

Importing Bulk Data



PestaRoo's structure allows importing from a wide variety of data sources. Typically these are spreadsheets or tab separated lists. You can easily bring in multiple types of data: Customers, Locations and Contact Details.

Overview

PestaRoo has tools to help you bring in data from other computer programs. Imports are typically done when converting to PestaRoo, or when purchasing the customers from another company. Several import options are available.

When you import data, it temporarily lands in a special 'Workspace' that is separate from the main PestaRoo file. There, you can review and edit your data for clarity. For example, by deleting empty rows or correcting obvious errors or inconsistencies. Once you are happy with your data, you'll click a button to 'Parse and Transfer Data'. This moves your data into the main PestaRoo table system. Lastly, it clears your Workspace so you are ready to do another import. The "Start Over" button allows you to manually clear your Workspace, and optionally delete all data you've imported today in the event that you want to completely start over.

Supported File Types

To bring in pre-existing data, first export it from the existing system into any of the standard file formats. The following types are the most common: Tab-Separated, Comma Separated, and Excel. Other formats can be used if you contact PestaRoo Support. Once the data is in one of these standard formats, it can easily be imported into PestaRoo. Most people use Excel formatted data as their source, but any of the formats listed above will work.

Linking to Customers

Some data to be imported into PestaRoo may be in two different files, most commonly 'Cus-

tomers' and 'Locations'. In this case, a common field value in both is needed to identify that linkage between the two files. Usually this is a field like "Customer Number." Let's assume "Customer Number" is what is used. So both imports will need to include this number. In each case it will be imported into PestaRoo's workspace field called **Customer Number**. Later, in the parsing scripts this field **Customer Number** will be used to tie the data in the Customer table to data in the Locations table. The old "Customer Number" will only be used during the import process. PestaRoo does not allow the old numbering system going forward. Since everything is to be connected to the customer data, import the customer list before bringing in Location or Invoice data.

For your future reference, the Customer Number will be permanently visible on the PestaRoo's Customer Preference screen.

Navigating to the Import Screens

To get to the Importing screens: Go to: Home Page > Management > Import Bulk Data... This lands on a screen that provides notes and overview information of the importing process. To begin the actual import work, click, "Go to Customer Import Screen".

Customer Import

You will import the Customer data first, and then, optionally, do a Location import.

When doing the Customer import, a dialog will ask if you will be importing a separate data set for locations, or alternatively, if you want to have the customer parsing system to 'AutoCre-

ate' the matching location records. Most imports will be 'AutoCreate'. And so, you won't do a second import of Location data.

If the export file from the old software is ready (and typically on your desktop), click on the "Select Source & Import into the Workspace" button. You will:

- 1) Navigate to the saved file.
- 2) Line up the fields on the right to match the field names on the left. The easiest sequence is to look at the first field on the left, and then drag a matching field on the right, up to match your first field. Then do the second field on the left, then the third... etc. You do not have to use every field on the left.

The fields on the left come from your old data. The fields on the right are the target fields available in the Customer workspace where your imports will land.

Once all field names are matched up, look to make sure that the center icon is a single arrow pointing from left to right. Those fields that are not needed should have their 'arrow' clicked 'off'.

Tip: If your exported data does not include field names or labels, click on the 'Arrow' next to 'Field Names' at the lower left. The arrows allow you to scroll through your data to import to visualize what data is in which row. This does not affect the import in anyway. It just helps you to match up the fields.

Click "Import". On the next screen, set the checkbox to "Perform auto-enter options while importing".

Click "Import", again. (Don't you just love redundant buttons?)

Your data will land within the customer workspace.

Parsing Customer Data

After a raw import, your data needs to be parsed into the main PestaRoo Customer table. The more 'clean up' you do before parsing, the better your final import will be. The import parser does several things for you:

- 1) 'AutoCreates' Location records. Remember, in PestaRoo a customer is who is

billed, whereas a location is where pest control services are applied. Good software always keeps these two concepts separate. Parsing will help by creating the first location for each customer. If customers have multiple locations, the location import button may be more helpful.

- 2) Splits first and last names, (IF your import did not include those fields, but did have 'Full Name') If first name and last names were clumped in one field in the original data, these should have imported into the field Full Name. The parsing button will split this data into more proper first and last names. If first names and last names were brought in separately the parsing script ignores the field 'Full Name'.
- 3) Creates Contact Detail records for each phone or email and connects them to the corresponding customer. The Parsing button takes any contact info imported 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 link to the customer. This allows an unlimited number of customer contacts and types. This parsing script moves the imported data into the related contact table. Note that the customer import screen allows import of up to four types of contact numbers. If they are properly imported, the parsing script will place them in the proper table, and connect them to the customer. If the old data includes notes in the same field, such as 'Bill's cell' or 'Emily's Work Email' that notation will be pushed into the 'Contact Type' label in PestaRoo.
- 4) If your import was because of the purchase of another business, PestaRoo will create a 'Source' record, and link every customer to it so you can monitor the sales of those Customers through time. If your import was your 'Initial' migration of data into PestaRoo, a Source record will not be created. Because of their success, PestaRoo users tend to purchase multiple other pest control businesses. Sources let you track

how each purchase is working compared to its acquisition cost.

Importing and Parsing Location Data

If your old software had separate tables for Locations and Customers, you will probably want to import them separately:

- 1) When importing the Customer data, be sure to select the option to “Import” the Location data. Note that this means the Parsing script will NOT AutoCreate location records. This is because you are going to import them.
- 2) When you have separate Imports for Customer and Location data, EACH must include the Customer Number field. (That field is the basis for the necessary linkage.)
- 3) After you have Imported and Parsed the customer data, click on the button, to ‘Go to Location Import’. There you will do a second import, and a second round of parsing.

Parsing Invoice Data

With Invoices, you may elect to bring in all the 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. For help importing Legacy invoices, contact PestaRoo support for custom assistance.

Importing Help?

If you would like, we can import your data for you. We offer a flat rate of \$200 for importing your customer, location, and contact number data from your exported files. This service is restricted to Customers, Locations, & Contact Details. For an additional fee we can bring in your invoices and repeat scheduling data. You must have export files for us to work from. We try to complete imports within 1-3 days.