

Agreements and Renewals



One of the very valuable functions of PestaRoo is its ability to handle Renewals for Agreements. Up to three reminder letters (or Call Sheets) can be automatically printed with the text of your choice and the interval. You may have different letter text and intervals for the different Types of Agreements. Semi-Automatic and Fully Automatic methods are supported.

Triggering Renewals

Potential Renewal Letters and Call Sheets are triggered once each day from the designated AutoTrigger computer. To change or set the AutoTrigger computer, see the support document titled “Designating Your AutoTrigger Computer”. The AutoTrigger functions take place at file launch, so make sure your printer is filled with paper before launching PestaRoo each day. To view a log of the trigger dates of the Agreement Renewals, go to Home Page >> Set Preferences >> “Trigger Date” tab. From this screen you can also read the **Date of Last Auto-Trigger**.

Agreements

Agreements are service arrangements that you provide to your customers on an annual (or multi-year) basis. Each Agreement has at the minimum: **Customer ID**, **Location ID**, **Agreement Type ID**, **Structure**, **Original Service Date**, **Original Cost**, and **Next Renewal Fee**. Most agreements include a signed contract between your company and the customer.

PestaRoo’s Agreement system keeps track of your agreements and automatically generates renewal reminder letters. It does not generate WO’s for the servicing of customer’s agreements.

In contrast, PestaRoo’s PreSched system manages services that are provided on an ongoing basis and creates the WO’s for them. PreScheds do not usually include a contract, and are provide on a ongoing basis.

Agreement Types

Agreement Types are defined from Home Page >> Edit Value Lists. Most companies commonly set-up from 1 to perhaps 4 or 5 Agreement Types. But, you may have as many Agreement Types as you want. Some examples include “Sentricon”, Baiting Stations, Annual Termite Treatments, Rodent Trapping Systems, General Pest Control Plans, and Restaurant Plans.

As you set-up each individual type, you can select the intervals for the different letters and call sheets, and the standard text to appear on each letter. Again, note that each type has its own letters and intervals.

A common approach would be to have a reminder letter that is a quasi-invoice printed at T-Minus 60 days. Then a plain reminder letter goes out at 30 days. If they still have not renewed at T-Minus 15 days their name would appear on a printed call-sheet to receive the personal attention that a phone call can provide. You can also set-up a termination letter that goes out 5 days (or whenever you want) after the stop date of the agreement.

Renewals

Renewal records appear on every Agreement record, in the portal labeled “Renewal History”. The first record entered in the portal describes when the initial Agreement expires. Each subsequent record describes another renewal interval. The newest record is always at the top. Every Agreement will have at least one renewal

record.

Entering a New Agreement

You can create a new Agreement from Customer Choose Name, the Location portal of Customer Data Entry, Location Choose Name or from the layout Agreement Data Entry itself. Once you have filled in the required fields, create the first renewal record. Lastly, enter the renewal stop date. That's all there is to do! PestaRoo will automatically generate the reminder letters that you have designated in the Agreement Type.

Semi-Automatic Renewals

Many companies rely on PestaRoo to print their renewal records. That alone is wonderful. They create the Agreement Record, and the first Renewal record. Next, they set back and let PestaRoo print the reminder letters. When a renewal comes due and a payment comes in, they manually 1) Click to Halt further reminders. 2) Create the next Renewal record. 3) Invoice the previous Renewal, and 4) Post and Pay the Invoice. That's it! Never again let a renewal slip through your fingers. Let's go through those individual steps:

1) Halting Additional Reminders

To stop all additional reminders for a renewal, click on **Halt All Renewals Reminders**. This is used immediately after receiving a full payment for the renewal.

PestaRoo prints reminder letters in the order that they appear in the portal (left to right). As each successive reminder is printed, the date of printing is set into the record. Besides precluding a second automatic printing of a given letter, it allows you to see the reminder status of any agreement. If you should need to manually reprint any letter, click the printer icon next to the reminder letter you want.

2) Creating the Next Renewal

In anticipation of next year's renewal you'll need to manually create a new Renewal record by clicking on the "Create New Renewal" or the "+" button below the portal.

Be sure the **Next Renewal Fee** in the agreement area is correct before clicking either of these buttons.

3) Invoicing a Renewal

PestaRoo prints the reminder letters, but does not create the actual invoice that you will need to accept the payment. From a renewal, you can create an invoice by clicking on the "Inv" button. This will create a new invoice with **Next Renewal Fee, Customer ID, Location ID, Agreement ID, and Renewal ID**. You will land on that new invoice. If the invoice already exists it will not let you create another one for that renewal. To return to the original Agreement, click on the blue jump-to triangle next to Source. From the invoice, notice that you can see the source **Agreements ID**. Cool.

If the invoice already exists, click on the blue jump-to triangle in the renewal record to go to it. By the way, once you have created an invoice for a renewal, you can see its status. It will initially show "Unposted". Other possible values include "Paid in Full", "Open", and "Installments".

4) Post and Pay the Invoice

If you have the check in hand, simply post and pay the Invoice by clicking on the Post and Pay button at the bottom of the Invoice Data Entry screen. Now you have completed the Semi-Automatic Renewal process.

Fully-Automatic Agreements and Renewals

PestaRoo has a fully-automatic posting function built-in that runs whenever you post an invoice. This process starts with the creation of the original invoice and actually creates the Agreement record for you. Here are the steps: 1) Create an Agreement Invoice which creates the Agreement and first renewal. Wait for reminder letters to print. 2) When a renewal payment arrives Create a Renewal Invoice. This will halt the additional reminder letters and create the next renewal. Fully-Automatic renewals! Let's go through those steps.

1) Creating an Agreement Invoice

This invoice is like any other, but requires that you specify the Agreement information. These fields are located inside a new window triggered by the round blue triangle labeled “Agreement Info”.



Clicking on this round button leads you to a screen where you can enter data into the seven extra fields:

New Agreements

Agreement Structure	<input type="text"/>
Agreement Years	<input type="text"/>
Agreement Type ID	<input type="text"/>
Agreement Original Cost	<input type="text"/>
Agreement Renewal Cost	<input type="text"/>
Agreement Size and/or Area	<input type="text"/>
Agreement Service Interval	<input type="text"/>

Each of these fields is necessary to describe a new agreement. Several of them are drop-down lists. Again, these fields are located inside the new invoice you created for the customers. When you post your invoice, all this information will automatically move to a new agreement. And, the initial Renewal will already be created for you. Very cool.

2) Creating a Renewal Invoice

This invoice is similar to the Agreement Invoice, but the information that you supply in the new window relates to the Renewals:

Agreement Renewals

Agreement ID	<input type="text"/>	-Renewal Cost \$
Agreement Years	<input type="text"/>	
Agreement Renewal Cost	<input type="text"/>	

Each of these fields is necessary to describe a renewal. When you post your invoice, all this information will automatically move to a new renewal. Note that the Agreement ID is a drop-down list of all the Agreements for only that single customer, so this is very quick.

The Semi-Automatic Agreement system tends to be used by those companies with only a few dozen Contracts or Agreements to manage. But even at these numbers, a consistently high renewal rate can be expected.

The Fully-Automatic Agreement and Renewal processes will save you time if you have more than a few dozen Agreements and is critical if you have hundreds (or thousands) of Contracts or Agreements.