

# PestPac CustomerConnect+ Additional Features

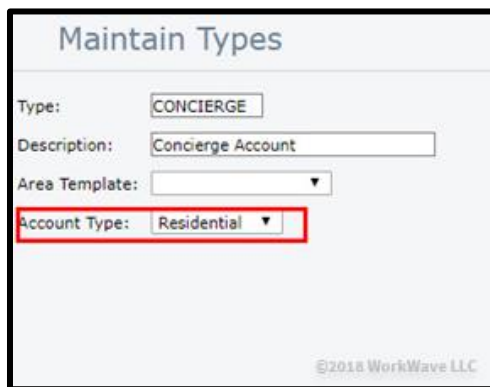
PestPac's secure, easy-to-use CustomerConnect+ gives your commercial customers 24/7 access to view account information, run reports, schedule service, pay bills, and more.

This document outlines the additional features YOUR commercial customers will see when they access the portal:

- [Types Lookup Table](#)
- [Commercial Dashboard](#)
- [Inspection and Pest Findings Report](#)
- [Conditions](#)
- [Reports Console](#)
- [Corporation Customers](#)

## Types Lookup Table

The *Types* Lookup Table includes an Account Type field so that you can differentiate between Residential and Commercial views for locations in CustomerConnect+.



The screenshot shows a form titled "Maintain Types" with the following fields:

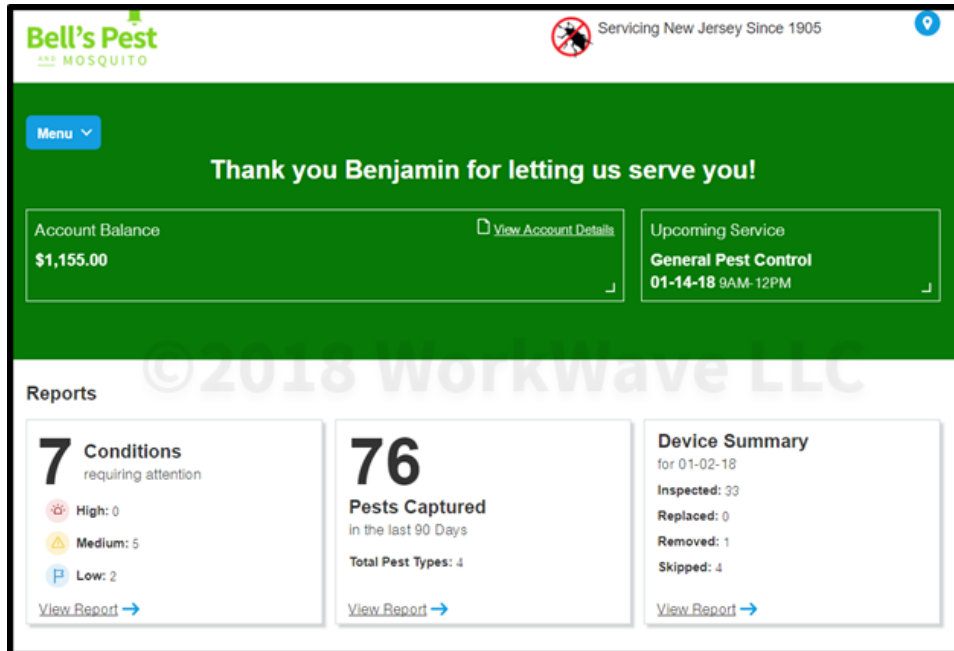
- Type: CONCIERGE
- Description: Concierge Account
- Area Template: [Dropdown]
- Account Type: Residential [Dropdown]

The "Account Type" field is highlighted with a red box. The copyright notice "©2018 WorkWave LLC" is visible at the bottom right of the form.

## Commercial Dashboard

Commercial CustomerConnect accounts will see a customized dashboard when logging into the portal.

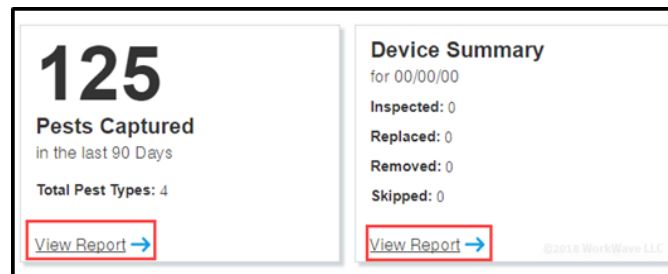




Your customers will see three report snapshots, including Conditions, Pests Captured, and Device Summary. Clicking *View All Reports* will open the Report Console.

## Inspection and Pest Findings Reports

Clicking the *View Report* link on the Pests Captured dashboard card allows the customer to download a PDF of the Pest Findings report for the location. Clicking the *View Report* link on the Device Summary dashboard card allows the customer to download a PDF of the Inspection report for the location.



# Conditions

Clicking the *View Report* link on the dashboard or going to *Menu > My Account > My Conditions* brings users to the Conditions page. Users can filter by location, area, severity, responsibility, status, and last inspected.

Clicking *Details* next to a location displays a page with specific information related to that condition and location.

**Conditions**

Report Options

Location: 237 New Street

Area: All

Severity: All Responsibility: All Status: All

Last Inspected: 30 Days 60 Days **90 Days** 1 Year

By Date

Severity	Condition Name	Status	Responsibility	Days Open	Last Inspected
<b>Interior -&gt; Bakery</b>					
Medium	stations are old	Open	PestManagement	64 Days	10-16-17 09:11 AM Details ->
Low	Loose Doorjam	Open	Customer	65 Days	11-06-17 10:59 AM Details ->
<b>Interior -&gt; East Kitchen</b>					
Medium	Broken screen(s)	Resolved	Customer	65 Days	11-16-17 07:06 PM Details ->
High	Loose Doorjam	Open	Customer	65 Days	12-14-17 08:30 PM Details ->
<b>Interior -&gt; Employee Lockers</b>					
Medium	hole in the wall	Open	Customer	42 Days	11-09-17 11:29 AM Details ->
<b>Exterior</b>					
Medium	Dumpster	Open	Customer	43 Days	11-06-17 10:54 AM Details ->
<b>Interior -&gt; Kitchen</b>					
Low	Loose Doorjam	Open	Customer	65 Days	12-06-17 04:26 PM Details ->
<b>Interior -&gt; Packaging</b>					
Medium	Broken screen(s)	Open	Customer	65 Days	10-17-17 10:14 PM Details ->

Page 1 of 2

**Status: Resolved** [View All](#) ->

**Broken screen(s)**

[View Inspection Report](#)

**Location:** 237 New Street, Iselin, NJ 08830

**Area/Device:** East Kitchen

**Description:** Flies coming from the broken screen

**Category:** Unknown

**Responsibility:** Customer

**Action:** Fix the screen

**Open Since:** 10-17-17

**Last Inspected:** 11-16-17

**Notes:** 4 +

**Done**

©2018 WorkWave LLC

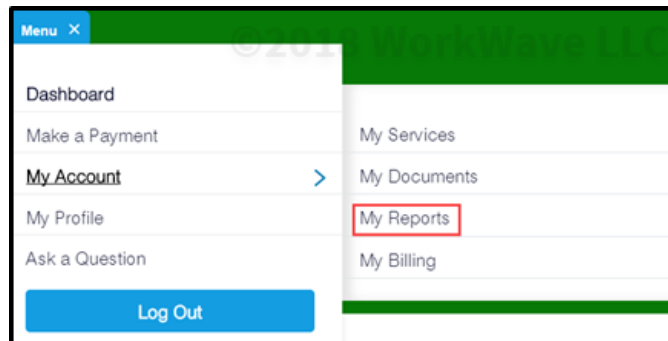


Clicking the *View Inspection Report* link allows the user to download a detailed PDF of the inspection report with which the condition is associated.

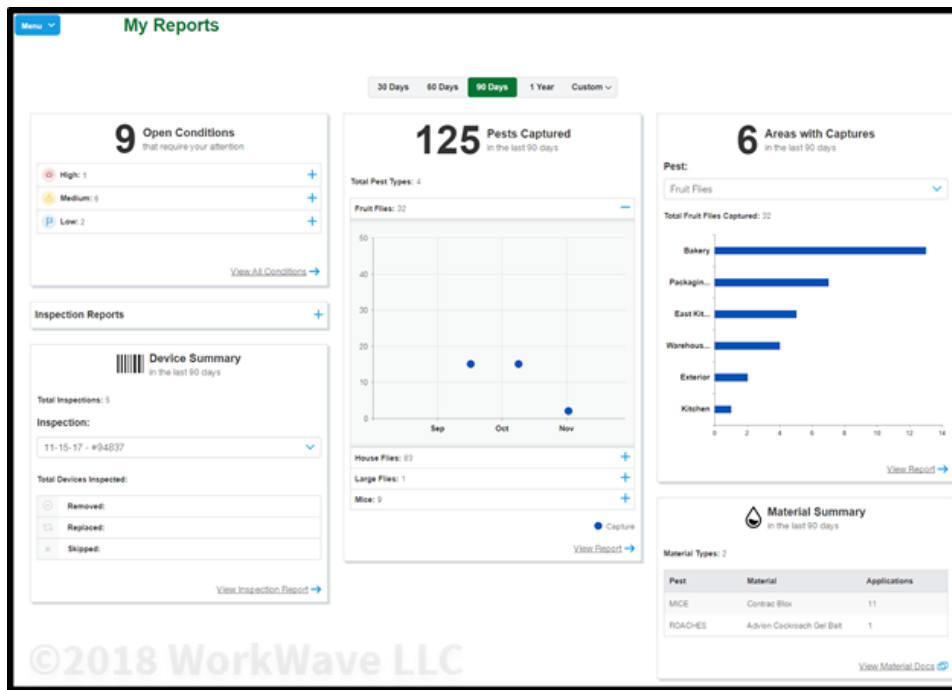
At the bottom of this page, users can click the + button to add a note to the condition (that can be seen by PestPac users).

## Reports Console

Your customers can access the Reports Console by clicking *View All Reports* on the dashboard or by clicking *Menu > My Account > My Reports*.



On the My Reports page, users can look at the reports on the dashboard in addition to the *Areas with Captures* and *Materials Summary* reports. Users can adjust the date ranges on the reports to reflect 30 / 60 / 90 days, 1 year, and custom ranges. Users can also change different aspects of the results displayed (e.g., select a different pest from the dropdown), and the reports will update accordingly.



## Corporation Customers

You can grant your Corporation customers a special view in CustomerConnect+. These customers will have a modified experience that limits functionality, specifically billing (inability to view or make payments).

You can grant Corporations access and manage which Locations are available via the Edit Corporation screen in PestPac.

### Edit Corporation

Documents   Regions & Locations   Edit

Corporation Account #: 100000

Company: Food Marts

Last Name: Badwal   First Name: Jeet   Title:

Street: 101 Washington St

City: Toms River   State: NJ   Zip Code: 08753-7625

Phone: 732-349-6200 x   Alt. Phone: x

Fax: x   Mobile: x

E-Mail: jeet.s.badwal@gmail.com

Web Site:

---

#### CustomerConnect Access

Invite User

NAME	EMAIL	ACCESS TYPE	REGION	VERIFIED
Pawan Padma	mike@workwave.com	Administrative	NJ Food Mart	<input checked="" type="checkbox"/>
Jason Stamos	jeet@workwave.com	Administrative	All	<input checked="" type="checkbox"/>

Enable Web Access   
  Show Service History   
  Show Online Payment  
 Web Access Account: 100000   
  Show Unpaid Invoices   
  Show Online Support  
 Web Access Password:   
  Show Payment History   
  Show Service Scheduling  
 Show Change Password   
  Show Device History  
 Show Material History   
  Show Location Documents  
 Show Open Orders   
  Show Account Updating  
 Deficiencies

©2018 WorkWave LLC

## Corporations Login

When logging into CustomerConnect+, customers who have Corporation Locations associated with their login will see a Locations listing and will have the ability to select Corporation Locations by selecting *Without Billing*.

### Accounts

With Billing   Without Billing

Select an account to view associated locations

#100022

**Food Plant of Asbury Park**

909 New Street  
Iselin, NJ 08830

#100024

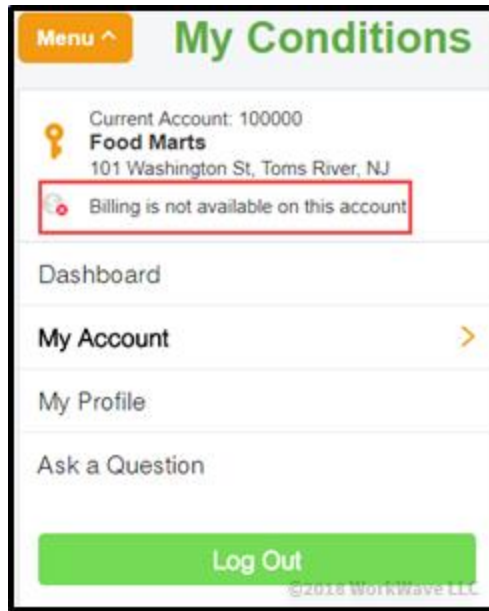
**ABC Builders**

889 New Street  
Iselin, NJ 08830

©2018 WorkWave LLC



Customers will see an alert on the menu bar notifying them that billing data is not available for the current Location.



#### Corporations Dashboard

After selecting a Corporation Location, customers will be immediately brought to the My Reports section. The Corporations reports page will allow customers to view data from the currently-selected Location or from all Locations associated with the Corporation.

**My Reports**

30 Days 60 Days **90 Days** 1 Year Custom

From March 2, 2018 To Present

Current Location All Locations

**3 Open Conditions**  
That require your attention

High: 1  
Medium: 1  
Low: 1

Create Report

**87 Pests Captured**  
in the last 90 days

Total Pest Types: 1

Ants: 87

Large Flies: 11  
Mice: 10

Create Report

**1 Area with Captures**  
in the last 90 days

Pest: Ants

Total Area Captured: 11

Other

Create Report

**Inspection Reports**

**Initial Pest Control** 06-01-18  
3000 State Route 06, Neptune, NJ  
View Inspection Report

**Weekly Pest Control** 04-29-18  
3000 State Route 06, Neptune, NJ  
View Inspection Report

**Weekly Pest Control** 04-27-18  
3000 State Route 06, Neptune, NJ  
View Inspection Report

**Weekly Pest Control** 04-27-18  
3000 State Route 06, Neptune, NJ  
View Inspection Report

**Termite Renewal** 04-19-18  
3000 State Route 06, Neptune, NJ  
View Inspection Report

Show More View All

**Device Summary**  
in the last 90 days

Total Inspections: 1

Inspection: 06-01-18 - #12264

Total Devices Inspected: 17

Removed: 0  
Replaced: 0  
Stripped: 0

View Inspection Report

**Material Summary**  
in the last 90 days

Material Types: 3

Material	Applications
Contact Box	1
Chemical X	1
Adhesive Ant Gel	3

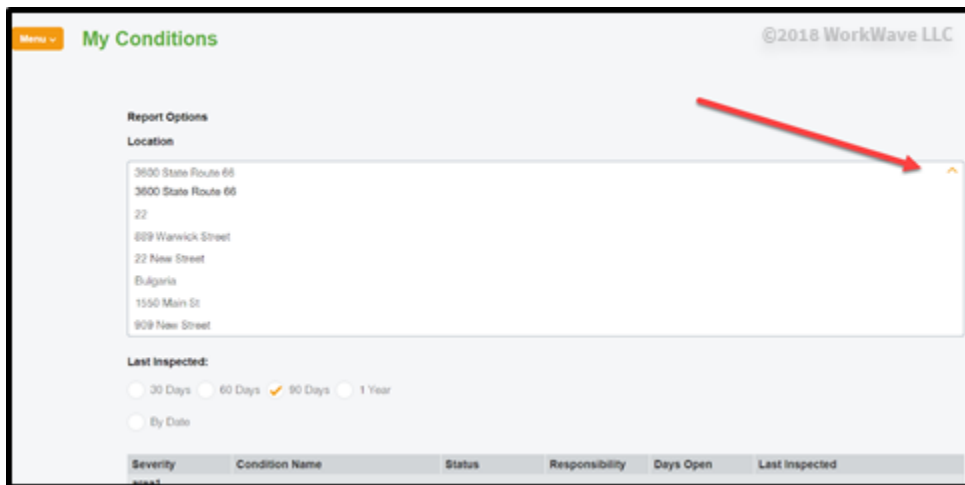
Create Report

Other Page Changes

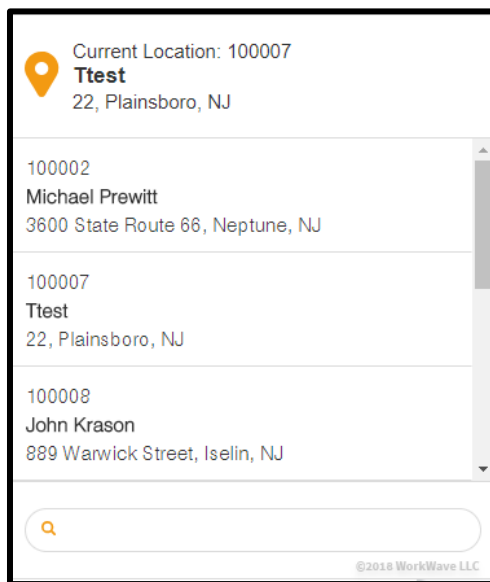
Additionally, the My Conditions, My Messages, and My Services pages will allow customers to select to view data from all Locations associated with the Corporation. The My Services page will also have any payment-related data removed.







Users will also be able to switch between Locations to which they have access. At the top-right of the screen, users can access a menu to browse quickly and search through available Locations.



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