

Customer Name Filters



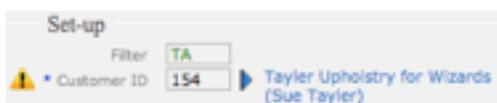
Filters are an aid to speedy data entry. They allow you to quickly select a specific customer even if you have thousands. PestaRoo uses them in many places. Filters enhance your productivity.

What are Filters?

Filters are special fields that are found in many areas of PestaRoo. They are always associated with a field that has a drop-down list. They restrict or “filter” the customers that appear in the drop-down list. This provides a huge performance enhancement. For example, if you have 500 customers (and no filter) a value list of your customers could take 5 seconds to appear. When you are talking to a customer this is simply too slow. If, on the other hand, your drop-down list has a filter where you type one or two letters, the response will be almost instantaneous! If you have 5,000 customers, the time savings is even more dramatic.

Using Filters

Filters usually look like this:



This example is from Invoice Info. Here we typed “TA” into the filter. (Notice that filters are always green, no matter where in PestaRoo they are used.) Next, by tabbing into the **Customer ID** field we get a drop-down list of every customer whose last name starts with “TA” plus any business name that has a word starting with “TA”. First names are ignored in PestaRoo’s filters.

So, in normal use you will first click or tab into the filter, enter 1-4 digits and then tab into the **Customer ID** field where you’ll select your desired customer.

What happens if you leave the filter field blank

and then tab into the **Customer ID** field? The **Customer ID** value list will show you all Customers.

Play with PestaRoo’s filters; you will quickly find that they save you a lot of time.

Where to Find Filters

Here are a few places where you will find Customer Filters:

- Agreement Info
- Inspection Info
- Invoice Info
- Location Info
- PreSched Info

Location Filters as a Similar Concept

On Invoice Info and other places you will find a similar concept. Setting the **Customer ID** automatically filters the available locations in the Location drop-down list. Only those locations that belong to the **Customer ID** selected will appear. Of course, you can overrule this list and type in any **Location ID** value you choose.

PestaRoo tries to save you time everywhere possible.