

Check List for a Quick Start



Here are a few things that you need to do or track down before you start using PestaRoo. Most of these drive value lists and so ease the use of PestaRoo. Tend to these items and you'll be up to speed in no time!

Company Info and Technicians

Fill out the rest of your company information by going to Home Page >> Preferences. Be sure that your Company Name exactly matches that which you registered with us when you purchased PestaRoo.

Type in the Names of your Technicians. From Home Page >> Staff Choose Name and clicking the "Create New Record" button.

This will take you to the Staff Info where you can type in a Staff. Click the blue "Create New Record" button for each additional staff person.

Service Types and Products

Type in the Service Types you provide: From Home Page >> Value Lists >> Service Types. We have put in some common service types. While setting up PestaRoo for the first time, you can delete any of these that you don't use. (But, once you start using them, they can no longer be deleted. You can, however, add new Service Types any time you choose.

Put in the products that you use. We have put in some common products to get you started. From Home Page >> Value Lists >> Products. Here you will enter those that are missing. For each product you will enter the **Name**, **EPA Number**, **Percentage**, **WO Units**, and **Rate**. Also make sure that the status field says "current" for all products you use. Only those products that are marked current appear in the drop down lists.

Default Products and Associations with Service Types

Select your default set of WO Products. From Home Page >> Set Preferences >> WO Product tab. Here you will select the 8 most common products that you use.

Next, pick the Products that are associated with each service type. Home Page >> Value Lists >> Service Types. For each Service Type you will select the most common products that are used with that Service Type. For a given WO the service type is used to determine which products should first appear. If that list of products is less than eight, then your list of default products are used to fill the WO up to eight products.

Pests

Review the list of Pests, and add (or remove) those that are needed. Home Page >> Value Lists >> Pests. The Pests that appear here are those those are visible from the drop-down lists in the program.

A Few Customers . . .

Type in your first few customers and addresses. If your service is at the same address, then click the button "Create Also as Location" This creates a matching location for the Customer. Remember that every WO must have a **Customer ID**, a **Location ID**, and a **Technician ID**. So, almost every customer is going to have at least one location.