

# 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**

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