

Alerts



How do you NOT forget to followup on something you promised for a Customer or Agency? Use PestaRoo's Alerts! They allow you to create reminders for any date in the future for any Customer, Agency, Staff or Vehicle! And when they do come due, it shows up as a red labeled button on Home Page!

What are Alerts?

Alerts are reminders of things you need to do for some date in the future. You could think of them as sticky notes or bulletin board notes that suddenly appear when they need to be done. Each Alert is connected to a Customer, Agency, Staff member, or Vehicle.

One of the keys to any successful business is learning to take personal responsibility for every customer. "How can I help you?" and "I can do that for you." In reality, that is your most critical job. If you take good care of your customers, all your other business problems will diminish.

Keeping track of all these promises can be challenging. PestaRoo's Alert system was designed to help you remember what you need to do for every customer and when.

Although most Alerts are used for Customers, they are also valuable for keeping track of things to do for Agencies, Staff members, and Vehicles also. Each of those occasionally have date-based tasks needing to be tracked.

Lastly, Alerts can also be automatically created on a repeating basis. This is great for those things we need to do on a repeating basis. (Note: Repeating Alerts do not apply to WOs as they have the full PreSched system.)

Creating an Alert

On many of the common layouts in PestaRoo you can create an alert with one click. Look for this symbol throughout PestaRoo:



This yellow triangle is PestaRoo's symbol for "Create an Alert". When you click on it, a new window opens where you select a date and text message for the alert. This "Create Alert" button is found on at least 50 layouts.

The type of Alert that is created depends on your context. If the yellow triangle is next to a Staff name, it will create a Staff Alert. If it is next to a Customer name, it will create a Customer Alert. If it is on an Agency screen, an Agency Alert will be created. And lastly, if it is next to a Vehicle name, a Vehicle Alert will result.

In the new window, your cursor will be waiting in the **date** field. You can type any date you prefer. Note that when typing a date you can skip typing in the year for dates in the current year. Thus, if you type "5/15" FileMaker will automatically assume the current year. Or, you may opt to use the pre-configured 'insert date' buttons. There are ten of these. Each of the 'insert date' buttons automatically skip Saturdays and Sundays. PestaRoo is smart. So, if you click "1 Day" on a Friday, it will set the date as the following Monday. But if you do want a weekend date for the Alert, you can type in the desired date.

After you have selected a date, you will type in the **text** of your Alert.

When you've completed typing your alert, click 'Save' and the Alert Window will go away, returning you to your prior work.

If you click 'Cancel' the Alert will be deleted and you will be returned to where you were.

Viewing Alerts

Alerts can be viewed as a group from Home Page, or from the individual record that they are associated with (Customer, Agency, Staff or Vehicle.)

From Home Page a 'Live Stat' button (along the right side) changes to indicate that you have, for example, '3 Alerts', with the lettering on this button changing to red to help catch your attention. The number on the button is the number of Alerts that are due now, or past due, and have not been marked as 'completed'. So, Alert Dates in the future are invisible to this button. And all 'completed' alerts are also invisible to this button.

Option: From Home Page, you can also click to "View Uncompleted Alerts" this takes you to the same Alert List screen, but shows those Alerts that are uncompleted, irregardless of their date. If you have no Alerts that are ready, this button is the only way to view the list of upcoming or 'uncompleted' alerts.

Option: From Home Page, if you hold down the 'shift' key while clicking the Alert Live Stat button, it will show you all Alerts.

Completing an Alert

When you click on the 'Live Stat' Alert button, it takes you to a list of those Alerts where you can read the text of what you are reminded to do. As you complete the task, click on the **Completed YN** box. This box tells the Live Stat Alert button to ignore it from now on. Should you inadvertently click to 'complete' the wrong Alert, you can 'Reset' the completing info also.

A footer button to 'View All Incomplete' allows you to view all incomplete records regardless of date. This is handy for viewing up and coming Alerts.

Another footer button allows you to 'Show All' alerts. This is useful for looking at recently completely items.

Within each Alert, a Blue Triangle allows you to jump to the related Customer.

Also, within each alert you can edit the date to allow you to postpone it till a later time.

Viewing Alerts for a Record

Each Alert belongs to a Customer, Agency, Staff, or Vehicle. So, if you go any of those records on a Data Entry layout, you can view all of the Alerts that 'belong' to the single record you are on. The Alerts are visible by clicking on the 'Alert' tab. The tab label also shows the count of Uncompleted Alerts for the that record. For example, if you are on the data entry layout for Customer John Doe, you can view all of John Doe's Alerts. If you are on a Vehicle record you can view the Alerts for that Vehicle.

Repeating Alerts

From the Data Entry screen of any of the four areas that support Alerts, you can also create a repeating Alerts. First, click on the Alert tab to view the Alerts. Next, click on the button 'Repeats'. This opens a new window where you can create or view Repeating Alerts for you current record. Click on the '+' button at the lower left to create a new repeating Alert.

A new Repeating Alert needs 6 fields filled in:

- Interval
- Month Number for next Alert
- Day number for next Alert
- Year number for the next Alert
- Text of the Alert
- Status ('Active' by default)

The **Log** is filled in automatically as the Alerts are created.

If you type a '3' in the **Interval** field, PestaRoo will create a new Alert every three months, starting with the **Month, Day** and **Year** you enter. If you do not type in the 'Next Alert' fields, PestaRoo create the first Alert on the first day of the next month, and then use your entered **Interval** for the subsequent Alerts.

See Repeating Alert Examples below.

Alert Examples

Remember that Alerts are always hooked to specific record, so, think of those things you need to do for a customer (or Agency, Staff, or Vehicle) in the future.

- Someone calls about one of your contract services. You might use an Alert to remind

yourself to call them back in a week to try to close the sale.

- Call someone to whom you sent a Quote, to make sure they received it.
- As you post an invoice, you realize that this customer would be a good prospect for an additional service. You create a '1 day' or a '3 day' alert to call them when you have a bit more time.
- One of your technicians reports that his trucks wipers will need to be replaced by next month.
- Some customers need servicing every couple months on a variable basis, and they need to be called to schedule an appropriate time. You could easily use an Alert for this. In this example this would be much like a PreSched, but it would create an Alert instead of creating a WO.
- A slow pay customer promising to pay on a certain date might need an Alert 3 days after that date to make sure the payment arrived.

Repeating Alert Examples

If your company does real estate inspections (typically for termites) this work is critical for bringing in new customers. Working with the various local agencies can insure you get a lot of these inspections. Quarterly or annual 'Thank You' letters or reminders are always a good idea.

- You want to send a pricing guide to a couple key real estate Agencies every twelve months.
- You want to send a thank you letter every 6 months to your Agencies for their referrals for inspections.
- A valued customer would enjoy a card on their birthday or anniversary every year.
- Reminders of annual or biennial relicensure dates for a staff person would be helpful Alert.
- Staff Birthdays
- Service a vehicle every 2 or 3 months.

Monitoring and Debugging

If you are interested in 'behind the scenes' info, or you want to double check if/how the Repeating Alert system is working, you can go to:

Home Page >> Set Preferences >> Trigger Dates tab.

This tab contains info on those functions that are associated with the AutoTrigger system. The AutoTrigger system runs once per day and is responsible for PreScheds, Renewals, Letters, and Repeating Alerts. The date that the AutoTrigger last ran is located in the top section. But lets focus on the Repeating Alert section.

The trigger for creating Repeating Alerts runs on the first day of each month that PestaRoo is launched. After the trigger runs, the **Last Trigger Month Number** is set to the current month number. This field allows you to see when the Trigger last ran. This field also precludes the Repeating Alerts from running more than once in a given calendar month. If you clear this field, the Repeating Alerts will be re-triggered the next day that PestaRoo launches. The other field in this area is a **Monthly log**. The **Monthly log** give a list of the dates of triggering and the number (in red) of Alerts created.

Conclusion

In the real world, the phone tends to ring and emails arrive faster than you can take care of them. Use PestaRoo Alerts to help take up the slack and preclude you from forgetting key tasks for your Customers, Agencies, Staff, and Vehicles. The convenient yellow triangles are placed throughout PestaRoo to make it easy to quickly create Alerts. Then you can take care of those issues when you do have the time.... Alerts will help you manage your business better!