

Areas: Setup Using Treemaps

You can create area treemaps to indicate that a technician has inspected an area as well as note material applications, pest findings, and conditions within each respective area.

Please note that there are three Area treemap setup options:

- [Location Templates](#)
- [Copying a Treemap from Another Location](#)
- [Building a Treemap on a Location from Scratch](#)

You can use any one of these options or a combination of all.

Location Templates

A Location Template allows you to create a generic treemap that can be applied to different types of locations. The Location Templates that you will set up will vary based upon the services you offer, the types of locations you service, and the areas that you will need to indicate you have treated.

A Location Template can be applied to a Location manually on an individual basis as well as applied in mass to already-existing locations through the Data Update Utility.

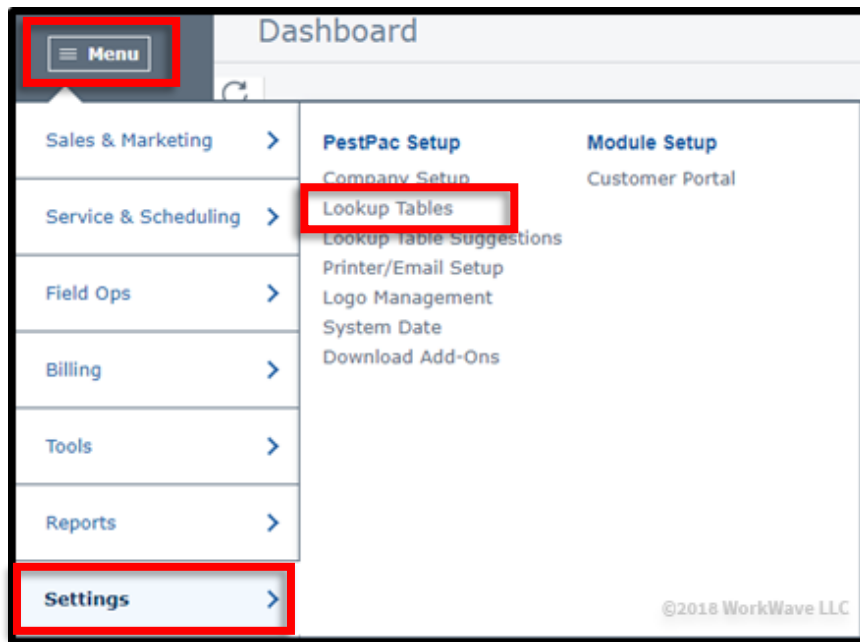
Once a Location Template has been applied to a Location, additional Areas can be added manually on the desktop or via the PestPac Mobile App (if applicable). From the desktop, you will be able to deactivate any unnecessary Areas that were added from the template.

Creating Location Templates

To create a Location Template, complete the following steps:

1. On the desktop, go to *Menu > Settings > Lookup Tables*.

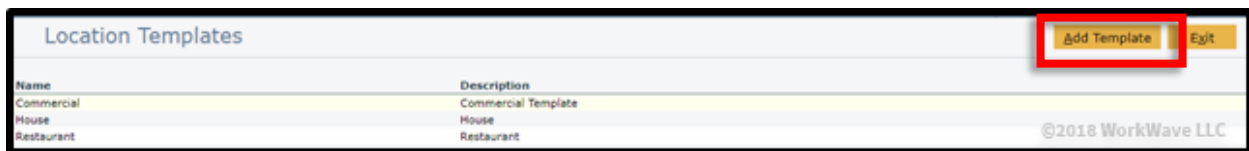
Apartment 2 BedRoom
Bathroom - Bathroom
Sink - Sink
Tub - Tub
Bedroom 1 - Master Bedroom
Half Bath - Half Bath
Bedroom 2 - Smaller Room
Kitchen - Kitchen
Refrigerator - Refrigerator
Sink - Sink
Living Room - Living Room



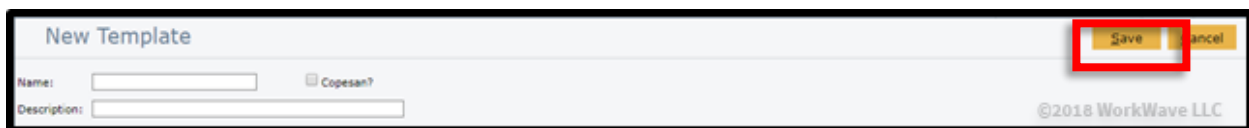
2. Under *Additional Lookup Tables*, click the *Location Templates* link.



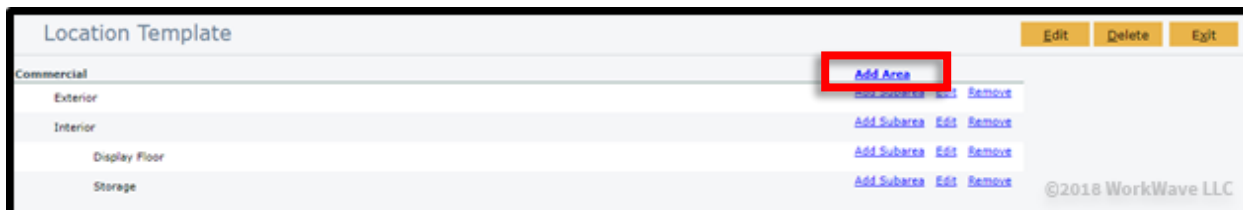
3. Click the *Add Template* button at the top-right of the screen.



4. Complete the name and description for that template; click the *Save* button.

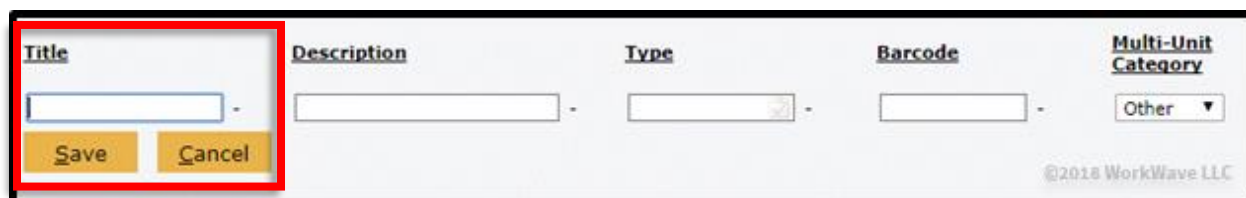


5. Click the blue *Add Area* link to begin adding areas.



6. *Title* is the main item required on this screen. Note that this will show on your Inspection Reports for the customer. *Description*, *Type*, and *Barcode* will only show when viewing on the desktop.

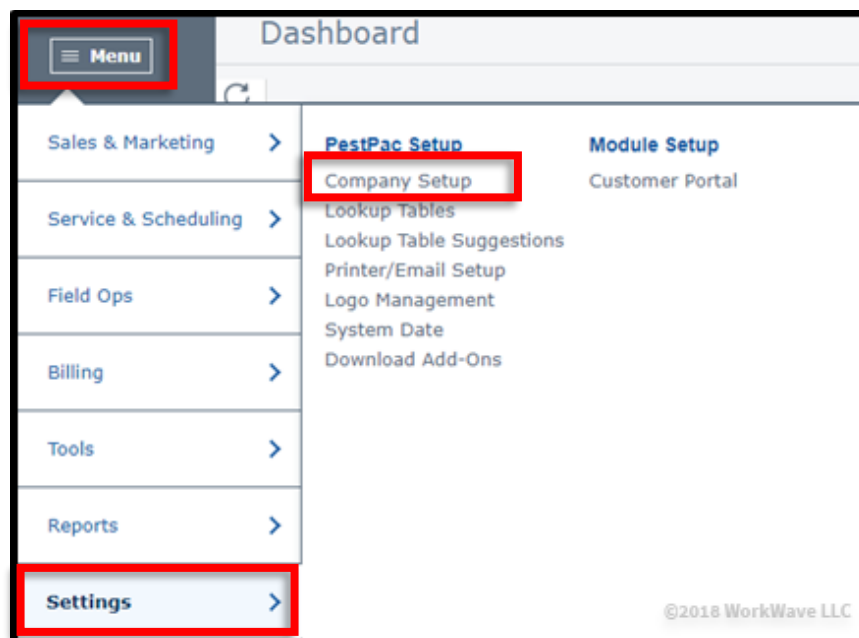
Click the *Save* button and continue adding areas and subareas to build your template.



Applying a Location Template to a Location

If you have one generic template that you would like pre-assigned to ALL locations, complete the following steps:

1. On the desktop, go to *Menu > Settings > Company Setup*.



- Go to the *Defaults for New Account* section to select the Location Template you would like to assign; click the *Save* button.

The screenshot shows the 'Company Setup' interface. At the top right, there are buttons for 'Show All', 'Save', and 'Exit', with 'Save' highlighted in red. Below this is a navigation menu with categories like 'General Options', 'Payment Options', 'Additional Modules', and 'Mobile Options'. The 'Defaults For New Account' section is active, displaying a grid of input fields for 'General Options' such as City, State, Zip Code, Area Code, Country, Personal Salutation, Type, Division, Terms, Tax Code, Credit Limit, and Method of Payment. At the bottom left of this section, the 'Area Template' dropdown is highlighted in red and set to 'Residential'. A 'Blank Branch' checkbox is unchecked, and a 'Generate Finance Charges' checkbox is checked. The footer shows the copyright notice '©2018 WorkWave LLC'.

If you are adding a new location and want to associate a Location Template, complete the following steps:

- From the *Add Location* screen, complete the location information, edit / assign the Location Template you would like associated with the new service location, and click the *Add* button.

The screenshot shows the 'Add Location' interface. At the top right, there are buttons for 'Add' and 'Cancel', with 'Add' highlighted in red. Below this is a 'Bill-To' section with radio buttons for 'Create a new Bill-To Account' (selected) and 'Use an existing Bill-To Account:'. The main form contains various fields for location and contact information, including 'Copesan #', 'Company', 'Last Name', 'Street', 'City', 'State', 'Country', 'Salutation', 'Phone', 'Fax', 'E-Mail', 'Web Site', 'First Name', 'Title', 'Street Search', 'Zip Code', 'Salutation Name', 'Alt. Phone', 'Mobile', 'Latitude', 'Longitude', 'Do Not Re-Geocode', 'Branch', 'Tax Code', 'Map Code', 'Division', 'Builder', 'PO #', 'PO Expiration', 'Time In', 'IVR', 'Type', 'Source', 'County', 'Prospect', 'Subdivision', 'Contact Date', 'Contact Code', 'Entered', and 'Tax Exempt #'. The 'Area Template' dropdown is highlighted in red and set to 'Residential'. The footer shows the copyright notice '©2018 WorkWave LLC'.

Location Templates: Applying to Multiple Accounts

To apply a Location Template to multiple accounts, complete the following steps:

1. Use Location Search to create the list of accounts to which you want to apply a Location Template, and click the magnifying glass *Search* button at the top-right of the screen.

2. To create a new list, click the *Add to List* button.

Acc#	Company/Name	Address	City	State	Phone	Branch
100000	John Smith	2988 Main Street	Neptune	NJ	732-555-5555	Main Branch
100156		130 Poppy crt	Briek	NJ		Main Branch
100159		130 Poppy crt	Briek	NJ		Main Branch
100162	Smyrna	130 Poppy crt	Briek	NJ		Main Branch
100166		130 Poppy crt	Briek	NJ		Main Branch

3. Enter a List Name, choose *Dynamic* (for the list to update each time you run it) or *Static* (for the list to always remain the same), select the Date Ranges; click the *OK* button in the popup window.

4. Scroll to the bottom of the List Management screen and click *Apply Location Templates*.

5. Select the Location Template to Apply from the drop-down menu, and check whether you want to *Deactivate Existing Location Areas* or *Exclude Accounts with this Template*.

Account #	Company/Name	Address	City	Zip Code	Apply
100000	Smith, John	2988 Main Street	Neptune	07753	<input checked="" type="checkbox"/>
100156	.	130 Poppy crt	Brick	08723	<input checked="" type="checkbox"/>
100159	.	130 Poppy crt	Brick	08723	<input checked="" type="checkbox"/>
100162	Smyrna	130 Poppy crt	Brick	08723	<input checked="" type="checkbox"/>
100166	.	130 Poppy crt	Brick	08723	<input checked="" type="checkbox"/>

6. To the right side of every account on the list, there is an *Apply* box that will be checked. Uncheck any accounts to which you do NOT want to apply the Location Template, and click *Apply Template* at the top-right of the screen when done.

Account #	Company/Name	Address	City	Zip Code	Apply
100000	Smith, John	2988 Main Street	Neptune	07753	<input checked="" type="checkbox"/>
100156	.	130 Poppy crt	Brick	08723	<input checked="" type="checkbox"/>
100159	.	130 Poppy crt	Brick	08723	<input checked="" type="checkbox"/>
100162	Smyrna	130 Poppy crt	Brick	08723	<input checked="" type="checkbox"/>
100166	.	130 Poppy crt	Brick	08723	<input checked="" type="checkbox"/>

7. You will see a popup that asks you if you want to apply the Location Template to all selected accounts on all pages; click the *OK* button.

app.pestpac.com says:
Apply Location Template to ALL Selected Accounts on ALL Pages?

Copying a Treemap from Another Location

If you are manually applying a Location Template to a single existing Location, complete the following steps:

1. From a customer's Location Detail screen, scroll down to the bottom of the screen and

click the *Areas & Devices* button.

The screenshot shows a software interface with various input fields and buttons. The 'Areas & Devices' button is highlighted with a red box. Other visible elements include 'Instructions', 'Mobile App', 'Batch Output', 'Print', 'Email', 'Automated E-Mails', 'Attributes', 'Skills', 'Loc Txt', 'Loc Ck', 'Loc List', 'Loc Date', 'Loc Num', 'Bill Txt', 'Bill Ck', 'Bill List', 'Bill Date', 'Bill Num', and a copyright notice for WorkWave LLC.

2. Click the *Tools* button at the top-right of the screen.

The screenshot displays the 'Areas and Device Treemap' screen. The 'Tools' button is highlighted with a red box. The interface includes a search bar, a table with columns for 'Name - Description', 'Type', 'Barcode', and 'Last Inspected', and a copyright notice for WorkWave LLC.

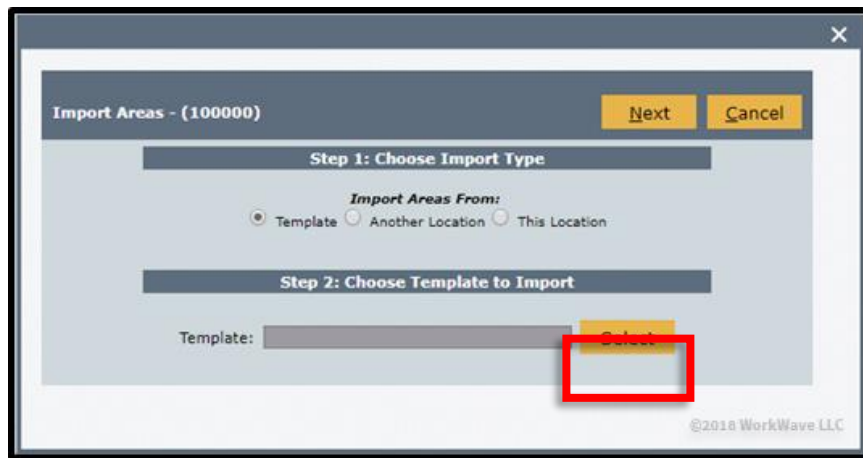
3. In the popup menu, click the *Import Areas* option.

4. If you want to use one of the Location Templates you have created, select that button. If you would like to copy from another location, select that button.

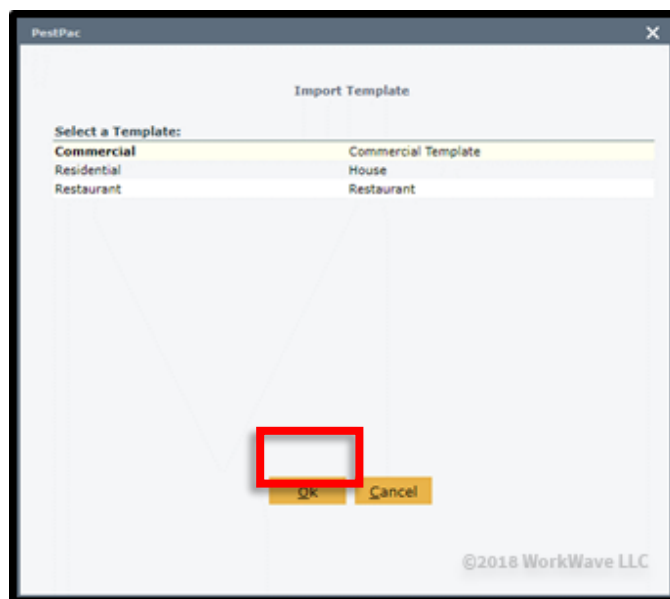
The screenshot shows a popup menu with the following options: 'Import Areas', 'Add Multiple Devices', 'Bulk Move Devices', 'View List of Devices', and 'Purge Inactive Areas/Devices'. The 'Import Areas' option is highlighted with a red box.

The screenshot shows a dialog box titled 'Import Areas - (100000)'. It has 'Next' and 'Cancel' buttons. The main section is titled 'Step 1: Choose Import Type' and contains the text 'Import Areas From:' followed by three radio button options: 'Template', 'Another Location', and 'This Location'. The 'Template' option is selected and highlighted with a red box. A copyright notice for WorkWave LLC is visible in the bottom right corner.

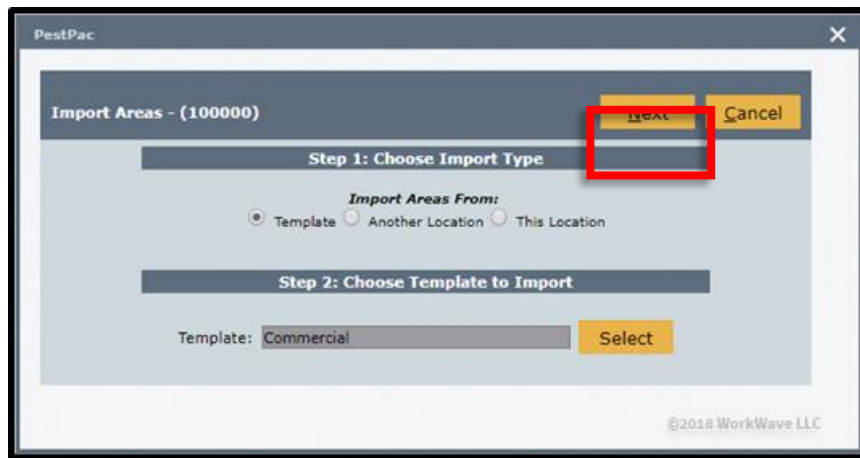
5. Click the *Select* button to bring up the list of templates / locations.



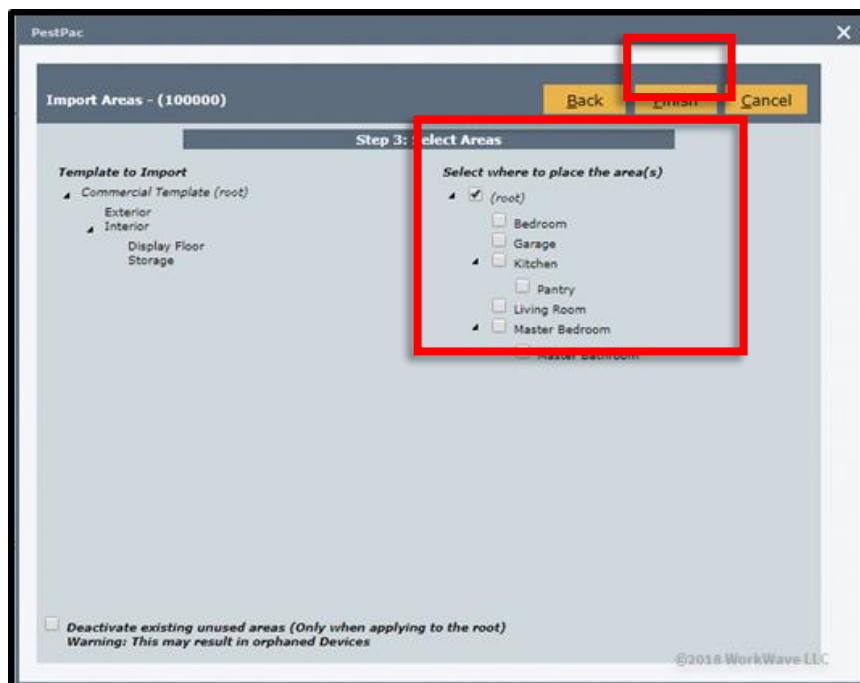
6. Select from the list, and click the *OK* button.



7. Click the *Next* button in the top-right of the popup.



8. Check the box where you want to place the Area, and click the *Finish* button at the top-right of the popup.



Building a Treemap on a Location from Scratch

If you are building a treemap on a Location, complete the following steps:

1. From a customer's Location Detail screen, scroll down to the bottom of the screen and click the *Areas & Devices* button.

Instructions:

Loc Txt: Bill Txt:

Loc Ck: Bill Ck:

Loc List: Bill List:

Loc Date: Bill Date:

Loc Num: Bill Num:

Mobile App

No Customer Signature Required:

Batch Output Total on S.O.: Re-Authorization

Print: Balance on S.O.: Require Re-Authorization:

Email: Include Mailings:

Automated E-Mails

Inspection Reports

Attributes: (None)

Skills: (None)

Label Credit Memo Payment Adjustment **Areas & Devices** Conditions

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Show Lists Add to List

Hide Loc Detail (Inst)

2. Click the *Edit* button on the top-right of the screen, and right-click the Location.

Areas and Device Treemap [View Guide](#)

Area Pest Findings Area Inspection Report **Edit** Tools

Expand All Show Inactive Search Clear

Name - Description	Type	Barcode	Last Inspected
Location 100000			

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3. Click *Add Area* item in the popup menu and then click *Done* when finished.

Areas and Device Treemap [View Guide](#)

Area Pest Findings Area Inspection Report Done Tools

Expand All Show Inactive Search Clear

Name - Description	Type	Barcode	Last Inspected
Location 100000			

Add Building
 Add Area

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