

Importing Bulk Data



PestaRoo's structure allows you to import from a wide variety of data sources. Typically these will be spreadsheets or tab separated lists. With these directions, you can bring in multiple types of data: Customers, Locations and Invoices

Overview

PestaRoo lets you bring pre-existing data from other computer programs. Several options for doing this are discussed.

Supported File Types

To bring in pre-existing data, you will need to first export it from your existing system into any of the standard file formats. The following types are among the most common: DIF, DBF, Tab-Separated, Comma Separated, SYSK, Excel, and XML. As long as you can get your data into one of this standard formats, you can easily import it on into PestaRoo. Most people use Excel formatted data as their source. But any of the formats listed above will work.

Linking to Customers

Any data you import into PestaRoo must have a field value that is used to identify the customer that it belongs to. Usually this is a field like 'Customer Number'. Lets assume that your field is called 'Customer Number' in your files. Then each and every import you bring in must include this number. In every case you will map it into PestaRoo's field called **Imported Customer Number**. Later, in the parsing scripts this field **Imported Customer Number** will be used to tie your data to the customer table data. Your old "Customer Number" will only be used during the import process. PestaRoo can not allow you to use your old numbering system going forward. Since everything is to be connected to the customer data, you must import your customer list before bringing in Location or Invoice data.

Import Screens

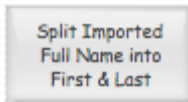
PestaRoo has to know what type of data you are wanting to import. Start at Manager's Access and click on the button "Data Importing Screens". Here you will find buttons for the three main types of imports. There are special screens and parsing scripts for bringing Customers, Locations, and Invoices.

Actual Import

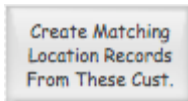
Once you have prepared an export file from your old software click on the Customers, Locations, or Invoices buttons for the type of data you have in your export file. Then you are ready to do the actual import. From the "File" menu select "Import Records" >>> File . . . " Then navigate to the saved file that you'll be importing from. After you open the file, line up the fields on the left and the right to control where your data lands. Here, you'll have to use a little common sense to line up the fields of data. With each field, you'll move the field name up or down on the right side by dragging it with the double-ended arrow. You can click on the center icon next to each field to import or not that data. On the fields you have lined up, you'll want to use the 'arrow' icon. (Don't forget, you must import Customer Number or whatever you call it, into **Imported Customer Number**. Once you have lined up the field names, check the Import Options. It should be set to "Add New Records" . Then, click "Import" On the next screen you should select "Perform Auto Enter Options while Importing". Congratulations! You have just imported your first data set!

Parsing Your Customer Data

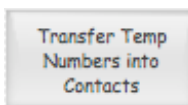
With each of the types of imported data you have one or more parsing buttons to help you clean up and connect your data. For Customers, there are three parsing buttons:



1) “Split Name...”: This parsing button is optional. If in your import file the first name and last names were combined in one field, you should have imported these ‘full names’ into the field Imported Full Name. Then you can use the first parsing button to split this data into more proper first and last names. If you brought in the first names and last names separately, you won’t need this parsing script.



2) “Create Matching Locations...” takes the customer address data and uses it to build corresponding Location records. Remember, in PestaRoo a customer is who we send a bill to, whereas a location is where pest control services are applied. So, we need both customer and location data tables. This button will only help you by creating the first location for each customer. If lots of your customers have multiple locations, you may want to use the location import button. If you use this parsing button, you won’t use the Location Import, and conversely.



3) “Transfer Temp Number...” takes any contact info you import into customers and moves it properly into the contact table. Why? PestaRoo stores contact numbers (phones, FAX, email, etc) in a separate table of data, but with a linkage to their own customer. This allows us to have an unlimited number of customer contacts and types! Wonderful. This parsing script moves the imported data into the related contact table. Note that the customer import screen allows you to import up to three types of contact numbers. If you properly import them, the

parsing script will place them in their proper table, and connect them to their customer. As the parsing script runs, it will ask you for the type of each of the three contact numbers: For example, “Phone”, “FAX”, and “email” It is OK to leave some contacts blank for some customers but not others.

Parsing Your Location Data

If you did NOT use the “Create Matching Locations...” parsing function under Customers, then you will want to import and then parse the Locations data. If your old software kept location data and customer data separate, you will want to use a separate export file to import, and then use the “Connect to Customers” parsing script. If your previous software did not keep location data and customer data separate, you will probably want to use the same export file, but on the Import Locations page. After the import you’ll want to use the “Connect to Customers” parsing script.

Parsing Your Invoice Data

With Invoices, you may bring in all your old invoices, or just the open invoices. Most companies only bring in their open invoices to avoid issues with old sales tax rates, residual balances, and payments. To bring in your open invoices, create your export file, being sure to include your old Customer Number that you used with the other imports. After the import you’ll want to use the “Connect to Customers” parsing script.

Importing Help?

If you would like, we can import your data for you. As of early 2008, the fee for importing your data is \$300-500. This service is restricted to Customers, Locations, & Invoices. For an additional fee we can sometime bring in your repeat scheduling data. You must have export files for us to work from. Please contact us for the current price & schedule. We try to complete imports within 1-3 days.