

OFFICE DAILY TASK LIST

Date:

MORNING 8AM-11AM

- SYS_CSR_101: Email Checklist to Collaborators
- SYS_CSR_01: Punch In
- SYS_CSR_03: Log in to Phone System
- SYS_CSR_04: Retrieving Company Voice Mail
- SYS_CSR_07 Post Service Orders
- SYS_CSR_09: Ensure all work orders are posted and complete
- SYS_CSR_13: Send Customer Survey Requests
- SYS_CSR_17: Apply Credits To Accounts
- SYS_CSR_14: Release CC billing OFFICE - Decline notices pasted to client notes weekly
- SYS_CSR_47 Accounts with -0- balance
- SYS_CSR_19: Start Weekly Checklist Current Day
- SYS_CSR_20 Confirm Customer Prep for Heat Remediation Treatments 2 days Out
- Review Schedule and Correct Any Errors**
- SYS_CSR_21: Punch Out

AFTERNOON / AFTER LUNCH 11AM-4PM

- SYS_CSR_01: Punch In
- SYS_CSR_56 Review previous day survey responses, and credit each account
- SYS_CSR_52 Place accounts on hold that are 31+ days past due
- SYS_CSR_22: Optimize route 7 days from today**
- SYS_CSR_23: Send customer service notifications, reminders, and welcome emails
- SYS_CSR_04: Retrieving Company Voice Mail
- SYS_CSR_26: Respond to all email inquiries from the contact and notify inboxes-Be sure to check Spam folders in each
- SYS_CSR_27: Complete weekly checklist for current day
- SYS_CSR_122: Complete all tasks due on PestPac Today
- SYS_CSR_28: Review Office Task List on intranet and complete open items
- SYS_CSR_107: Complete new customer value calls
- SYS_CSR_116: Call canine handler
- SYS_CSR_109: Closing Leads

BEFORE LEAVING 4PM-6PM

- Review Schedule and Correct Any Errors**
- SYS_CSR_26: Respond to all email inquiries from the contact and notify inboxes-Be sure to check Spam folders in each
- SYS_CSR_30: Check mail outside mail box
- SYS_CSR_31: Complete all document filing to include contracts & vendor statements
- SYS_CSR_124: Move all on hold service orders
- SYS_CSR_32: Review Schedule for Next Day & Optimize
- SYS_IS_250: Clean Up Parked Appointments
- SYS_CSR_39: Ensure tech has been notified for all stops with a scheduled start time before 9 or after 5
- SYS_CSR_34: Release all payment batches
- Check and Return All Voicemails Before Closing**

MUST BE DONE AFTER CLOSING

