WORKWAVE® PestPac

Clean Data: Where to Get Started
Please Note: Not all action items below may be applicable to your business.

SETUP

Complete an audit of your Company Setup required field options

☐ Menu > Settings > Company Setup > Field Setup
  ☐ Enable fields that should be required when adding or editing data to ensure all users maintain clean and consistent data moving forward.
  ☐ Some examples of this may be customer's email, schedule type, or service order duration.

Audit your Employee Lookup Table and deactivate employees no longer with your company

☐ Menu > Settings > Lookup Tables > Employees
  ☐ Use the Deactivate button to deactivate an employee while archiving them for historical record keeping and reporting.
☐ Use tools such as the Change Technician Utility (Menu > Tools > Data Update Tools > Change Technician Utility) if you need to reassign work from a technician that no longer works at your company.
☐ If you need to run any reports, such as the Service Setup List, Commission Report, or Technician Production Report, make sure to run them before deactivating the employee.

Ensure all fields remain applicable in your Services Lookup Table and remove services no longer in use

☐ Menu > Settings > Lookup Tables > Services
☐ Be sure that if you are making any changes to existing Service Codes or creating new ones you think through how that may affect your reporting before you get started.

Complete a thorough audit of Locations

☐ Create a list of all customers to work off of by using the Advanced Search.
☐ Managing Locations in PestPac includes the process of marking accounts active or inactive as appropriate, geocoding, updating phone numbers **(Ask us about WorkWave's Phone Scan Service!)**, updating types, validating or capturing Email, and sweeping of Location Instructions/Notes to make sure the content is up to date.

Remove Tasks, Leads, and Calls that no longer need to be in the system

☐ Perform an audit of all open items and determine the next actionable step to take. If the Task, Lead, or Call can be closed, do so with the appropriate reasonings. If they still need action to be taken, work internally to have them completed in a timely manner.

SERVICING & SCHEDULING

Ensure all active Service Setups have the necessary information

- ☐ Use the Service Setup List Report (Menu > Reports > All Reports > Service Setup List) to spot any inconsistencies. Focus on the available Search, Sort, and Show Columns when running this report.
- ☐ Items you can look for when running this report include:
  - ☐ Missing Schedule Type.
    - ☐ Use tools such as the Visual Route Manager to assign a schedule to your customers that works optimally for your routes.
  - ☐ 0 or Incorrect Duration.
    - ☐ Leverage the Service Setup and Order Duration utility (Menu > Tools > Data Update Tools > Update Service Setup and Order Durations) to correct the durations in bulk.
  - ☐ Missing or No Longer Employed Technician.
    - ☐ Use tools such as the Change Technician Utility (Menu > Tools > Data Update Tools > Change Technician Utility) if you need to reassign work from a technician that no longer works at your company.
  - ☐ Audit missed opportunities for recurring customers.
    - ☐ If your greatest service frequency is annual but you are seeing setups that have a Last Generated date greater than that time frame, you can look into why those accounts were missed.

Complete an open order audit

- ☐ Use the Service Order List Report (Menu > Reports > All Reports > Service Setup List) with a blank starting work date and an ending work date of the previous calendar day.
  - ☐ This will allow you to see what open orders are still out there that need to be scheduled, rescheduled, or posted as not serviced or void.
- ☐ Ensure productivity goals are being met and tracked correctly.
  - ☐ Use the Exception Report (Menu > Reports > All Reports > Exception Report) to find anomalies, such as Locations that have a dollar per hour production rate lower than expected.
  - ☐ Use the Invoice List Report (Menu > Reports > All Reports > Invoice List Report) for checking Callbacks and Not Serviced Reasons, ensuring everyone uses the same process so that reasons are properly reflected on reports.

ACCOUNTING

Find any outstanding balances and credits to ensure open items are valid

☐ Run the Accounts Receivable Report (Menu > Reports > All Reports > Accounts Receivable) to verify accounts with open credits, negative balances or aged balances and use corrective transactions to resolve them.

  ☐ Auto Apply Credit Utility (Menu > Tools > Data Update Tools > Auto Apply Credit Utility) for your write-offs and account cleanup.

  ☐ Send Statements (Menu > Reports > All Reports > Statements) to collect past due balances.

REPORTING

Leverage your Report Gallery for keeping your data clean moving forward

☐ Menu > Reports > Report Gallery

☐ Before using this feature, ensure you perform a clean up/resave of existing reports and make sure the right people are receiving the reports on the correct cadence.