

PestPac CustomerConnect Navigation

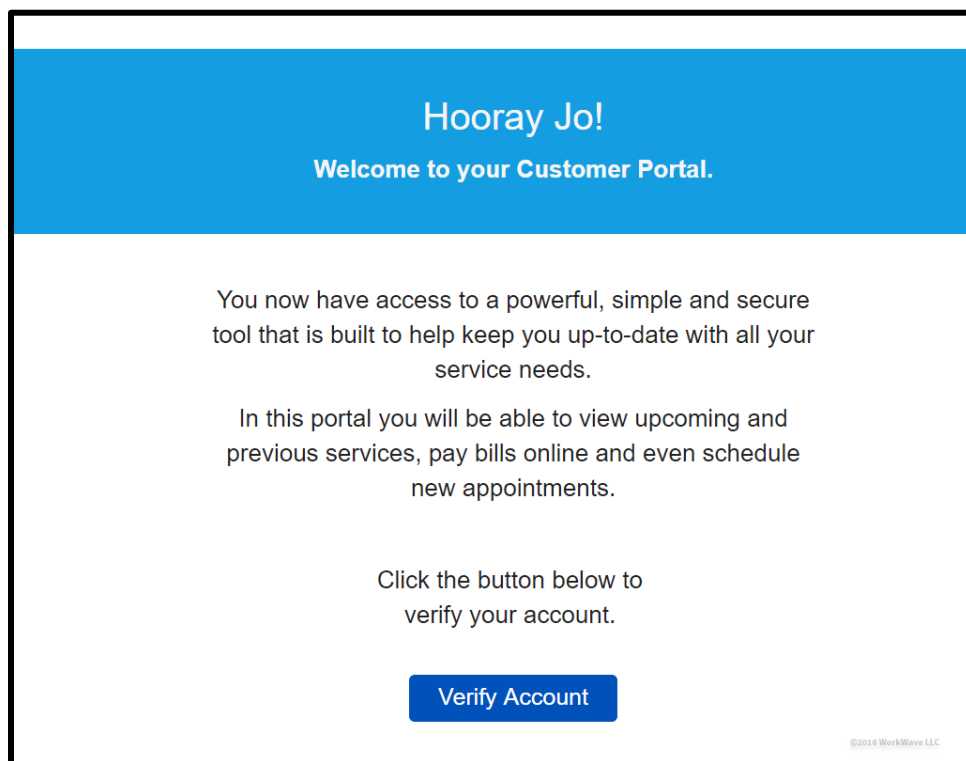
PestPac's secure, easy-to-use CustomerConnect gives your customers 24/7 access to view account information, run reports, schedule service, pay bills, and more.

This document outlines what YOUR customers will see when they register and navigate through the portal:

- [Portal Registration](#)
- [Portal Navigation](#)

Portal Registration

If you have invited your customer using the *Invite Link* in the Bill-to within PestPac, they will receive an email that includes a button to reset their password.



Your customer will need to verify the bill-to account # or the bill-to phone number to gain access to the site.

Create Your Account

Verify Your Account

By Billing Account Number ▼

Billing Account Number*

Enter Your Name and Create a Password

First Name*

Last Name*

Password*

Confirm Password*

Passwords must have at least 8 characters, including at least one upper-case letter, one lower-case letter, one number, and one of the following special characters: ! @ # \$ % ^ & .
Remember, passwords are case sensitive.

Show Password

Save

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If your customer requested their own access via your portal link by clicking *Sign Up*, they will be able to enter their email address to sign up.

Sign Up for Online Account Access

Please enter your email address into the field below, hit submit and a verification email with a temporary password will be sent to the email provided.

Keep in mind you must have an existing Billing Account with us in order to Sign Up for Online Account Access.

Email
jcurmi@workwave.com ✕

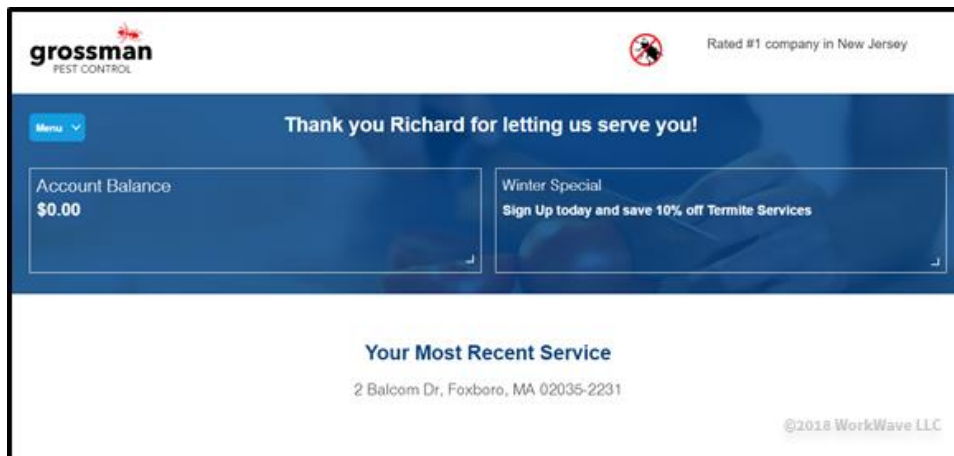
Submit

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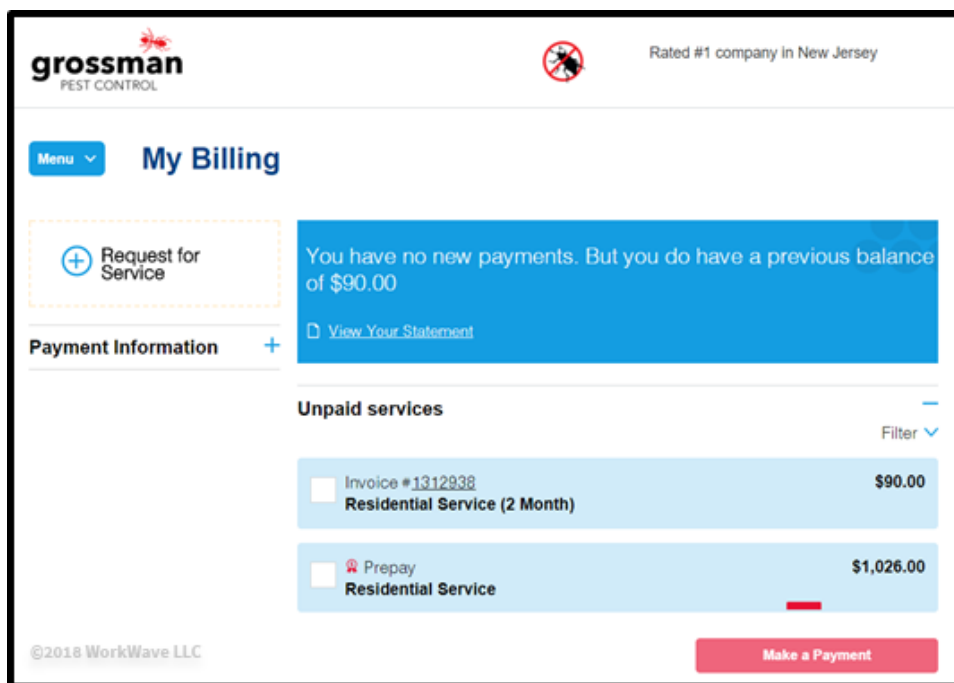


Portal Navigation

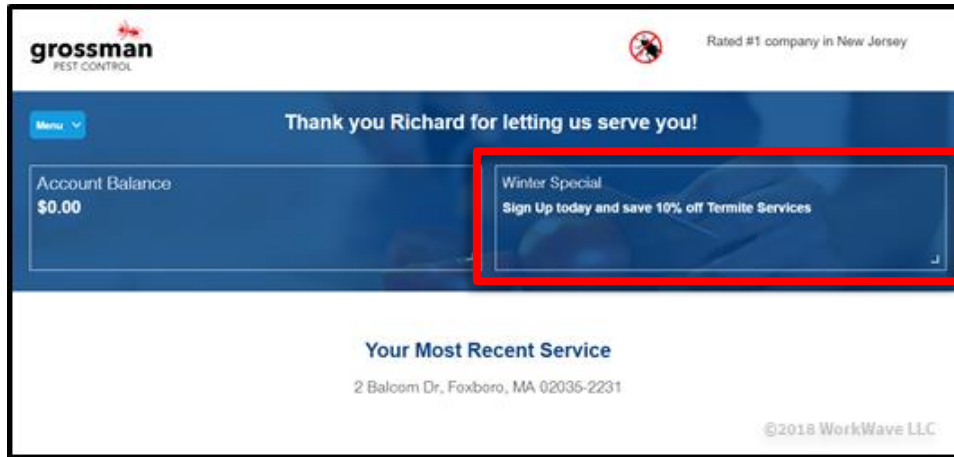
After your customer logs in, they will see the Dashboard where they can view their current account balance and any marketing text that you have enabled.



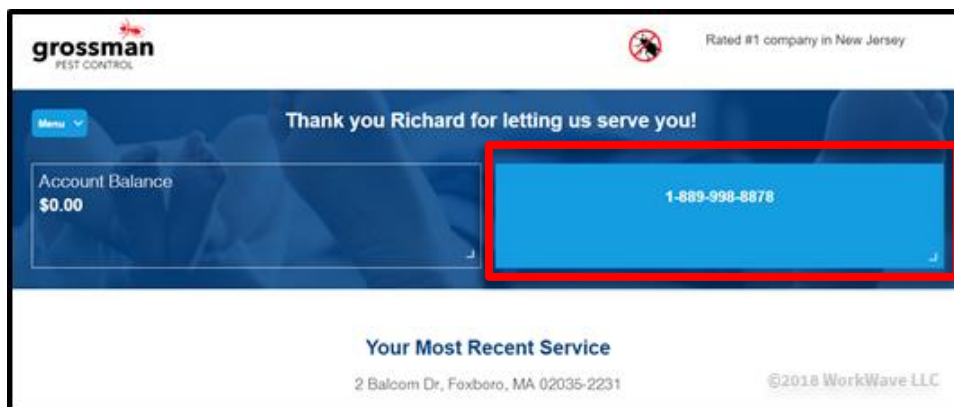
If enabled, clicking the *Account Balance* will bring your customer to the *My Billing* screen where they can make a payment or link a credit card to their account. Note that your company must be set up and configured with Vantiv to use this feature.



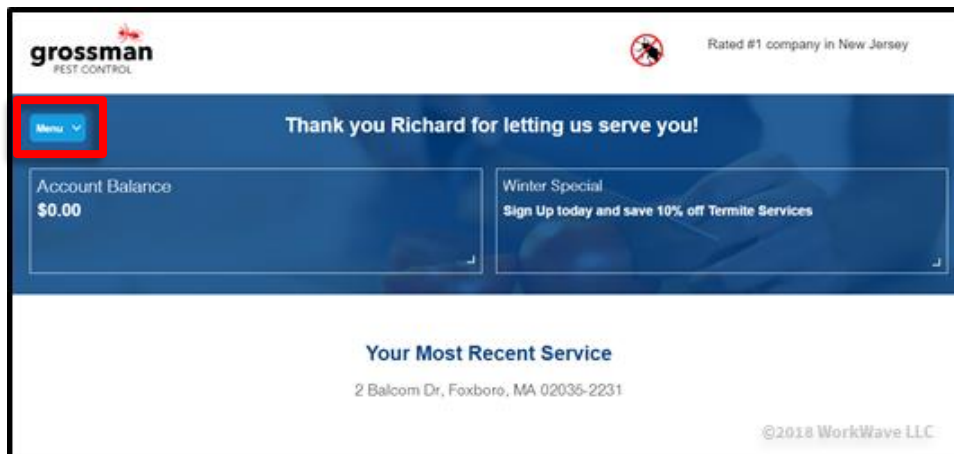
If enabled, on the right-hand side, your customers will see the marketing text (headline and body text) that was configured in your CustomerConnect setup. Note that this text does NOT respect the rules from your Marketing Text lookup table in PestPac.



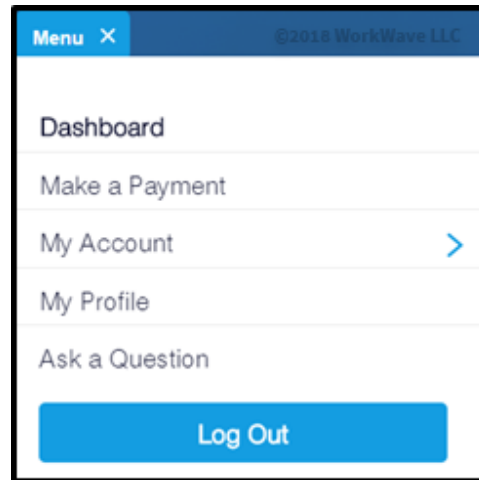
Clicking the marketing text will bring your customer to the *Call-To-Action*. If the marketing text is turned off, the Account Balance will show in the entire width of the screen.



To access the remainder of their portal options, your customers can click the *Menu* button in the top-left corner of the screen.



This menu will bring your customer to options based on the access rights and settings you configured in CustomerConnect. This menu is also where they can Log Out of the CustomerConnect.



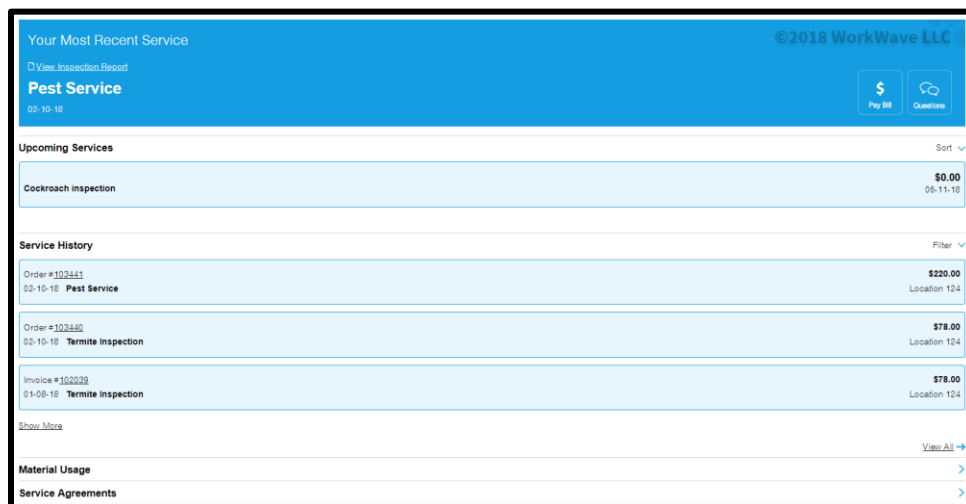
Each option's screen is show below:

Make a Payment

Customers can bypass billing details and go directly to the Make a Payment screen. Payment occurs as noted above.

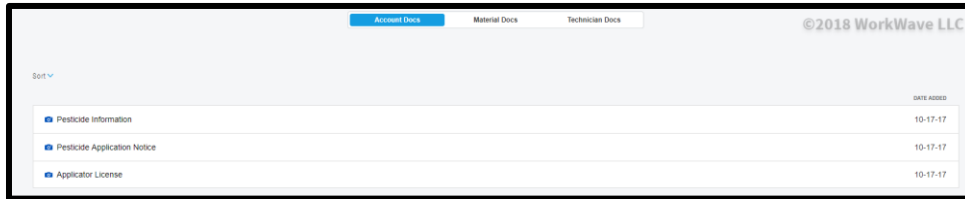
My Account > My Services

Customers can view their upcoming services, service history, material usage, and any service agreements.



My Account > My Documents

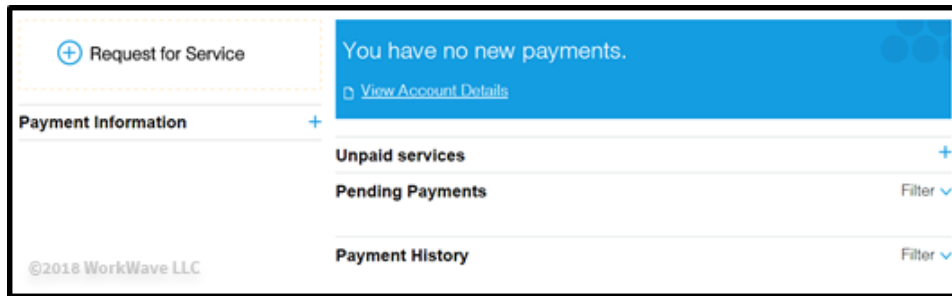
Customers can view any company- or material-related documents.



	DATE ADDED
Pesticide Information	10-17-17
Pesticide Application Notice	10-17-17
Applicator License	10-17-17

My Account > My Billing

Customers can update their payment information as well as view any unpaid services, pending payments, and payment history. They can also opt into auto-billing for their service agreements. Once they turn on auto-bill, they can select a credit card on file (must be on file prior to turning on auto-pay).



Select Service(s)

After choosing to make a payment, customers are brought to the *Select Service(s)* screen where they can select one service, multiple services, or *Pay Other Amount*. If using *Pay Other Amount*, CustomerConnect will create an open credit in PestPac for the customer in the amount entered.

Make a Payment ©2018 WorkWave LLC

Select Service(s)
 Pay for Service(s)
 Submit Your Payment

Select a Service(s):

Prepays & Renewals

<input type="checkbox"/> <input checked="" type="radio"/> Renewal	Loc #100000
Termite Renewal	\$200.00
<input type="checkbox"/> <input checked="" type="radio"/> Prepay	Loc #100000
Quarterly Pest Control	\$2,280.00

Pay Other Amount

Pay for Service(s)

The next step in the payment process is the *Pay for Service(s)* screen where customers can select a card on file or click *Add a New Credit Card* to use a new one.

Make a Payment ©2018 WorkWave LLC

Select Service(s)
 Pay for Service(s)
 Submit Your Payment

Pay for Service(s):

<input type="checkbox"/> Visa *****6781	Edit
<input type="checkbox"/> Visa *****1111	Edit
<input type="checkbox"/> Visa *****1111	Edit

[+ Add a New Credit Card](#)

Clicking the *Add a New Credit Card* button brings users to a page where they can enter the card owner and credit card information into the *Vantiv Card Information* window.

Make a Payment

Pay for Service(s):

Name on Card:*

Street Address:*

City:*

State:*

Zip Code:*

Card Information * Denotes a required field

*Card Number:

*Expiration: /

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Submit Your Payment

Customers can finalize payment on the *Submit Your Payment* screen. This screen reviews options selected for payment and includes any associated prepay discounts. Once the customer is satisfied that everything is correct, clicking the *Submit* button processes the transaction and charges the card.

Make a Payment

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Review and Submit Payment:

Prepay Loc # 100000

Quarterly Pest Control **\$2,280.00**

Payment Details:

Payment Method:	Credit Card
Credit Card Type:	Visa
Card Number:	*****6781
Subtotal:	\$2,400.00
Tax:	\$0.00
Prepay Discount:	-\$120.00
Payment Amount:	\$2,280.00

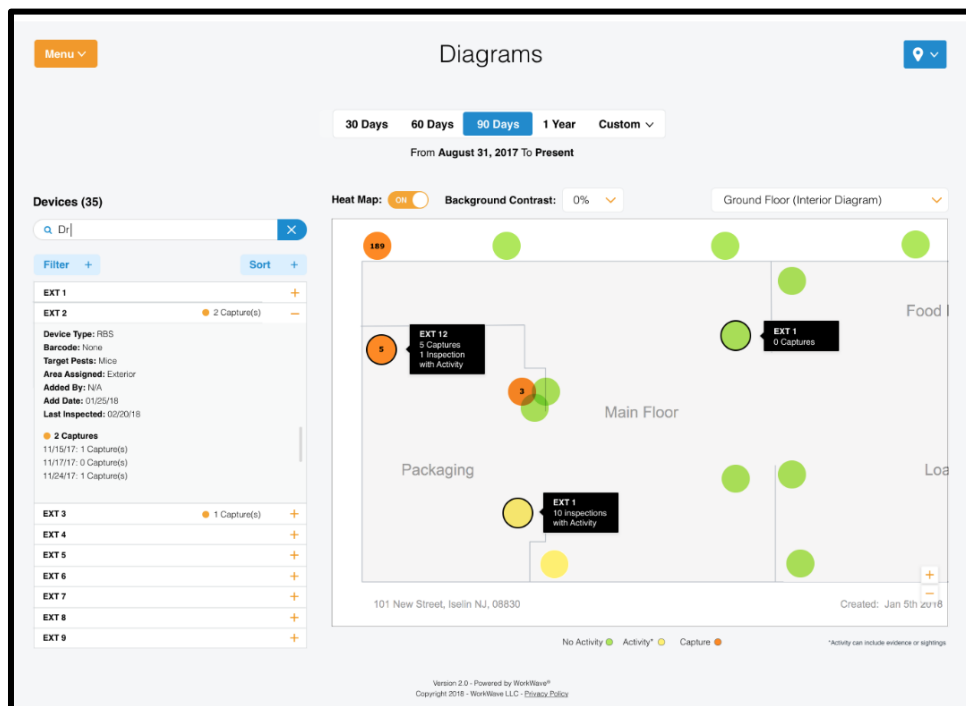


My Account > My Diagrams

Customers can view Diagram information. Devices are listed to the left of the diagrams as well as circles on the Diagrams. Hovering over a Device on a Diagram will display the full name. You will also see the capture details related to the Device on the side panel.

CustomerConnect users have the option to view a heatmap. A toggle will display above the diagram to turn the feature on and off.

- Green Dots indicate a device with no captures over the selected time range.
- Yellow Dots indicate observed activity (pest evidence/sightings).
- Orange Dots indicate a pest capture in the selected time range. The number of pests captured will display in the orange dots.



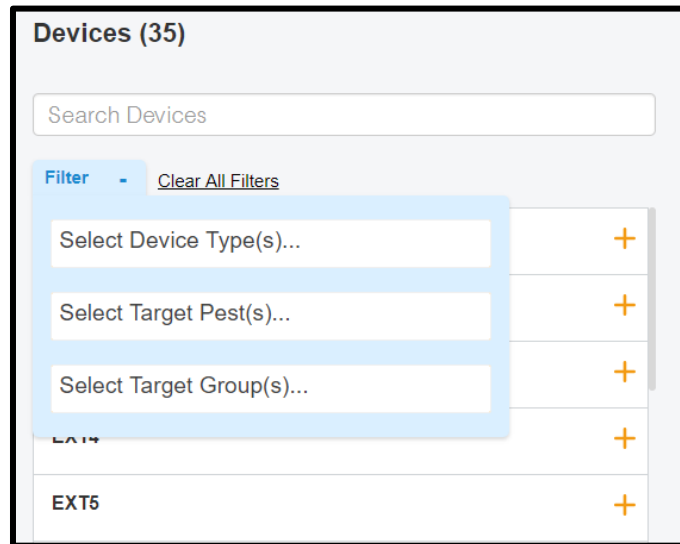
In the *Diagram* section, you can filter pest activity on your diagrams by date range.



You can expand the Diagram (and hide the left Device bar) for easier viewing.



Keep in mind that you can filter your Devices on this screen by Device Type, Target Pest, and/or Target Groups.



My Profile

The My Profile section allows users to update their account information. The *Account Information* page is the first page your customers will see when opening their profile. They can edit their address and contact information. They can also indicate if they wish to receive exceeded threshold alert emails.

Account Information ©2018 WorkWave LLC

Primary User: Jo Wilson

Billing Address: 111 S 293rd PL, Seattle, WA 98105

First Name:*

Last Name:*

Your Address:*

City:*



State:* **Zip Code:***

Main Phone:*

Cell Phone:*

Email:*

Note: If the first and last names are updated on this page, those changes will be reflected on their bill-to under PestPac CustomerConnect. Information updated on this page will not update the bill-to information in PestPac.

CustomerConnect Access				Invite User
NAME	EMAIL	ACCESS TYPE	VERIFIED	
Jo Wilson new	jcurmi@workwave.com	Jenn	<input checked="" type="checkbox"/>	 

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Ask a Question

Customers can ask questions as well as reschedule or request information about a service.



Communications
 2 Balcom Dr, Foxboro, MA 02035-2231

To ask a question, reschedule or request information about a service, please complete the form below, and we'll be in contact with you shortly.

Location:
 2 Balcom Dr, Foxboro, MA 02035-2231

Pest Concern:

Name:*

Contact By: **Phone:***
 Phone Email

Question:

Preferred Service Day(s): **Time:**

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Log Out

Customers can log out of the Portal.

grossman
 PEST CONTROL

Rated #1 company in New Jersey

Email

Password

[Forgot Password?](#) Remember Me

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

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

