Customer Sources and Promos

Purchasing an existing customer base from another company and/or running promotions are two methods for expanding your business. 'Sources' makes it easy to track sales generated by these two methods so you can evaluate their effectiveness.

Overview

From 'Edit Value Lists' you can define new Sources, view the sales generated from that source, and view its costs. From any Customer's Data Entry screen you can designate the **Source ID** for that customer. Any subsequent payment will now be attributed to that Source. Lastly, from Date Range Reports, you can print a report that summarizes all payment data associated to any single source for a date range selected.

Defining Sources

'Sources' describe where a customer (and his/her subsequent payments) come from. You may have an unlimited number of sources. But, each customer can only be associated with one source.

Customer sources and promotions are both tracked the the same way. In general, we will refer to both of them by the common name of 'Sources'.

Here is a list of example Sources that you might use, as examples:

- Newspaper Ad Sept 2006 "10% Off"
- Newspaper Ad Nov 2007
- Radio Ad March 2007
- Radio Ad May 2007
- Names gathered at a Home & Garden Show
- Customers you bought from company one
- Customers you bought from company two
- Names from a broadcast mailing.
- Customers found by a technician on commission
- Door hangers put out in XYZ neighborhood
- Referral from another customer
- Unspecified
- Legacy

Notice the wide range of different options that 'Sources' can be used for! The more complete your list and the more you use it, the more valuable it becomes. Any time you enter a new customer, you should make a point of always identifying the **Source ID** immediately.

If your Source record is an ad, or some sort of marketing plan, you may want to enter the **cost** of the program. As customers come in you'll be able to compare the Cost vs. the Income Generated for that source. This will help allow you to evaluate the cost effectiveness of each marketing effort.

On Customer Data Entry the **Source ID** has a blue triangle next to it. Click on this blue triangle to go to that source record where you can view all the data. Or, you can click on an icon representing a pair of binoculars to open a new small window with summary data for the current source. This allows you to see how the designated source data is accruing without leaving the customer's record.

Defining Source Payouts

'Sources' in PestaRoo are often used to track the payouts owed for the purchase of a block of customers. There are two frequently used payment methods for purchasing new customers from another pest control company: percentage of sales, and flat fees.

The percentage approach allows you to pay a percent of the payments received to the company that you bought the customer from. Typically this would be some figure, like 25%, for all sales received over 12 or 24 months. To implement this system, enter your percentage as a decimal fraction in the **Payout Percent Amount** field. Since this calculation is based upon the payments received (as compared to the invoice amount) recognize that the payment received may include sales tax.

The Flat Fee approach is set-up to allow you to pay a fixed amount per payment received per customer. This could be, for example, $25 per payment. Typically, this approach assumes that the customer will pay for a given invoice with a single payment. The advantage of this approach is that you are rewarded for any successful up-selling. To use this approach enter a value in the **Payout Flat Amount** field.

Which ever approach you use, PestaRoo will accrue the charges automatically for you. You can view these by printing the "Payment Summary by Source of Customer" report. You would probably run this report and make a payout each month. See 'Printing a Date Range Source Summary', below.

Using Sources

Typically the **Source ID** of a customer is defined at the time the customer is first created in PestaRoo. The **Source ID** field is on Customer Data Entry. This field has a drop-down value list showing all the values currently defined. The key to getting valuable and accurate data, is to always define the **Source ID** for every new customer. You should get in the habit of asking EVERY new customer, "How did you hear of us?" And then, immediately, select the appropriate **Source ID**. When you select a **Source ID**, PestaRoo automatically displays your choice in blue type beside the **Source ID**.

This is all you have to do. PestaRoo does all the other work.

How Does it Work?

When you post a payment, PestaRoo looks back to the Customer, and associates the payment amount with the record of the **Source ID** you have selected. This association only takes place at the time of payment posting. This means that previously posted payments will not be connected to a source that is added to a customer after payment posting. This reemphasizes the need to set the **Source ID** as soon as you create a new customer. (And before you accept any payments.) To edit source data after the payment has been posted, see, 'Correcting Source Data' below.

Notice that 'Sources' tracks payments, not invoices. Why? With 'Sources', we are only interested in the money we actually received (payments) not the amount we may someday receive (invoices).

Setting a Group of Records to a Single Source

If you purchase a group of customers, or enter a large number of new potential customers at a 'Home Show' on a single date, you might want to set all the **Source ID** values at one time.

Note: This technique requires Managers Access.

Find the records you want to set. Make sure you are only looking at those records that you want to change. Click into the **Source ID** field on one of the records. Pick the value you want. Then, click again to close the drop-down list, leaving your cursor in the field. Next, press the two keys "Command-=" (on windows, use Control - =) Read the dialog warning. If correct, click 'Replace'. This will change all the values in **Source ID** to be the selected value you chose.

Reviewing Source Data

To review any Source data, go to Home Page and click "Edit Value Lists..." >> "Sources". From here you can review the name, costs, associated records, and payouts.

To view the Customers associated with a given Source, click on the button to "View xx Customers." The 'xx' will be the number of Customers currently associated with this source. If there are no customers, the button will be labeled "No Customers" Clicking on the button opens a new window where the customers appear in alphabetical order.

To view the Payments associated with a given Source, click on the button to "View xx Payments." The 'xx' will be the number of Payments currently associated with this source. If there are no payments, the button will be labeled "No Payments" Clicking on the button opens a new window where the payments appear in date posted order. Note that the payments in this little window are not filtered by dates. Thus this windows shows ALL records connected to this source.

Printing a Date Range Source Summary

Source ID is set at the customer level. Any new invoices created after you set the **Source ID** will be associated with the value of your source. But, the data is not tracked until a payment is made against the invoice. So, the "Payment Summary by Source of Customer" report only looks into the payments you have actually received during the selected date range.

To print the report, go to Home Page and click "Select Report to Print..." >> "Date Range Reports" >> " Payment Summary by Single Customer Source". Don't forget to type in your desired date range before clicking the report button. You will have a print or preview option.

This is the only way to view date range data for a source.

Correcting Source Data

What if you need to edit the source data that appears on the Date Range Report? Perhaps you had the wrong **Source ID** on a customer and you caught it only after you had posted a payment? You can edit payment data only from within the Manager's Access Payment screen. Here you can find, edit, or remove the source data link for any record. You can change the **Source ID** or even change the payout amount if needed.