



Importing a Customer from a Backup

Everyone eventually makes the mistake of deleting a customer, only to find that they deleted the wrong one.... So, how do you retrieve a record from a backup copy of PestaRoo? Learn how to do this so that all related data is preserved.

Crisis!

PestaRoo prevents the regular user from deleting customers, invoices and payments. But with Manager's access you do have deletion privileges. Perhaps, someday you will inadvertently delete one of these records. Maybe when you were trying to eliminate a duplicate.... Although at time time it seems like a crisis, this is a manageable problem. This support doc shows how to import a lost record from a backup file. Since a deleted customer is by far the most common, we will focus on importing a customer. But the same approach work for all types of records.

Why Import?

You might be tempted to just re-enter the customer and move on from the situation, thinking that is the best solution. However, if you do, that causes an entirely new problem: you'll lose all the Customer's related records such as Payments, Invoices, WOs, and PreScheds. This is because PestaRoo uses the **Customer ID** to maintain the connection between related records. If you just create a new customer and put in the old address etc., this new customer will have a new and different **Customer ID**. It will NOT be able to see or connect to any of the old customers related records. They will still be there, but you'll not be able to see or find them. By importing the record from a backup, the **Customer ID** is preserved, thus maintaining the connection to the related records. (If you lose and re-enter an Invoice, the new one will loses all Payment Lines and connections to future WOs. Not good.)

Quick Directions:

- Quit PestaRoo
- Open backup copy of PestaRoo and find the needed record.
- Export all fields for that record to the desktop as a .fp7 file.
- Open PestaRoo and import that data while on any customer layout.

Detailed Directions

You don't ever want to have two files open with the same name, so before you open your backup copy it is import that you quit PestaRoo.

If you are running PestaRoo on a regular computer as a single user (or with one or two guests) PestaRoo automatically makes a full backup (BU) three times a week. These files are located inside the 'PestaRoo Folder', in a folder called 'Backups'. They are labeled for Monday, Wednesday, and Friday. Select the one you want and copy it to the desktop. We will do all our work on the desktop, so we'll need to move a copy there. Notice that we don't move the file. But, instead, we copy it to the desktop. When responding to a problem, we ONLY work with copies of backups, thus carefully preserving the original BU. That way, if we make a mistake, we still have the original backup to return to.

If you are running server, your BUs are on the Backup HD.

Once you have your BU on your desktop, you need to make sure its name is exactly "PestaRoo". So, if it is something like

“PestaRoo BU Friday”, you’ll have to rename it. You can only open a backup of PestaRoo whose name is exactly ‘PestaRoo’ or ‘PestaRoo.fp7’. This is a security feature to help protect you from inadvertently running two copies at once, or from accidentally improperly renaming PestaRoo.

After you have renamed your BU on the desktop, open it. If it prints Late Letters or Renewals, ignore and discard these. Find the customer record that you need. Next, we are going to export this data into a special file that our regular PestaRoo can use as an import source. You should now be on Customer Choose Name or Data Entry with a found set of exactly one record. Again, you want to have a found set of exactly one record.

From the File menu, select ‘Export Records...’ At the bottom of the first window, select the ‘Type’ to be ‘FileMaker Pro’. Name your file after your customers name, like ‘John Doe Data.fp7’. Make sure the destination is your desktop. The last step from within this window is to click ‘Save’.

In the second window, you’ll select the fields to export. At the upper left, a drop down list will say either ‘Current Layout’ or ‘Current Table’. You want ‘Current Table’. (If you select ‘Current Layout’ then only the fields on the current layout will be exported, thereby missing many of the critical fields.) After selecting ‘Current Table’, click ‘Move All’ to tell FileMaker that you want all the fields. Do not select any other options. Click ‘Export’.

Now all your ‘John Doe’ data is in a special file on the desktop. Close the BU copy of PestaRoo that you have been using for the last few minutes, and move it to the trash. We are done with it.

Open your regular PestaRoo. (To open PestaRoo, you should have a shortcut or alias on your desktop.) Once it is open, go to Choose Customer and click on ‘Show all Customers’, a button at the lower right. It doesn’t matter which Customer we are on.

Now we are ready to import the data from the file on your desktop.

From the File menu select ‘Import Records’ and then slide over to ‘File...’ submenu. In the

‘Open File’ window, navigate to your desktop, click on your ‘John Doe Data’ file, and then ‘Open’. A new window, called ‘Import Field Mapping’ opens. At the lower right, there is a ‘Arrange by’ option. Select, ‘matching names’, then click the ‘Import Button’.

Finally, we are on the last small window! This last window is called ‘Import Options’. Here, we must make sure that the ‘Perform auto-enter options while importing...’ in NOT checked. Then click ‘Import’.

Your customer data for the record you lost will now be back in your copy of PestaRoo. Congratulations!

Using a Backup as Master

So far, we have talked about bringing in a single record that was lost. But what if your entire master copy is lost?

How do we make a BU into our master copy?

- 1) Rename it to PestaRoo
- 2) Place it in the ‘PestaRoo Folder’.

If you have lost the entire folder, you can create a new one. It must be named exactly ‘PestaRoo Folder’. In addition to your master copy of PestaRoo, you must also have a folder named, ‘Backups’ in this same folder.

Conclusion

PestaRoo is structured such that Customers, Invoices, WO’s, Payments, etc are all in their own separate data tables. This means we can export or import records at will.

If we ever need to bring in a record from a backup or from a purchased company, this structure is very handy.