Interface Elements

PestaRoo was built behind the scenes using the incredibly powerful software of FileMaker Pro (FMP). Here we summarize a few common interface elements used throughout PestaRoo.

Overview

To be the best of all pest control software packages, PestaRoo was designed from the ground up with an entire suite of graphic elements. These elements help give PestaRoo a consistent look and feel that helps establish PestaRoo's ease of use and training. Everything we do is designed to be visually clear and attractive.

Structure

Behind the pages of whatever screen you are on, is an entire suite of tables. Each of these tables has its own name that describes the kind of information that it includes. This underlying structure is critical for what we do with PestaRoo. A good metaphor to understand the file structure of our software, is a kitchen. A well-organized kitchen has everything organized by type. For example, the silverware is typically in a drawer. Canned good are together. Pots and pans are together. Plates are in one place, etc. Good software is organized in the same fashion. Can you guess what is in each of these files? Customers, Locations, Work Orders, Payments? Each of these files contain exactly what their name suggests. This carefully designed foundation allows us to build software for any function you want. PestaRoo is the result of 20 years of experience, and many years of construction. The table Customers contains the records for who is going to pay for your service. Locations contains records that describe where you did the work. Work Orders are records for what you are planning to do. Invoices contains the records of what you did do, and that you need paying for. PreScheduled WOs are for advance repeating work you are intending to do.

Portals

Portals are "windows" that look into other tables or places in the database. The example above is from invoices. It shows the pests that were controlled by way of that invoice. This is a non-filtered portal. You will see lots of them in PestaRoo.

A different but cool use of Portals is to filter what it lets you see. For example, if you have a portal in Customers looking into Invoices, you would see all the different invoices for only that customer. Cool! And we can even filter it deeper. For example, we have a portal in Customers that only shows 'unpaid' invoices. With a single click that portal can be changed to 'all' invoices. Portals are very valuable.

Tables and Layouts

All tables have several common layouts that are handy for quick navigation. A layout is merely another name for one way to look at your data. Choose Name, Info, and List. Some tables may have several more.

Choose Name layouts are used for partial-entry searches (such as "J D" or "Doe" to find John Doe's record).

Info layouts are used to view all or most data about a single record.

List layouts are compact layouts where we can visually view a large set of records, and then select the one we want with a single click. (for example selecting among the 13 "Doe" records.)

Most layout have a quick and easy linkage to the other layout views. Some layouts are available from the pop-down menu above the rolodex-like book over to the left side of the screen.

Going Home

Most layouts have a round blue button at the upper right corner that takes you to the Home Page.

Also, in the "Scripts" menu you will always find a script called "Go to Home Page". So, as you are exploring, you can always get back Home. Its nice to know that you won't ever be lost.

Creating New Records

From most any table, such as Customers you can type Control-N (Command-N on the Mac) to create a new record. Many layouts, such as those on Value Lists have the blue "new" button.

Gray Borders

Most fields that are designed for text entry have a faint gray border.

Blue Triangles

Many places you will find blue triangles like this: ▶ These are buttons that let you zoom into whatever the blue triangle point to. For example, lets say we have a portal list of all the invoices for a single customer. Clicking on the blue triangle before any invoice will take you into that invoice. They are also called "Jump-To" triangles.

Blue Text

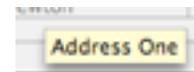Data that is flowing from other tables is normally in Blue type. Normally you would not edit the spelling of this information except in its native table. The blue type is to warn you that the data lives elsewhere.

Drop-Down Lists with IDs

You will quickly see that we frequently use pop-up lists to save you data entry time. You will also notice that many of these lists include a number before the value in the list. This number is the internal ID that PestaRoo uses to track your selection. When you click on a list item, FileMaker actually types in only the ID. The name itself flows in independently. Why bother to do it this way? This approach saves you a lot of time on the long term. It allows you to edit the data without breaking the relationships.

This is a classic example of why we use relational databases. With proper design we can just click on a name in a list, instead of typing the name. Never again do you have to worry about mistyping a customer or employee's name. In many older pest control systems, they make you type the names over and over every day hundreds of times, or you have to learn esoteric codes for each customer or staff. PestaRoo allows you to easily search by the name itself. Another advantage of this design becomes apparent when, for example, one of your techs or customer gets married and changes their name. With PestaRoo you only have to change it in your Staff table, and the change can flow instantly throughout your system.

Tool Tips

A Tool Tip is a tiny yellow note that pops up when you mouse-over an object. There are about a thousand Tool Tips located in PestaRoo! These are your first line of help. They are limited to a couple sentences of information.

Help Buttons

Throughout PestaRoo you'll find these Help buttons. They are for more extensive help comments of several paragraphs. Help buttons are context sensitive.

Help Menu

At the far right of the menu bar is a help menu where you can send the PestaRoo FAQs, Web Site, and Support docs.
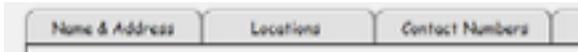
Customer Alerts

Alert Buttons are located on any screen that directly contains customer information. Clicking on this button will create an Alert (or "reminder") for the customer that you are on. Then, you will be returned directly to your previous place.

Profit Builders

The light bulb icons are "Profit Builder Techniques". These open a new window with an idea for boosting the company profits. These have proven to be very popular. We will be adding more of these.
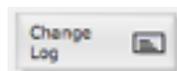
Tabs

Layout Tabs look like file folder tabs. By clicking on them you see an entire new area of the layout. A good example is on Customer Info. Click on "Locations" let you see all the Locations for that customer. Click on "Contact Numbers" and you see all the ways to call that customer. We use these in PestaRoo to cut down on layout clutter. Instead of packing everything and the kitchen sink onto one layout, we let you pick the things you want to see.

New Window Info

These two buttons are similar to the Blue Triangles. But instead of jumping to a different part of the database, these buttons open a new window with additional information. In the first sample above, it lets you "Write Off" the balance of the current invoice in a new window. The second sample is a generic button that lets you zoom in on some other key data fields without loosing your current record's context. When you close these new windows you immediately return to where you were.

Change Logs

These new window buttons show all times that key fields have been changed in the current table. This is handy if you want to know when a field, such as address, was changed, and what its value used to be. We are continuing to update this feature, so if you have a request for a field that you think should be logged, let us know! You'll find Change Log buttons on many of the key info screens. Change Logs are critical in that they let us audit a records history.