

Working With PreScheds



PestaRoo's PreSched system automatically creates Work Orders for you via recurring intervals. With PreScheds you can control every aspects of these auto-created Work Orders. Never miss another service call again! The PreSched system is a very effective tool in boosting your sales.

Overview

Each PreSched is a service for a customer at some location that needs triggering on a recurring interval. The interval may be any number of weeks (weeklies) or any number of months (monthlies). Each day when PestaRoo launches, all the PreSched records are evaluated for timeliness. Those that are ready, are used to create a WO (and /or an Invoice). Each created WO will have an **Actual Date** or an **Approx Date**. After the WO is created, a log entry is made showing that the WO has been created and its WO ID. Next, the original PreSched record is updated for the **Next Trigger** for WO creation. The PreSched system does not print the WOs, it merely creates them, leaving them either in the Schedule Book or in the Unscheduled Call list.

Why use PreScheds? Every pest control business has some number of 'misses', where you should have gone back to a customer, but forgot, or routine stops that were forgotten. The PreSched system can dramatically reduce these misses and thus boost your sales year-in and year-out.

Setting PreSched Preferences

From Home Pages click on "Set Preferences", and then the "Trigger Dates" tab. The following fields affect the PreSched System:

Auto-Trigger Computer Name: By default this is empty. For companies with only one computer running or connected to PestaRoo, this should be empty. If you have two or more computers, you need to specify which computer 'triggers' all the auto-triggers, which include the PreScheds. Usually this is the first computer

turned on in the morning. To find your computer's user name, look under the FileMaker preferences.

Days Out: (Weeklies only) The number of days after the trigger date that PestaRoo assigns the Approx date or starts looking for a valid Actual Date.

Months Out: (Monthlies only) The number of months (0, 1, or 2) from the first of the month of the trigger date that PestaRoo assigns the **Approx Date** or starts looking for a valid **Actual Date** if you have set the actual date preferences.

Selecting the Interval

Each PreSched will trigger after the number of months or weeks that you select. So, for example, you can set up a WO quarterly by typing in '3' in the **Months**. If you want to have a retreatment every 5 years, put in '60' in the **Months**. (The maximum number of months is 84.) For an every other week WO you would enter a '2' in the **Weeks**. For annual service you could type 12 in **Months** or 52 in **Weeks**.

You may also select when you want the **Next Service** to be. Monthlies and weeklies each have their own **Next Trigger** field. This is handy for determining when a WO should trigger for a customer new to PestaRoo but where you have recently provided service. For monthly PreScheds this will be a month number (1-12). For weekly PreScheds this will be a specific date. This means you can select when you want the PreSched to start triggering and how often it happens. **Next Trigger** is normally blank on new PreScheds. For example, **Next Trigger** might be used when setting up a new quarterly

PreSched where you went 2 months ago. By typing in next months month number, we know that the PreSched system will trigger then. Important Note: When setting the initial **Next Trigger** don't forget to allow for the Months Out value which is normally "1". So, if you are wanting a March WO and your **Months Out** is blank or "1" (which is the same), then you would set the **Next Trigger** to "2". If your **Months Out** was "0" then you would set the **Next Trigger** to "3". These examples would create the March-dated WOs that you want.

Actual Dates vs Approx date.

By default, PreSched created WOs have **Approximate dates** only and will be "Unscheduled". (Thus they will NOT land in the Schedule Book.) This is to allow you to do the actual final scheduling yourself based on your current schedule and work load. Since, conceivably, the PreSched system creates WOs every day, how do you find those Unscheduled WOs so that you can schedule them? Go to Home Page and click on "Find Unscheduled Work Orders".

What if you want PestaRoo's PreSched system to do the Actual scheduling? Easy! On each PreSched record you may optionally select the Actual Date Preferences. You may select the **Week of Month**, **Day of Week**, and even the time of day! All these fields are blue in color and grouped together. As long as you select the **Week of Month** or **Day of Week** PestaRoo will then convert the **Approx Date** into the first **Actual Date** that meets your preference.

Triggering

PestaRoo keeps track of two different types of triggers: Monthlies and Weeklies. Every PreSched record must be one or the other. Monthlies are triggered the first day of the month that PestaRoo launches on the specified computer. The monthlies do not trigger again until the next month. So, monthlies trigger only once per month. What if you don't launch PestaRoo on the first of the month? The Monthlies will trigger on the first day that you do launch PestaRoo. Note that if you don't launch PestaRoo till later in the month, PestaRoo will calculate the WO dates as IF you had launched on the first of the month.

Weeklies trigger in a similar fashion but, they trigger every Thursday. In other words, every Thursday the system looks for PreScheds that are ready to build WOs. If the PestaRoo is not launched on Thursday, then Friday or Monday is used.

What happens upon triggering? PestaRoo goes through every single PreSched record and creates WOs and/or Invoices for ONLY those that are ready, according to its **Months** or **Weeks** value and its **Next Trigger** value. Only when appropriate will the actions occur. This is one of PestaRoo best features. The PreSched system is remarkably flexible.

To review when PestaRoo monthly and weeklies have triggered, go to Home Page >> Set Preferences >> Trigger Dates. There you will find logs showing the last Monthly and Weekly trigger dates. This is a good place to become familiar with the triggering dates. After a given record triggers, its **Next Trigger** is reset by the **Interval**.

Typical Data

PestaRoo allows you to enter nearly any information in a PreSched that will subsequently be passed onto the WO and/or Invoice. Here is a list of the most common fields that are typically filled out in a PreSched record:

- Customer ID
- Location ID
- Technician ID
- Pests
- Amt of Charge
- Service
- Notes Display and Notes Confidential

Each of these fields and their contents, will pass on to the WO and then, subsequently, on to the Invoice. That this data is so quickly transferred, saves you lots of time preparing the WOs and saves your technicians time.

Trigger Single Button

When setting up a single PreSched record for the first time, you might want to cause a WO to be created right now for the current month or week. Then when the next month comes along the PreSched system will take over. This button is called "Trigger Single".

Other Options

Create Invoice: By default this is 'yes'. If you change this to 'no' then an invoice will not be created as you print the route sheets.

Invoices but No WO: If you have some work that you do every day or week and do not need WOs for it because it is so routine, then set this field to 'yes' and PreSched will make the invoices (perhaps once a month) while you do the work without WOs.

Exclusions

There are three methods of exclusions in PreScheds. First, you can change the **Status** to 'Inactive'. So long as this is inactive it will be totally ignored by all the PreSched scripts. This is better than deleting, which we avoid doing in PestaRoo. By deleting we lose all evidence of what we have done in the past. As a general rule, don't delete records. Records with **Status** set to 'Inactive' do not trigger.

Excluded Months are for seasonal businesses where, for example, they don't want your services during the months of Jan, Feb, March. You click the months to be excluded. **Excluded Months** need to be contiguous (side by side). They apply year by year indefinitely. Records with **Excluded Months** still trigger, but do not create the actual WO. They are also logged with an (XX) after the date.

An **Excluded Range** is typically used for short vacations of the customer. They only apply for one time for one date range. Records with **Excluded Range** still trigger, but do not create the actual WO. They are also logged with an (XX) after the date

An Alternative to PreScheds

Some companies choose to use PreScheds in PestaRoo only occasionally. How do they do this, and why? The short answer is that they always 'advance schedule' from within the invoice before they post it. Here's how they do it:

After entering the information from the technician who has completed a work order, they use the 'Create WO' button at the lower left of the invoice data entry to create a future work order. This button is located in a special area of

the layout, called "Next":

This new WO will match the current invoice, including such info as the customer, locations, service, technician, and pests. But you get to select a new Amount of Charge, Approx Date, and Notes.

After you click on the Create WO button, a "r" will appear beneath the button indicating that a WO has been created.

As long as you haven't posted the invoice, you can create multiple advance WOs from a single invoice. For example, you might want to schedule a follow-up visit in 30 days and at 60 days. To do this, you'll create the 30-day WO and then press the button again to make the 60 day WO. A blue 'Jump-To' triangle is provided to allow you to go to the advance WO.

So, when do you use the PreSched system and when do you use the Create WO from Invoices? The general rule is that if you are only going to return once or twice, schedule from the invoice before posting. But, if you are going to service this customer on an ongoing basis, then use the PreSched system.

One final comment about the two approaches: Scheduling from an Invoice will always make the WO land with only an **Approx date**. This means it will land among the unscheduled WOs waiting you to call the customer for the exact time and date. If you schedule from the PreSched system a WOs can land with **Approx Date** or **Actual Date**, depending on whether you have entered Actual Date Preferences.

Sample Monthly Set-Up Example

Let say you have a couple hundred jobs which you need to do once a month, every other month, or quarterly. We'll go through the process of setting these up with the ideas and options behind our choices. PestaRoo's PreSched system has tremendous flexibility and many dozens of options. But here we will focus on the basic features so you can get up to speed

quickly. We will assume that it is now the middle of the month, and we are preparing for the first of the next month triggering. (Monthlies trigger on the first open day of every month and that is what we want to get ready for.)

- 1) Create the PreSched records for each job. This is easiest from the Location portal of customer data entry. Click on "PreSched" in the 'new' column to create a PreSched record for this customer and location. Set the **Service, Amount of Charge, Technician, and Interval**. Remember, for monthly customers set the **Interval** to '1', quarterlies to '3', etc.
- 2) Set the **Months Out** to '1'. This is how far in advance the PreSched system creates the WOs. We could set this to '0', but then the PreSched system might schedule work for today, when your technician has already left, or for tomorrow, which might already be full. '1' in **Months Out** puts the new WOs far enough out that you can adjust your schedules easily. Some companies set this to '2' so they will have two months to tweak their schedules. But for this example we will use the most common setting of '1'. By the way, this **Months Out** field can be set in Home Page Preferences. You will probably set this once, and then never again change it.
- 3) Setting the **Next Trigger** field. This is what determines when the PreSched system 'starts-up' for a given record. For monthly service you'll leave this blank. But for quarterly or semi-annual service you'll want to see when you last serviced this account and calculate the **Next Trigger** by subtraction. Remember to subtract out the value in **Months Out** so that the **Approximate Date** of the WO matches the month when you need to service the account.
- 4) Press the "Trigger Now" button to create the WO we will need in about two weeks. So we will manually create the first WO and then the PreSched system will create all subsequent records.
- 5) Setting Actual Date Preferences. These values are used by PestaRoo to find the correct **actual date**. If left blank, the WO will be left as unscheduled. For our example, let's fill them in. A typical use would be to pick the 3rd week of the month on Tuesday at 9:00

am, with a duration of 1 hour. If these four fields are filled in, our example WO will be created and scheduled for that time at every trigger. You will normally fill in all four fields for a monthly. But, you will skip the **Week of Month** if it is a weekly.