706: Daily Posting, Pest Control – Procedures

700: Pest Prevention · https://milo.masseyservices.com/docs/706-daily-posting-pest-control-procedures/

Section: Pest Prevention
Subject: Daily Posting, Pest Control - Procedures
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Effective Date: 15 October 1990
Last Reviewed Date: 15 October 2023
Policy Owner: Administrative Training Manager

Policy

We value TRUTH and INTEGRITY. Never compromise! Be consistent and fair.

One of the most important functions for an administrative team member is posting production to customer accounts. It is imperative that this task is executed with meticulous attention to accuracy. This function shall solely be carried out by administrative team members who have successfully undergone the requisite administrative initial training.

A production stop will be posted only when a work order has been completed using a mobile device or a paper service report has been completed in its entirety. At no time will a paper service report be posted without meeting these requirements: all product usage, detailed notes, target pests, technician signature, license number, the date the workorder was completed, customer signature when available or notes indicating the customer was unavailable to sign, and management review with signature.

Production Posting Production Completed on a Mobile Device

The primary method Service Technicians/Specialists will complete work orders is by using a mobile device. The Service Manager will provide verified Technician Summary reports to the administrative team for posting. This must include both the team member and Service Manager signatures, miles driven, and hours worked.

Steps to post production completed on a mobile device:

- Sign in to ServicePro.
- Click on the Office tab on the home screen.
- Click on the ServSuite Mobile Studio link.
- Ensure the proper Service Center is selected. (If this needs to be changed, click on the “change box”, select the appropriate Service Center, and click the “done” box.)
- Review any Cash/Checks listed in ServSuite Mobile Studio
    - Click the down arrow under the Cash/Checks column
    - Click View Details
    - Only when the payment has been received by the administrative team, click Remove.
    - Post the payment with the daily deposit.
- Review all Sold Events to ensure they are scheduled for a future date.
    - Click the down arrow under the Sold Events column
    - Click View Details
    - Click the down arrow next to the word New
    - Click View Details
    - Review the “First Service Date” to ensure it is in the future.
    - Verify the Service type is a proactive visit
    - Verify the service is on the correct technician route
    - Click Close on the details of the sold event.
    - Click Close on the Sold events
- Verify the Technician Summary report matches the work orders completed in ServSuite Mobile Studio.
    - Click the down arrow under the “work orders” column.
    - Click View Details.
    - Verify that all work listed on the Technician Summary report is also listed in ServSuite Mobile Studio.
    - Click “Close” to close the work order details.

    - Repeat for each Technician Summary Report. (If no Technician Summary report is provided, consult with the Service Manager to obtain the reports that are missing to be verified prior to posting.)

- After verification is complete, under the “Process” column, check each white box under Sold Events, then click “Process Selected Items”.
- When the Work Order, Payment and Event Processing box opens, click on “Click Here to Start Processing”.
- After the sold events have been posted, under the “Process” column, check each white box under Work Orders and click “Process Selected Items”
- When the Work Order, Payment and Event Processing box opens, click on “Click Here to Start Processing”.
- When all production has been posted in ServSuite Mobile Studio, print and close the production batch.

Manually Posting Production Completed Using Paper Service Reports

There will be rare occasions when a service cannot be completed using an iPad. When this occurs, the work order will need to be posted manually. To manually post a work order you must have a fully executed service report. In order for a paper service report to be considered complete, it must have the following:

- Product usage
- Detailed notes describing the service
- Technician signature
- Technician license number
- Target pest
- Date
- Customer signature when available or notes indicating the customer was unavailable to sign
- Manager review and signature

If any of the above details are missing, the service report is incomplete and will not be posted regardless of service center management directives; return these service reports to the Service Manager.

Steps to manually post a completed work order:

- Sign in to ServicePro.
- Click on the Office tab on the home screen.
- Click on the link for “Enter Completed Work Orders”
- Review the work order to identify the work order #
- Enter the work order # in the box and click “Show”
- Click [Add] on the line indicating Labor
- From the dropdown list, select the name of the team member that completed the work order
- Update the date to reflect the date the work order was completed.
- Click “Add”
- If the work order is a request or proactive visit, click [Add] on the line indicating Pest Activity
- From the dropdown list, select the appropriate pest indicated on the completed work order
- Click “Save”
- Click “Complete” to finish posting the work order

If additional work orders will need to be posted manually, repeat the steps until all are posted. (Note that you will need to change the team member under the labor line if there are multiple team members using paper work orders.)

When all manual work orders have been posted, print and close the production batch.

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