



PestPac
by WORKWAVE®



5 RECOMMENDED STEPS FOR MANAGING RECURRING SERVICES

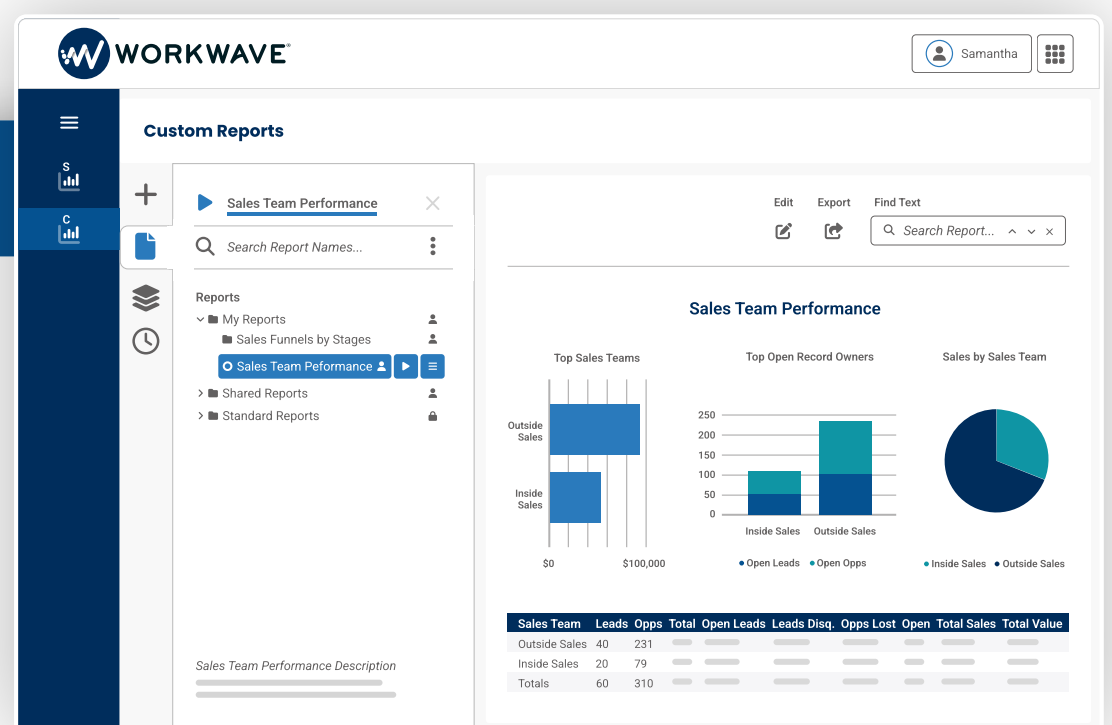
Plus, bonuses for Report Writer and RouteOp users!

- ☐ Review your existing recurring services for data accuracy. You can use the Service Setup List under **Menu > Reports > All Reports > Data Lists**. To group active setups into relevant categories and see what may need adjusting, you can use the Show Columns, Primary Sort By, and Group By filters for key fields and settings such as:
 - ☐ Tech
 - ☐ Route
 - ☐ Duration
 - ☐ Instructions for specific time or day of week needs
 - ☐ Schedule Types
 - ☐ Locked
 - ☐ Time/Time Range
 - ☐ Skip Months
- ☐ After reviewing your existing durations, navigate to your Services Lookup Table under **Menu > Settings > Lookup Tables**. Here, you can add or adjust default durations to use for each Service code moving forward.
- ☐ If updates to durations are needed for existing setups or orders, you can utilize the Update Service Setup and Order Durations Utility under **Menu > Tools > Data Update Tools**. You can update durations here in mass based on average, a set number, or pulling from your Services lookup table. Note that in order to use the averaging feature you must be posting accurate durations on completed service orders and technicians must be accurately timing in and out from the mobile app.
- ☐ Ensure **mobile tech training** enforces proper time in and out of orders from the mobile app.
- ☐ Utilize the **Visual Route Manager** to review current setups and make changes to which techs and schedule types are assigned on setups in different service areas.



BONUS for Report Writer users:

- ☐ Review this [Report Writer](#) article and download the three Report Writer files below to your workstation:
 - ☐ Service Setup Review ([file 1](#))
 - ☐ Service Lookup Table Review ([file 2](#))
 - ☐ Timeblock Review ([file 3](#))
- ☐ In PestPac, go to **Menu > Reports > Report Writer > Reports** and create a new folder; alternately, you can navigate to the folder you would like to save these reports to if it already exists.
- ☐ Hover over the folder you want to use, click the hamburger icon and choose Upload File. Select the first file.
- ☐ Repeat the above step for the two remaining files.
- ☐ You can now use these three bonus reports to assist in reviewing more detailed information, as well as to complete service setups with information directly from RouteOp, defaults in your Services Lookup Table, and pending Timeblocks on the Appointment Scheduler.



For free training, setup and usage resources, visit the

PestPac Community Site

The PestPac Professional Services team is also happy to provide one-on-one training for a deeper dive on these and other topics to help you get the most out of your software. Visit pestpac.com/professional-services and fill out the form to receive an email with more information and pricing.

TO GET STARTED, SIMPLY VISIT