Why Prepay Letters?

• Notification of automatic renewal
• Offer discount for prepayment
• Get signed contract for new/renewed services
  • Upsell new services to existing customers
  • Solicit new customers
Start with text

Go to
- Data
- Customer Parameters
- Letter Setup
Add a Record

- Name it
- Choose “Plain Text Letter” (usually)
- Check “Pre-Pay/Renewal …”
Enter text

The maximum length of the message will be determined by the number of services listed.
Items to include

You may wish to include offer expiration date and discount amount, even though it prints elsewhere. We strongly recommend mentioning your auto-renew policy.

I would like to take this fine opportunity to thank you for the trust you have placed in Super Green to care for your lawn. It’s a responsibility we won’t take lightly.

I believe you’ll find the use of the highest quality products, applied by licensed Super Green Professionals will be the right combination to give you a beautiful lawn we will both be proud of.

Your treatments are scheduled to start automatically in April or May depending on which program you scheduled. On the following page you will find a description and price for each application you are currently scheduled for. If you are interested in taking advantage of our 10% Prepayment savings, please send a check for the amount shown.

Please note that our service is continuous. We will return each year unless you notify us in writing or by phone of your desire to discontinue service.

Again, thank you for the trust you have placed in Super Green and we look forward to seeing you soon!
Other Options – Letter Object

If you want a special font, size or graphic, you can choose “Letter Object” instead of “Plain Text Letter”.

If you just want your logo, there is an option for that (which we will see later).
Other Options – Letter Object

Design it in Word, leaving about 3” of space at the top (where we will print addresses)

Ctrl + A (to select all), then Ctrl + C to copy to Windows clipboard
Other Options – Letter Object

1 - Left-click in the big gray “Letter Object” box

2 - Click on the Edit menu at top and select “Paste Special”

3 – Select “Picture (Metafile)”
Other Options – Letter Object

The Letter Object is not often recommended, since it may be difficult to place the graphic exactly where you want. Also, any changes have to be made on the Word document, then copy/paste again.
Choosing records for Prepay Letter

If you want to print a letter for just one customer, go to that customer’s Contact tab.

In the Letters section, choose “Prepay” from the list box, then hit the “New Record” icon next to it.
Choosing records for Prepay Letter

You will be brought to the Prepay Letter screen, with that customer already chosen.

Note: the rest of the criteria from the first two tabs are also considered (which we will see later).
Choosing records for Prepay Letter

If you wish to choose differently from the regular Prepay Letter criteria, you can generate and export from almost any report (including Mail Merge).

Example – You may wish to send a letter only to customers with a specific source. Go to the Customer List, choose your criteria, then preview (to make sure you have chosen the desired customers).
Choosing records for Prepay Letter

Choose Export, which will bring up the Export Options screen

Select Prepay/Renewal from Export Type (then OK here and on the Report screen)
Choosing records for Prepay Letter

When you access the Prepay Letter screen, you will see the number of records exported here.

(if nothing appears here, it may be because you already had the prepay letter screen open on this computer)
Choosing records for Prepay Letter

When exporting to this module, the selection criteria is unavailable (grayed out)
Normal Prepay Selection

Go to

• Print –
• Letters –
• Prepay/Renewal Letters

Like other reports, the settings are saved from the last time this user generated this letter. You need to review all fields (especially the first time each winter)
Select Customers Tab

You can choose customers from individual branches or all.

You can choose multiple seasons.
Select Customers Tab

The Season field is referred to from the second and third tabs. For Active Customer Prepay Letters, choose the new season (not the one just completed).

It won’t do you any good to make price and program changes to the new season, then offer last season’s program for prepayment.
Select Customers Tab

Choose the Customer Status

For our example, we are sending Prepay Letters to Active Customers

Although it is possible to send letters to old cancels and rejects, Service Assistant has a better way (not in LA3). We will see that later.
Select Customers Tab

If you send letters throughout the season, you can exclude those who already received one.

In this example, we are not sending to anybody who received a prepay letter within the last 20 days.
You can send a second letter during the winter (possibly with a lower discount or after a price increase).

You would exclude the customers who prepaid after your first offer.
Select Customers Tab

You can exclude Group Billing Other Bill-to and Credit Hold Customers

Then maybe send them a different letter (excluding the ones already sent within the last 1 day)
You can choose by Zip Code Range

If you want several, non-consecutive zips, you will need to export from a report, such as Customer List.
Select Customers Tab

You can choose by Customer Number Range

This is a good way to get a small sample for Previewing or Printing for proofreading.
Select Customers Tab

You can print letters to go out with your techs along with the day’s invoices.
Select Customers Tab

You can choose what order to print these letters.

If “No Sort” is chosen, they will print in customer number order.
Select Customers Tab

You can send separate letters to Residential and Commercial Customers
Select Customers Tab

You can include or exclude customers based on their flags.
Select Programs/Jobs Tab

On the second tab, we are choosing customers with certain Programs and Jobs.

Remember, this refers to customers with services in the season range from above.
Select Program/Jobs Tab

Example: We are getting customers with any active services in the new year.

Be sure to choose “Any” of these services. If you select “All”, you are not likely to get anybody.
Select Programs/Jobs Tab

We could do separate letters, depending on program billing type.
Select Program/Jobs Tab

You could send letters to just new sales (or new estimates or choose by Schedule Date)

Otherwise, keep it as “All” dates
Select Program/Jobs Tab

You can choose to send only to customers with “Full Programs”

The number of services that determine a “Full” program is defined in the Program Parameter setup.
Include on Letter Tab

On the next tab, we start to select what actually gets printed on the letter
Include on Letter Tab

For regular Prepay/Renewal Letters, we want to show all services scheduled for the new year.
Include on Letter Tab

"Include Inactive Rounds" = "Do you want to show skips as scheduled?"

You shouldn’t have any skips for new season after renewals run. This option is for when you run based on last year.
Include on Letter Tab

“Use Renewal Price” need only be chosen if you are running based on last year.
Include on Letter Tab

An incentive service can be added with an extra discount or offered instead of prepay discount. This can even be for a service they already have (be careful when entering that prepayment).
Include on Letter Tab

Discounts:
“All” if run for new season
“Permanent” if run for old season.
This looks at Discount Parameter settings

If you choose “All” when running for old season, you may be giving a New Customer Discount in error. “None” would ignore “Senior Citizen Discount”, for example
Include on Letter Tab

You have option to show Discount Amount as $ or %

(If “Incentive” Service is chosen, it will automatically choose “Dollar Amount”)
Include on Letter Tab

Other choices:
Leave them all checked if running for new season (except for possibly services already prepaid)

You can show only the services with the billing types chosen

If run for last year, uncheck the services that “Don’t Repeat”
Include on Letter Tab

If offering a prepay discount, you can enter different percentages for different services.

The recommended, simplest method is to offer the same discount for all services. Otherwise, you may have confusion when entering the prepayment.
Upsell/Neighbors Tab

In addition to information about their scheduled services, you can try to sell extra ones on the third tab.
There are three options for printing information near the bottom of the letter.
Upsell/Neighbors Tab

Upsell – choose the services (that they don’t already have)

You can offer a prepay discount, as well (recommended same % as active services)

If Service Assistant can’t calculate a price, you can’t offer it as an upsell
Upsell/Neighbors Tab

When running “Regular”, One-Column letter, there is room for only four upsells.

This letter format can only support 20 lines of scheduled rounds or services and up to 4 extra of up-sell services.

You can save when prepaying for these extra services:

<table>
<thead>
<tr>
<th>Service</th>
<th>Regular price</th>
<th>Prepay price</th>
</tr>
</thead>
<tbody>
<tr>
<td>BAYLETON</td>
<td>$63.65</td>
<td>$57.29</td>
</tr>
<tr>
<td>CORE AERATION</td>
<td>$121.60</td>
<td>$109.44</td>
</tr>
<tr>
<td>CHIPCO GT</td>
<td>$52.25</td>
<td>$47.03</td>
</tr>
<tr>
<td>DURSBAN INSECTICIDE</td>
<td>$39.42</td>
<td>$35.48</td>
</tr>
</tbody>
</table>
Upsell/Neighbors Tab

When sending letters to potential customers (Marketing or old Rejects), you can show current customers near them.
Upsell/Neighbors Tab

Choose what type of customers to use as references.

Maybe only Lawn Care Customers if you are trying to sell new lawn customers.
Upsell/Neighbors Tab

What proximity defines a neighbor to your prospect? How many to list (maximum of 12)

Here are some of your neighbors who already have Super Green lawns:

- 123 N Main St
- 865 High St
- 205 Loroy Ave
- 609 Phillips Ave
- 761 Grant Ave
- 327 S Bywood Ave
- 1007 W Selfridge Blvd
- 236 N Chocolay Ave
- 486 Shenandoah Dr
- 240 S Chocolay Ave
- 345 Huntley Ave
Upsell/Neighbors Tab

“None” leaves that space blank or allows for special billing options (which we will see later)
Letter Options Tab

You have many print options on the fourth tab.
Letter Options Tab

Similar to invoice printing, you will want to print company information, unless you have custom pre-printed forms.
Letter Options Tab

Note: If you choose to print your company logo, you may need a different return envelope (should be ok for standard window envelopes)
You have the option of including the customer’s balance when offering a prepay amount.
Letter Options Tab

If you don’t have current homeowner information (for non-active records), you can have alternate greetings. There is an option to print subdivision.
Letter Options Tab

You can give a “Bill Me Later” option on the remittance tab, if you wish.
Letter Options Tab

On remittance tab, “List Services As:”
Scheduled (for current customers)
Proposed (for prospects)
Letter Options Tab

You must have an Expiration Date for your offer

SAVE! 10%

On This Service for One Full Year
Expires on 03/31/13

Your payment of $206.99 gives you a $23.03 discount off regular service for one full year
Expires on 03/31/13
Letter Options Tab

Expiration date can be set for “Use Date”, which will print the date you enter. “Use Days” will increment the expiration date daily. Example: if you set it for March 31, it will change to April 1 the next day.
Letter Options Tab

New safeguards will prevent errors when you don’t update expiration date
Letter Options Tab

You have the option of showing the prepay price for each service next to the regular price and draw attention to the offer.
Letter Options Tab

If your form already has text printed, check this box.

Otherwise, you can compose the text that appears here.

SAVE! 10%
On Your Service for One Full Year
Expires on 03/31/11

SAVE! 10%
if you sign up and Prepay
Expires on 03/31/11
If this is not a prepay offer letter, you can exclude prepay text and checkboxes.
Letter Options Tab

Like with invoices, you can ask for credit card payment.

You can print a line for a required signature (on remittance portion).
Letter Options Tab

If you have $0.00 priced services (possibly from an incentive), you chose the text that appears next to it.
Letter Options Tab

You can offer “Installments” in addition to prepay

<table>
<thead>
<tr>
<th>Total Service Amount</th>
<th>$217.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Service Amount with tax</td>
<td>$230.02</td>
</tr>
<tr>
<td>After 10% Prepay Discount</td>
<td>$206.99</td>
</tr>
<tr>
<td>You Save</td>
<td>$23.03</td>
</tr>
</tbody>
</table>

8 Monthly installments of $28.75
Letter Options Tab

If the Upsell tab is set as “None”, you can spell out the Payment options, by checking “Show Boxed Payment Options”.

Example 1:
“Boxed Payment Options” checked, “Installment Options” unchecked. Edit the “Custom savings text” (Block 1 and Block 2). You need a Bill Me Later message.
Letter Options Tab

If the Upsell tab is set as “None”, you can spell out the Payment options, by checking “Show Boxed Payment Options”

Example 2:
Check Installments and Options boxes, change “Bill Me Later” message to “No Message”
Letter Options Tab

If the Upsell tab is set as “None”, you can spell out the Payment options, by checking “Show Boxed Payment Options”

Example 3:

Check Installments and Options boxes, select “Bill me Later” message and check “Eliminate Prepay Text and Checkbox”
If the Upsell tab is set as “None”, you can spell out the Payment options, by checking “Show Boxed Payment Options”.

Example 4:

Check Installment and Options boxes, uncheck “Eliminate Prepay Text” box, choose “Bill Me Later” message.
If printing Upsells or Neighbors, you should have a title line.
Letter Options Tab

Add a big, italicized Banner Line to print above your text

Banner Line: Get Ready for Spring and Save!

Get Ready for Spring and Save!
I would like to take this fine opportunity to thank you for the trust you have placed in Super Green to care for your lawn. It's a responsibility we won't take lightly.

I believe you'll find the use of the highest quality products, applied by licensed Super Green Professionals will be the right combination to give you a beautiful lawn we will both be proud of.

Your treatments are scheduled to start automatically in April or May depending on which program you scheduled. On the following page you will find a description and price for each application you are currently scheduled for. If you are interested in taking advantage of our 10% Prepayment savings, please send a check for the amount shown.

Please note that our service is continuous. We will return each year unless you notify us in writing or by phone of your desire to discontinue service.

Again, thank you for the trust you have placed in Super Green and we look forward to seeing you soon!
Letter Options Tab

Letter Format:
Pre-Pay Letter (Form)
One – column,
Upsells at bottom and checkboxes in remittance portion
Letter Options Tab

An Option for this format allows you to group services within a program (if priced the same)

<table>
<thead>
<tr>
<th>Service</th>
<th>Num. of Services</th>
<th>Price Per Service</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lawn Care</td>
<td>7</td>
<td>$31.00</td>
</tr>
<tr>
<td>Soil Test</td>
<td>1</td>
<td>FREE</td>
</tr>
</tbody>
</table>
Letter Options Tab

Letter Format: Renewal Letter
Few Options
To be printed two sheets of plain 8.5” x 11” paper
Has option to show employee signature (from parameters)

Dear Mr. Paul Graham,

I would like to take this opportunity to thank you for the trust you have placed in Super Green to care for your lawn. It’s a responsibility we won’t take lightly.

I believe you’ll find the use of the highest quality products, applied by licensed Super Green Professionals will be the right combination to give you a beautiful lawn we will both be proud of.

Your treatments are scheduled to start automatically in April or May depending on which program you scheduled. On the following page you will find a description and price for each application you are currently scheduled for. If you are interested in taking advantage of our 10% Prepayment savings, please send a check for the amount shown.

Please note that our service is continuous. We will return each year unless you notify us in writing or by phone of your desire to discontinue service.

Again, thank you for the trust you have placed in Super Green and we look forward to seeing you soon!

Sincerely,

Elaine Anderson
Elaine Anderson
Sales Manager
Letter Options Tab

Letter Format: Pre-Pay Letter with Upgrade Offer
Allows you to make two different offers (Two Columns)

Recommended so you can give extra discount if they prepay for Renewed AND Upsell Services
Letter Options Tab

On “Include” tab, a second column appears to give a higher discount
“Banner Line” heads the left column
“Upgrade Banner” goes on the right
**Letter Options Tab**

<table>
<thead>
<tr>
<th>Scheduled Services</th>
<th>$</th>
</tr>
</thead>
<tbody>
<tr>
<td>EARLY SPRING APPLICATION</td>
<td>31.00</td>
</tr>
<tr>
<td>LATE SPRING APPLICATION</td>
<td>31.00</td>
</tr>
<tr>
<td>EARLY SUMMER SLOW RELEASE</td>
<td>31.00</td>
</tr>
<tr>
<td>LATE SUMMER SLOW RELEASE</td>
<td>31.00</td>
</tr>
<tr>
<td>EARLY FALL FEEDING</td>
<td>31.00</td>
</tr>
<tr>
<td>WINTER DORMANT FEEDING</td>
<td>31.00</td>
</tr>
<tr>
<td>LIME</td>
<td>31.00</td>
</tr>
<tr>
<td>Soil Test</td>
<td>FREE</td>
</tr>
</tbody>
</table>

**Save 10% if You Prepay for Renewed Service**

<table>
<thead>
<tr>
<th>Total Service Amount</th>
<th>$ 217.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Service Amount with tax</td>
<td>$ 230.02</td>
</tr>
<tr>
<td>After 10% Prepay Discount</td>
<td>$ 206.99</td>
</tr>
<tr>
<td>You Save</td>
<td>$ 23.03</td>
</tr>
<tr>
<td>Prepay Amount</td>
<td>$ 206.99</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Recommended Services</th>
<th>$</th>
</tr>
</thead>
<tbody>
<tr>
<td>CORE AERATION</td>
<td>51.00</td>
</tr>
</tbody>
</table>

**Save 15% on Prepay for Renewed and Extra Service!**

<table>
<thead>
<tr>
<th>Scheduled Services</th>
<th>$</th>
</tr>
</thead>
<tbody>
<tr>
<td>EARLY SPRING APPLICATION</td>
<td>31.00</td>
</tr>
<tr>
<td>LATE SPRING APPLICATION</td>
<td>31.00</td>
</tr>
<tr>
<td>EARLY SUMMER SLOW RELEASE</td>
<td>31.00</td>
</tr>
<tr>
<td>LATE SUMMER SLOW RELEASE</td>
<td>31.00</td>
</tr>
<tr>
<td>EARLY FALL FEEDING</td>
<td>31.00</td>
</tr>
<tr>
<td>WINTER DORMANT FEEDING</td>
<td>31.00</td>
</tr>
<tr>
<td>LIME</td>
<td>31.00</td>
</tr>
<tr>
<td>Soil Test</td>
<td>FREE</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Total Service Amount</th>
<th>$ 268.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Service Amount with tax</td>
<td>$ 284.06</td>
</tr>
<tr>
<td>After Prepay Discounts</td>
<td>$ 244.16</td>
</tr>
<tr>
<td>You Save</td>
<td>$ 39.92</td>
</tr>
<tr>
<td>Prepay Amount</td>
<td>$ 244.16</td>
</tr>
</tbody>
</table>

Upgrade Offer Letter (Two Column)

This prints below text
Letter Options Tab

Remittance portion can show left column total or right
Letter Options Tab

Letter Format: Renewal Notice
Prints on Letter-sized form

Ideal for Termite Renewal Letters
Letter Options Tab

Choose the Letter Name (we created earlier)

Prepay Now and Save!

I would like to take this fine opportunity to thank you for the trust you have placed in Super Green to care for your lawn. It's a responsibility we won't take lightly.

I believe you'll find the use of the highest quality products, applied by licensed Super Green Professionals will be the right combination to give you a beautiful lawn we will both be proud of.

Your treatments are scheduled to start automatically in April or May depending on which program you scheduled. On the following page you will find a description and price for each application you are currently scheduled for. If you are interested in taking advantage of our 10% Prepayment savings, please send a check for the amount shown.
Letter Options Tab

In what type of envelope are you mailing these? (defaults to blank for new users)

Different envelopes have address windows in different places
Letter Options Tab

Lines of text plus services
For one column letter: 26
For two column letter: 32
Letter Options Tab

You may have some customers that have more services than you have space allotted.
Letter Options Tab

You have five options:

1. Adjust number of lines on this tab – you may have more than you need
2. Edit your letter to have fewer lines
3. Print the ones you can, then print the remainder with shorter text (change “Days Since” to 1)
4. Print the ones you can, then print the remainder as “Group by Program”
5. Print all of them as “Group by Program”
Letter Options Tab

Printer Offset:
Every printer is a little bit different.
Print (not preview) ONE letter.

If the print is too high, increase the Offset by .1” or less (never more than .3”)

Letter Options Tab

For Customer Assistant Website Companies: Enter your Bundle information here and a unique Offer Code will print for customer (see CAW presentation)
Printing “Picture Letters”

You can put a picture of the prospect’s house on a prepay letter!

You will need the proper form (top part is blank, product K-228) and envelope (full window on front, with small area for postage, product E-52)
Printing “Picture Letters”

Select the “Property Image Window” envelope
Printing “Picture Letters”

That will enable the Images tab (top right)
Printing “Picture Letters”

Make your choices to determine which customers and which pictures should print.
Printing “Picture Letters”

Preview of top portion of Picture Letter
Letter Preview

Make sure you Preview before printing

Choose a small sample (from first tab). It may take a long time to generate your entire customer base, even for a preview
**Letter Preview**

**Things to look for:**

- If it says “Up to 10%”, you have some services without a discount percentage
- Proofread your text (it may have last year’s info on it)
- Scroll through several to look at services scheduled/upsells
- Use a calculator to see if the math makes sense to you

<table>
<thead>
<tr>
<th>Service Description</th>
<th>Regular Price</th>
<th>Prepay Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Core Action</td>
<td>$127.90</td>
<td>$206.99</td>
</tr>
<tr>
<td>Total Service Amount</td>
<td>$245.80</td>
<td></td>
</tr>
<tr>
<td>After 10% Prepay Thing</td>
<td>$206.99</td>
<td></td>
</tr>
<tr>
<td>Full Year</td>
<td></td>
<td>$206.99</td>
</tr>
<tr>
<td>Total</td>
<td>$363.59</td>
<td>$363.59</td>
</tr>
</tbody>
</table>

The text above the table reads:

*Prepay New and Save!*

Would like those who have always trusted you to save as much as possible. It’s in your best interest.

• Your treatment is scheduled to start automatically in April, depending on which program you choose.
• Do the following to end this session and within 30 minutes, if you’re interested in signing up for our 10% Prepayment plan, please call your local number.

Please note that any services in excess of the package amount will be invoiced on a time and materials basis.

Apples, please sign up for the first time. You will be contacted and offered one 10% Prepayment plan, shorter than usual.

Go to www.supergreen.com/adaptive and order your offer code ‘10-COMFORT’.

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**Prepay New and Save!**

Would like those who have always trusted you to save as much as possible. It’s in your best interest.

• Your treatment is scheduled to start automatically in April, depending on which program you choose.
• Do the following to end this session and within 30 minutes, if you’re interested in signing up for our 10% Prepayment plan, please call your local number.

Please note that any services in excess of the package amount will be invoiced on a time and materials basis.

Apples, please sign up for the first time. You will be contacted and offered one 10% Prepayment plan, shorter than usual.

Go to www.supergreen.com/adaptive and order your offer code ‘10-COMFORT’.
Print a Sample

When printing (or Sending to RGS), you can have pdf copies saved in the customers’ accounts.

With “Print” or “Send to RGS” selected, click on the Options button.
Print a Sample

On the Options screen, check "Automatically Create Linked Documents"
Print a Sample

1. Enter a description
2. Choose a category (you should create a Prepay Letters category in Customer Parameters)
3. `_filenamepart_` should stay `_PrepayLetter_`
4. Leave the “Location” blank
Print a Sample

Hit OK on the Options screen and on the Letters screen.

Just like with Previewing, it will go through several steps: Retrieving Data, Evaluating your customers, Calculating Upsells or Gathering Neighbors, Building the Letters plus Generating the PDFs – So make sure you print your test batch with only a couple of customers (otherwise you may be wasting hours)!
Print a Sample

If you have chosen to create PDFs, you may get an error if the driver has not been installed – Hit “Yes” to install it.

If you continue to get this error, call Real Green Tech Support

You will get an error for every record in your batch … another reason to test with a very small sample group!
Things to look for when printing a sample:

- Does the printing line up with the fields on the form? (if not, adjust Printer Offset)
- Fold it and insert into envelope – look at address fields - maybe you chose wrong envelope type
Customer Screen Review

Go to Customer Screen – Contact tab

You will see a Letter record with the Letter Name you chose.

You need to scroll to the right and see the dollar amount offered.
Customer Screen Review

If you linked the document, you can view the pdf from this page.
Customer Screen Review

Or, on the Diagram/Docs tab, we can see the Linked PDF.
E-mailing Prepay Letter

You can e-mail a prepay letter.

This will appear as a pdf attachment to an e-mail

Click on “E-mail” and the Report Options will appear
E-mailing Prepay Letter

This will create a pdf that will attach to an e-mail from your default Outlook account to your customer’s e-mail address.

You have the option of creating and linking a pdf, without e-mailing (uncheck “E-mail Linked Documents”), e-mailing without saving a copy in customer’s file (check “E-mail it Only”) or saving and sending (check the first, uncheck the second).
E-mailing Prepay Letter

If you are saving as a linked document (uncheck “E-mail Only”), you will need to fill in fields for names and categories. You should create a Linked Document Category for “Prepay Letters”.

E-mailing Prepay Letter

You can keep a copy of the e-mail (with attachment) in your Outlook’s “Sent” folder, if you want to be sure it got sent.

You will want to create a Subject Line and Message text. You also can use your default Outlook Signature (if you feel it is professional).

Note: all of these settings will be automatically saved (by user) for the next time you e-mail a prepay letter.
E-mailing a Prepay Letter

Note the Subject, Message and Signature

Preview of e-mail received
E-mailing a Prepay Letter

The actual letter is a pdf attachment. (Preview on next slide)
Note that there is very little background shading, so the customer does not use a lot of ink.
E-mailing a Prepay Letter

It is STRONGLY recommended that you test this with a single customer. It should be yourself, so that you can test the letter’s reception.
Sending to Real Green

Real Green can
- Take your uploaded data
- Sort (to get best postal rates)
- Print
- Fold
- Insert
- Mail

Talk to RGS Direct Mail Department for pricing
Sending To Real Green

You should preview and print a small batch first (and test the PDF export), just as if you were printing them yourself.
Sending to Real Green

After gathering the batch, you will see a selection box (sorted by zip)

Direct Mail personnel will give you more detailed instructions on uploading
Exporting from Prepay Letter

If you don’t like the form that Service Assistant generates, you can create your own.
Exporting from Prepay Letter

You would choose the Export Fields and Export to Excel.

Then you would create a Word mail merge document (too involved to explain in this presentation).
You can send letters to inactive accounts that have sizes – Service Asst will fill in the prices from price charts.
You will want to compose some new text possibly several letters, depending on their old status.
Old Cancels/Rejects/Marketing

There are two ways of generating “Marketing” Prepay Letters for Active Database (status 0 – 9) customers

1) Individually, go to Contact tab and select the Marketing letter (and hit “Add” icon) – you will go directly to the Marketing Prepay Letter screen
Old Cancels/Rejects/Marketing

There are two ways of generating “Marketing” Prepay Letters for Active Database (status 0 – 9) customers:

2) Find a report that will give you the customer records you want

Customer List may be the best (and easiest) report to use

Example: Choose a small zip code (as a test), choose the customer statuses you want, only those with sizes and “Include Customers Without Services”
Old Cancels/Rejects/Marketing

If you are sending different letters for old cancels than old rejects, you will need to do separate exports.
Old Cancels/Rejects/Marketing

Export to Prepay Letter, but go to the Marketing Prepay Letter (instead of Regular letter)
Old Cancels/Rejects/Marketing

If you export to this letter, you will not see the first tab.

This tab is for sending letters to your marketing database, using criteria such as zip code and customer number.
Old Cancels/Rejects/Marketing

The Marketing Prepay Letter looks very similar to the regular one. However, there is not a tab to select service criteria.

Instead of printing whatever program they had before, we will be offering one based on current parameters (not old price or old schedule).
Old Cancels/Rejects/Marketing

Like the regular letter, you can choose what program to print.

It will give the services as set up in program parameters and refer to the current price chart for pricing. So check your parameters!
Old Cancels/Rejects/Marketing

If you are sending these letters in mid-season, you may wish to check “Honor Programs Skip After Date”
Old Cancels/Rejects/Marketing

This looks at your program's set up.

As an example, if this box is checked and you generate a letter on 5/15, offering this program, it will not list Round 1 or show in dollar totals.
Old Cancels/Rejects/Marketing

If offering a repeating special, it will annualize the service as set up in parameters.

Mowing Service (24 @ $90.00)  
Price  
$2,160.00
Old Cancels/Rejects/Marketing

As with the regular prepay letter:

- Preview a small batch before printing
- Print a small batch (with PDFs) before printing or uploading all