



# 15 Quick Concepts to Get You Up to Speed

These fifteen concepts will make it easy to start using PestaRoo and improve your business! Most of us hate reading directions, but these 15 items will give you a sizable boost. You'll be a power user in no time!

## 1) Tables of Data, Like Drawers in a Kitchen

We all have kitchens where we have carefully organized the different things necessary for feeding our families. One drawer for silver ware, one cupboard for plates, a place for pots and pans. PestaRoo is built around the same type of organization. About 75 different Tables of data contain unique and special information to help manage your business and boost your profits. You can probably guess quite what many of these tables contain, just by their names: Customers, Locations, Work Orders, Invoices, Staff, Agreements, and Products.

The power of PestaRoo lies in its easy to use connections (or relationships) between these tables. For example, from one customer we can see all the locations that he/she is responsible for. Or, we can see all the Work Orders (WOs) for that customer. Or, all the Products used on one Work Order. And going the other way, we can easily find every Work Order where we used a certain Product. Or, perhaps, all the jobs a given Technician has performed while controlling a specific pest in a specific town. Wow.

By having this powerful foundation underneath your data, the sky is the limit for what we can do. For now, just know that all these tables are unique and wonderfully interconnected. These connections are what makes it even easier to do what you already do with whatever system you have.

## 2) Interface Icons and Notes

Throughout PestaRoo certain symbols, buttons, and conventions are used everywhere.

One of the most common is the Go to Home Page button:



You can always go Home. There is a Home Page button at the top right of every page.

On Home Page you will see several buttons, identified by the magnifying glass and the dark grey background:



These buttons are provided for when you need to quickly find one of those named items.

Next, and also quite common, is the Blue Triangle:



The Blue Triangle allows you to zoom into whatever it is pointing to. For example, on an Invoice, you can zoom in on the Customer or the Location for that Invoice. Blue Triangles allow you to quickly move around your database, going where you wish. They work much better than 'Back' and 'Forward' buttons com-

mon in browsers which do not allow you to pick where you want to go.

Help Windows are generously placed throughout PestaRoo. They are indicated by this symbol:



The help screens appear in new separate windows and can be dismissed by clicking the 'Done' button.

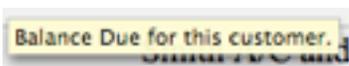
Profit Boosters are suggestions for improving your sales or margins. Look for this icon:



The Profit Booster screens appear in new separate windows and can be dismissed by clicking the 'Done' button. They are printable.

**Blue Text**, usually next to an ID indicates the the data is found elsewhere and cannot be edited at the current layout.

Tool Tips appear upon "mouse-over" and are used throughout PestaRoo to give you little tips, and to label a field. The yellow Tool Tips look like this:



There are probably 1000 Tool Tips to help you use the software. They are on fields, and sometimes they are on buttons.

Fields that allow entry for editing or finding are normally bounded by a faint gray borders;

Many drop down lists are based upon IDs:



When you click into the Drop Down list you will see a list of Names (sometimes with num-

bers in front) But once you select one by clicking or using your arrow keys, the ID of your selection will appear, with the name of your selection in blue. Making most references in PestaRoo by IDs, means you can change the spelling of a name or product without breaking its connections throughout your database. Very important.

Four click rule: PestaRoo is designed to get you anywhere with four mouse clicks or fewer.

Many layouts have a New Button:



This lets you create new records in that table.

The single most frequently visited area in PestaRoo is the Schedule Book and so many layouts have a direct link that immediately takes you back to the Schedule Book:



In general you should not delete records from a database without carefully considering whether any data is linked to that record. (If in doubt, don't delete) But when you can, and may need to delete, look for this icon:



Clicking on the Trash Can will delete the record.

### 3) Choose Name, Info, and List (Layouts)

PestaRoo has several common types of screens (layouts) you see in many areas. They let you see into the data tables underneath. A Choose Name screen is designed to make it very fast to find a specific record. A Info screen, on the other hand is designed to show you a lot of information in a well organized fashion. Some tables also have a List screen that makes it easy to see lots of data in rows.

Customer Choose Name screens are ideal for quick finds of customers, locations, work or-

ders, invoices, etc. They allow you to instantly search for any part of a Customer name or a Location address. So, to find Jonathan P. Doe on the Customer Choose Name screen, you could type in “Doe” or “Do” or “J D” or “John” or “Jo Do”, and press the enter key. Wow! It is that fast and easy. No, you do not need to memorize arcane codes or customer numbers. With PestaRoo you get to use any part of their names to search. PestaRoo has more than a dozen different Choose Name screens for rapidly tracking down whatever you want. Choose Name screen are fast ways to speed you on your way.

Every Choose Name screen also has a “Info” button next to each record you found or are looking at. As you would guess, these buttons lead you directly into the much richer Info screens where you can find, view, edit and print lots of data on that record. Most Info screen in PestaRoo also have one or more portals or windows into their related data. For example, on Customer Info is a portal into all their Locations, all their invoices, etc. Cool.

Note that you can do ‘Finds’ from any screen in PestaRoo, not just the Choose Name screens that are optimized for finding.

#### 4) Contact Numbers and Notes

It used to be that most people had a home phone and a work phone. But today people frequently have quite a few contact numbers beyond that. Husband work, Wife work, Home, His Cell, Her Cell, 2nd Job Phone, FAX, Email, Pager, etc. We find families with 10 numbers not unusual. So where do you put these numbers and what they are? From Customer Data Here you will find a portal that lets you enter an unlimited number of contact numbers for a customer, plus, you get to name them by your choice. (See Editing Value Lists) Since one or two contact numbers are likely to be used the most, you can mark them as primary, and they automatically appear on the front page of customer info, and on every WO and call sheet for that customer. These first two ‘primary numbers’ may be edited from the front page of customer info.

Customers frequently call to ask for quotes or information. The Log Notes gives you an easy place to track that information. For example, in May a customer may ask for quote on a job. Then calls back in June and speaks to a different person. The Notes allows you to quickly see what the first staff person said to prevent mixed signals or mistakes.

Notes are wonderful. You should use them on nearly every call where you don’t immediately create a WO. And the system keeps track of the date and time and who entered it.

#### 5) Editing Value Lists

Value lists are used throughout PestaRoo to allow you to customize the program to best suit your needs. More than 20 values lists can be edited.

From Home Pages click on ‘Value Lists’ to go to the layout where you can select the Value List to edit.

Some value lists are very simple with only a single field. Others, like Service Types have many options to review.

You should review all of most of the value lists as you set-up your software. And repeat this every so often as your skill with PestaRoo grows.

#### 6) Preferences

From Home Pages you can click on ‘Preferences’ to change many of the basic setting for PestaRoo.

There are seven categories of information that have preferences. Yes, PestaRoo is highly customizable! You should browse through all of these, and then go back again after you have a little more experience.

#### 7) Customers vs Locations

A customer is someone who pays you money for your services. A Location is where you apply the treatment. Both of these have an address, and they may or may not be the same. For example, a customer may own three rental properties at different addresses, plus his/her home. So, this

one customer will be associated with four different locations. A Customer with only one home will have only one location. So, almost every Customer will have at least one related location. And, every location will be connected to a single Customer who is responsible for the bills at that Location.

In PestaRoo, we are very careful to never mix-up Customers and Locations. From Customer Info is a location tab where you can quickly see all the Locations that this Customer is responsible for. And with a single click we can quickly create a Work Order or a PreSched record for any of these locations.

Conversely, from the Location Info we can easily change the Customer who is responsible. So, when a property sells, it is very easy to change its related Customer. One click!

Every single WO and Invoice in PestaRoo is associated with exactly one customer and exactly one Location.

## 8) Work Orders vs. Invoices

Work Orders (WOs) are single records or papers describing the work we intend to do. Invoices, on the other hand, are records of the work we have done, and need to be paid for.

WOs are frequently printed out in duplicate on NCR paper and carried by the technician to the job site. Each WO is separate. A WO provides all the information your technician needs to do the work correctly. It describes the pests, location, customer, service, date and time, and any notes provided by the customer about their needs. After the technician's work is complete he/she will log the chemicals used and other information about the job. One copy of the WO is left with the customer.

A route sheet is a compact list of all WO's for one tech for a day, in order. Unlike WO's, the route sheet also includes driving directions and confidential notes about the client and/or the stop. Each tech get his/her own route sheet for the day.

So, Invoices are a description of what we actually did, and need payment for. A WO and an Invoice are almost the same thing. The critical difference is that a WO represents what we intended to do and an Invoice represents what we

actually did. This difference is small but critical. Although they may be printed for some customers, most invoices are never printed. (Because many customers pay from their copy of the WO) But, they DO exist inside PestaRoo. One last small detail: Invoices are "posted", thus allowing payments to be entered against them. (Posting basically means locking the record to preclude additional changes.) All accounts receivable systems are based on invoices.

So, how does PestaRoo help you manage both WO's and Invoices? Lets compare how WO's and Invoices are both created, edited, and used.

Work Orders are created in an ongoing fashion every day, typically when a customer calls, or PestaRoo reminds us it is time for a repeat service. But once we print the Work Orders for a tech, we typically don't touch those WO records in the computer again. (But they are wonderful for data mining later on.)

Next, as we print the Route Sheet summary for our technician, PestaRoo automatically creates a matching invoice for each WO. The technician, in the field, makes notes of his/her product usage on the work order, and leaves one copy at the Location. The second copy comes back to the office where the office person transfers the usage info onto the WO's matching invoice and posts it, and perhaps pays it.

Here is the concept summary: Work Orders are given to the technician as pre-formatted pages (even with anticipated products!) along with a summary Route Sheet for the day. When he/she returns at days end, the usage data is moved to the invoice. The invoice provides the long-term record of applications and the is the basis behind PestaRoo's accounts receivable system.

## 9) Making Payments

Any invoice that has been posted is ready to be paid. PestaRoo makes it very easy to quickly post payments.

There are two places where you can start a payment. 1) From an Invoice, you can choose to Post and Pay as one operation. 2) and from Customer Choose you can either view existing payments or Create a Payment.

Which ever method you use to start the process, you will land on Payment Info for that

customer. The Payment screen is in two sections, a top portal of Unpaid Invoices and a portal of Invoices to be Paid.

The top left portal shows all invoices with a remaining balance. Each record will have a button next to it labeled with either 'Pay' or 'Details' If it says 'Pay' you can click on it, and the invoice will jump to the lower portal (and disappear from the top). If the button says 'Details' this means we have an Invoice with installments. Clicking on 'Details' causes the list of remaining installments to populate the upper right portal where 'Pay' buttons allow you to select the one or more to pay. Normally you will pay the oldest invoice or installment first.

Customers frequently pay multiple invoices at once, or only pay part of one or more invoices. PestaRoo makes this process easy. Simply select each invoice or installment to be paid on, and then type in the Amount to Pay in the lower portal.

Once all invoices are selected the sum of their 'Amounts to Pay' should total the amount of the check you have.

Next type in the Check Number or 'cash' or whatever in the field 'How Pay' and click Post.

Posting a payment double checks your addition, applies the payments to the invoices of concern, resets the customer's balance due, and locks the payment to preclude additional changes.

After a number of payments have been made you can print a 'Print Deposit Report' from Home Pages that will summarize all payments made. Normally, you will print a deposit report each day, or nearly so, for good cash management.

Another report, 'AR Summary by Account Category' is typically printed each month.

## 10) What are PreScheds?

PreScheds are repeating Work Orders (WOs) that get automatically created on some repeating schedule. With PestaRoo this intervals can be any number of weeks OR any number of months. So if you have a customer that you service every week or every other week, or every

one month, or every 3 months, or every year in August, then the PreSched section of PestaRoo is perfect for you. Most companies rely on PreScheds for a bulk of their work. The advantage of PreScheds is that you don't ever have to worry about forgetting a key customer when you are extra busy. PestaRoo on launch every day looks through all your PreScheds to see if any of them are ready. If their time has come, a WO will be created.

When a Work Order is created by the PreSched system, your selected options determine what technician is assigned, the date and time (or the week of the month), the pests to control, the amount of charge, and many other options.

What happens if you are gone for several days, that may include the trigger dates for some upcoming WOs? PestaRoo is smart enough to realize you have been away, and goes back to the last date it triggered and build the WOs from there so that no WOs are ever skipped. This one feature alone can easily pay for PestaRoo cost many times over every month.

## 11) Approx Dates vs Actual Dates and the Schedule Book

Approximate Dates are estimates when you will need to go to a customer, but where the Actual Date hasn't been scheduled with the customer. Only Actual Dates appear in the Schedule Book. PestaRoo helps you by allowing Approx Dates in three areas: PreScheds (for ongoing regular work), Work Orders, and from Invoices when you want to schedule a followup call. Lets focus on this second method first.

On many service calls you know at the time of first application that a followup visit will be needed in a couple months or that the customer might like to have you return in 6 months, or next year at this same time. But, you don't think this customer is a good client for the PreSched system. (Since it is not for an ongoing service) So, your technicians should always write in the upper right corner of the WO when he/she thinks you should try to reschedule the next visit for this customer/problem. When you post the Invoice for that WO, a special area allows you to create of WO in the future with only an Approx Date. Then when the date gets closer you can then schedule the Actual Date.

PreScheds can create Actual Dates (if you specify the requested time in the week or month) or Approx Dates. If you have no requested time of week or month you can call the customer to schedule the exact time of the service call.

PestaRoo has a simple printout you can trigger weekly to view your Approx Date Work Orders that await scheduling. From Home Page click 'Find UnScheduled Work Orders'.

So, what is the Schedule Book? A rapidly accessible area for viewing or making WO's by date and technician. In the Schedule Book you can quickly zoom to any date and view the work load of 2 technicians at a time.

To view any date, click into the date field at the upper right and select the desired date from the calendar picker. Or, click on the 'Today' button or the 'Tomorrow' button for instant access to those dates. Once you have selected your date, scroll through the available tech by clicking on the blue arrows at the page bottom to flip through successive pages of technicians.

On each page you view any WO in its portal. Or, you can zoom in on a single WO by clicking its Blue Triangle. For a given technician you can view all his/her WOs or create a new one for this date. Fast, Neat, and Cool.

Schedule Book also provides another key feature that helps you when you get busy and the phone is ringing incessantly- Hot Link Routes.

Hot Link Routes routes allow you to view with a single click all the days that you are currently going to a specific town or area (called 'routes').

So how do Routes work? Go to the Schedule Book and notice the drop-down field to the right of the technicians name. (This field's value list is populated from the 'Routes' value list) As soon as you start scheduling for a technician for a day, pick a value from the Route list that best describes where he/she will be working that day. Imagine that you are giving his/her work a location name for the day. As long as you pick values from the value list, then the Hot Link buttons can see them.

You may have 40 routes but only need 10 Hot Links to navigate to the common ones. To set your Hot Links for Schedule Book, go to Preferences.

Selecting Routes in your Schedule Book is a great time saver.

What determines which technician is in the Schedule Book? This is set from within Staff Info. To get there, click Home Page, More Choose Names, and then Staff Choose Name. Select the staff you want to change by going to his/her info screen.

When you are viewing the correct staff make sure their status is 'Current' and that they are 'Yes' for Schedule Book.

## 12) Agreements and Renewals

Agreements are long-term service obligations between you and your customers. They are usually for a single type of pest control or service and are renewed annually. The key is that they are invoiced and renewed annually. Annual termite treatments, Sentricon systems, and similar systems are all 'Agreements'. Expect to see many more similar systems for our industry in the future.

Renewals are records used to track if and when a given 'Agreement' has been renewed, or how soon it will be due.

PestaRoo tracks the impending dates when a given Agreement is due. Up to four customizable letters will be automatically printed as the due date approaches. Each day the timely letters just print as you launch PestaRoo. This is a wonderfully easy way to increase your companies percentage of Agreement renewals.

## 13) AutoPrint Letters

Each day you start PestaRoo a script runs that may trigger the printing of automatically generated letters. (And the PreSched system) If your office has more than one computer running PestaRoo you can select the Trigger computer in Preferences. A list of some of the common letters follows:

Late Letters for Invoices on Installments.

Agreements ready for renewal (first, second, or even third letters.)

Welcome Letters to new customers (via Posting Function)

90 day Special Offer for Termite Inspections  
(via Posting Function)

Call sheets for late Renewals

Each of these letters are ready to put into a window envelopes for quick mailing.

From Home Page Preferences and Service Type value lists you can edit these letters and change there settings or even stop them from printing. In most pest control businesses you should plan on using all of these letters.

## 14) Managers Access

PestaRoo allows a higher level of access to the program called Manager's Access. This is accessible from Home Page. It is password protected. You set your own password the first time you go in. Deleting of addition records, undoing payments, and editing posted invoices and payments are some of the features supported in Managers access. Editing Time Clock records and passwords is also done from here.

Should you lose your Password for Manager's access, or it is compromised, contact us for a small tool that will clear your password allowing you to reset it.

## 15) Learning More

We have many support files that are available. From inside PestaRoo look for the Getting Stated menu and pull it down to "Support Documents." There you can instantly see any new or revised documents on using PestaRoo to boost your profits!