

# Schedule Book and WOs



PestaRoo's Schedule Book lets you manage any number of technicians quickly, with a visual interface. It displays his/her Work Orders (WOs) for any date, in time order. It includes Hot Links for Routes, Blue Triangles for navigating, and buttons for instant scheduling on any Tech/Date combination.

## History

PestaRoo's Schedule Book is one of its most popular features. It combines simplicity with an instantly familiar visual approach. In the recent past, most pest control companies used large paper notebooks for keeping track of their technician's schedules. Each page would typically include information on 2 or 3 technicians. Each date would be on a separate page. There were several problems with this paper system:

- If you had several technicians you often needed to have multiple books open at once on your desk.
- Schedule changes involved a lots of 'crossing-out' and erasing. It was very difficult to reschedule without making a mess.
- There was no way to print the list for your techs
- They were very difficult for multiple office people to use concurrently.
- There was no easy way to make notes about a specific appointment, or add directions.

PestaRoo's Schedule Book was designed to address all of these short comings and more.

## Assigning Staff

To put any staff onto the Schedule Book, merely set the **Schedule Book Flag** to "Yes". This field is on Staff Choose Name and also on Staff Data Entry. The staff person also must be "current". Changing the **Schedule Book Flag** to "No" removes them from the Schedule Book, but does not delete any WOs associated with that technician.

## Fixed vs Dynamic

From Home Page >> Set Preferences... >> 'Schedule Book' tab, you can choose between 'Fixed' or 'Dynamic' pages. If 'Fixed' you control who is on each page by selecting them one by one. If 'Dynamic' the software automatically places them in the schedule book by staff creation order. The vast majority of PestaRoo users use the default setting of Dynamic. The primary use of 'Fixed' is to allow you to move a recently hired tech to the first page, instead of the last page. Or, where you want to control the order that Techs appear in your Schedule Book. Caution: If you use 'Fixed' you have to add/remove/move any staff after every staff change.

## Going to the Schedule Book

From every page in PestaRoo there is a button at the lower right corner to go to the **Schedule Book**. This button is on every layout because we don't know where you'll be when the phone rings with a request. From Home Page, there is also a button to **View the Schedule Book**. Every time you launch PestaRoo, the Schedule Book **date** is reset to today's date.

## MultiUser Ready

Each user of PestaRoo in your office has his/her own view into the Schedule Book. Changing the date on one computer doesn't effect the other computers.

## Navigating to Any Date in Schedule Book

On the Schedule Book page click the button **Today** or **Tomorrow** for single click date selection.

To navigate forward or backward one day at a time, use the Blue Triangles that are adjacent to the Schedule Book **Date**. When navigating via the Blue Triangles, PestaRoo automatically skips Sundays.

To jump to any specific date, past or present, click into the **date** field, and type in the desired date with this format: MM/DD/YY. Or, click into the tiny calendar icon next to the **date** to select a date from within a traditional calendar. Once you see the date you want in the drop-down calendar, double-click on the date to use that date in your Schedule Book.

## Navigating Between Pages

At the lower outside corner of each page is a large blue **Arrow** for navigating between pages. If the arrow is gray, it is disabled.

## Adding Appointments

Any WO with an **Actual Date** and a **Tech ID** will immediately appear on the proper Schedule Book page. PestaRoo allows us to create WOs for the Schedule Book from at least 6 places:

- ✓ Schedule Book page itself
- ✓ Customer Choose Name
- ✓ Location Choose Name
- ✓ Location Portal on Customer Data Entry
- ✓ PreScheds
- ✓ While Posting an Invoice.

Each of these can be used to quickly create WOs for the Schedule Book.

## Actual vs Approx Dates in WOs

**Approx Dates** are estimates when you will need to go to a customer, but where the **Actual Date** hasn't been scheduled with the customer. Only WOs with **Actual Dates** appear in the Schedule

Book. See the support doc "15 Quick Concepts." for more on **Approx Dates**.

## Assigning Routes and Locking

A drop down list to the right of the Technician's name allows you to assign the **Route** for that Tech/Date. To lock a day so that no more WOs can be added, click on the padlock icon.

## Hot Links

In the upper right of Schedule Book appear your Route Hot Links. If these are set up, a single click allows you to jump to a special Schedule Book page where you can view all the dates where you will be going to the Route.

## Generic WOs for Company Notes

PestaRoo supports notices for the Schedule Book like 'Company Meeting Today' from 3-4 pm. Or, 'Change Oil in Truck'. To create one of these Generic WOs, start on the Schedule Book and click the "+" button near the lower spline of the desired tech/date. This will create a blank WO that we will use for the Generic message. But this WO will not need a Customer ID or a Location ID like normal ones. Instead, you will type into the field **Generic WO Message Text**. Whatever you type here (up to about 200 characters) will appear on the Tech's Route Sheet, but will not cause a WO to print.

## Rearranging a Single Tech's Day

At the bottom of each Tech's page is a **View All** button. Clicking this button brings up a list of all WOs for that Tech/Date on Choose Work Order. From this list you can easily change the start times or duration for any WO. You can also change the **Tech ID** and the **Actual** or **Approx Date** fields.

## Editing a Single WO

A blue triangle next to each WO takes you to the WO Data Entry screen where a single WO can be edited.