

Customers and Locations



Learning to work with Customers and Locations mean recognizing the difference between these two things . . . A Customer is who pays us, while a Location is where we do our work. Many accounting systems do not recognize this difference that is so key to our industry.

Overview

If you think about it, Customers and Locations are two totally different concepts. A customer is someone who pays you money. A location is somewhere that you do work, perhaps applying chemicals. A customer might own 5 different houses. But for every location we have exactly one Customer who is responsible for it. We can use a work order (also called service ticket) to illustrate this. A work order is a request for a specific service at a Location to be paid for by a Customer. PestaRoo excels at making this critical distinction easy to use. Many software packages “out there” do not keep these concepts separate.

Customers

Find a Customer on Choose Name. From this screen, you can see the customer’s six most critical pieces of information: Name, balance due, status, address, phone. Click Info, and you can edit that customer. Plus, from the Choose Name screen, even more information is instantly available. Each of the “view” buttons in the top row changes to green lettering if they have an active record you can navigate to. So, for example, “View Invoices” changes to green if the customer has an invoice. “View Payments” changes to green if they have made a payment. So, if you click on one of the view buttons, it will take you to that record(s) for that customer.

From the customer info screen you can see multiple tabs showing Name & Address, Locations, Contacts, Log Notes, Invoices, and Alerts for that single customer. Of course, blue triangles in each let us navigate with one click to that related record.

To create a new customer from Customer Choose Name, click on the button, “New Customer.” Cre-

ate a few customers to see how easy it is. (If you can’t create new records, see Installation notes above about write-protected files.)

Locations

A location is a place where we do work. This means every work order will be connected to a **Location ID**. This also applies to every Invoice and PreSchedule record.

Finding a location is very similar to finding a customer except you type part of the address. For example, you might type 123 for the house number or “Grand” to find all the addresses in your system that have a house number of 123 or “Grand” in them. So, you can navigate very quickly to any address in the system. Once you find a location, click info to go into that location. Here, you can do some remarkably cool things. First, look at the upper left to see who this location belongs to. Now, lets say that a house is sold to a new owner. How do you change it in PestaRoo? Merely click in this top box and choose the name of the new customer. Or, if the new customer isn’t in your system, click on the “Return to Customer button, create a new customer, and then return to the location info to hook it to the customer. It is much easier to do that it is to describe it.

To create a new location you could do it from Location Info but then you would have to hook it to the correct Customer. So, what we normally do is create new locations from within the the Customer’s info screen. There we have two options “New Location for this Customer” and “Create Also as a Location”. Both of these are very fast ways to create new locations.