

Sales Rabbit Integration

Sales Rabbit (<http://www.salesrabbit.com/>) is a smartphone app (iOS and Android) tailored for door-to-door sales. This is a popular sales technique for some pest control companies. Sales Rabbit (SR) is used for lead management up to the point of the sale, not for ongoing customer relationship management, scheduling, or accounting. That is where the integration with PestPac comes into play. Once an agreement is signed in the SR app, the customer info is transferred over to PestPac, preventing the need for double entry. You must be on PestPac version 1.43 to utilize this integration.

Please note: This documentation specifically addresses the setup and integration of Sales Rabbit with PestPac. The most current documentation for the app itself can be found at <http://help.salesrabbit.com>. You will need to login with your Sales Rabbit email/password.

Contents

What can Sales Rabbit do? (Overview)	2
How is Sales Rabbit Integrated with PestPac?	3
How do I set up Sales Rabbit?.....	4
How do I navigate the SR App?	8
What information is transferred over to PestPac?	9
How do I use the scheduler to schedule the initial service?	11
How do I submit an agreement on the app?	13
Where does the information go after I've submitted an agreement via the SR app?	15

What can Sales Rabbit do? (Overview)

- CAPTURE A LEAD'S INFORMATION (NAME, PHONE NUMBER, EMAIL, ADDRESS, ETC)
- RANK EACH LEAD BASED ON THEIR LEVEL OF INTEREST
- DROP PINS ON HOUSES/BUSINESSES TO TRACK LEAD STATUS
- CALL, TEXT, OR EMAIL LEADS DIRECTLY FROM THE APP
- AUTO-POPULATE LOCAL ADDRESSES USING GPS, AND QUICKLY ACCESS TURN-BY-TURN DIRECTIONS TO YOUR APPOINTMENT
- TRACK CURRENT LOCATION
- VIEW & FILTER LEAD LISTS
- RECEIVE NOTIFICATIONS OF APPOINTMENT
- DRAW OUT SALES TERRITORIES
- ACCESS AUTOMATED FORMS AND CONTRACTS
- CAPTURE CUSTOMER SIGNATURES
- SEND A COPY OF THE CONTRACT TO THE CUSTOMER VIA EMAIL AUTOMATICALLY
- SYNC PAPERWORK WITH THE HOME OFFICE/ENTIRE COMPANY
- CUSTOMIZE CONTRACT GUARANTEES, TERMS AND CONDITIONS, CANCELLATION INFORMATION, ETC



How is Sales Rabbit Integrated with PestPac?

A salesperson will use the SR app to manage their leads. At the point of sale, the salesperson fills out the agreement on the SR app and the submitted information will create a location and billto, a service setup, and an initial order in PestPac. The signed agreement will also upload to the location documents on that new account.

The SalesRabbit API is built into the Mobile App API. So any updates to the SR integration would be included in a Mobile App release.

How do I set up Sales Rabbit?

Once you've signed up for the app, Sales Rabbit will contact WorkWave to enable the integration. Most of the setup is within your Sales Rabbit Dashboard. (Please note: Login information for the Dashboard and other more detailed setup instructions must be obtained from Sales Rabbit.) To set up the Sales Rabbit integration, do the following:

1. Add a user named SRABBIT in the Employee lookup table within PestPac.
 - For more detail on how to add an employee, please refer to the separate training documentation that covers the Lookup Table features.
2. Populate the Branch Zip Code Lookup Table in PestPac.
 - In order to schedule initial services from the app and check the availability of the techs that are able to service that zip code, you must populate your zip codes and the corresponding branches.
3. Set up Work Day Calendars for your Technicians
 - This is to determine the allowed working hours for each tech that will be reflected on the appointment scheduler within the Sales Rabbit app.
4. The connection between Sales Rabbit and PestPac is completed by populating the Integration Settings in the SR Dashboard. This can be found under Settings > Integration.

The screenshot shows the PestPac Settings page under the 'Integration S' tab. The 'PestPac Account' section includes the following fields:

- API Credentials:**
 - URL: * (text input: login.pestpac.com)
 - Password: * (password input: masked with dots)
 - Company Key: * (text input: 555555)
- Service Codes:**
 - Initial Service: * (dropdown: PESTSTART)
 - Regular Service: * (dropdown: PESTMTREGULAR)
- Schedule Codes:**
 - Monthly: * (dropdown: Monthly)
 - Bi-Monthly: * (dropdown: BiMonthly)
 - Quarterly: * (dropdown: Quarterly)
 - Custom: * (dropdown: May July and September setup for Mosquitos)
- Tech Appointments:**
 - Initial Duration: * (text input: 60)
 - Regular Duration: * (text input: 30)

API CREDENTIALS

URL – This URL depends on the URL you use to access PestPac. If WorkWave hosts PestPac for you, see the chart below* to figure out which URL you use.

PLEASE NOTE: If you host PestPac on your own server, you will need to have an external URL set up so that PestPac can be accessed outside of your network.

Password – This is the password for the SRABBIT user in the Employee Lookup table.

Company Key – This is the 6 digit key used to log into your PestPac database.

SERVICE CODES: Pull from the Services Lookup Table in PestPac

Initial Service – This will be the service code used on all initial service orders created when an agreement is submitted from the app.

Regular Service – This is the service code used on the service setup when a new account is created in PestPac after an agreement is submitted.

*If You Log Into PestPac with This....	This is Your Sales Rabbit URL
Login.pestpac.com	https://api.pestpac.com
www80.mypestpac.com or newest.mypestpac.com	https://www83.mypestpac.com
Your own IP or URL (self-hosted)	Your External URL

SCHEDULE CODES: Pull from the Schedule Types Lookup Table in PestPac.

Monthly – Choose a monthly frequency schedule to be used on a service setup created from the SR App.

Bi-monthly – Choose a bi-monthly frequency schedule to be used on a service setup created from the SR App

Quarterly – Choose a quarterly frequency schedule to be used on a service setup created from the SR App

Custom – Choose a custom schedule to be used on the service setup created from the SR App.

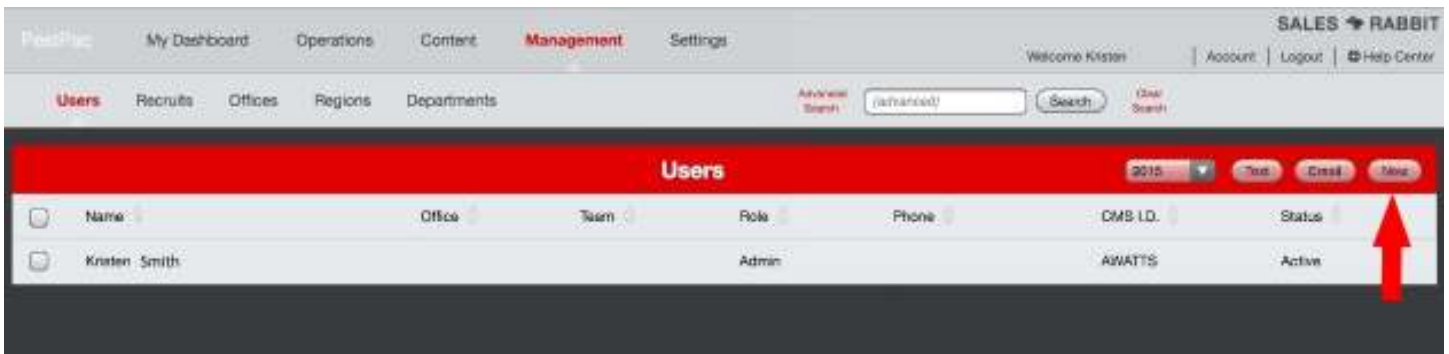
TECH APPOINTMENTS

Initial Duration – In whole numbers only, indicate the number of minutes for the initial service. This will show up in the duration field on the initial service order.

Regular Duration – Indicate the number of minutes for the regular recurring service. This will show up in the duration field on the service setup created when an agreement is submitted.

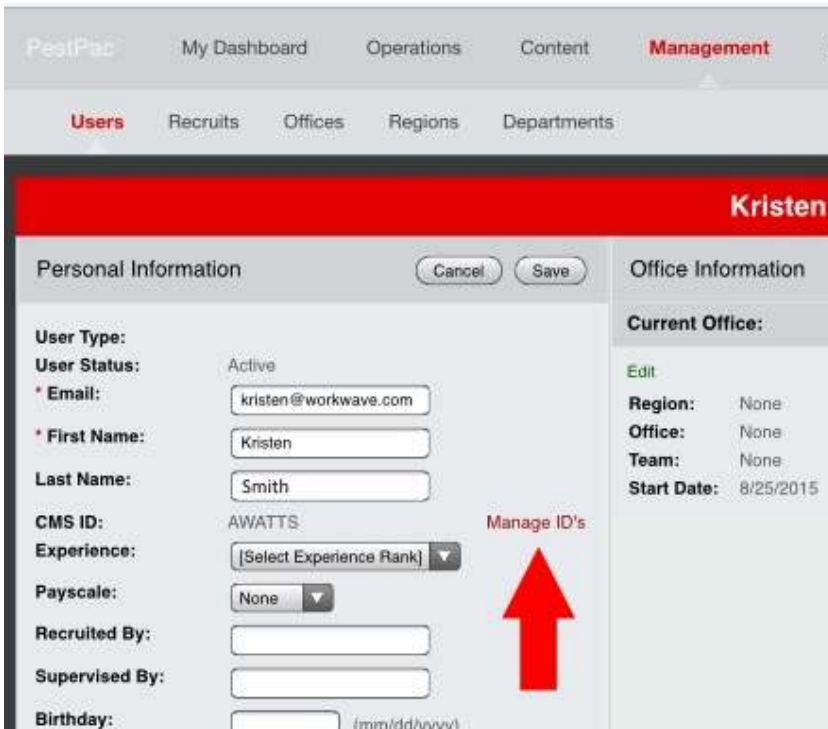
5. Each user of the app must be entered into the Sales Rabbit Dashboard under Management > Users:

a). Click on the “New” button and fill out the personal information of the user. You must populate an email address and password for them to be able to log into the app.



The screenshot displays the 'Users' management interface in the Sales Rabbit dashboard. The top navigation bar includes 'Post/Log', 'My Dashboard', 'Operations', 'Content', 'Management' (highlighted), and 'Settings'. A search bar is present with the text '(advanced)'. Below the navigation, there are tabs for 'Users', 'Recruits', 'Offices', 'Regions', and 'Departments'. The main content area features a red header with the title 'Users' and a dropdown menu set to '2015'. To the right of the header are buttons for 'Text', 'Email', and 'New'. A table below the header lists user information with columns: Name, Office, Team, Role, Phone, DMS ID, and Status. The first row shows 'Kraton Smith' with the role 'Admin' and status 'Active'. A red arrow points to the 'New' button.

Name	Office	Team	Role	Phone	DMS ID	Status
Kraton Smith			Admin		AWATTS	Active



b). After adding the user, a CMS ID must be entered that matches up with a username in your PestPac database. Click “Manage ID’s” within the user’s profile to add this.



c). Type in the username and click the “Add ID” button. This will be used for the salesperson on any new setups/initial orders created when this user submits agreements from the app.

How do I navigate the SR App?

After logging in, the salesperson will be brought to the Home screen:



CANVASS



AGREEMENTS



TOOLS



LEADERBOARDS

CANVASS

As salespeople canvass a neighborhood, they will have the ability to know which addresses are already customers in their PestPac database since they will be marked on the map. Customers near your location will show up if you have it enabled via Settings > Customers in dashboard.

The salesperson will also have the ability to plot markers on the map to indicate who is interested, who asked them to come back later, who they've signed up, etc.

AGREEMENTS

The core of the integration lies on the agreements page. When a new customer is about to sign up, the salesperson will have the ability to record all important contact information and schedule the initial

service into an available time slot.

TOOLS

Sales Rabbit's fully customizable Sales Tools section allows you to organize sales presentation materials electronically. Being able to upload your materials at will makes it easy to switch outdated materials with up-to-date versions. No longer do managers have to print out new materials and distribute them to individual reps. With Sales Rabbit, you can upload the new materials straight to the app, and your employees have instant access to it.

LEADERBOARDS

Using the Sales Rabbit platform, a sales team can stay connected, up-to-date on company activity, and motivated with the Leaderboards feature. The Leader Boards' sales tracking system helps you create, deploy, and manage reports.

What information is transferred over to PestPac?

The screenshot shows a mobile app interface for creating an agreement. At the top, there are buttons for 'New', 'Save', 'Customer Info', 'Agreement', and 'Submit'. The 'Customer Info' section includes fields for First Name, Last Name, Business Name, Primary Phone, Alternate Phone, Email, Address, Apt/Suite, City, State, and Zip. A 'Same Billing' toggle is set to 'Yes'. The 'Payment Info' section shows a credit card selection (Discover, Visa) and a 'Pay with' toggle set to 'CC'. The 'Service Info' section includes 'Covered Services', 'Additional Services', 'Initial Service Date' (with a 'Select Date' button), 'Auto Pay?' (set to 'No'), and a 'Treatment Schedule' grid for months Jan-Dec. Below this is a 'Pest' section with fields for Frequency, Agreement Length, # of Services, Initial Fee, Discount, Regular Fee, Total Initial, and Total Regular. A 'Notes' field is at the bottom. The app's bottom navigation bar shows 'Home', 'Calendar', 'Agreements', 'Tools', and 'Dashboard'.

Customer Info - When on the agreement screen, you will see fields for contact info. The First Name, Last Name, Business Name, Primary Phone, Alt Phone, Email, Address, Apt/Suite, City, State and Zip all translate over to the account in PestPac.

If **Same Billing** is set to “Yes”, then both the Location and Billto in PestPac will have matching contact info. If “No” is selected, you will have additional fields to populate Billto information that is different from the Location.

Payment Info - The ability to collect credit card information is available so that the customer can be set up on AutoPay. **(Coming Soon)**

Service Info – Covered Services and Additional Services are verbiage that will show up on the agreement. This is pulling from the Settings > Contracts section of the SR Dashboard.

Initial Service Date – Click on Select Date to schedule the initial service order. This will pull from the current appointment calendar in Pestpac so it will only show available time slots based on the tech’s availability.

Auto Pay - Can be set to “Yes” or “No” and will translate to the auto-bill check box within the service setup that is created. **(Coming Soon)**

Treatment Schedule – Click on months in this visual schedule for indicating the frequency of service. This does not have any bearing on the schedule chosen on the service setup, rather it is for the agreement only to show the price per service.

Pest – Frequency will allow you to pick Monthly, Bi-Monthly, Quarterly, or Custom based on your Integration Settings. This will drive the schedule that is populated on the service setup back in PestPac.

Length – Indicate the contract length in years. For the agreement only; does not affect the schedule of the service setup.

of services – Indicate the number of services in the contract length. For the agreement only; does not affect the recurring service setup in any way.

Initial Fee – Indicate the base price (without tax) of the initial service order.

Regular Fee – Indicate the base price (without tax) of all future recurring services. This will show as the subtotal on the service setup created in PestPac.

Discount – Indicate the dollar amount you would like to reduce the initial or regular prices by. This currently does not transfer over to PestPac in any way.

Notes – Notes indicated here will transfer over to the service instructions in the initial service order along with some details from the contract.

Agreement – Once submitted, a PDF version of the agreement can be found attached to the Location Documents of the account created in PestPac.


How do I use the scheduler to schedule the initial service?

When you click on “Select Date,” this opens the scheduler showing all techs that are eligible to service the branch the zip code falls into. It knows which branch the customer belongs to by using the Branch Zip Code lookup table in PestPac.

Service Info

Covered Services: _____

Additional Services: _____

Initial Service Date: **Select Date** 

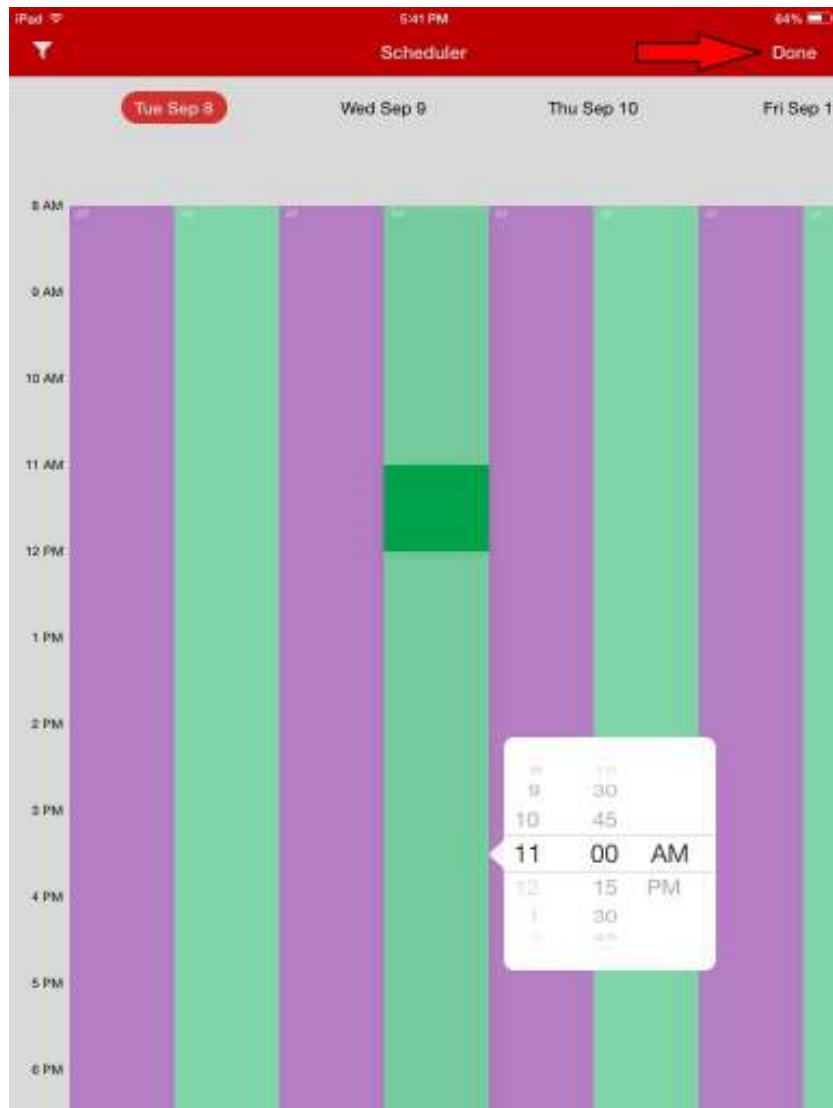
Auto Pay? Yes No

Treatment Schedule: Jan Feb Mar Apr May Jun Jul Aug Sep

To narrow your search, tap on the filter icon in the top left to select which tech’s schedules you’d like to view. Tapping on “All Selected” will DESELECT ALL techs and then you can tap on a few specific techs.



Then tap on any blank spot on the scheduler to select a time slot you'd like to book. A work time selector will pop up so you can scroll to the time for the initial appointment.



How do I submit an agreement on the app?

Once the salesperson has completed populating the agreement screen, they will want to flip over to the actual agreement document and have the customer sign it. Tap on the agreement button at the top of the app to get to the agreement form. All information entered on the Customer Info screen will translate onto the agreement form.

The screenshot shows the 'Agreement' screen in the PestPac app. The top navigation bar has a red background with a white menu icon, 'New', 'Customer Info', 'Agreement' (highlighted with a red arrow), and 'Submit'. The main content area is divided into sections:

- Customer Info:** Name: Joe Smith, Business Name: [blank], Phone: (555) 555-5555, (444) 444-4444, Email: joe@email.com, Same Billing: Yes (selected), No. Address: 1 Main St, Apt/Suite, Citytown, VA, 20030.
- Payment Info:** Credit Card #: [blank], Logos for Discover, American Express, and VISA, Exp Date, CVV, Pay with: CC (selected), ACH.
- Service Info:** Covered Services: Roaches. Additional Services: \$ Mosquitos. Initial Service Date: 9/4/2015 10:00 AM.
- Auto Pay?** Yes (selected), No. **Treatment Schedule:** A grid showing monthly fees: Jan (\$100), Feb (\$125), Mar (\$125), Apr (\$125), May (\$125), Jun (\$125), Jul (\$125), Aug (\$125), Sep (\$125), Oct (\$125), Nov (\$125), Dec (\$125).
- Summary Table:**

Pest:	Frequency: Bi-Monthly	Initial Fee \$ 100	Regular Fee \$ 105
	Agreement Length: 1 Year	Discount \$ 0.00	Discount \$ 0.00
	# of Services: 6	Total Initial \$ 100.00	Total Regular \$ 105.00
- Notes go here**

The bottom navigation bar has icons for Home, Search, Agreements (highlighted), Tools, and Leadboards.

Tapping on the box to collect initials will allow the customer to sign with their finger. Same goes for the signature line at the bottom. Once all information on the customer info page has been verified all signatures are captured, tapping on "Submit" will send close the lead and send the information over to PestPac.

iPad 12:35 PM 41%

New Customer Info Agreement Submit

9/28/15, 11:00 am

Customer Information

Name: **Kyle Smith** Business Name: _____
 Email: _____ Phone: **(888) 777-6654** Alt. Phone: _____
 Street: **44 Wayside Rd** Apt: _____ City: **Orange** State: **VA** Zip: **22623**
 Bloodstreet: _____ Apt: _____ City: _____ State: **VA**
 Deck # _____ Top Deck: _____ POV: _____
 Professional/Contractor: _____ Account Type: _____ Service # _____ Address # _____

Service Details

Covered Services
 Roaches, ants, flying insects, spiders, other crawling insects

Additional Services
 Mosquitoes, bedbugs, not included.

Treatment Schedule

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
15	ON	ON	ON	ON	ON	ON	ON	ON	ON	ON	ON	ON
16												

Notes
 Notes from the notes-section would go here.

Service

Service Type: **Peak** Agreement Length: **1 Year**
 Frequency: **Monthly** Total Services: **12**

Initial Fee	\$ 75.00	Regular Fee	\$ 100.00
Discount	\$	Discount	\$
Total Initial	\$ 75.00	Total Regular	\$ 100.00

Service

Initial Fee	\$	Regular Fee	\$
Discount	\$	Discount	\$
Total Initial	\$	Total Regular	\$

Easy Pay Option
 Easy Pay Option:

Guarantee
 Guarantee info from the Contract settings section would go here.

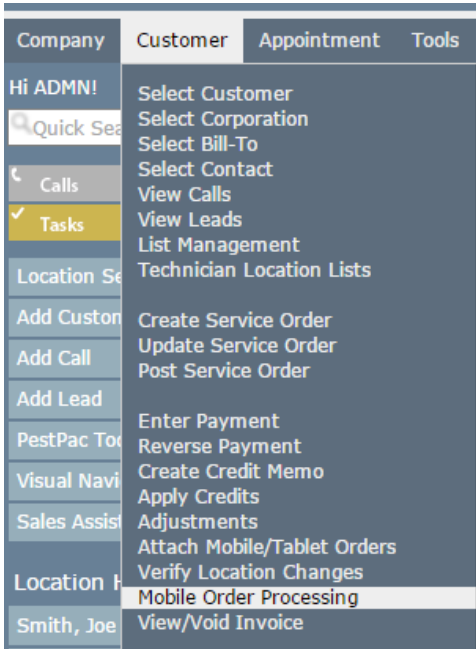
Terms
 Terms and conditions from the Contract settings section would go here.

[Signature]

9/27/2015 A. Wain

Home Contact Agreements Tools Dashboard

Where does the information go after I've submitted an agreement via the SR app?



Once the agreement is submitted, an account is created in PestPac but needs to be accepted by office staff. The approval process is completed under the Customer menu > Mobile Order Processing.

The account will still be visible to users even if it has not been approved, but it will show a red "Pending Confirmation" tag until then.

Once you get to the Mobile Order processing screen, clicking on the account info on the left will bring up that new account. You can then make changes to any information before clicking on "Accept" or search for an account to match it up to.

If additional changes need to be made to the location or billto, this can be done by doing a Location Search for the account and clicking on the Location or Billto number to edit from there.

