

Sending Reminders



PestaRoo provides a fully automated Reminder System. Reminders is a powerful time-saving tool to quickly and easily communicate with customers regarding their upcoming service date.

Overview

The Reminder System is a valuable tool to remind customers of their upcoming service appointments, ensuring technician access to property and saving expenses caused by rescheduling. There are three types of Reminders – Text, Email and Call Sheet. The Reminder System offers a variety of timeline options for Reminders ranging from one day to two weeks prior to the service appointment. Reminders can be sent to the Customer (property owner) or the Location (tenant). This support article primarily addresses reminders sent via Texting.

NOTE: The computer running reminders will not be able to perform other functions while Reminders are running. A Splash Screen will display saying “Reminders being sent. Please Wait...” until the process is complete

Reminder System Requirements

A Twilio Account is required for Text reminders. Twilio is a cloud-based platform that allows the ‘Send Text’ functions in the Reminder System to work. The Twilio account information is entered at Home Page >> Preferences >> Reminders. The required Twilio Account is very low cost. A text Reminder from Twilio costs only a fraction of a cent. A Twilio account includes a dedicated phone number from which the Text messages are sent.

Manual vs. AutoTrigger

Reminders can be triggered from the AutoTrig-

ger (host) computer, or can be triggered manually from any PestaRoo computer using the “Send Reminders Now” button. This option is set at Home Page >> Preferences >> Reminders. If the AutoTrigger setting is selected, a time of day must also be selected. Once PestaRoo is opened on the AutoTrigger computer, the system will test for the AutoTrigger time every 15 minutes for the Reminders to be sent. If the AutoTrigger computer opens PestaRoo later than the selected time, Reminders will run immediately.

The AutoTrigger setting may be overrode by using the “Send Reminders Now” button if Reminders have not already been sent for that particular day.

Reminders Preferences

To initially set-up Reminders, go to Home Page >> Preferences >> Reminders. “Send Reminders Master” must be set to “Yes”. If text reminders are desired, “Reminders by Text Allowed YN” must also be set to “Yes”, and the four ‘Twilio Account Information’ fields are required. At this time, only Twilio accounts are supported.

For each Customer wishing to receive reminders, the following fields at Customer Info >> Preferences must be set:

- Reminder Type ID
- Email address (If they want Reminders via Email). This is set by clicking on the ‘Preferred’ checkbox next to the desired Email inside Contact Details portal.

- Selected Number for Text Reminders. This is set by clicking on the ‘T’ in the associated ‘Contact Details’ portal. The ‘T’ may not be visible until Reminders are turned on.

If it is preferred that Reminders are sent to the Location, the same fields must be set at Customer Info >> blue triangle for Location >> “Location Contact Details” button.

PestaRoo supports two ‘targets’ for Reminders. The vast majority will be sent to the Customer. That is the default ‘target’. But in some instances, a Customer may have multiple Locations with each having their own Tenants. For this situation, PestaRoo allows you to go to Location More where the Reminder Target can be set. In this case all future reminders for this location will be sent to the Tenant, rather than the customer. Tenant contact information is entered and set at ‘Location Info’ using the ‘Location Contact Details (Tenant)’ button. The Location Target may be changed back to ‘Customer’ at any time.

Again, it is vital that regardless which preference setting is utilized that the Preferred Contact Number or Email is selected by clicking on the ‘T’ in the associated ‘Contact Details’ portal.

Logs

A summary of all Reminders sent for the day is logged at Home Page >> Preferences >> Reminders. At Home Page Reminders Preferences, the total count of reminders sent of each Reminder Type is logged, as well as any failures. Failures are listed in red with the associated Work Order ID. Individual Reminders, with details, are also logged at Work Order More.

Correcting Reminder Failures

Note the WO ID from the Home Page log. Trace the Customer or Location Tenant associ-

ated with the Work Order. Most likely, the Preferred Contact Detail has not been selected or marked as ‘Preferred’. Once the Contact Detail is fixed, a single Reminder for that WO can be sent by clicking the ‘Remind Now’ button on Work Order More.

Single Reminder

For services rescheduled or scheduled last minute, a single Reminder can be sent to the customer from the Work Order More layout for the specified WO using the ‘Remind Now’ button. The reminder will be sent using the default settings outlined above and logged at WO More.