57909</a>	Call			at	Location		326 Richmond Ave Point Pleasant Beach, NJ

- a. Select the message you want to use and specify when you want messages sent. If you would like to use different messages for different types of services, you must complete this process for each service and message.
- b. If there are any Service Orders that you would like to remove, uncheck the *Calls* box.
- c. Click the *Send* button, and click *OK* on the popup.
- d. You will receive a confirmation of the number of calls sent.

## Using a Call List

To manually call, schedule, and confirm appointments, complete the following steps:

1. Go to *Menu > Service & Scheduling > Call List*.

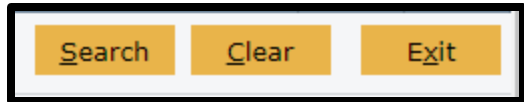


2. Enter the Search Filters for the Service Orders you want to include, specifically Start/End Dates.
3. You can also select Yes / No / Either for the following: *Unscheduled*, *Has Date*, *Has Time*, *Has Tech*, and *Needs Re-authorization*.
4. Select the appropriate selection from the *Notifications* dropdown menu. If you leave this field blank, the search will pull all orders.
  - a. Notification Required / Not Notified (any orders that require call notification but have not been notified)
  - b. Notification Required / Notified (any orders that require call notification and have been notified, including both confirmed and not confirmed)
  - c. Notification Not Required (any orders that do not require call notification)
  - d. Confirmed (any orders that require call notification and have been notified and call confirmed)

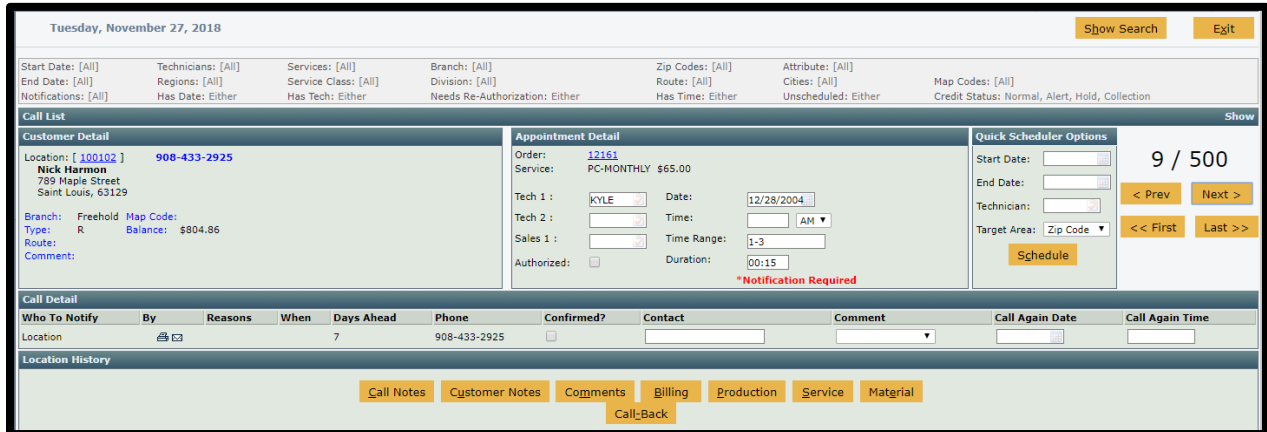
A screenshot of the 'Search Filters' form. It has a title 'Search Filters' and two input fields. The first is labeled 'Start Date:' and the second is labeled 'End Date:'. Each input field has a small calendar icon to its right, indicating a date picker.

- e. Not Confirmed (any orders that require call notification and have been notified but not confirmed)

5. Click the *Search* button.



6. PestPac displays your results and any orders that match your criteria will be available to call. As you call your customers, you can use the following options to update the Service Order and Location.



- a. *Top of the screen*: includes the search criteria used
- b. *Customer Detail*: Location information (click the Location number to go to the Location Detail screen in another tab)
- c. *Appointment Detail*: Service Order information (click the Service Order number to access it in another tab)
  - i. All the fields in this section are editable from within the Call List results window.
- d. *Quick Scheduler Options*: available if the customer needs to reschedule (launch the Quick Scheduler by clicking the *Schedule* button)
- e. *Call Detail*: used to mark the order Confirmed, the Contact, and Comment (Call Again Date and Call Again Time available)
- f. *Gold buttons at bottom of screen*: ties to Location-specific items, including Call Notes, Customer Notes, Comments, Billing, Production, Service, Material, and Call-Back.

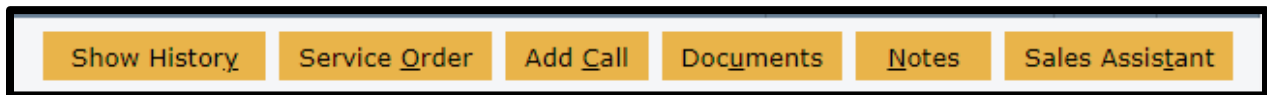


- To navigate between Service Orders, use the < Prev, Next >, << First, and Last >> buttons.
- As you finish calling and updating the notification information for each Service Order, moving to the next order will save it for you. If you want to perform a new search, click the *Show Search* button, adjust the search criteria, and click the *Refine List* button.
- Click the *Exit* button when finished.

## Confirming Service Notifications

To confirm if a service notification was completed for a particular Service on a Location, complete the following steps:

- Access a Location in PestPac, and click the *Documents* button.



- For emails and printed notifications, look under *Mailing Type* to see if any notifications have been sent.

Mailing Type	Date Sent	List Name				<a href="#">Show/Hide</a>
Letter	11/20/2018	90 DAYS PAST DUE-KG				
Price Increase	09/26/2018			\$210.00	SENTRICON	
Price Increase	09/26/2018			\$240.00	SENTRICON	
Price Increase	09/26/2018			\$11.00	SENTRICON	
Price Increase	09/26/2018			\$11.00	SENTRICON	
Price Increase	09/26/2018			\$12.00	SENTRICON	
Renewal	09/07/2018	*Keith's List	12/22/2018	\$125.00	T-RENEWAL	
Renewal	09/07/2018	*Keith's List		\$0.00		
Renewal	09/07/2018	*Keith's List	12/22/2019	\$200.00	STM	
Renewal	09/07/2018	*Keith's List		\$0.00		
Renewal	09/07/2018	*Keith's List	12/22/2018	\$125.00	T-RENEWAL	
Email	06/14/2018	REMINDER test		From: ccole1@workwave.com To: ncampanile@workwave.com		
Letter	01/12/2018	1ST COLLECTION LETTER (OLD)				
Postcard	09/12/2014	TEST				

- For notifications made via the Call List, you can see notification information in the Service Order by clicking the *Notifications* button in the *Notify* section under the Service Order.

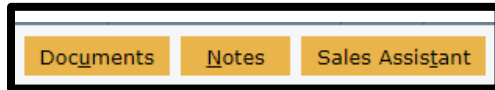


- PestPac will display any notification calls made as well as the confirmation, user who updated the confirmation, contact, and comment.

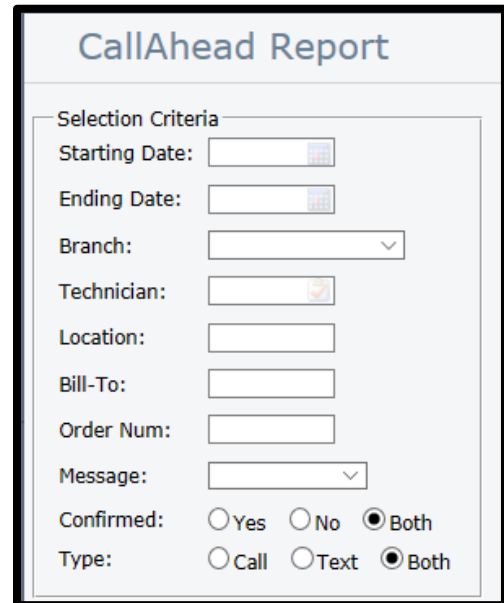


4. For notifications using CallAhead, go to *Menu > Reports > All Reports* and select the *CallAhead Report*.

- a. You can also view CallAhead information in the Notes of the Location by clicking the *Notes* button on the Location Detail screen.



- b. Completed calls will have a Note Code of CALLAHEAD in the history. Text messages will be specified in the Note details.



**CallAhead Report**

Selection Criteria

Starting Date:

Ending Date:

Branch:

Technician:

Location:

Bill-To:

Order Num:

Message:

Confirmed:  Yes  No  Both

Type:  Call  Text  Both

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