

How to Create a Customer Inquiry Work Order



The Customer Inquiry event is used to inform technicians, managers, or the front office team that a customer needs a return phone call. This event should NOT be used when a customer wants a technician to return to their property and perform additional treatment.

Customer Inquiries should be used whenever no one is available to assist with an administrative request.

- 1 From the Home screen of the customer's account, locate the program the customer is calling about.

- 2 If multiple sites are on the account, locate the correct program by verifying the address shown in the Site information.

The screenshot displays a software interface with several sections:

- Summary Section:** Includes boxes for 'Past Due 61-90 Days' (\$10.00), 'Past Due 91-120 Days' (\$0.00), and 'Past Due 120+ Days' (\$0.00). Below these are 'Fin Charge' (\$0.00), 'Debit Bal' (\$10.00), and 'Remaining Discounts' (\$0.00). There are also buttons for 'Statement Date' and 'Last Post Card Date'.
- Contact Log Section:** Shows 'Outstanding' with a red notification icon, and tabs for 'Contact Log' and 'Notes/Reminders'. A table below has columns for 'Message From' and 'Message Subject'.
- Account Summary Table:**

8/22/2024	\$0.00	\$0.00	Deca-T-12	JA TESTER	Call ahead
-----------	--------	--------	-----------	-----------	------------
- Site Information Section:** Includes a 'Print' button and 'Date scheduled 9/22/2023'. A table lists site details:

Private Site Notes	Click here to add action tags	Steven Strange	1205	NE Blue Dr	321 Danger Lane	Residential
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- Order History Section:** Includes a 'Print' button and 'Date Sold 5/19/2022'. A table shows order details:

5/16/2024	\$0.00							
st	Next	Cancel	Amount	Prod Amount	Route	Salesperson	Call ahead	Warranty
	7/27/2023 3:00 AM WP		\$0.00	\$0.00	00TVeitch	Justin Abla	Call ahead	

3

Click "Add New Event" in the top right corner of the program.

3blue Dr
er Lane
AL 35806

ail To Tech

Created by: 6/23/2021 4:37 PM By lee.dunston@cookspest.com Last changed by: 6/23/2021 4:37 PM By lee.dunston@cookspest.com [Edit](#)

building destroyed

Contact Log

Outstanding 0 Contact Log Notes/Reminders

Message From	Message Subject	Body	Sent Date	Read	Type
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00 AM WP \$0.00 \$0.00 00Tveitch Justin Abila Call ahead Print 23468314

[Print](#) Date Sold 8/22/2022 [Add New Event](#)

Cancel	Amount	Prod Amount	Route	Salesperson	Call ahead	Warranty	Expires	Next Work Order
	\$0.00	\$0.00	00Tveitch	JA TESTER	Call ahead		Print	21620493
	\$0.00	\$0.00	_Pilot Testing Service	JA TESTER	Call ahead		Print	22614415
	\$0.00	\$0.00	00Tveitch	JA TESTER	Call ahead		Print	

[Print](#) Date Sold 8/22/2022 [Add New Event](#)

4

From the dropdown menu, select the only option that ends with "Customer Inquiry."

formation

None

- None
- Res Pest - Initial Service
- Res Pest - Service Call
- Res Pest - Follow Up
- Pest - Customer Inquiry**

5

Adjust the time shown to reflect the approximate time the customer called.

Service call: 2/29/2024 Specific Time 3:00 AM Duration: 0

00TVeitch In WorkPool Confirmed Use COP Use COA

0.00 Sales Comm: 0.00 Prod: 0.00 [View/Change Price](#)

0.00

Non Ta

Assignment Date: 2/28/2025

Comments

Target

Products/Materials

Customer Invoice Note

443941 Private Account

Information Contact Log

Information

6

From the "Route" drop-down menu, select the route of the employee the customer would like to speak with.

If they would like to speak with the:

- **Route Technician:** Leave assigned to the default route.
- **Manager:** Select the appropriate Department Manager route.
- **Main/Head/Office Manager:** Select the District Manager route.
- **Front Office:** Select the "XXXX-O-Manager" route for any requests that don't require the technician or manager.


The screenshot displays a software interface for "Future Svcs". At the top, it says "Event Information Future Svcs". Below this, there are several input fields: "Next service call:" with a date of 2/29/2024, a "Specific Time" dropdown set to 11:20 AM, and a "Duration:" field set to 0. The "Route:" dropdown menu is open, showing a list of options including "00Tveitch", "Corp-BMaxwell", "Corp-CHenderson", "Corp-CWood", "Corp-JKiefer", "Corp-MWyrosdick", "Corp-O-Manager" (highlighted with a green circle), "Corp-PWagner", "Corp-WHuggins", "Deca-D-Manager", "Deca-T-12", "Memp-S-03", "Memp-S-Manager", "OlvB-D-Manager", "OlvB-P-Manager", "Sales Test Route 01", "Sales Test Route 02", "Sales Test Route 03", "Sales Test Route 04", and "Shel-S-05". To the right of the dropdown, there are checkboxes for "In WorkPool", "Confirmed", "Use COP" (checked), and "Use COA" (checked). Below these are fields for "Invoice:" (00), "Prod:" (0.00), and a "Show/Change Price" button. At the bottom left, there are buttons for "Close Comments" and "Problem". At the bottom right, there are buttons for "Target", "Ants, ...", "Products/Materials", and "Customer Invoice Note". The interface also shows "Account # 443941" and "Financial Information" at the bottom.



Be sure to reference the [Customer Communication Protocols](#) to determine if the situation qualifies as **urgent**. Urgent Customer Inquiries have an escalated protocol.

7

In the "Problem" field, add a detailed description of the customer's request and/or concerns.


Next service call: 2/29/2024  Specific Time AM Duration: 0

Route: Corp-O-Manager In WorkPool Confirmed Use COP Use COA

Invoice: 0.00 Sales Comm: 0.00 Prod: 0.00 [Show/Change Price](#)

Sales Value: 0.00

Tax: Non Ta

End Commission Date: 2/28/2025 

[Close Comments](#)

Problem

Customer, Dr. Strange would like to talk with his serving office about changing his technician.

[Copy notes from template](#)

Outcome

Target Ants, ...

Products/Materials

Customer Invoice Note



Be sure to include **ALL** relevant information provided by the customer to reduce the risk of miscommunication.

8

Locate the "Target Pest" information and click the "Remove" button.
(A target pest should only be added to Service Call work orders.)

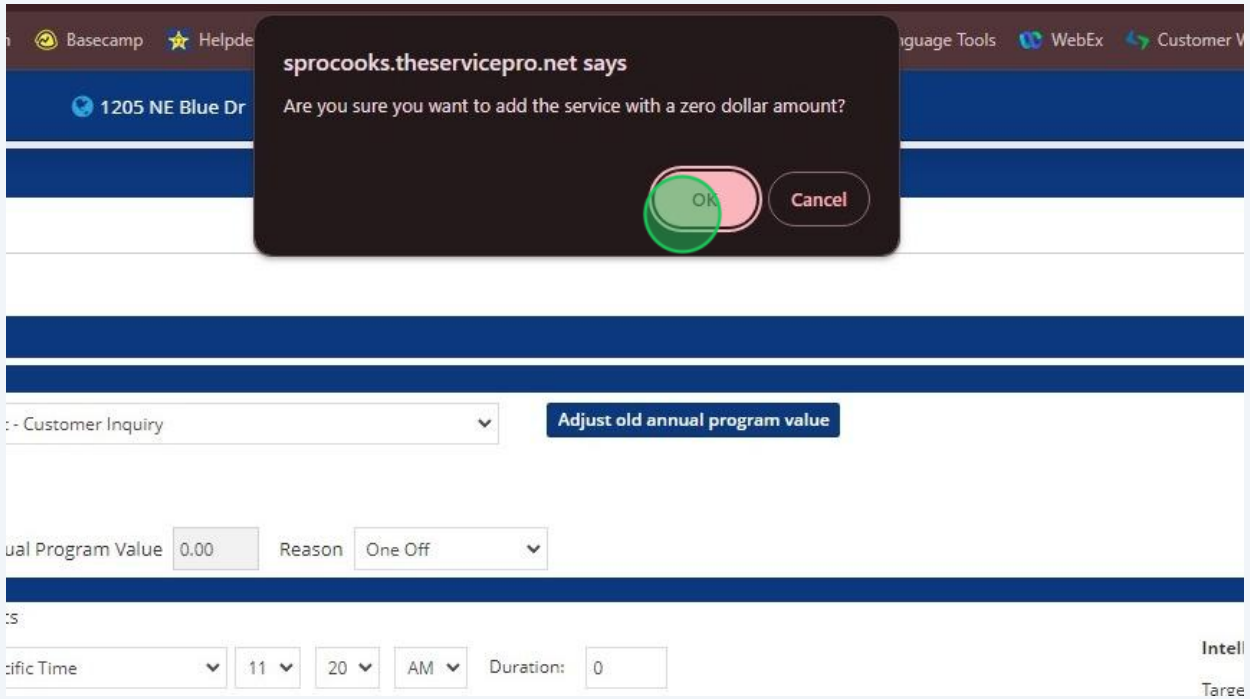
The screenshot shows a software interface with several controls. At the top, there are checkboxes for "In WorkPool", "Confirmed", "Use COP", and "Use COA". Below these are input fields for "Sales Comm: 0.00" and "Prod: 0.00", followed by a "Show/Change Price" button. A central area contains a "Close Target" button, a dropdown menu with "Ants-Carpenter" selected, an "Add Target Pest" button, and a "Remove" button which is circled in green. To the right of the "Remove" button is the text "Is Primary Target". Below this are three green buttons: "Products/Materials", "Customer Invoice Note", and "Customer Invoice Note". A text area on the left contains the text "talk with his serving office about changing his technician." and a small orange information icon. At the bottom, there is a "Confirm Permanently" checkbox.

9

In the top right corner of the screen, select the checkbox next to "Send Email To Tech" and click the "Finish" button.

The screenshot shows a software interface with a dark blue header bar. In the top right corner, there is a checkbox labeled "Send Email To Tech" which is checked, followed by a green "Finish" button and a red "Cancel" button. The "Finish" button is circled in green. Below the header bar, there is a section with a dark blue background and white text that reads "d annual program value". At the bottom of the screen, there is a section titled "Intelligent Routing Scheduling Targets" with a "Modify" button. Below this title, the text reads "Target Time: Any Time" and "Target Route: Any Route".

10 When prompted, click "OK" in the pop-up dialog box.



i Customer Inquires should never have a charge associated with them.

11 In the "Subject" field, replace the default information with "Return Call Needed."

Created By Christie Paquay

To

Reply To
christie.paquay@cooksppest.com

Subject
Created By : christie.paquay@cooksppest.com

Send As
HTML

For
Steven Strange 1205 NE Blue Dr 321 Danger Lane Huntsville, AL 35806

Quick Fill

Message

Active Techs with email addresses

Search tech...

- 001120 - Atl Se Manager
- 0023 - Mary South
- 0040 - Scott Pearman
- 0041 - Lisa Hutto
- 0067 - Stephen Gates
- 0068 - Jeremy Smith

12 Using the search field in the top right corner, search for the contacts who should receive a copy of the Customer Inquiry email based on the [Customer Communication Protocols](#).

Steven Strange
Other

1205 NE Blue Dr Huntsville, AL 35806

justin.abla@cooksppest...

ay

Active Techs with email addresses

District Office

Clear

pest.com

uest

E Blue Dr 321 Danger Lane Huntsville, AL 35806



Begin typing the name of the servicing District Office in the search field to see a full list of District, Manager, and Department mailboxes.

13

Select a contact from the search results to add the contact's email address in the "To" field. *You can add multiple email addresses in this field.*

Send Email To Tech

Created By Christie Paquay

To

Reply To
christie.paquay@cookspest.com

Subject

Send As
HTML

For
Steven Strange 1205 NE Blue Dr 321 Danger Lane Huntsville, AL 35806

Quick Fill

Message

Active Techs with email addresses

Search tech...

- [001120 - Atl Se Manager](#)
- [0023 - Mary South](#)
- [0040 - Scott Pearman](#)
- [0041 - Lisa Hutto](#)
- [0067 - Stephen Gates](#)
- [0068 - Jeremy Smith](#)

14

Review the instructions in the "Message" field and click the "OK" button to send the message.

Quick Fill

Message

Instructions
Customer, Dr. Strange would like to talk with his serving office about changing his technician.

Copy notes from template

OK

Send Message

15

A new Customer Inquiry event and/or work order should now be shown under the program.

Estimate for Residential Pest - PPS Max - SPTesting									Print	D
Program: Residential Pest - PPS Max Instructions August										
Service	Target Pest	Last	Next	Cancel	Amount	Prod Amount	Route	Salespers		
Res Pest - Initial Service	Ants		8/22/2022 3:00 AM WP		\$0.00	\$0.00	00Tveitch	JA TESTER		
Res Pest - PPS Max	Ants		12/12/2023 3:00 AM		\$0.00	\$0.00	_Pilot Testing Service	JA TESTER		
Res Pest - Service Call	Ants				\$0.00	\$0.00	00Tveitch	JA TESTER		
Pest - Customer Inquiry			2/29/2024 11:20 AM		\$0.00	\$0.00	Corp-O-Manager			