

Welcome Letters



Getting new customers and keeping them is the hardest thing for any growing business. Automatically sending a 'Thank You' letter is a key part of retention. PestaRoo makes this easy with autotyping 'Welcome Letters'.

Why Welcome Letters

When you visit many growing profitable companies, you quickly discover that they grow because of the way they take care of their customers. There are many examples of this care. In this support article we are focusing on sending 'Thank You' letters for new customers in a way that does not burden you at all. And leads to new business.

PestaRoo has a built in function to automatically print any needed letters upon file launch. You get to dictate the text of the letter and what services trigger the letters. You can also easily turn off this function. (Allow though this is discouraged.)

A informal survey of PestaRoo users shows that at least a third of these letters generate additional business in the next month or so. Considering the low cost of three stamps, this additional business is purchased at a bargain price. This is a classic way that PestaRoo users consistently out-grow the users of other software.

To start sending Welcome Letters we need to:

- 1-Turn on Welcome Letters
- 2-Compose your letter text
- 3-Select the services that trigger the letter

Turning On Welcome Letters

From Home Page >> Preferences , find the field, **Print Welcome Letters** and set its value to 'yes'.

With each invoice you pay in full (for covered services), PestaRoo flags its customer as needing a 'Welcome Letter.' Once this letter is sent out, the customer is flagged so they won't receive another letter.

Typing in Your Letter Text

From Home Page >> Preferences >> Form Letters >> "New Customer Welcome Letter". This opens up a new window where you can type your text. As you compose your letter, remember that the customer's name and address automatically appears above your text as an inside address. Your company Logo appears to the upper left of your letter. Your company address info appears in the footer of the letter.

The typical 'Welcome Letter' thanks the customer for their business, and then offers them an immediate \$5 or \$10 discount off their next service if taken in the next 30 or 60 days. You also might want to tell the customer of several of your more popular services.

You may also format your text also, with different fonts, bold or italic, etc. But note that the customers name and address will be printed at the top of the letter in Times New Roman 11 pt.

PestaRoo ships with a sample letter already typed in, ready for you to edit.

Selecting Your Services

PestaRoo lets you select which Services trigger the 'Welcome Letters.'

Some companies use 'Welcome Letters' for all services. But other companies exclude courtesy services like "Give Estimates" or "Insect Identification".

To select your services for the 'Welcome Letters' go to Home Page >> Value Lists >> Service Types. Go to the first service that you want to send 'Welcome Letters'. From there, click on the round blue triangle for "Posting Functions".

This will open a new little window where a blank line is waiting. Click into the first available field and select “Send Welcome Letter.” Now, the next time a new customer of this service pays their invoice, they will receive a ‘Welcome Letter’ (if they are a new customer).

Repeat for each covered service.

When are the letters printed?

Each day when you launch PestaRoo, it searches through any newly paid invoices and their respective customers for newly flagged records. If any are found, they are printed.

All you have to do, is fold the letter into a window envelope and mail it!

Since Auto Trigger letters (there are about 5 types) always print first thing in the morning upon file launch, it is always a good idea to make sure your printer is loaded with plain paper before launching PestaRoo.

Don't forget that you must shut down PestaRoo once per day to allow the auto-triggers to work.

Will they receive more than one letter?

No, each new customer will only receive one ‘Welcome Letter’.

Reprinting a Letter and Flagging Sets of Customers NOT to print

From customer list you can view and edit the several ‘Welcome Letter’ fields.

Here you will find a button that (Re)Prints a ‘Welcome Letter’ with a single click. After you print the letter from here, today's date will be inserted into **Welcome Letter Sent Date** which will preclude any additional ‘Welcome Letters’ from printing for this customer. Should you chose to reprint a second letter, this button will let you.

Also on this layout is **Welcome Letter Sent Date** that will let you preclude any future letters from printing.

If you import a number of legacy customers from a purchase or from another software package, you may want to set any date in the

Welcome Letter Sent Date field to preclude the ‘Welcome Letters’.

To set this field on multiple records at one time, 1) find the records, 2) type in the desired date, and 3) While your cursor is still in the field, select “Replace Field Contents” from the Records menu. This will put that same date in each record, precluding ‘Welcome Letters’ for the entire set.

Limits to the Letter text

The ‘Welcome Letter’ text has room for several paragraphs of information. Remember, though, that short letters are almost always more effective.

Many users have asked if the body of the letter can be customized with various fields from the database. At this time, the answer is no.

However, the Customer Form Letter system does allow you to design letters with field data, but without the autoprint function that makes the “Welcome Letters” so useful.

Summary and Other Ideas

‘Welcome Letters’ are one of those small details that can make a big difference in your business. And, with PestaRoo, they are easy to set-up.

Some companies use the welcome letter for a short quality control survey. Others include a small brochure that lists there common services. You could even include a refrigerator magnet with your logo and phone number!

The key detail is to use these letters, to start growing your business, now.