

Custom Treatment Areas



Treatment Areas appear as checkboxes on your printed Work Orders. These may be customized for each Work Order and even at the PreScheds that create Work Orders. This can be a nice time saver for your technician while improving upon your company's disclosures.

What are Treatment Areas?

Treatment Areas (TAs) are pre-defined checkboxes that appear on every Work Order (WO). They typically include values like 'Kitchen', 'Crawl Areas', and 'Foundations'. These pre-defined check boxes allow your technician to quickly mark those areas where he (or she) applied the treatment. This not only meets governmental requirements but also helps save time for your technician. In addition the customer has a quick and easy to read assessment of your work.

With PestaRoo, the list of TAs is based on a value list, meaning that you can modify that list. You might have a short default list of TAs that are usable on your residential customers. But then a longer list that is used for selectively adding to individual WOs or even PreScheds. This support article is focused on how to manage those lists of TAs.

Adding or Changing TAs

From Home Page >> Value Lists >> Treatment Areas, you can add or change any treatment area. Like all other PestaRoo value lists, there is a 'New' button at the top of the screen. Note that the TAs names are limited to 20 characters each. If you type more than the 20 allowed characters, PestaRoo will reduce your name to the character limit. This is to allow PestaRoo to print three rows of three TAs. Previous versions only had room for 14 characters. The additional 6 letters is a big improvement.

Notice the field **Default YN**. Setting this to 'Yes' puts the current TA into the default list. (This

means it will automatically appear on all new WOs where you don't customize the TAs.) The TAs that you select as 'Default' should describe your most common type of work. If most of your work is Residential, you'll want a list that refers to households areas. If you do mostly commercial work, then change your default set accordingly. Some companies with a mix of residential and commercial accounts select several residential TAs and several commercial TAs.

Intentional Blanks

A normal WO has room for 9 TAs. If you select fewer TAs as default, this will leave a space allowing your technician to indicate a couple of hand-written TAs by his/her discretion. However, most companies choose NOT to use this approach. Rather they use the **Notes** area to list these other TAs.

Deleting TAs

Since TAs are not connected through relationships, they can be deleted without affecting your pre-existing data. However, the deletion function only works if you are using Manager's Access. To delete a TA, go to Home Page >> Go to Manager's Access and then return to the Value list list where now you will have the ability to delete.

Setting a WO to use custom TAs

From WO info, there is a button called 'Custom TAs'. Clicking on it opens a new window where you can view the current TA set for this WO. Nine TA fields are listed. Clicking into any one

of the fields shows a drop-down list of all of your TAs values. This list shows ALL of the TAs you have typed into you TA value list, whether or not they are listed as **Default YN**. You can also type into each of these fields if you want to set up a one time TA but don't want to add it to your TA value list.

Treatment Areas on PreScheds

Setting TAs on a PreSched is even more valuable than on a single WO. Custom TAs at the PreSched level automatically flow into all subsequently created WOs downstream from that PreSched. Cool! This is a huge time saver. This is another valuable reason to use PestaRoo's PreSched system.

Like WO info, you have a button on PreSched info called 'Custom TAs'. Clicking on it opens a new window where you can view the current TA set for this PreSched. Editing this list will change all future WOs created from this PreSched.

Missing TAs

What if your WOs suddenly don't show your treatment areas? This usually means that none of your values are marked as **Default YN**. Go to Home Page >> Value Lists >> Treatment Areas to correct this. Correcting this issue at the value list level only changes those WO created AFTER you make the changes. So, you may need to reset them at the individual WO level.

Note the 'Reset' button in the 'Custom Areas' new window. With one click you can reset all nine TAs for that WO.

What if you try to edit your TAs for a WO or a PreSched and no values appear in the drop down lists? Then you have no values in your value list.

Conclusion

Custom TAs are another time saver that PestaRoo provides. Remember that 10-30 seconds per WO quickly adds up to many hours by the end of the year.

Custom TAs are another reason you don't want to use preprinted forms for your WOs. Along with Custom WO Products, they help take

PestaRoo's WO customization to another higher level.