

Form Letters



There are many situations in business where we need to send a similar letter or email to several or even lots of people. PestaRoo's Form Letter component lets you design and send an unlimited number of form letters to any group of Customers or Agencies.

Overview

Form Letters allow you to compose a letter once but then reuse it multiple times for different recipients. In addition to multiple recipients, PestaRoo's form letters support a series of merge fields so you can automatically insert specific information inside the letter, such as their name or balance due. PestaRoo supports Form Letters from Customers and Agencies, and retains copies of each letter sent. Form Letters are designed from Edit Value Lists, but printed from Customers (or Agencies). Lastly, each form letter can be printed or emailed.

Creating a Form Letter

From Home Page, click on Edit Value Lists... >> Form Letters (Cust). Or, click to create a Form Letter for Agencies. This takes you to a list of all the Form Letters that you have designed for either Customers, or Agencies. To create a new one, click the round blue 'New' button at the top of the layout. Type in a Name for your letter, select a Format, and type the body of your letter. That it! Note that in the body you can also use nearly any style, color, font, or font size in any combination.

Adding Merge Fields

There are two sources of merge fields: Customer data or your own company info. Or, if you are creating an Agency letter, Agency data and your company data. The allowable Merge fields are listed to the right of the letter body. You'll recognize them because they are in blue text and have double carrots around them. To

insert a merge field, type in its name surrounded by the double carrots. Be sure to type the merge fields exactly. When PestaRoo prints your letter it will substitute the merge name with the actual data.

Example:

Dear <<Name First>>:

We wanted to remind you that your account is past due. Your current balance due is: \$ <<Balance Due>>. Thank you for your prompt attention.

<<Company Name>>

<<Company Phone>>

If your letter format is a postcard, fewer merge fields are available.

Printing or emailing your Form Letter(s)

To print a Form Letter, go to Customer Data Entry (or Agency Data Entry) and find the set of records you want. At the lower left, click 'Select Form Letter to Print'. A new window slides down. Click 'Use' next to the letter you want, and then click either the 'Print Single' or the 'Print Found' buttons. Or click 'Email Single' or the 'Email Found' buttons. When emailing form letters, PestaRoo will skip those Customers (or Agencies) that do not have a designated 'primary' email.

Viewing Previous Form Letters

There are two ways to view the letters you've previously sent: 1) From the Value List of Customer Form Letters, you can click on the

Blue Triangle next to 'Count of Uses' to see a list of all previous recipients. From this 'Letters List' you can also navigate back to a customer, or even 'Reprint' a letter. 2) From Customer Data Entry, you can click on 'View Letter' at the upper right to view the letters for a single Customer.

You can view Agency letters in an analogous fashion.

Examples

Here are a few examples that you might want use with Customer Form Letters:

- Late Letters for past due Balances.
- Introduce a new service for everyone who has needed, say, rodent control in the past.
- Introduce a new technician to customers in a certain area.
- Spring or Fall special
- Request for their Email address to save on postage. "Help us keep our rates low!"

Here are a few examples that you might want use with Agency Form Letters:

- Thank You for referrals.
- 'We do Termite Inspections' as a reminder to all real estate Agencies in the area.
- Give a handful of coupons, with a cover letter, to the Agency that they can give 'Offer for your new home owners'