903: Daily Posting

Deprecated Policies · https://milo.masseyservices.com/docs/903-daily-posting/

Section: Lawn Care Administration
Subject: Daily Posting
Approved by: David Armstrong
Effective Date: 15 October 1990
Last Reviewed Date: 15 October 1990
Policy Owner:

Policy

As posting service and payments to customers Accounts is one of the most important functions we have, it should be done with the UTMOST ATTENTION TO ACCURACY. The step by step procedure to do this is as follows:

1. Turn on Modem.
2. Turn on the terminal.
3. Turn on the printer.
4. At prompt, enter access code.
5. At prompt, enter password.
6. At Routeman, enter the Main Menu.
7. At the Main Menu enter Posting and Scheduling Menu.
8. Select Option 4 to begin SERVICE SCHEDULING POSTING PROGRAM.
9. Enter Company number. Press the down arrow. (You must use the arrow keys to move the cursor on this screen at all times).
10. Enter man number in the ROUTE NUMBER field. (If the technician who services the route on a particular day is not the regular service technician, you can note the change by entering the number of the route in SCHEDULED FOR ROUTE field to which the account being posted is

normally assigned).

11. In the Date Serviced field insert the actual day service was performed. (MM/DD/YY).
12. In the Date scheduled field you must enter the actual date for which the accounts were scheduled for service on this particular route. If you enter the wrong date the system will pull only those services scheduled for the date you have incorrectly entered or will indicate to you that there are no accounts scheduled for that particular route on the date entered by presenting a "SCHEDULE FOR DATE SELECTED HAS BEEN EXHAUSTED" message on the subsequent posting screen.
13. If for some reason you wish to cancel the session and do not wish to use the information just entered, use the F7 key to cancel the batch. If you wish to exit and then later come back to posting with the information intact, use the F9 key to save current batch information.
14. Prior to posting, use your calculator and manually total all charges and payments listed on invoices for each route then verify totals to DAILY PRODUCTION REPORT SUMMARY. You will use these totals to verify your data entry during posting.
15. When the company, route and batch information is entered, the AUTOMATIC SERVICE POSTING PROGRAM screen appears (above the Customers Account and Name). The first name to appear for posting will be the first account scheduled for that particular route on that particular day. (The Service Manager or General Manager is responsible to see that the pre-printed worksheets are what is used by the technicians and turned in daily along with the signed invoices in the same order as found on the worksheet. This way the invoices will be in the same order as the posting screen will bring up the Accounts.) Verify that the company, Route and Date information is correct before continuing. If it is not, press F9 to exit the posting screen.
16. When the customer appears on the screen, there will automatically be a "Y" for yes in the SERVICE field, indicating that you wish to post the charge. If you wish to enter a charge for this service, simply hit enter.
17. The cursor will advance to the payment field where there will be a "Y" for payment and the standard per-trip amount will appear in the payment field automatically. Note: That if a customer has a credit balance, the account is chained or has a debit balance it will appear with a "N" and the amount will be a combination of the standard per-trip amount along with the balance. If you wish to apply payment simply hit enter. If the payment field appears with an "N" and you do not wish to apply any payment hit enter, the system will not apply any payment. If you do wish to apply a partial payment but not what is showing in the payment field, arrow over and adjust the

amount accordingly. This field can be changed to either a "Y" for yes or a "N" for no. If there is no invoice for the customer that comes to the screen, enter a "N" for both the SERVICE and PAYMENT fields, it will then prompt the system to automatically enter a "S" for service missed. By hitting enter it will then ask you for an explanation for the reason of missed service. Hit enter again it will then take you back to the next Account.

(When you see your final batch proof the customer with no invoice will appear but will not be added to the batch total, you will not be able to completely delete him from the batch.)

18. If you have answered "Y" to either SERVICE and/or PAYMENT the system will then ask you if you wish to (A)ccept, (M)odify, (C)ancel Service or (S)ervice Missed.

    (A)ccept: Accepts the record as it appears on screen and brings the next available customer to the screen.

    (M)odify: Lets you go back and change any incorrect information.

    (C)ancel Service: This option tags a customer as cancelled. It would then prompt you to enter a reason for cancellation. (THIS DOES NOT CANCEL THE TRANSACTION AND THIS SHOULD NEVER BE USED.)(S)ervice Missed: This option tags the entry as a service missed record and will label customers that need to be rescheduled for service. You may include a brief explanation for the missed service. (You will have to enter in the date the customer was actually scheduled for to retrieve his record).

19. Once you have chosen the appropriate transaction the system will present the CHEMICAL USAGE POSTING screen. This screen will allow you to chose the chemicals used on the particular customer. All routes are pre-set with the chemicals used the most. The cursor will appear in the amount column and you must enter the amount used (the amount is in ounces) in the correct category that corresponds to what was written on the invoice in the chemical used box by the technician. When you are sure of the amount hit ENTER, this will bring you back to the next customer account.
    - See Examples:

      (A) Even Month Lawn Chemicals (Chemical Names)

      (a) Even Month Lawn Chemicals (Coded)

      (B) Odd Month Lawn Chemicals (Chemical Names)

      (b) Odd Month Lawn Chemicals (Coded)

      (C) Pest Control Residential (Chemical Names)

(c) Pest Control Residential (Coded)

(D) Pest Control Commerical (Chemical Names)

(d) Pest Control Commercial (Coded)

20. If technician used a special chemical or a different chemical not appearing on the chemical screen then you must arrow down to the next available line and fill in the correct TARGET, CHEMICAL, METHOD, AMOUNT and PERCENT. There are two ways to input this information. You can either enter it by a chemical name or by a chemical code that represents that chemical. (All the chemicals available to you are found on the CHEMICAL DESCRIPTION TABLE along with their proper code numbers).
    When using the chemical name use the F1 scroll key until the appropriate chemical comes up and hit enter then arrow over to the next field and continue to F1 scroll for each column. If you choose to enter by the code use the F2 codes key to switch the screen over to the code menu and use the F1 scroll key to choose the appropriate code for the chemical used. If the chemical that was used does not appear on the CHEMICAL DESCRIPTION TABLE YOU MUST NOTIFY THE DIRECTOR OF LAWN CARE OPERATIONS FOR LAWN CHEMICALS OR DIRECTOR OF TRAINING AND TECHNICAL SERVICE FOR PEST CONTROL BEFORE CONTINUING. (Note: You will see a F8 key on this particular screen, it will allow you to abort what was just input and return you back to the first screen with the customers information to make any corrections then return to the chemical screen. It will only allow you to do this one time per customer then the second time it will take you to the next Account record).
21. Repeat steps 16 thru 20 for all accounts that display in order on the posting screen. Notice that a running total of the number of ENTRIES, total CHARGES and total PAYMENTS is tracked in the upper right corner of the posting screen. These totals should match totals you computed manually from invoices you have in your hand. If these totals do not match your manual total press F1 = REVIEW this will allow you to go in any transaction and make any corrections at this time.
    The system will list all transactions that have been posted in the batch so far. Check each invoice against the listing on this screen. If you find a discrepancy, highlight the transaction by using the down arrow to the error and press ENTER. The posting screen will return displaying the posting information for the selected transaction. Correct the information and press ENTER. The system will allow you to accept the modifications and return you to the REVIEW SCREEN. If the totals now match your manually computed total press F9 to return to the posting screen.

22. Once you have completed posting to each of the accounts for a particular route on a particular day, the screen will tell you "SCHEDULE FOR DATE SELECTED HAS BEEN EXHAUSTED", you then have the following options:
    1. You can enter an account number for a customer that was not scheduled for that route and day.
        1. Call backs or complaint calls that were not formally rescheduled.
        2. Accounts scheduled for that particular route on a previous day.
        3. New Accounts:
            1. Posting: After you have exhausted the route and day, add in your new accounts.
                1. Enter Account Number.
                2. Hit Enter. (It will then bring up the Customer’s Account).
                3. Arrow through invoice.
                4. Cursor will be in service. Use arrow keys and arrow across to type.
                5. Put code in for Initial Service (5-Pest Control Or 7-Lawn). Hit Enter.
                6. In the SERV field it will automatically bring up the service type entered at the time the account was set up. Arrow over and enter in the
                7. correct Initial Service Code. (Lawn or Pest Control)
                8. Arrow over to Description and TYPE IN Initial Service.
                9. Arrow over to Amount. Enter in the amount accordingly. (You must use decimal points in this posting screen).
                10. Arrow over until you return back to the "Y" in the service field. Hit enter to move the cursor to the payment field.
                11. The payment will default to the amount previously entered in for the Initial Service Amount. Hit enter to apply payment.
                12. Hit enter again to accept entry. The screen will then roll over into the chemical screen, use the F3 key to continue with the next transaction. (Do not enter any chemical information here)
                13. Follow steps 1 thru 5 with the same information.

14. Arrow over to SERV field. Put in the code for Excess Initial.
15. Arrow over to the Amount field. Enter in the Excess Initial Amount. (Remember to use decimal points in this posting screen) Hit Enter.
16. Hit enter again to accept the entry. The screen will then roll over to the chemical screen, use the F3 key to continue with the next transaction. (Do not enter any chemical information here)
17. Hit enter to accept the route. It will ask you "ARE YOU SURE YOU WANT TO ACCEPT THIS ROUTE (Y/N)" Enter "Y". (Note: Once you have accepted the route you will not be allowed to make any corrections until you go to apply this batch)
18. The screen will roll back over to the Service Posting Screen where you first started entering the route and date and batch number information. Your cursor will be on the route field. Enter in the assigned route for your new account and hit Enter. Follow steps 1 thru 4.
19. Enter actual type. (i.e. 0 - Residential Pest Control, 1 - Commercial Pest Control, 2 - Lawn).
20. Arrow over to SERV field, enter a "Z" (NO CHARGE).
21. Arrow over to description and TYPE in No charge service. Hit Enter. This will bring you down to the payment field. The payment field will automatically have a 0 for amount. Hit Enter.
22. The screen will go into the chemical screen and enter the chemical amount here for New Accounts. F3 to the next transaction. Hit Enter.
23. The screen will then ask you if you are sure you want to accept the route, Hit "Y"
24. Go to option 5, Apply the batch.

    (**Note**: (R)eject will be one of your options after you have exhausted the date selected and start entering other accounts that were discussed in 1 thru 3. This option will only show up here. It will allow you to reject all information including the account and name just entered. You will then be able to continue on with the next account number. If by chance you key in the wrong account number which will delete it.)

2. You can press ENTER to accept the route and resume posting to another route/date. (Note: It is very important that you make all corrections before you accept the route. Once you have accepted the route you will no longer be able to make any corrections to the route in the SERVICE SCHEDULING POSTING SCREEN. (See number 24/25 for exception).
3. You can hit the F1 key to review and correct your entries.
4. You can hit the F7 key to cancel the entire batch.
5. You can hit the F9 key to exit posting and return at another time.

23. If you choose to press ENTER to accept the route the system will prompt: "ARE YOU SURE YOU WANT TO ACCEPT THIS ROUTE (Y/N)" Answer "Y" to accept the batch. The system will return you to the AUTOMATIC SERVICE POSTING PROGRAM screen so that you may enter another route. Post all routes until you have accepted all necessary batches.
24. Once you have completed all the posting and gone through all the screen prompts, you will come back to the DAILY POSTING and SCHEDULING MENU. IMPORTANT NOTICE: To complete the posting, update the customers file and generate the batch edit list, you must choose OPTION 5 - APPLY SERVICE BATCH from the POSTING and SCHEDULING SCREEN.
25. When you choose OPTION 5 it will give you the following choice:
    (A)Accept Batch
    (B)Cancel Entire Batch
    (C)Modify Batch
    You must choose (A) to finish your batch. You must choose (C) to modify the batch and get another copy of the batch to send to corporate. You may also make any final corrections at this time to any transaction before accepting the batch.

Downloads

Embedded media: https://milo.masseyservices.com/wp-content/uploads/2025/09/903-Daily-Posting.pdf

903 Daily PostingDownload