

# 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

Put in your company information. Home Page >> Set 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 >> Choose Staff >> Show All >> New.

This will take you to the Staff Data Entry where you can type in a Staff. Click "New" for each additional staff person.

## Service Types and Products

Type in the Service Types you provide: From Home Page >> Edit 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 >> Edit Value Lists >> Products. Here you will enter those that are missing. For each product you will enter the **Name**, **EPA Number**, **Percentage** 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 >> Edit 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 and Zip Codes

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

Enter the most common Zip Codes for your area. Home Page >> Edit Value Lists >> Zip Codes. By typing in the data here, you will never again need to type the city name. From a new customer data entry screen, you'll just type in the **Zip**, and the **City** and **State** will automatically flow in. So, typing in you zip codes now, will save lots of time later!

## 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.