

PestPac Mobile 3.x App Initial Setup

The PestPac Mobile App is an iOS- and Android-based application that allows technicians to service accounts without the use of paper tickets. Some features include timing in and out of appointments, viewing location information, entering material application information, and syncing data in real-time if a connection is available.

This document covers the following:

- [Tested Devices and Hardware](#)
- [Turning on the Module in PestPac](#)
- [Configuring Access Templates](#)
- [Setting Up Mobile App Technicians](#)
- [Printer Setup Options](#)
- [Setting Up Note Codes](#)
- [Setting Up Instructions](#)
- [Setting Up Materials](#)
- [Installing the Mobile App](#)
- [Logging into and Using the Mobile App](#)

If you have IPM, please refer to the *PestPac Mobile App 3.x IPM Desktop Setup* document for specific information that applies for that module.

After following the initial setup instructions (along with IPM setup, if applicable), please refer to the *PestPac Mobile App 3.x Usage* document for more information.

Tested Devices and Hardware

Tested Devices:

- iOS: iPhone 6 / 6S / 7 / 7S
- Android: Samsung Galaxy 5 / 6 / 6S / 7
- Samsung Galaxy Note 5

Operating System Versions:

- iOS 8 and above
- Android 4.3.0 and above

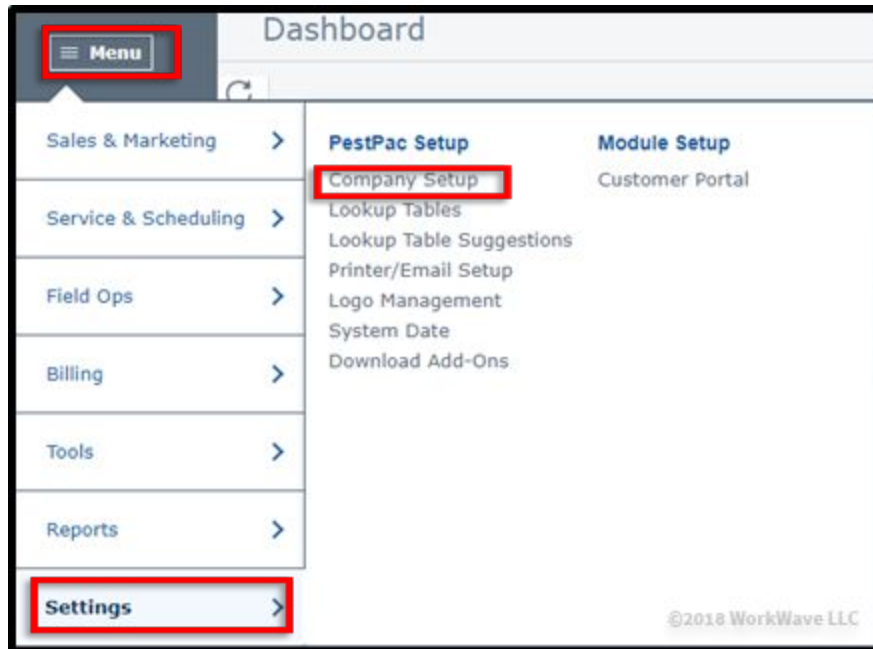
Compatible Printers: PJ763MFi (works for both Android and iOS devices)



Turning on the Module in PestPac

To turn on the module, complete the steps below:

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



2. Under *Additional Modules*, click the blue *PestPac Mobile App* link.



3. Check the *Use PestPac Mobile App* box. In this section, you will see how many licenses you have available, configure the options you want to use for payment batch handling as well as credit card payment batches (if utilizing the Vantiv credit card integration), and set requirements for signatures.

PestPac Mobile App Use PestPac Mobile App

Licenses in Use: 0 out of 2

Create separate payment batch for Credit Card payments

Create new mobile payment batch:

- Only when no mobile payment batch exists
- For each technician
- For each work date
- For each technician and work date

Signatures

- Require Customer Printed Name
- Require Customer Signature
- Require Tech Signature
- Attaching Files on Mobile App

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4. Click the Save button in the top-right of the screen.

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5. Under Mobile Options, click the blue *PestPac Mobile Classic* link.

Mobile Options

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

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6. Check the *Use PestPac Mobile Classic* checkbox. Note that these settings are for a different version of PestPac Mobile; however, checking this box is necessary for the Mobile app.

Mobile Options ©2018 WorkWave LLC

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

PestPac Mobile Classic Options Use PestPac Mobile Classic

7. This section allows you to set up how you would like your completed Service Order batches to be handled.

Order Posting

Require tech comment on completed orders

Assign new posting batches to user:

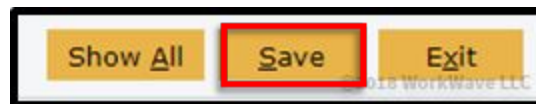
Make new posting batches public

Create new handheld posting batch:

- Only when no handheld posting batch exists
- For each upload
- For each technician
- For each work date
- For each technician and work date

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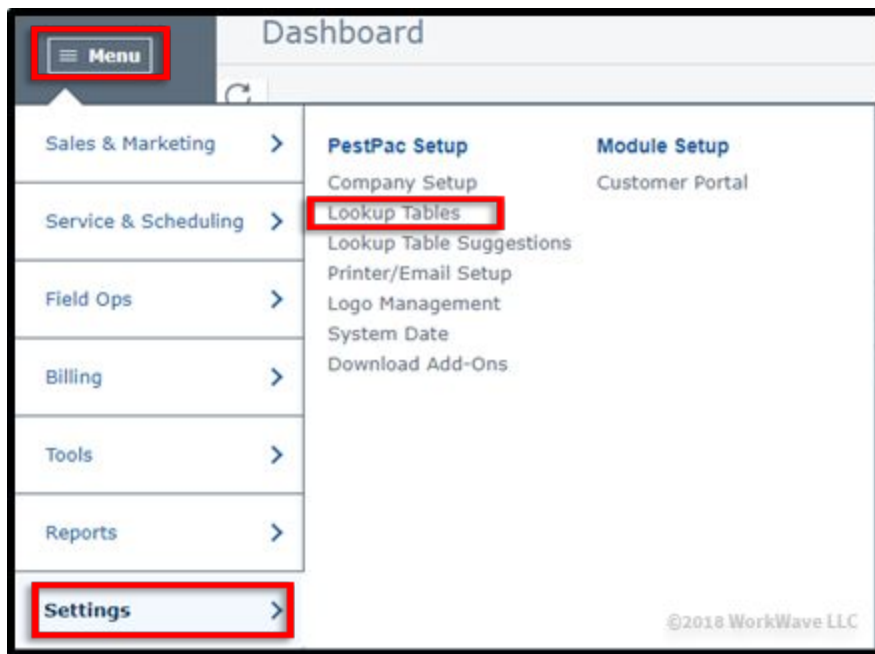
8. Click **Save** in the top-right corner of the screen.



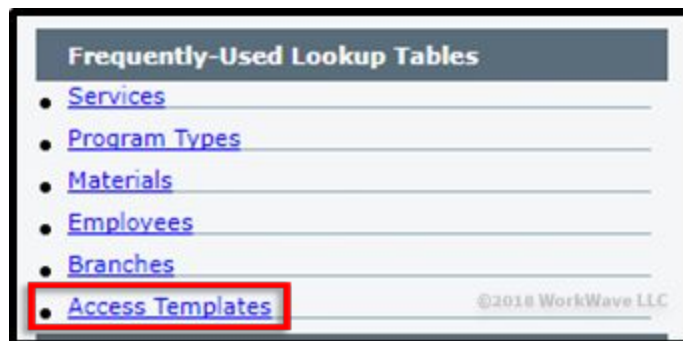
Configuring Access Templates

To configure the Access Templates, complete the steps below:

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



2. Under *Frequently-Used Lookup Tables*, click the *Access Templates* link.

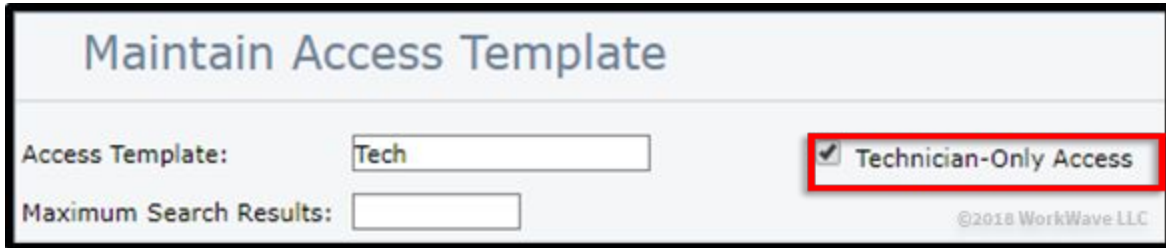


3. Click the Access Template you want to set up for your technicians if it already exists. Note that if you are creating a new Access Template, you will need to click *Add Access Template* or *Clone Access Template*.



NOTE: If you are using the Administrator template, ALL options will be enabled automatically. If you have a technician that would need Administrator access for the desktop settings but you want to adjust some of the mobile options, you will need to create a new template. To do this you can clone the Administrator template, give it a new name, and then un-check any Mobile App options as needed for the mobile user's needs.

If you are using the pre-populated Tech template in which the *Technician-Only Access* is selected, you will need to un-check that checkbox to ensure any changes you make as far as selecting / de-selecting additional access rights will be respected.



Maintain Access Template

Access Template: Technician-Only Access

Maximum Search Results:

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4. The following access right options exist for use with the PestPac Mobile App.

PestPac Mobile App Options

Change Order Services and Pricing:

Create New Customers and Orders:

Show Future Orders:

Show Prices and Balances:

PestPac Mobile App Advanced Options

Add Documents to Service Orders:

Associate Orders:

Attach Devices to Setups:

Background GPS Tracking:

Check for Scheduling Conflicts:

Edit Instructions:

Edit Order Types:

Force Scan for Device Activity:

Geocode a Location:

Manage Leads:

Post Orders as Not Serviced:

Re-open a Completed Order:

Require Break Every Four Hours:

Reschedule an Existing Order:

Send Notifications:

Show Future Month's Orders:

Take Credit Card Payments:

Use Timesheets:

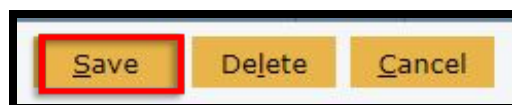
PestPac Mobile App Options	
Change Order Services and Pricing	If enabled, technicians can add and/or edit the service codes and pricing from within the service order in the app.
Create New Customers and Orders	If enabled, technicians can create new locations and/or service orders from within the app.
Show Future Orders	If enabled, technicians will be able to see all orders for the past as well as all orders for the current month. If disabled, technicians will only see orders dated for the past, today, and tomorrow.

Show Prices and Balances	If enabled, technicians will see prices and balances on the main service order screen and the payment screen. Note that they will need to see prices and balances to collect payment.
PestPac Mobile App Advanced Options	
Add Documents to Service Orders:	If enabled, technicians will have the ability to attach photos, videos and voice notes to assigned Service Orders. Upon completion of service, these documents can be attached to emailed inspection reports.
Associate Orders	If enabled, technicians will be able to associate two or more orders for ease of timing in and completing them at the same time as long as the orders are for the same location, tied to different setups/services, assigned to the same technician, and assigned the same work date.
Attach Devices to Setups	If enabled, when scanning in new devices, technicians will be able to indicate if the devices should be tied to the specific service setup for which they are completing the service order.
Background GPS Tracking	Allows users to disable many of the GPS features on the mobile device in an effort to improve the battery life when using the mobile app. Specifically, geofencing and geotagging features will be disabled when the new access right is disabled.
Check for Scheduling Conflicts	If enabled, the app will check for conflicts and disallow the technician to schedule an order if another order exists during that same time. This feature works when adding new orders and rescheduling new orders (access right controlled separately).
Edit Instructions	Technicians will have permission to add or edit Location, Service and Order instructions.
Edit Order Types	If enabled, technicians will be able to change the order types of Service Order, Estimate, Production, and Call-Back.
Force Scan for Device Activity	If enabled, technicians will be forced to scan a barcode to inspect a device. If disabled, technicians will be able to tap on a device in the app to inspect it without having to scan the barcode. <i>Please note that if the technician is skipping the device due to it being broken, missing, or inaccessible, this enabled access right will not prevent them from doing so since no activity is being reported.</i>
Geocode a Location	If enabled, the app will check to see where the technician's current physical location coordinates are when they start an order, and if



	they do not match the latitude and longitude currently on the account, the app will ask if they would like to update it.
Manage Leads:	Allows technicians the ability to add and edit leads.
Post Orders as Not Serviced	If enabled, technicians will be able to post an order as Not Serviced. The Not Serviced options they will see pull directly from the Not Serviced Reasons lookup table on the desktop. If disabled, the option will not show in the app
Re-open a Completed Order	If enabled, a technician will be able to re-open an order once it has been completed to add/edit the order's information. If disabled, orders cannot be re-opened on the app once they have been completed; changes will need to be made on the desktop.
Require Break Every Four Hours	Gives technicians a prompt to remind them to take a break if they have been timed into timesheets for 4 hours.
Reschedule an Existing Order	If enabled, a technician can reschedule orders from the app to a different time/work date. <i>Please note that the orders will always stay assigned to the same technician.</i>
Send Notifications	If enabled, technicians will be able to send Tech-Initiated Notifications from within the app to let the customer know they are en route to their property. Separate setup is required to configure this feature.
Show Future Month's Orders	If enabled technicians have ability to view and start service orders that are scheduled for future months.
Take Credit Card Payments	With Credit Card processor integration, technicians can process credit card payments from the field.
Use Timesheets	If enabled, technicians will be required to utilize the Timesheets module to start and end their day in the app. Separate setup is required to configure this feature. Please refer to the <i>PestPac Mobile App 3.x Timesheets</i> training document for additional information.

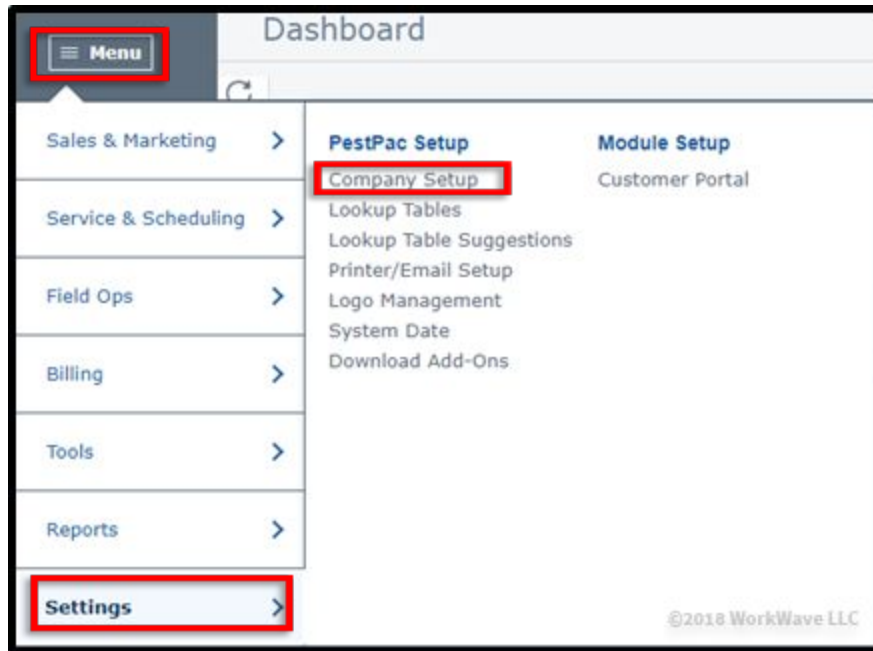
5. Click the Save button in the top-right of the screen.



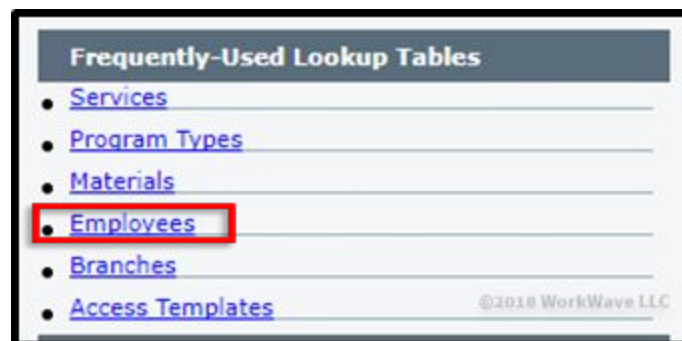
Setting Up PestPac Mobile App Technicians

After you have set up your access templates, make sure the correct one is assigned to all your technicians by completing the following steps:

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



2. Under *Frequently-Used Lookup Tables*, click the *Employees* link.



3. Click the employee if they already exist or click the *Add an Employee* button if setting up a new user.

Maintain Employees							
Branch: <input type="text"/>		<input type="button" value="Go"/>		<input type="button" value="Send Verification Emails"/>	<input type="button" value="Show Inactive"/>	<input type="button" value="Add an Employee"/>	<input type="button" value="Exit"/>
Jump To: <input type="text"/>							
Username	Name	Type	Default Branch	Confirmed Email	RouteOp	PestPac Mobile App	IPM
ACE	Aardvark Control	User/Tech	Main Branch		<input checked="" type="checkbox"/>		
ADMN	Admin Admin	User/Tech	Main Branch	<input checked="" type="checkbox"/>			
AKLEIN	AKLEIN AKLEIN	User/Tech	Main Branch				
ASHLEY	ASH ASH	User/Tech	Main Branch				
ROBTEST	Rob Test	User/Tech	Main Branch	<input checked="" type="checkbox"/>			
BETSY	Betsy L	User/Tech	Main Branch				
EDWARD	ED Ed	User/Tech	Main Branch		<input checked="" type="checkbox"/>		
SALES1	John Stamos	User/Tech	Main Branch				
TEST		User	Main Branch				

- Enter a Username, Password, First Name, Last Name, Email, and Adjust Hours if different than EST time zone. Note that each technician will need a separate and unique email address.

Basic Information

Username:

Password:

First Name:

Middle Name:

Last Name:

Email: ?

Alternate Email:

WorkWave ID: ? pending confirmation

Login Expiration:

Adjust Time (hrs):

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- Scroll down to *Employee Type* and check the boxes for *User*, *Technician/Salesperson*, and *PestPac Mobile App User*, if not already selected.

Basic Information

Username:

Password: [Edit] [\[Password Suggestion\]](#)

First Name:

Middle Name:

Last Name:

Email: ?

Alternate Email:

WorkWave ID: ? pending confirmation [Send Verify Email](#)

Login Expiration:

Adjust Time (hrs):

Work Day Calendar: [Open]

Default Inventory Warehouse:

Employee Type: User Technician/Salesperson PestPac Mobile App User

Role(s):

Reports To:

Show on Appt. Screens:

Show on In/Out Board:

GPS/VRM Color (Google maps):

VRM Color: [\[Assign\]](#)

Technician Signature: [\[Add\]](#)

NOTE: If you have the IPM module enabled, you will have access to a checkbox to enable it for the technician.

6. Within this screen, go to *Branch Access Rights* under the *Access* section. Here is where you will select the access template for this technician under Company Wide and/or Branch depending on your company access rules.

Maintain Employees

Employee: **BETSY** (Betsy Betsy)

General Options

[Basic Information](#) :: [Personal Information](#) :: [Payroll Setup](#) :: [Tech Photo/Bio](#) :: [Notifications](#)

Technician Setup

[Commission](#) :: [Licenses](#) :: [Regions and Skills](#)

User Preferences

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

Access

[Branch Access Rights](#) :: [IP Access Rights](#) :: [Login Times](#) :: [WorkWave Marketing Access](#)

7. Check the *Tech* checkbox next to any branches in which they will potentially be completing work. Also, select the *Default* radio button next to their main branch.

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Access

Company Wide: Tech

Copesan: (No Access)

Branch	Access	Tech	Default
California Branch	(No Access)	<input type="checkbox"/>	<input type="radio"/>
Main Branch	(No Access)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
North Branch	Tech	<input checked="" type="checkbox"/>	<input type="radio"/>
South Branch	(No Access)	<input type="checkbox"/>	<input type="radio"/>

8. Under *Tasks*, set up the *Task For* field to auto-assign tasks to a desktop user. When a technician is adding a Memo to Office (MTO) note in the field.
 - If Task For is entered in Employee Lookup, this is who the MTO goes to.
 - If no Task For, it goes to the Branch Manager set in the Branches Lookup.
 - If no Task For or no Branch Manager set, the MTO goes to NOONE which is essentially everyone.

Task Preferences

Task Manager Defaults

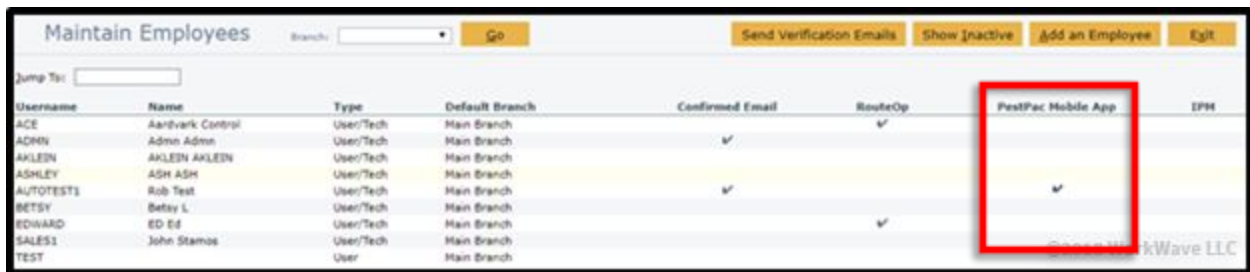
Task For:

Branch:

- Finish entering any other employee-specific information and click the **Save** button in the top-right of the screen.



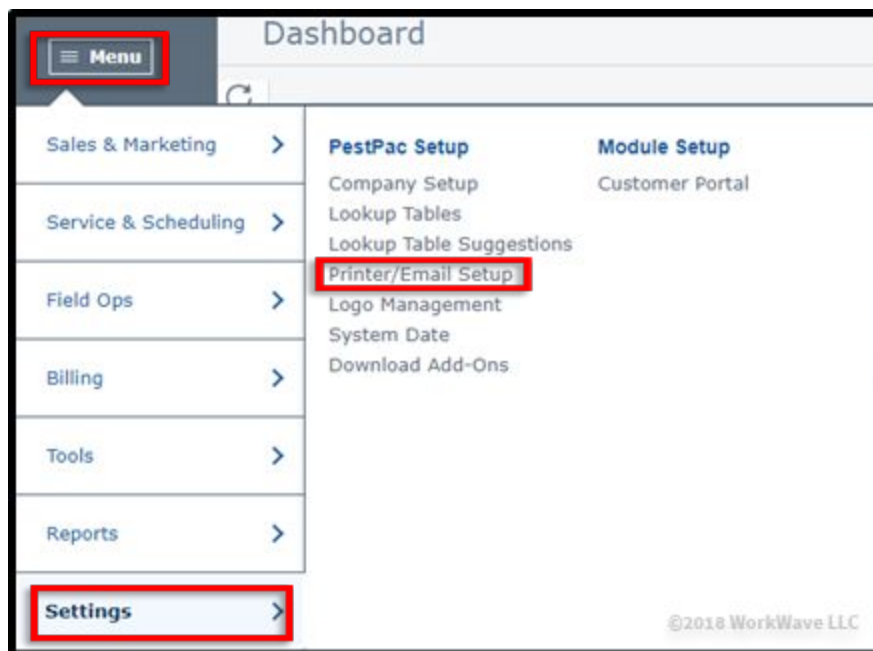
- You will know you set your technicians up properly when you see the PestPac Mobile App checkbox checked on the main *Maintain Employees* Screen.



Printer Setup Options

The settings in Printer/Email setup are company-wide, and the options for Inspection Report, Invoice, and Service Orders are respected. To review these settings, complete the following steps:

- On the desktop, go to *Menu > Settings > Printer Setup*.



2. Under the *Defaults* section, click the blue *Inspection Report* link. Here is where you will indicate under *Report Title* how you would like your Inspection Reports to be labeled, set pricing options when printing, as well as what Inspection sections you want to print on the report.

The screenshot shows the 'Printer/Email Setup' interface. At the top right, there are buttons for 'Show All', 'Save', and 'Exit'. Below the title, a navigation bar contains links for 'Service Order', 'Invoice', 'Statement', 'Renewal', 'Report', 'Letter', 'Label', 'Post Card', 'Collection', 'Consolidated Invoice', 'Inspection Report' (highlighted with a red box), 'Credit Card Receipts', and 'Tech Notifications'. The main content area is titled 'Inspection Report Defaults' and includes a 'Report Title' field with the value 'Service Inspection Report'. There are sections for 'Print Report In' (Summary and Detail), 'Print Prices on Billable Orders' (Summary and Detail modes), 'Print Prices on Production Orders' (Summary and Detail modes), and 'Print Sections' (Conditions, Material Applications, Device Inspections, and Attributes). The 'Print Sections' section has checkboxes for 'Pest Findings', 'Area Inspections', 'Device Questions', and 'Attributes'. The footer of the page reads '@2018 WorkWave LLC'.

NOTE: All items under *Print Sections* except for Material Applications are specifically tied to the usage of the IPM module.

3. Keep in mind that any changes made here are respected company-wide. In addition, the information listed under *Automated E-mails* will be respected when manually emailing from the Mobile App.

PDF Attachment E-Mails:

From Email Address:

Subject:

Body :

Font Family Font Size **A** **ab** HTML

B ***I*** **U** **ABC**

Please see your attached Inspection Report from your most recent service.

Thank you so much!
The Team at JT's Pest Control

Path:

[Link a PestPac Document](#)

Bill-To Name and Address Source:

Invoice Bill-To

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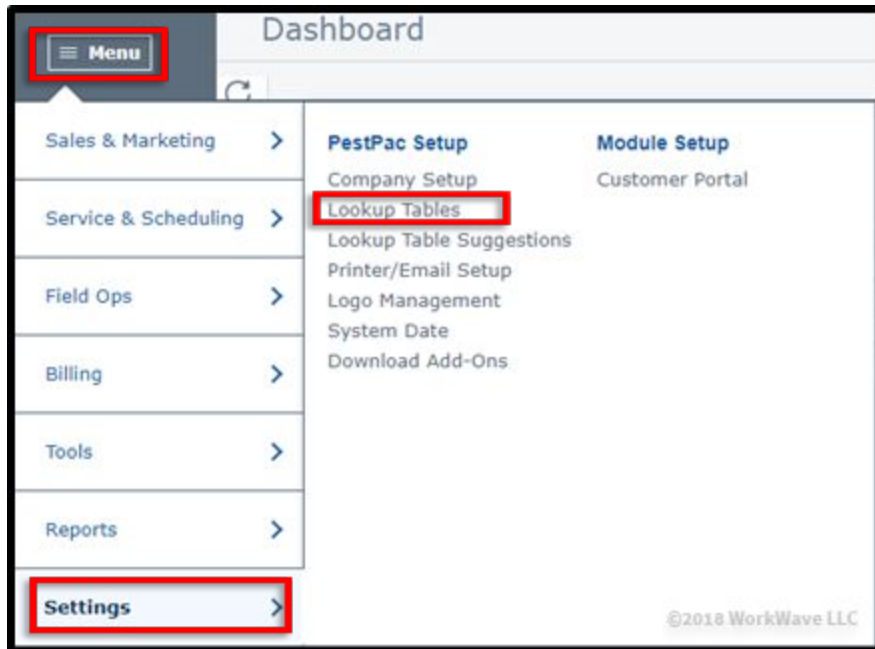
- Repeat the same steps for your desired settings under *Invoice* and *Service Order*, and click the *Save* button at the top-right of the screen.

Printer/Email Setup Show All **Save** Exit

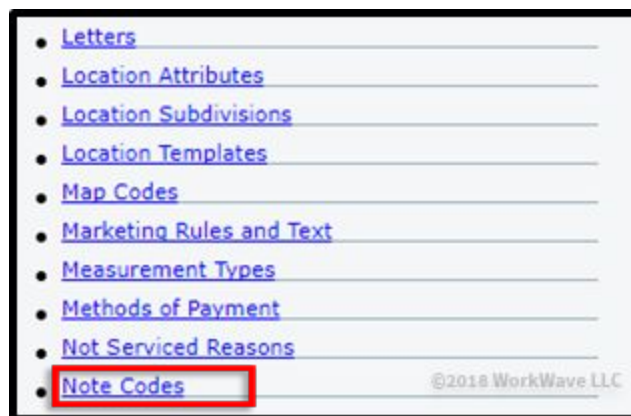
Setting Up Note Codes

To set up Note Codes, complete the following steps:

- On the desktop, go to *Menu > Settings > Lookup Tables*.



2. Under *Additional Lookup Tables*, click the *Note Codes* link.



3. There are two Note Codes to consider setting up for use with PestPac Mobile.

- a. **HHALERT** (Handheld Alert Note): This Note Code can be used to add a note on a location so that whenever an order tied to that location is pulled up on the app, the note will appear prior to being able to view the order itself.

The screenshot shows the 'Maintain Note Codes' form. The 'Note Code' field is highlighted with a red box and contains the text 'HHALERT'. The 'Description' field contains 'HandHelad Pop-up Alert Note'. There are two checkboxes: 'Show on Customer Portal' which is unchecked, and 'Show on Mobile App' which is checked. The copyright notice '©2018 WorkWave LLC' is visible in the bottom right corner.

- b. **MTO** (Memo to Office): This Note Code can be used for the technicians to add a private note from the app regarding a location or service to notify a user on the desktop.

The screenshot shows the 'Maintain Note Codes' form. The 'Note Code' field is highlighted with a red box and contains the text 'MTO'. The 'Description' field contains 'Memo to Office'. There are two checkboxes: 'Show on Customer Portal' which is unchecked, and 'Show on Mobile App' which is checked. The copyright notice '©2018 WorkWave LLC' is visible in the bottom right corner.

- 4. For all other Note Codes that are currently setup in the system, check/un-check the *Show on Mobile App* checkbox to prevent or allow technicians from seeing location notes based upon the Note Code assigned.

The screenshot shows the 'Maintain Note Codes' form. The 'Note Code' field contains 'OFFICE'. The 'Description' field contains 'Office Note'. There are two checkboxes: 'Show on Customer Portal' which is unchecked, and 'Show on Mobile App' which is checked and highlighted with a red box. The copyright notice '©2018 WorkWave LLC' is visible in the bottom right corner.

- 5. If you are using CustomerConnect, go into all Note Codes that are currently setup in the system, and check/un-check the *Show on Customer Portal* checkbox to prevent or allow your customers from seeing their location notes based upon the Note Code assigned.

Maintain Note Codes

Note Code: OFFICE

Description: Office Note

Show on Customer Portal

Show on Mobile App

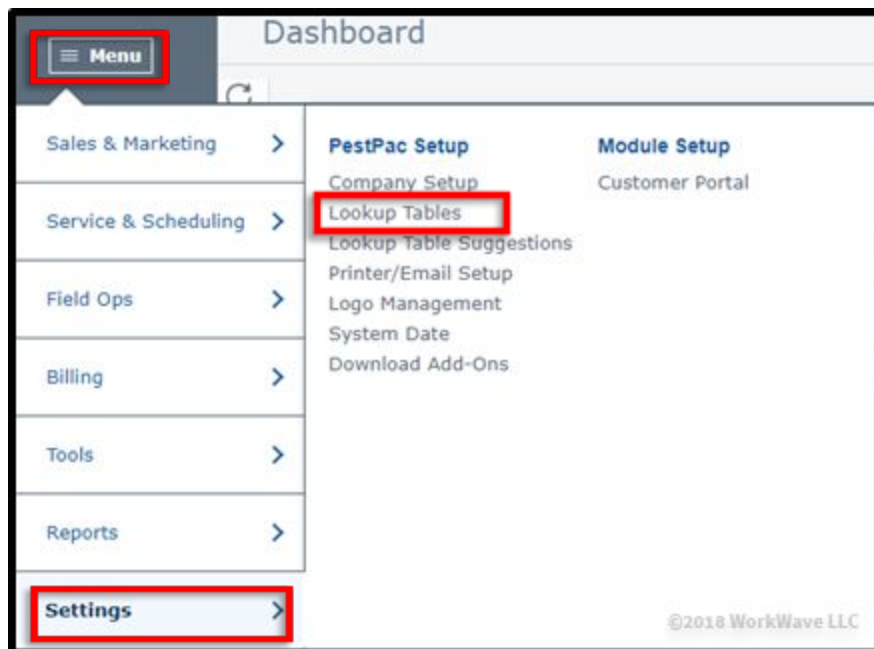
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Setting Up Instructions

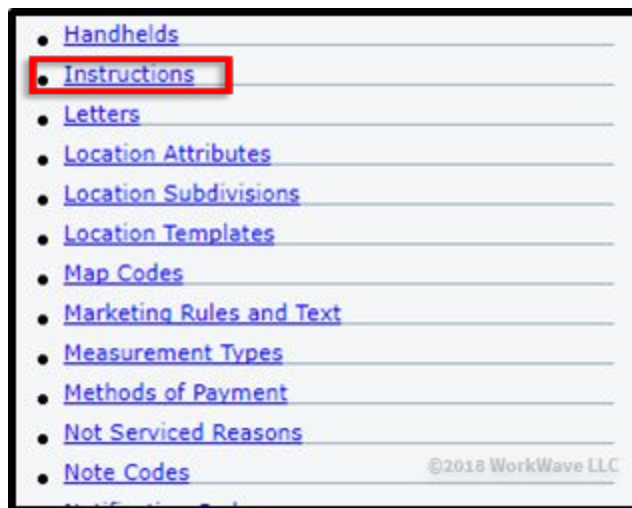
The Instructions Lookup Table allows you to pre-populate any canned comments for the technicians to be able to pull in when completing a service. This feature can help the technicians save time out in the field and streamline the process. They will can add/edit the text once it has been pulled into the Tech Comment section of the order on the app.

To set up Instructions, complete the following steps:

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



2. Under *Additional Lookup Tables*, click the *Instructions* link.



3. You can either edit any existing Instructions by clicking the Instruction or you can add a new Instruction.



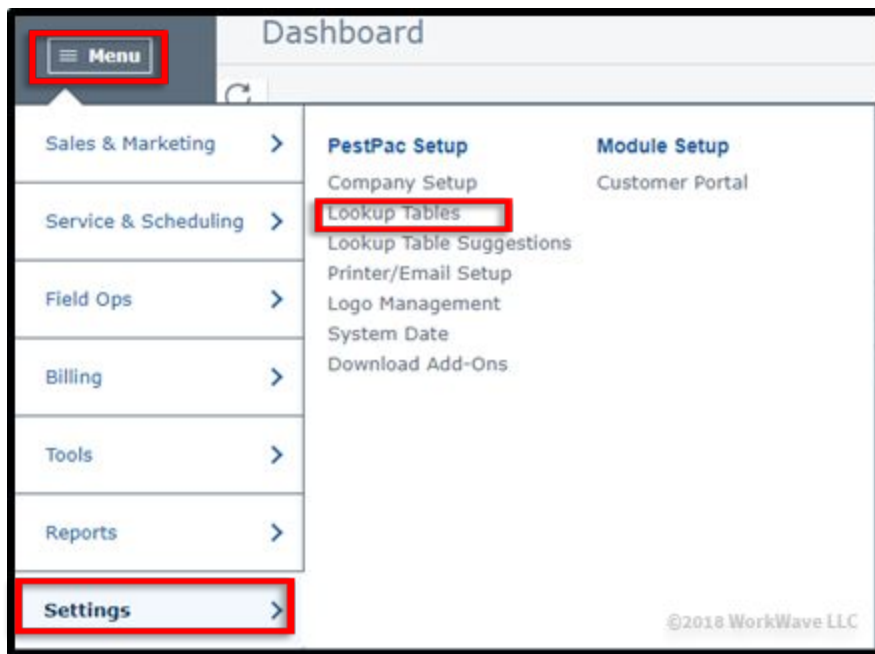
4. Edit the name and the description of the Instruction, and click the Save button at the top-right of the screen.



Setting Up Materials

If your technicians will be entering Material information when completing services on the app, you will need to set up your Materials on the desktop by completing the following steps:

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



2. Under *Material Lookup Tables*, click the *Materials* link.



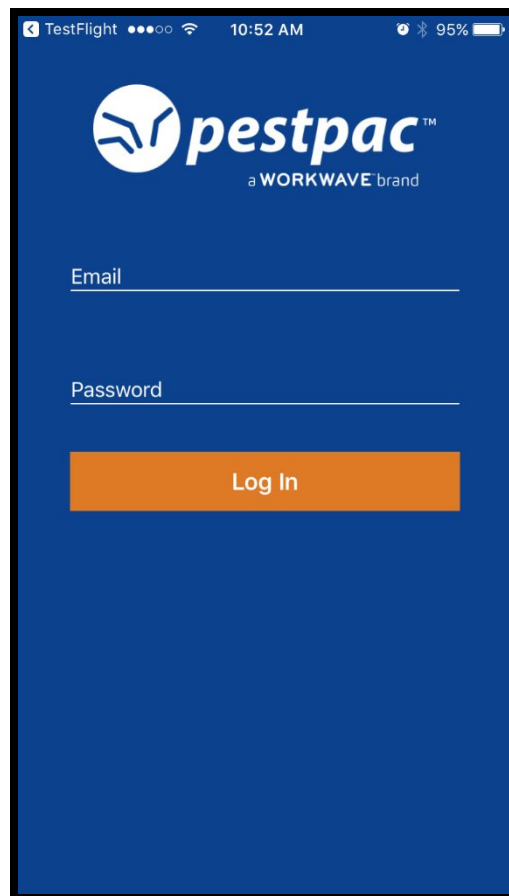
For full training on setting up your Materials, please reference the *Material Setup* document and *Materials* video available under the Training link in PestPac.

Installing the Mobile App

To install the mobile app, visit the App Store on an iOS device or the Google Play store on an Android device, search for PestPac, install the application, and open the app.

Logging into and Using the Mobile App

After opening the application, enter the email address and password as it was set up in the Employee Lookup Table, and click the *Log In* button.



Once you have logged in, the email address will be saved on the login screen, requiring you only to enter in the password each time. The app will also automatically download two days' worth of fresh data from PestPac.

After completing this setup process, please refer to the *PestPac Mobile App 3.x Usage* document for more information.

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

