

AltiGen Integration

The AltiGen integration allows the user to have a pop-up linked to their phone system (Affiliated) without downloading a separate bridge application.

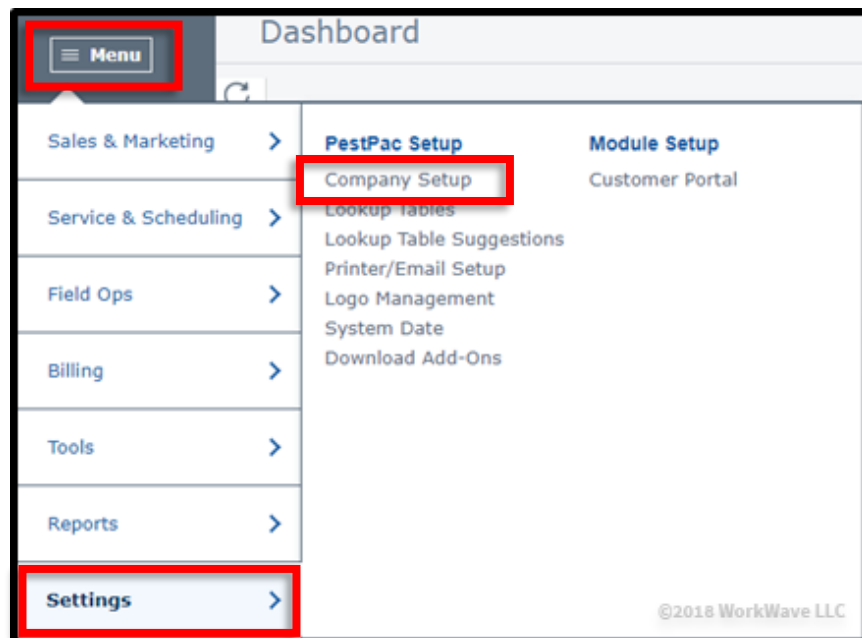
Note: New AltiGen integrations will receive initial training from the VoiceForPest branch of Affiliated. This document is intended as a reference that outlines initial setup, enabling the integration, updating the Employee Lookup Table, and using the integration.

Affiliated will coordinate installation of their services for your company and notify WorkWave of the successful setup of your account. A member of PestPac Support will reach out once the AltiGen Web API access has been activated in your database. You will need your AltiGen credentials, including server name, extensions, and passwords.

Enabling Integration

To enable the AltiGen integration, complete the following steps:

1. On the desktop, go to *Menu > Settings > Company Setup*.



2. Under *General Options*, click the blue *Additional Features* link.

Company Setup

General Options
[Company Information](#) :: [Defaults for New Account](#) :: [Field Setup](#) :: [Posting](#) :: [Renewals](#) :: [Service Order/Service Setup](#) :: **[Additional Features](#)** :: [Period Lockdown](#) :: [Generate Options](#)

Payment Options
[Auto Apply](#) :: [Credit Cards](#) :: [Payment Screen](#)

Additional Modules
[Collections](#) :: [General Ledger](#) :: [Inventory](#) :: [Lead Import](#) :: [Timesheets](#) :: [RouteOp and VRM](#) :: [GPS](#) :: [PestPac Mobile App](#) :: [LogIt](#) :: [Call Tracking](#)

Mobile Options
[PestPac Mobile Classic](#) :: [PestPac Mobile Office](#) :: [Sentricon](#)

- Under the *Customer Calls & Sales Leads*, click the *Use Altigen* checkbox to enable the integration.

Customer Calls & Sales Leads

Use Sales Cycles

Default Calls to Customer Tech

Send Email on New Calls/Leads

Lead/Call/Task Email Method:

SMS

Text

HTML

Use Altigen

Create Location on Save New Lead

Lead Color On Scheduler From:

Service

Pending Event

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Employees Lookup Table Setup

After enabling Altigen, complete the following steps to set up the integration for each Employee profile:

- On the desktop, go to *Menu > Settings > Lookup Tables > Employees* and select the appropriate employee.

Maintain Employees Branch:

Jump To:

Username	Name	Type	Default Branch	Confirmed Email	RouteOp	GPS	PestPac Mobile App	IPM	Sentricon
01	Whom A&A Verr	User/Tech	OAKHURST	✓					
02	Bill Butler	User/Tech	Freehold						
03C	Chris Roberts	User/Tech	North Brunswick						
1	4 23	User/Tech	Main						

- Click the blue link named *Calls*.

Maintain Profile ©2018 WorkWave LLC

General Options
[Basic Information](#) :: [Tech Photo/Bio](#) :: [Notifications](#)

User Preferences
[General](#) :: [Appointments](#) :: **[Calls](#)** :: [Collection](#) :: [Leads](#) :: [Location Detail](#) :: [Location Search Columns](#) :: [PestPac Today](#) :: [Tasks](#)

- Under *Altigen Web API Credentials*, enter the credentials provided to you by Altigen.

Altigen Web API Credentials

Server:

Extension:

Password:

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- Click the *Save* button to finish completing the integration.



Using the Integration

The AltiGen integration will pop up as a separate window within PestPac when the Employee (who is set up for the integration) answers the call. The integration matches the call with a record within PestPac, including:

- Locations
- Location Contacts
- Bill-tos
- Leads
- Inactive Accounts

Note that the primary phone number, alternate phone number, and mobile phone number fields are included in the search.

New Call from 732-267-...

Inbound Call Matches

Account #	Name	Address	City	State	Zip	
100061	Brian Nicoletti	2360 ROUTE 9	TOMS RIVER	NJ	08755-1929	View Bill-To
100030	Heather Mazza	843 FISCHER BLVD	TOMS RIVER	NJ	08753-3836	View Location
100053	Mazza					View Location
100061	Brian Nicoletti	2360 ROUTE 9	TOMS RIVER	NJ	08755-1929	View Location

Inactive Accounts

Account #	Name	Address	City	State	Zip
<i>No matches found.</i>					

[Exit](#)

PestPac will create an open call on the account, allowing the Employee answering the phone to note the conversation. PestPac will auto-close the call on the account when the phone is disconnected.

Date	Time	User	Code	Minutes	
Monday, 11/05/2018	04:19 PM	ADMN	BILLING	1	[Edit]
Called For: KYLE					
Order Number: #174765					

The call will include the inbound phone number, extension, and Employee to which the extension is assigned.

The Altigen integration also allows the Employee to click on the phone number within PestPac and dial out through Altigen.

If the Employee is using a physical phone, the phone will ring, dial out, and connect to the Customer. If the Employee is using VoIP, they will be prompted to accept the phone call to call out from the system.



REMEMBER: For additional setup, training, and usage resources, including live webinars and a robust video library, please visit [PestPac University](#).

