BEYOND SERVICE 23

USER CONFERENCE

January 8-11, 2023 • Hilton Orlando, FL

PestPac
by WORKWAVE®

BOOTCAMP:
The Daytona 500

DIGITAL WORKBOOK

LOOKUP TABLES

When was the last time you gave your lookup tables a tune up? As your business grows, your lookup tables may need to be updated. You may even benefit from using new lookup tables.

- **LOOKUP TABLES THAT MAY NEED TO BE UPDATED**

  - **Materials:** Application methods and rates can change

  - **Tax Codes:** Tax rates may have increased or decreased

  - **Sources:** Are you advertising in new ways?

  - **Targets:** Are you offering new services to new targets?

- **LOOKUP TABLES TO KEEP YOU ORGANIZED**

  - **Division:** Assign service classes and services to divisions within your company

  - **Service Classes:** Group services together for ease of reporting

  - **Material Groups:** Make pulling materials used for a particular group, like ants or turf insects

  - **Target Groups:** Assign species to a group, like all beetles or stinging pests, into a class

  - **Tech AutoFill:** Have technicians auto-assigned

  - **Tax Autofill:** Have tax auto-assigned

Materials Resources
- Adding Materials

Sources Resources
- Adding Sources

Tax Codes Resources
- Video: Adding a Tax Code

Technician Auto-Fill Resources
- Tech Auto-Fill

SERVICE & SCHEDULING

How you choose to set up and schedule your services can have a big impact on your daily productivity, overall customer experience and reporting capabilities. Is your PestPac set up to provide optimal workflows, create a seamless experience for your customers and allow you to retrieve reporting that has value?

TIPS & TRICKS

- **Make customizations to the way you view your scheduler by adjusting your individual user preferences.** Adjust which technicians you see, how many techs/days will be visible on the schedule, the starting and ending time of the day (with three customizable view settings), and determine what the second line of the appointment should display (choosing from Street, City, Zip, Route, Technician, Service Code, Time or Map Code).

- **Set defaults in the Services lookup tables to provide consistency and more efficient data entry.** You can take the guesswork out of data entry with predefined pricing, durations, materials, follow ups and more!

- **Make it easy to get paid by taking advantage of all of our unique service setup options.** These include payment plans, credit card, split, each, invoice, production and utilizing auto-bill features.

- When applicable, **bundle your services and take advantage of our new Bundles feature.** This allows you to quickly and easily set up a series of services in one easy-to-use window.

Adding Services (One Time and Recurring)
- Adding New Service Setups
- Service Setup Charge Types
- Adding a One-Time Service Order

Posting Process
- Posting Batches: Daily Review and Release
- Video: Posting Service Orders

Scheduling
- Video: Show Your Schedule Some Love
- Video: Scheduling and Servicing
- Video: Using the Appointment Calendar/Scheduler
- Appointment Scheduler - Unscheduled Appointments
- Using Time Blocks in Appointment Scheduler
- Reports for Common Scheduling Questions
- Reschedule Service Orders
- User Profile Preferences
- Additional Features Appointment Scheduler Options
- Change Appointment Scheduler View

BILLING

The fundamentals of any business run on money, and we all know time is money! Come join us and learn more about what PestPac can do for you, including tools that will take your accounting to the next level and help keep you on track.

TIPS & TRICKS

- **Stay organized!** Determine what your processes are for corrective transactions and what reasons to use for more accurate reporting.

- **Eliminate the need** to call customers on expiration dates or to manually update info for a new credit card by ensuring you have Account Updater turned on.

- **Smooth transitions!** Make sure to set up GL Codes with the exact codes you currently have in your accounting software so your accounting totals import correctly.

- **Get paid!** Let the Collection Manager do the work and help you keep track of your outstanding balances. In conjunction with the AR Report, you are bound to stay on top of all accounts.

Reverse Payment
- How to Reverse a Payment

GL Codes
- General Ledger Module
- Video: General Ledger (GL)

Collections
- Collections Module

Corrective Transactions
- Accounting Transactions and Corrections Chart
- Accounting in PestPac: Getting Started

ePay Link
- ePay Link for Invoices and Statements

Account Updater
- WorkWave Payments Account Updater Service
- Turning On Account Updater Service

COMMUNICATION

Communication is the key to having a successful business. Come join us to explore ways to improve engagement, productivity and customer satisfaction through different channels of internal and customer communication.

TIPS & TRICKS

- **Log it!** When sending letters, postcards, renewal notices and other documents via PestPac, make sure to log mailings in order to record that notices were in fact sent out to customers for tracking purposes.

- **Never forget again!** Update your profile settings to customize your screen to view any calls, leads and tasks that were assigned to you.

- **Did you know** that Regulatory Forms are free on PestPac desktop? Regulatory Forms allow for a more professional pre-mapped NPMA and state-mandated forms to be sent to your customers directly from PestPac.

- **Need help keeping track of forms?** Let the Form Tracker do all the work and use it to resend notifications, filter forms and even export information for reporting.

Letters
- Creating Letters

Renewal Notices
- Using Renewals
- Sending Renewal Notices

Form Tracker
- Form Tracker

Documents Tab
- Documents on the PestPac Mobile App

Add Call
- Video: Calls, Leads and Tasks in PestPac
- Call/Lead Indicator Profile Options

Regulatory Forms
- PestPac Regulatory Forms
- Video: Becoming Regulars With PestPac Regulatory Forms

REPORTING

Take advantage of Standard reports, as well as other reports you may have overlooked, to help monitor and grow your business.

- **BUSINESS VALUATION REPORT**
  - Get a quick, on-demand report of how many recurring services you have, along with corresponding monthly and annualized revenue.

- **MOBILE TIME CARD REPORT**
  - Monitor technicians' usage of the mobile app. Useful to audit accuracy of timing in and out for each day and service order, as well as material usage.

- **INVOICE LIST VS. INVOICE REGISTER**
  - Know when to use an Invoice List and when to use an Invoice Register.

- **REPORT GALLERY**
  - Add any commonly used report to the gallery for ease of running. Remember you can link a custom Report Writer Report to the Gallery, as well.

Business Management
- Standard Reports - Business Management
- Standard Reports - Accounting

Report Gallery
- Adding Standard Reports to Report Gallery

"YOU CAN'T WIN THE GAME
if you don't know what the score is."

MOBILE

PestPac Mobile is where work gets documented in the field. Create consistency and save time all at once. These tips can ensure accuracy while saving your field staff time in their day!

- **SAVE TIME FOR YOUR TECHNICIANS IN THE FIELD**

  - Auto-fill Tech Signatures so they no longer need to sign each service order. Use Instructions for Tech Comments to deliver a consistent message to your customers.

- **SAVE TIME WHILE GIVING TECHNICIANS INDEPENDENCE FROM THE OFFICE**

  - Rescheduling Service Orders gives technicians the ability to manage their routes. Creating Locations and Service Orders in the Mobile App eliminates the need for field reps to call or email the office to enter necessary information to sell new service.

PestPac Mobile Resources
- [PestPac Mobile App Usage](#)
- [PestPac Mobile App Usage Video](#)

TOOLS IN THE TOOLBOX

Do you often find yourself doing data updates manually? In this section, we will cover tools that allow you to make mass changes more efficiently and effectively.

TIPS & TRICKS

- **Familiarize yourself with the tools** at your disposal that can save you time and maximize your efficiency.

- **Save time by reducing** manual edits to data as your business grows and processes change.

- **Taking advantage of tools** means less human error. Provide consistent and accurate updates, every time.

Data Update Utility
- Data Update Utility
- Video: Data Update Utility

Change Technician Utility
- Change Tech Utility

Geocoding Utility
- Geocoding Utility

Merge Bill-To and Locations
- Merging Locations and Bill-tos

RECAP
AND RESOURCES

PestPac Usage

Click here for a comprehensive PestPac Guide.

PestPac Training

Click here for more tips and tricks on training new hires on PestPac.