

# Mobile Setup



PestaRoo Mobile is capable of rapid deployment. This guide will show you what steps are required to quickly prepare your office network for PestaRoo Mobile. In addition, the guide will outline the steps required to setup your office iPads and complete your first sync. Let's go Mobile!

## iPad Requirements

Non-Apple tablets are not compatible with PestaRoo Mobile.

16 GB of memory is adequate.

For networking, only Wi-Fi is needed. You do not need a cellular connection for PestaRoo Mobile.

## Setting Up Your Office for Syncing

To sync within your own office, no special networking is needed beyond your offices basic Wi-Fi. If you are going to sync ONLY in the office, skip this section.

To sync from places outside of your own office's Wi-Fi, you will need to complete the following steps.

- 1) Get a static IP from your ISP (Internet Service Provider).
- 2) Set up a fixed IP on your PestaRoo host computer (Directing FileMaker connections from outside your office to the right computer). You do not want to only use DHCP for the PestaRoo Host computer. Its IP needs to be 'fixed' or 'static'.
- 3) Configure Port Forwarding on your router. Direct port 5003 (both TCP & UDP) to your PestaRoo host computer.

If you are not familiar with these terms, you might want to have a local IT person help you. Or, many high school students are quite capable

of doing this if they are computer game players. (Game players routinely configure their router to play games with remote players.)

The support document "Networking PestaRoo", also gives more info and options for setting your static IP.

Once this is setup, you will be able to sync so long as the PestaRoo host computer is on, and PestaRoo is open.

## Host Computer Setup (Mac)

The computer that has your PestaRoo folder, is called the 'Host Computer'.

Launch PestaRoo on the Host Computer. Once open, ensure that your FileMaker's Network Sharing is turned "On". To do this, click the File menu at the top of your screen. Drag down to 'Sharing' and select 'Share with FileMaker Clients...'. A dialog box will open and you can set Network Sharing to "On" and set 'Network Access to File' to "All Users". And click 'OK'.

## Host Computer Setup (Windows)

The computer that has your PestaRoo folder, is called the 'Host Computer'.

Launch PestaRoo on the Host Computer. Once open, please ensure that your FileMaker's Network Sharing is turned "On". To do this, click the Edit menu at the top of your screen. Drag down to 'Sharing' and select 'Share with FileMaker Clients...'. A dialog box will open and you can set Network Sharing to "On" and

set 'Network Access to File' to "All Users". And click 'OK'.

## About Mobile Builder Setup

'PestaRoo Mobile Builder' moves, or PreLoads, a copy of much of your initial set of data into Mobile. This includes your customers, locations, contact details, and value list data. By PreLoading your data, the time of first sync is dramatically reduced. Each successive sync session updates these data.

## Preparing PestaRoo Mobile

You will receive a download link in your email. Download this file to your desktop and unzip the file. Move this file, 'PestaRoo Mobile Builder' into your PestaRoo folder (which is inside your Documents folder). The file 'PestaRoo Mobile Builder' MUST be inside the PestaRoo folder in order to function. It can NOT be in any sub-folder. Double click on 'PestaRoo Mobile Builder' to begin the setup process.

The credentials are 'user' and 'user'. So, enter 'user' for the Account Name AND the Password.

Click 'Add Mobile Devices' to setup one or more iPads. Enter the number of devices that you want to setup today, and click 'Go' to create mobile device records in the portal. Each record will need to be populated with a Staff ID, a Device Name, and a Type. (At this time, Mobile only supports iPads as Devices.)

Next, click 'Build' to PreLoad your PestaRoo data. When this process is complete, a message will appear that says "PestaRoo Mobile' is ready for distribution." Click "OK".

During the 'Build' process, two or three new files have been added to your PestaRoo folder: 'PestaRoo Mobile' and 'PestaRoo Sync Connector', and perhaps 'PestaRoo PreLoad Connector'.

Before you can move any files to your iPad, you must enter the your network settings into 'PestaRoo Sync Connector' so it can communicate with your master copy of PestaRoo on the host computer.

Double-click on 'PestaRoo Sync Connector', entering 'user' for the Account Name AND the Password. Follow the 'Sync Connector Networking Setup' directions in the file to setup the External File References.

When you are done with the 'Sync Connector' setup, you are ready to move both 'PestaRoo Mobile' and 'PestaRoo Sync Connector' to the iPad.

## Moving Mobile & Sync Connector To the iPad

The app FileMaker Go (14) must, first, be installed on each iPad. This is a free App that is available on the App Store. Go to the Apple App Store on each iPad, do a search for FileMaker Go and then click to install on the iPad.

The first time you open FileMaker Go, a file called 'Getting Started' will launch a tutorial (you can run the tutorial or you can close the file by clicking on the 2 squares in the upper left hand corner — select 'Windows' — this will minimize the window and you can click the red X to close the file).

Once you have Filemaker Go installed, connect your iPad to your computer with your cable. Make sure your iPad is not locked (enter the passcode if needed). You will not be able to install the files on a locked iPad.

Open iTunes on your computer.

Select your iPad in the iTunes source list. Then click on the 'Apps' link. Scroll down a full page to the File Sharing section and click on the FileMaker Go icon.

Find 'PestaRoo Mobile' and 'PestaRoo Sync Connector' in your PestaRoo Folder. Drag them into FileMaker Go's App window.

You do NOT have to 'Sync' for the documents to be moving to your iPad.

'PestaRoo Mobile' and 'PestaRoo Sync Connector' are now installed on this iPad.

To eject your iPad: select your iPad in the iTunes Source list and click the eject icon next to the iPad in the Source list. Or, you can also choose Eject iPad from the Controls menu. Once it has ejected from iTunes, disconnect the cable from the device.

Critical Note! You will not be able to perform any sync with the iPad still plugged into the machine.

After you have installed 'PestaRoo Mobile' on your mobile device(s), then delete the copy of 'PestaRoo Mobile' that is on your computer inside the PestaRoo folder. After deployment, the copy of 'Pestaroo Mobile' is deleted from your computer. Why? This copy is a 'snapshot' of your data that is only good for one day. When you wish to setup another iPad at a later date you will build and PreLoad a new copy of 'PestaRoo Mobile' with new data.

## iPad Setup

Tap on the FileMaker Go app icon.

Tap to open your 'PestaRoo Mobile' file listed under "Files on Device".

— (Please Note: you will never open 'Sync Connector' directly. However, it will be visible during a Sync session.) —

Enter 'user' for the Account Name AND the Password.

Tap the Setup icon on the 'PestaRoo Mobile' Home Page.

Select the Mobile Device ID for this iPad.

Now, click on the Home Page icon to return to the Home Page and click the 'Sync Now' button. This will sync the next 30 days of Work Orders for the Staff ID you entered during setup. When it is done syncing, you will get a message that says 'Syncing of PestaRoo Mobile is complete.'

## Syncing Notes

Please remember, PestaRoo must be open on your master Host computer in order for you to sync your iPad. And the 'Listener' in Preferences must be on.

If you get an error message, then you have to make sure that your Networking setup is correct and that PestaRoo is open on the host machine.

'PestaRoo Mobile' is designed to look and feel just like the PestaRoo desktop version but there

are fewer fields. You can create Customers, Contact Numbers, Locations, Work Orders, Invoices, and view the Schedule Book.

The setup is now complete, and you've successfully gone mobile!

## Syncing Daily

Be sure to sync each day, or nearly every day, on each Mobile Device. If you wait several days or weeks, the amount of data needing to be synced from your master copy of PestaRoo, can grow substantially. When you have a large amount of data to sync down, the sync process can take much longer.