A Typical Day with PestaRoo

Let's take a walk through a day at a typical company with three technicians but only one person in the office. We will review those things that mark a normal day and how they fit into the general flow. We'll look at a handful of tasks that PestaRoo will help you manage.

Note: What is typical? There are many ways to use PestaRoo to run your pest control business. This article describes the most common approach we see. PestaRoo support many other approaches. So here we go...

Technicians Depart

You need the technicians to get right into their trucks and out into field to take care of customers. Technicians in the office make no money. Having printed the Work Orders (WOs) the night before helps to get them out the door. Each WO is a two part form with the name and address of the service and a list of the eight most likely products that the technician will need for the call, based upon the service to be performed. The WOs are to designed to provide your technicians with everything they need to complete their work effectively. Even the last treatment date for the location is provided. Atop each stack of WOs is a Route Sheet. The Route Sheet summarizes their entire day, in order. It includes notes from the customer's call, directions, and potentially confidential information, and contact numbers if you need to call the customer. You want the technicians to grab their WOs and go!

Launch or Relaunch PestaRoo

If you leave your copy of PestaRoo open at night for remote access, you'll need to quit and relaunch. This resets PestaRoo. You'll need to launch PestaRoo every work day. The series of things that PestaRoo does each day always triggers at the first file launch of the day (but only the first file launch).

Check the Printer

PestaRoo does a lot of things automagically on file launch: Prints Thank You letters, Agreement Renewals, Late Payment notices, Call Sheets, creates PreScheds, updates Late Pays, updates Agreements, and others. Any or all of these could start printing the moment you launch PestaRoo in the morning. So, check the printer, stuff the envelopes and run them them through the postage meter (or put on stamps).

Processing Yesterday's Work

Once the technicians are out the door and the printer has been taken care of, it is time to post invoices from yesterdays WOs. Expect to spend the morning doing this, because as you work your way through all of yesterday's WOs, you are also making payments, taking more phone calls, and scheduling followup work. PestaRoo makes it easy to manage all four of these tasks concurrently, but you'll be busy! Lets look at Posting Invoices, Making Payments, Followup Scheduling, and Taking Calls, in turn. But, in reality, they all happen simultaneously! So we'll also address managing Interruptions.

Posting Invoices

When your technicians came in last night they will have brought in one copy of each WO, and hopefully with a check-paper clipped to many of the WOs. The notes of their work, the products they used, service charges, and followup dates need to be entered into PestaRoo.

A Live Statistics button on Home Page, "Un-Posted Invoices" makes it easy to quickly go to

those you need to post. This button leads you to a list where you can quickly pick out each WO to post. In essence, posting the invoice is a quick process where you summarize what was done and how much the customer was charged. Since most WOs involve the use of only one or two products, you can finish posting an invoice from a WO in two or three minutes. When you printed the Route Sheets the night before, PestaRoo automatically created the corresponding invoices and filled in most of the information for you. So you are left mostly with product usage info to enter.

If no payment is with the WO, your last step is to "Post" the invoice. This completes it and sends the invoice to the Accounts Receivable system to wait for payment.

Making Payments

In many cases the technician will have brought back a payment. In this case you use the "Post and Pay" button on the invoice info screen to complete two tasks at once. This button Posts the Invoice and takes you to blank payment for that customer where you can also post the payment. Click "Pay" next to the invoice they are paying, type in the check number, and click post. The payment screen lets you see any open invoice this customer may have so you can pay the current invoice and /or any previous invoices. You also can accept partial payments. After posting a payment, you land on Customer Choose Name where you can select your next Customer or return to Home Page and the other UnPosted Invoices. Notice how fast you can enter a payment. With the phone frequently ringing "off the hook" posting invoices and payments has to be quick and easy.

Followup Scheduling

A good technician always marks on the WO when the customer would like us to come back. This is followup sales and is critical to quality customer service. It might be a return visit in 30 days, or 6 months or a year. But, ideally, every WO should come back to the office with a tentative return visit written in the upper right corner. As you post invoices you can also do this followup scheduling. PestaRoo provides a set of tools to use the current invoice as the basis for a

future WO. This is wonderful, because all you have to do is pick the date (approximate or actual) and PestaRoo will transfer all the appropriate information and set it up. Quick and easy.

Taking Calls

As you have been taking care of yesterday's work, the phone has been ringing and probably more than a few people have walked in the door. Let's go through a typical call.

If your caller is a known customer you'll immediately go to the Customer to review any future WO's and then go to the Schedule Book. Because the Schedule Book is so important, it has its own link on every page and screen. As you are talking to your caller you can go to any date with a single click on the drop down calendar. One more click on "+" on a technicians page adds a blank WO to the schedule! Or, just as handy, you can click on the Hot Link for his/her city, and view all the different times your techs are going to be in her city or area!

If you've created a blank WO for a date, you need to tell the software who it is and where the work is to be done. Clicking to the **filter** field and type the first couple letter of his name. If you are talking to "Mary Doe" you'll type "do" or "doe" then tab into into the **Customer ID** field. You'll get a drop-down list of all of your customers whose last name starts with "do" or "doe". This makes it easy to quickly filter down to similar names so you can click on the correct one. Then, you'll tab into the **Location ID** field where all of Mary Doe's addresses will drop down awaiting your selection. Lastly, you'll pick the service type, the pests, and whatever else you choose.

If you are not sure if she is already a customer, go to Home Page >> Customer Choose Name. Type in part of their first and last name, then press enter. So for "Alice Johnson" you might type "alice jo". PestaRoo allows very fast finding based on only partial names. If you do find her, you can then jump directly to the schedule Book as above. If she is not in your system (be sure to check carefully!), then put her in as you talk. Be sure to also create her location record (one click) and set the tax jurisdiction in location info, then go on to the schedule book

from the location to schedule the appointment. The nice thing about coming from the location is that the **Customer ID** and **Location ID** will already be entered for you.

One of the things that makes the Schedule Book so effective is that you add records to it from so many different directions: Customers, Locations, Invoices, Work Orders, Schedule Book days, or even Routes. Each of these approaches has its own advantages. You'll probably use them all at one time or another. Here is a hint to help you when learning to schedule WOs for the Schedule Book: all of the required fields are marked with blue asterisks.

Interruptions

Yes, they happen! You are in the middle of setting up a Work Order when the phone rings and you jump to help the new customer. After you get the new customer put into PestaRoo and scheduled you want to return to your previous work, only to discover you can't remember which record you were working on! Yikes! PestaRoo can help us here, too, because it keeps track everything you do, in order. In this example, go back to the Work Order Info screen and find all records modified today. (Enter Find, click into Data Modified at the top of the screen, type in todays date, press Enter to perform the find.) Click through those records and you'll quickly find the last one you were working on.

PestaRoo tracks date, time, and user on every Info screen. So you could find the record that "Sally" modified between 2 and 3 pm on a certain date! Nifty.

When you are interrupted, using modification date and times is a great way to get back to where you were!

Schedule Some Unscheduled

It is very important to recall that there are two types of schedules dates for WOs: Actual and Approximate Dates. Actual Dates are for those WOs that are already on a specific date in the Schedule Book. But when scheduling from Invoices, and from the PreSched system you may get a lot of records where you only have approximate dates. Effectively these records are in limbo, waiting to scheduled with an actual date. Once a week, you need to print out these approximate date WOs so they can be scheduled. Typically, you'll print out this list every week, and then spend a little time each day calling customers to get them on the actual schedule. To print this list, go to Home Page >> View Unscheduled WOs. Then click "Print Found as Call Sheet". Now call a few customers and get them onto the schedule!

Payments via Mail

When the mail comes, you'll probably have some more payments to post. Since they will not be with WOs you will find the customer by Customer Choose Name, then click on the button to Create Payment and then pay the invoice(s) as before.

Sometimes a check comes in the mail where the account name doesn't seem to match any name in PestaRoo. This is common where a person owns a separate business and uses a company check to pay for something that you had under his personal name. There are several ways to track this down. You could search by city or address. Or you could go Customer Choose Name and search by **Balance Due**. Once you have the actual name on the invoice you can go back to Customer Choose Name and create a payment.

Note: Throughout PestaRoo we have provided hundreds of "jump to" blue triangles. So to get back to the customer from an invoice, it is a single click on the blue triangle.

Make the Deposit

Most companies make a deposit any day that they have two or more checks. PestaRoo makes this an easy process.

Every time you post a payment, PestaRoo flags that payment for the next deposit. Once a day, when it is time to do the deposit, you will go to Home Page and click on the live stat, "Payments to Deposit". This Report will print and summarize all payments ready to deposit, and clear the flags behind the scene so you are ready to print another deposit report tomorrow! This process is and must be very fast and smooth

since you will probably be doing it every day. Fill out whatever your bank requires and zoom to the bank. Most companies keep PestaRoo's deposit reports in a notebook, in order, as part of their cash accounting system.

Now you are down to the last two key steps of the day: Printing Work Orders and Route Sheets and making a backup. Once you complete these two, you are basically done for day.

Printing the Work Orders

Once each day you need to print Work Orders for the next work day. Try do this as late in the day as possible, to allow as many last minute schedulers to get on the schedule as possible. You want the technicians to have full, but manageable days.

To print Work Orders, start at Home Page and click "Tomorrows WOs". This one button will find all the WOs for tomorrow and present them in a list view to take one last look at. Next, put blank NCR paper White Yellow, White Yellow, White Yellow, etc., into the printer. In the button bar, click on the printer button and select, "Print Found as WOs" This will sort them by technician and by time and then print the doubles copies on the NCR paper. You'll separate the piles by technician.

Warning! According to NCR, their paper is more flammable than normal paper, so each technicians WOs should be immediately removed from the printer and separated into individual piles. This helps them cool.

You will give the technicians both copies of the WOs with their Route Sheets.

Print Route Sheets

After you have separated the piles of WOs, pull out the NCR paper from the printer and put the normal paper back in. This time, in the button bar, click on the printer button and select, "Print Found as Route Sheets". This will print 2 copies of each one. One for you, and one for each technician. Add one to each technician WO pile and you are done!

Add a Last Minute WO

What happens if you get a last minute call right after you print the WOs and Route Sheets, and before you can get out the door?! It will happen! And frequently it will be for tomorrow: "Can you possibly squeeze me in tomorrow??" You will hear that sentence a lot! Here is how you handle this last minute scheduling: First, put it on the Schedule Book. Next use the blue triangle to go to that WO where you'll click the button "Print Single WO". You'll finds this button up in the list of WOs. The neat thing about this button, is that it Prints the WO, and it also creates the corresponding invoice. You could re-print the Route Sheet for this tech without creating another set of invoices, but most people just write the addition on the route sheet.

Make Backup and Go Home!

At the close of business, you'll quit FileMaker (and thus also PestaRoo.) You must close PestaRoo in order to make a full backup. If you have more than one computer running PestaRoo, you'll quit everyone else, and then, lastly quit FileMaker on your machine. Making this Backup is critical for every day. Do it every day. We recommend burning a CD-R or using a small portable hard drive and taking it home at the end of the day. You will never reuse the CD-R, but they only cost 15-20¢ so don't be tempted to double-up your backups. One CD-R per day, and take it off site.

If you will be connecting from home, you'll re-open PestaRoo before you leave, so you can get in remotely.

Hooray! You've journeyed through another day!