

# PestPac CustomerConnect Initial Setup

PestPac's secure, easy-to-use CustomerConnect gives your customers 24/7 access to view account information, run reports, schedule service, pay bills, and more.

This document outlines how to set up the module as well as how to set up your customers with their portal accounts:

- [Before You Get Started](#)
- [Accessing CustomerConnect](#)
- [Express Setup](#)
- [Advanced Setup](#)
- [Portal Account Access](#)

## Before You Get Started

Before you get started, you will need:

- The logos and images you would like to use
  - Format: PNG (preferred) or JPG
  - Required Dimensions: minimum width: 585px; maximum height: 100px
  - Maximum File Size: maximum file size: 1MB
- The domain that your company would like to use for the new Portal
  - Option 1: WorkWave will set up and manage a Portal URL for you.
    - The Portal URL will include your company name as the subdomain of one of two secure, WorkWave-hosted domains. You can choose from [yourcompanyname].pestconnect.com or [yourcompanyname].myserviceaccount.com.
    - WorkWave will host and manage the subdomain and associated SSL certificate.
  - Option 2: You can use your website domain to create a Portal subdomain.
    - Your website administrator will need to point this URL (e.g., myaccount.[yourwebsiteaddress].com) to the Portal server at **ha.pestpac.com**.
    - This site will be hosted and managed by your company.
    - The SSL certificate for this site will be hosted and managed by your company. For an additional monthly charge, WorkWave can manage your SSL certificate.
- If you currently use Customer Account Access (CAA) or Premier Portal, please contact Support for how best to handle transitioning to CustomerConnect.

Once you complete these steps, please contact WorkWave for installation. After installation is complete, we will email you with administrator setup instructions. After

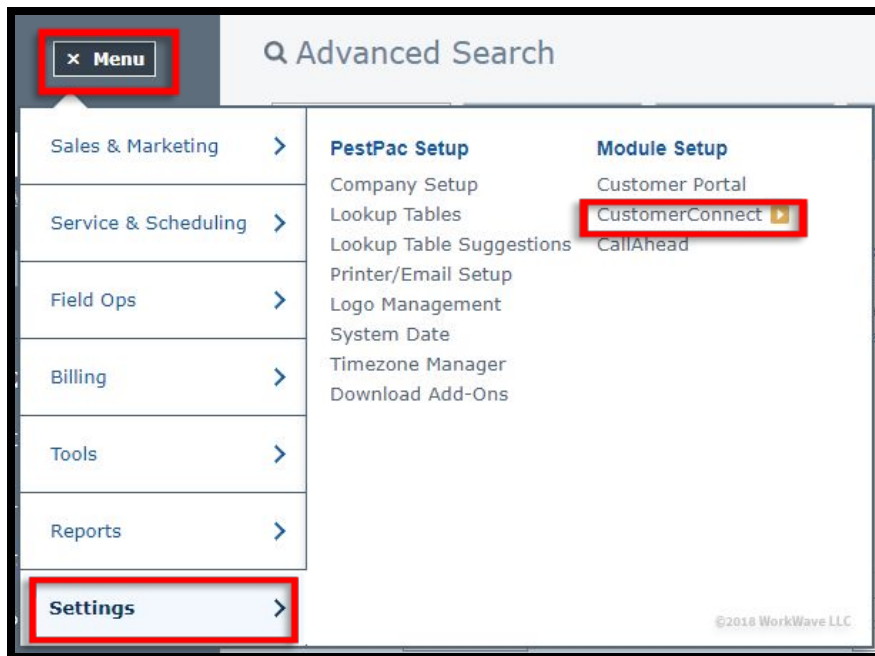


setting up your WorkWave ID email and password, please keep the login information handy. (Note: This information is separate from your PestPac login credentials.)

## Accessing CustomerConnect

To get started setting up CustomerConnect, you will need to access your CustomerConnect Setup by completing the following steps:

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



2. Log into CustomerConnect with the **NEW** WorkWave ID email and password you set up from the WorkWave welcome email mentioned above.

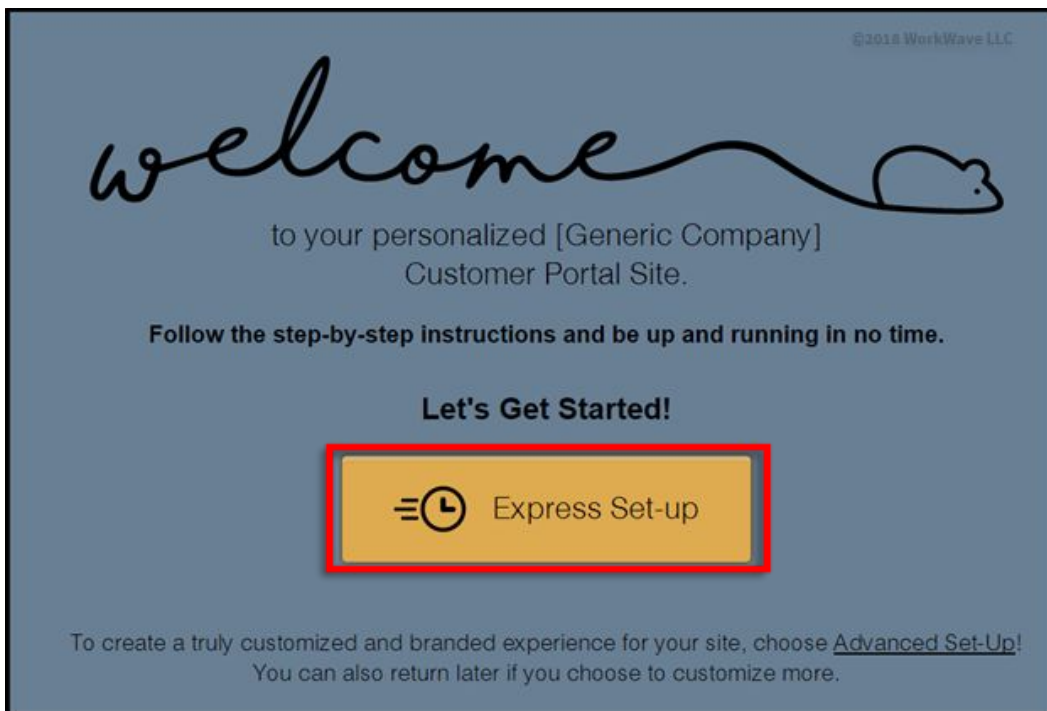


You will have the option to complete Express Setup, a quicker way of getting the CustomerConnect ready, or Advanced Setup, a fully customized and branded portal. Note that you can always return later to make additional customizations which we will touch on later in this document.

## Express Setup

To use Express Setup, complete the following steps:

1. Click the *Express Set-up* button to start customizing your portal.



2. Permissions determine the type of access given to your customers when they log in to view their own account information. Note that if you are not utilizing a specific feature in PestPac (e.g., Conditions), you should not have that item checked as a Permissions Set.

Select the options you want to allow customers to see when they log into the portal by checking the boxes, and click the Save button.

## Express Set-Up

Last save occurred: 0 minutes ago [?](#)

### General Information

Please select or create what you'd like your customers to be able to see and do on your site.

Permissions Set:

Administrative ▼

Custom Permissions

Online Support

Update Account

Manage Users

Open Orders

Account Documents

Select All

Unpaid Invoices

Online Payment

Payment Info

Service History

Payment History

Permissions Set:

Administrative + Permissions Set

**Save**

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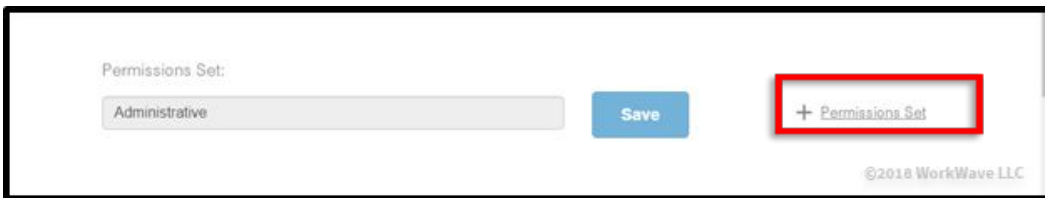
Access Right	Description
Online Support	Access right to allow the customer to “Ask a Question” (Menu > Ask a Question).
Update Account	Access Right to edit the “Account Information” in profile settings (Menu > Profile). User will be able to view account information.
Manage Users	Current feature has been disabled in CustomerConnect.
Open Orders	Access Right to allow the customer to see any upcoming services (Menu > My Account > My Services > Upcoming Services).
Account Documents	Access right to allow the customer to view documents that have been uploaded to their account in PestPac (Menu > My Account > My Documents > Account Docs). This access right



	does not control company documents or material documents.
Unpaid Invoices	Access right to allow the customer to view unpaid invoices. The balance will still reflect accurately on the account; however, the customer will not be able to view/pay these invoices if not enabled (must have "online payment" access right enabled in order to pay).
Online Payment	Access right to allow the customer to pay outstanding balance. Must have Vantiv enabled in PestPac.
Payment Info	Access right to allow the customer to pay outstanding balance. Must have Vantiv enabled in PestPac
Service History	Access right to allow the customer to see historical service records. This applies to the dashboard page as well as Menu > My Account > My Services > Service History.
Payment History	Access right to allow the customer to see historical payments on the account (Menu > My Account > My Billing). Customer will still be able to see "pending payments" that are residing in an unreleased payment batch.
Billing Info and Online Payments	<p>CustomerConnect admins are able to toggle whether certain customers have access to see pricing information within CustomerConnect. The following data will be hidden if this access right is not checked:</p> <ul style="list-style-type: none"> <li>• Menu &gt; My Billing link will be hidden</li> <li>• Pricing will be hidden on "Upcoming Service Card" on dashboard</li> <li>• Pricing will be hidden on "Most Recent Service Card" on dashboard</li> <li>• Pricing will be hidden on upcoming services and service history on "My Services"</li> <li>• Invoice links will be hidden under service history</li> <li>• Pricing will be hidden on "Show All Services" page</li> <li>• Pricing will be hidden on service agreements</li> <li>• All inspection report links will use "Display without Prices" inspection report</li> </ul>

3. To create more than one Permission Set, click the + *Permission Set* link and follow the steps again to create a new one.



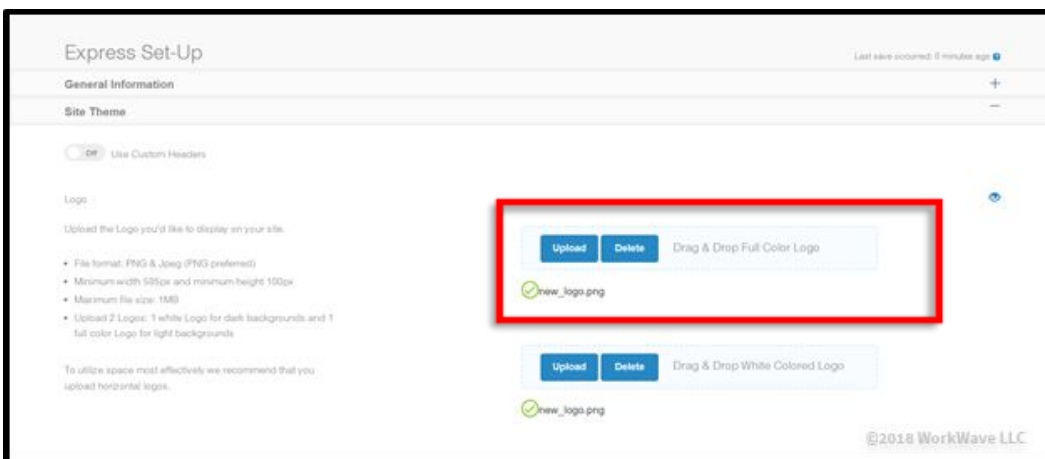


4. Click the *Next* button next in the bottom-right corner to continue with the setup.



5. To set up your Site Theme, make sure your logo(s) meets the format requirements as listed, and upload each logo to the area in which you want it to appear by clicking the *Upload* button.

You can also drag and drop the image from your computer to the space provided.



6. In addition to logos, you can set a branding message and select a theme by clicking into the *Branding Message* box and typing your message to appear alongside your logo. Note that the box saves automatically when you click out of it.

Branding Message

The branding message is what you want your customer to remember most about your company. It could communicate your mission statement, emergency contact information, charities you support or even employee of the month!

Uploading an image is optional, but if you choose to upload an image make sure that the image you upload is supportive of the text you're placing next to it. If your image exceeds the live area it will be automatically adjusted to fit.

- File format: PNG & jpeg (PNG preferred)
- Minimum width 50px and minimum height 50px
- Maximum file size: 1MB
- Full color

Theme selection

You can change your Color Theme here by selection from our most commonly used pre-designed color palettes.

Upload Delete Drag & Drop Branding Logo

pest control Daphne AL.png

Branding Message

Rated #1 company in New Jersey

Color Theme:

Blue Red

Back Next

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The *Branding Message*, *Branding Logo*, and *Company Logo* entered here will appear in your CustomerConnect site at the top of the page shown below:

Bell's Pest  
MOSQUITO

Servicing New Jersey Since 1905

Menu

Thank you for letting us serve you!

Account Balance [View Account Details](#)

**\$2,145.00**

Pending Payments: **\$590.00**

Reports At A Glance [All Reports](#)

<p>Open Conditions</p> <p>Assigned to You</p> <p>You currently have no open</p>	<p>Pests Captured</p> <p>In the last 90 days</p> <p>No pests found within last</p>	<p>Device Summary</p> <p>No inspections yet</p>
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7. Select a Color Theme from the bottom-right option box.

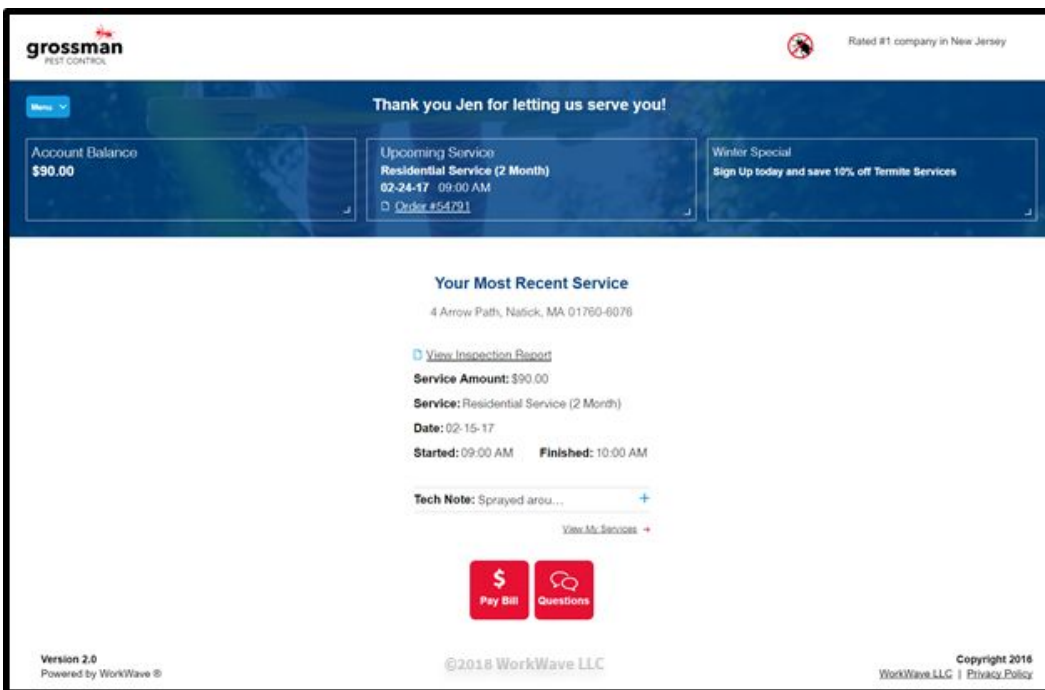




8. Click the *Next* button in the bottom-right corner.



Express Set-up is now complete. You can log back in at any time to adjust if needed.



Next, we will look at the optional Advanced Setup options. If you are satisfied with how your CustomerConnect site looks after Express Setup, please skip to [Portal Account Access](#).

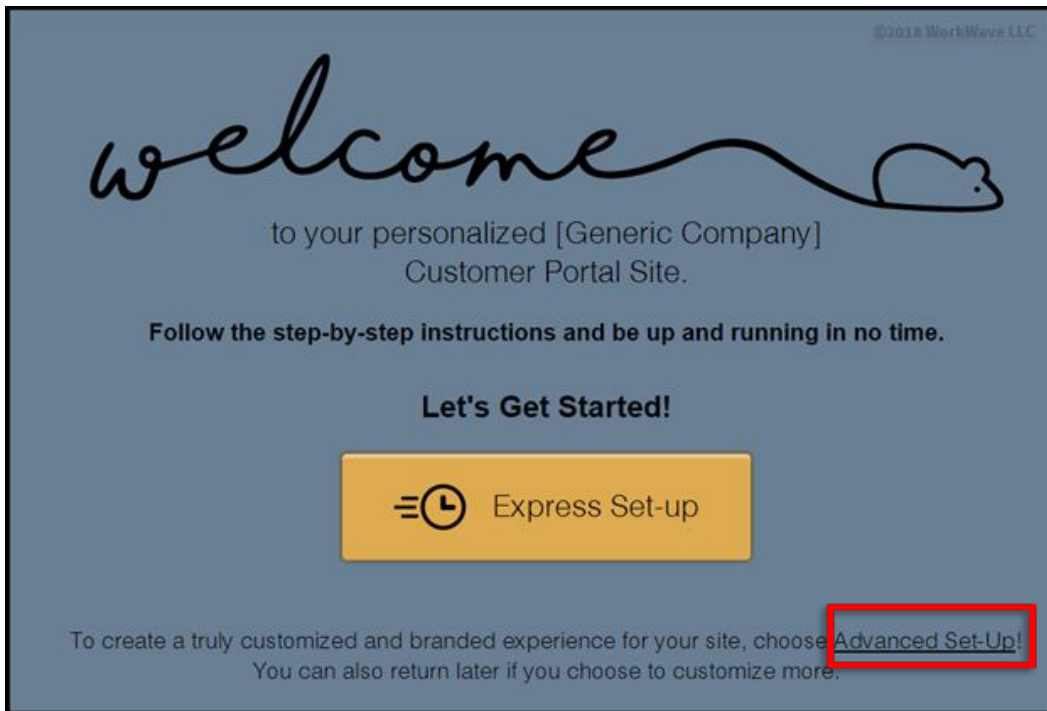
## Advanced Setup

Advanced Setup allows you to access additional options to fully customize your portal. To use Advanced Setup, complete the following steps:



1. After logging into CustomerConnect from PestPac, click the *Advanced Set-up* link to start customizing your portal.

The additional options available include *Basic*, *Payment*, *Service*, and *Communications*.



2. Within the *Basic* step, select the options you would like configured to allow your customers to Ask a Question from within the CustomerConnect. This selection will affect the *Ask A Question* section of CustomerConnect displayed below:

Step 2 Last save occurred: 0 minutes ago [Log out](#)

**Preferences**

**Basic**

Select how you would like to handle your customer communications.

How would you like your customers to Ask a Question?

Email Note Code

Email: \*  SERVICE v

Source Code Source Code

CUSTOMER v

Would you like to show technician notes?

Show Tech Notes

[Back](#) ©2018 WorkWave LLC [Next](#)

**Ask A Question**

Need to reschedule an appointment or request information about a service? Please complete the form below. We will get back to you as quickly as we can.

\* Subject:

\* Question:

Attachments:

\* Name:

Contact By:

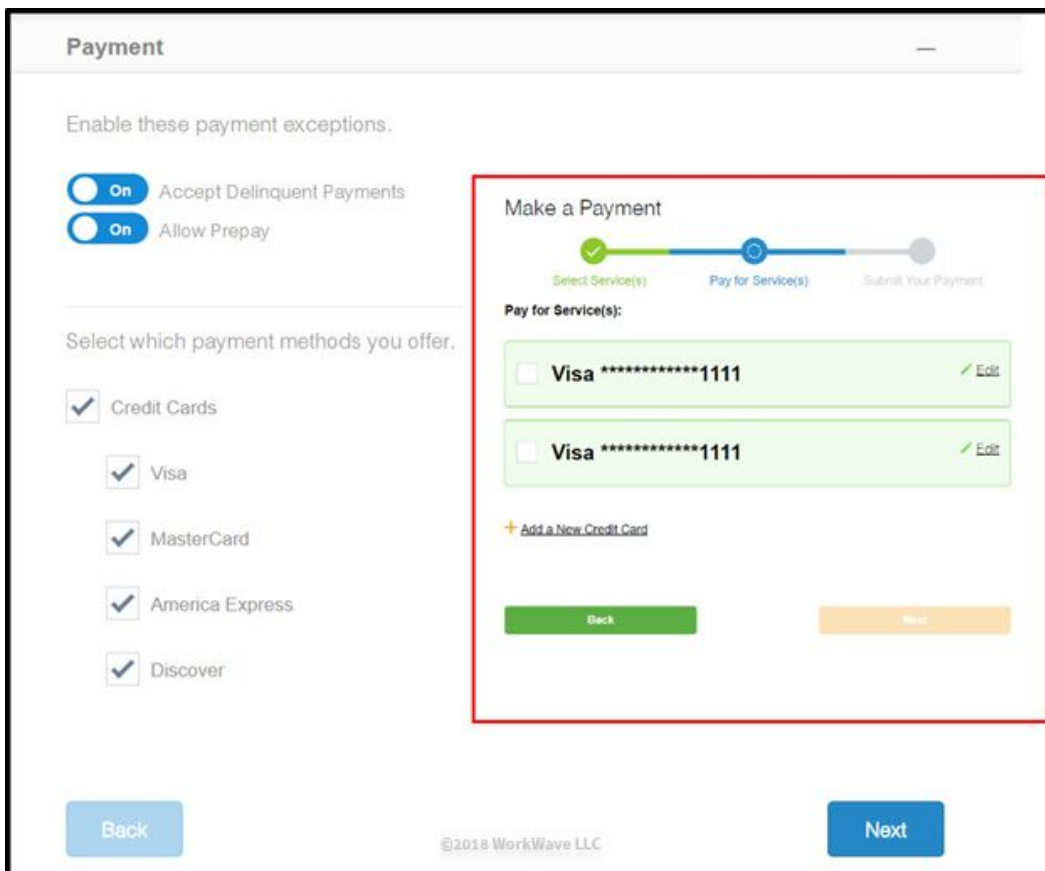
Phone  Email

- Once you have selected the Note Code and/or Source Code from the dropdown menus, a *Next* button will appear; click the button to continue to the next step.

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- Within the *Payment* step, select what types of payments you will accept from customers on the *Make a Payment* (displayed below) screen in CustomerConnect. Please note that that you have Vantiv Credit Card processing set up to use this feature.



5. Once you have selected the options, a *Next* button will appear; click the button to continue to the next step.



6. Within the *Service* step, select your preferences regarding allowing your customers to request a service through the CustomerConnect. If you do not want to allow access to this feature, leave the option for *Basic Scheduling* set to *Off*.

**Service**

Select how you would like to handle customer scheduling requests.

**On** Basic Scheduling

Email  
 Email \*

Log  
 Note Code  
 Note Code

Source Code

How would you like technicians to be assigned?

Current Technician     Any Technician in Branch     Search all Technicians

Between  and  Days Out

Maximum Appointments Displayed:

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- Once you have selected the options, a *Next* button will appear; click the button to continue to the next step.

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- Within the *Communications* step, you will see messaging that displays on the front page of CustomerConnect and will change depending on the user logged into CustomerConnect (e.g., a customer for whom you recently performed service will see the *Recent Service Performed* headline message).

**Communications**

View Headline Messages 

First-Time User:


Returning Customer:


Recent Service Performed:


Incoming Notification:


Payment Due:

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Servicing New Jersey Since 1905




Menu 

Thank you for letting us serve you!

Account Balance
 [View Account Details](#)

\$2,145.00

Pending Payments: **\$590.00**

Reports At A Glance
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All Reports 

9. Once you have selected the options, a *Next* button will appear; click the button to continue to the next step.

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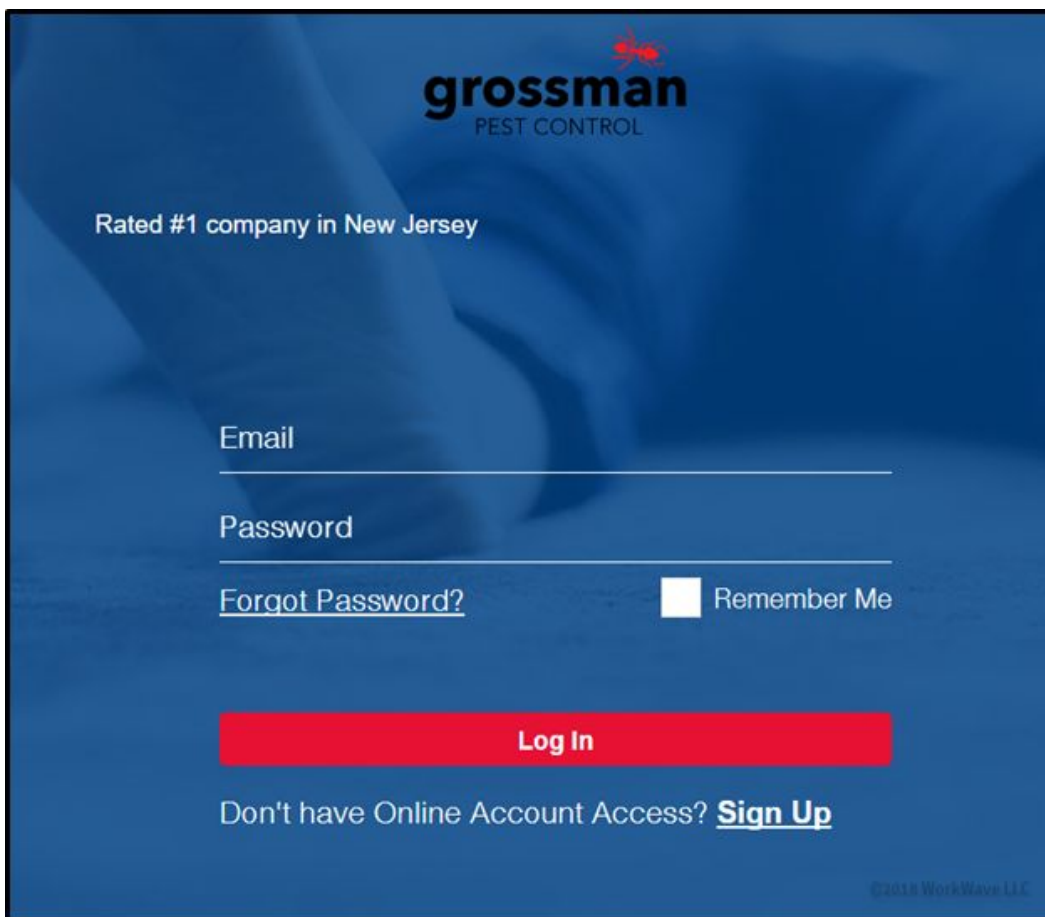
You are now at the next step of customization that allows you to configure additional items, including photos and graphics, colors, and marketing messages. These options are covered in the [Express Setup](#) section.

## Portal Account Access

Now it's time to set your customers up with their portal account access. There are two ways this can be done:

- *Option 1:* You can direct your customers to your login page and advise them to click the *Sign Up* button in the bottom-right of the screen.

Note: Users **MUST** have a valid email address entered on their Bill-To in order to gain access to CustomerConnect.



**grossman**  
PEST CONTROL

Rated #1 company in New Jersey

Email

Password

[Forgot Password?](#)  Remember Me

**Log In**

Don't have Online Account Access? [Sign Up](#)

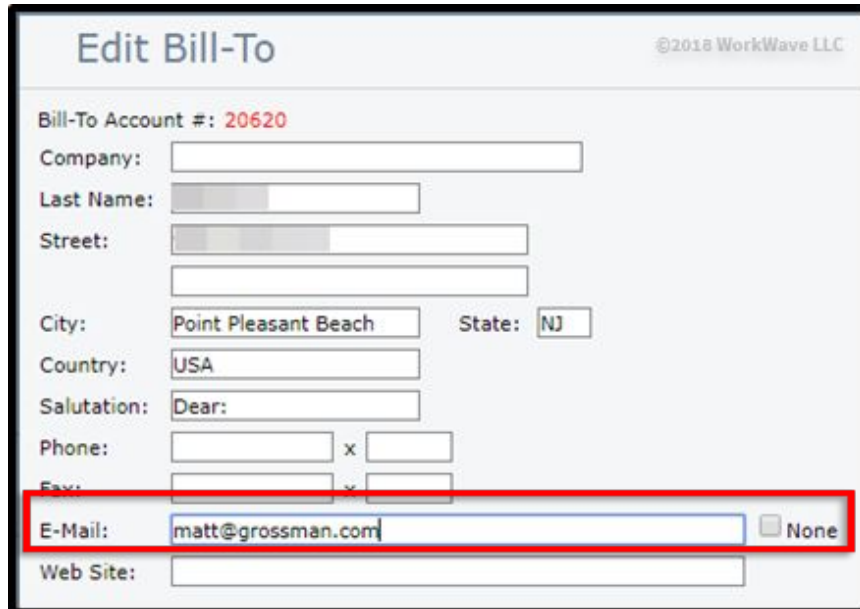
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If you choose this method, we recommend you send out a mass communication to your customers encouraging them to sign up via email.

- *Option 2:* You can manually set up each account via the Edit Bill-To Edit screen within PestPac.

If choosing Option 2, complete the following steps:

1. From the *Edit Bill-To* screen, ensure that the Bill-To you are setting up has an email address populated and note that email address (you will need it in the next steps).



**Edit Bill-To** ©2018 WorkWave LLC

Bill-To Account #: 20620

Company:

Last Name:

Street:

City:  State:

Country:

Salutation:

Phone:  x

Fax:  x

E-Mail:   None

Web Site:

2. At the bottom of the *Edit Bill-To* screen, click the *Invite User* button.



**CustomerConnect Access**

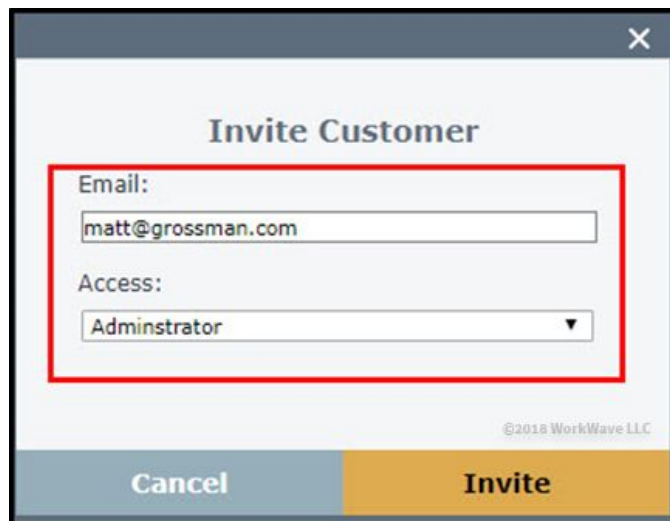
NAME	EMAIL	ACCESS TYPE	VERIFIED
No users found.			

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3. In the *Invite Portal User* window, enter the customer email address from the Bill-To, and select *Portal Access* to grant them from the Permissions Set you created in the setup process.

Note: If customers sign up themselves through your CustomerConnect site, PestPac will pull the access they have for the permissions set; you can change the user's access later here.





Invite Customer

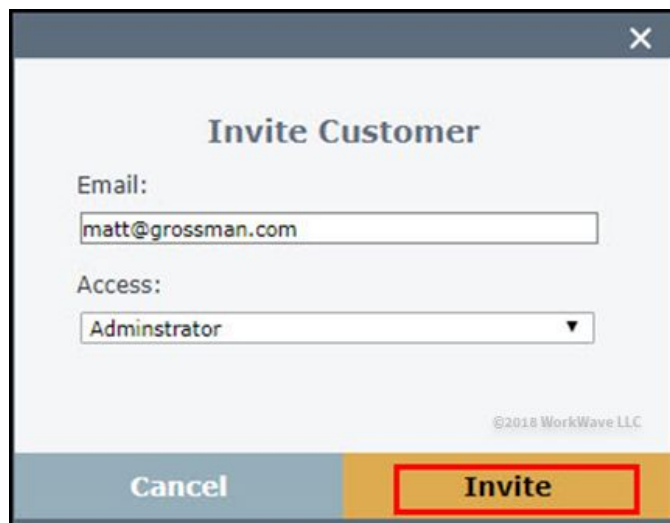
Email:

Access:

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Cancel Invite

4. Click the *Invite* button to send the email.



Invite Customer

Email:

Access:

©2018 WorkWave LLC

Cancel Invite

5. An email has now been sent inviting your customer to set up a portal account, and your initial setup is complete.

# Hooray Jo!

Welcome to your Customer Portal.

You now have access to a powerful, simple and secure tool that is built to help keep you up-to-date with all your service needs.

In this portal you will be able to view upcoming and previous services, pay bills online and even schedule new appointments.

Click the button below to verify your account.

Verify Account

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



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