

# Customer History



Ranking your customers, finding those who only use a single service, or those who use one but not another service, or those that spend more than XX dollars on a given service are powerful tools for marketing your business. PestaRoo is the only pest control software that gives you this extremely powerful tool that can be used to grow your business.

## Overview

Every time you post an invoice, PestaRoo updates that Customer's History for the service of the current invoice. The dollar value of that invoice for that service is sent to the Customer's History portal. It is always available to you from Customer Info. By letting you look into these numbers PestaRoo gives us a unique view into our customers. This tool, Customer History, is available only with PestaRoo. (And only those updated on or after Oct 2008.) It is one of the most powerful techniques available in our industry.

## The Longer you use it the Better it Gets

As you post invoices the depth of your statistically knowledge of your customers grows. So the longer you use PestaRoo the more data you have to mine for marketing and business choices. Each successive year increases the value of this data set.

## Rebuilding Stats from Legacy Data

If you have upgraded from a version of PestaRoo that did not include Customer History, you may want to have PestaRoo re-analyze your existing legacy data. In other words, you can go back and analyze all your data from the date you started using PestaRoo. From Home Page >> Value Lists >> Service Types click on the Rebuild All Stats. This may take a few minutes or even more if you have a lot of invoices to analyze. Each time use this button, it clears out

all previous stats, and brings in fresh numbers. After you Rebuild All Stats, PestaRoo will keep your Customer Stat data current.

Once your stats have been rebuilt, you are ready to start extracting value from your data.

Each time you mine your data you will find a set of customer records. From that set, you'll click on the button 'View on Choose Cust'. Then, at the bottom of that screen you'll be able to

- Print Found as 5160 Labels
- Print Found as List (for phone calling)
- Export Found as Excel (for sending to your printer for fulfillment).

Note: Each of these three scripts includes steps that omits the non-current records before printing. This is key, because you do not want to market to people who are deceased or who have moved out of the area. (You are marking the Customer Status fields when someone dies, or leaves the area, aren't you?) Also the records will be sorted alphabetically, unless you custom pre-sort them yourself by some other criteria.

Lets look at a few specific examples for finding groups of records.

**Strong suggestion:** Carefully read the support doc: "Finding Records". This document explains how to do complex finds that work extremely well with Customer History. PestaRoo support docs are found under 'Support' at [www.PestaRoo.com](http://www.PestaRoo.com).

Note: when doing complex finds with PestaRoo, it is OK to include data from multiple tabs.

## Example 1- Finding All Customers that Only Use a Single Specific Service

From any Customer's Info screen enter Find mode and click into the History tab. Type the name of the service you want, and also a "1" in the 'Count of Services'. When you perform this Find by pressing the 'Enter' key, you get every customer that has ONLY used this one service. A good reason to use this method is for those services that you have that may dominate your business, such that your customers may be missing your other services. Perhaps termite control is your major service. With this technique you can quickly find all your customers that ONLY use your termite control service. These are customers likely to be interested in your other services.

## Example 2- Finding All Customers Use One Service But Not Another

From any Customer's Info screen enter Find mode and click into the History tab. Type the name of the service you want. If you Performed your Find now you would get everyone that had used that service, regardless of what other services they had used. But now we want to 'exclude' a service. To do this, type Command-N (or Control-N on Windows) to start a new request. In this second request, type in the Service name you want to exclude. Then, click into the 'Omit'. Now, when you press 'Enter' to perform the Find, you be doing two things: Finding those you want, and then excluding those that you don't want. A complex Find like this is really powerful.

## Example 3- Finding your Best Customers

I'm sure you already know your best 5 or 10 customers. But can you accurately say who your top 50 are? Maybe you are going to send out Thank You cards, or merely flag them for special care.

Here is how: From any Customer's Info screen type Command-J (or Control-J on Windows). Next sort them by the Customer Stat field Total field. This field is has a very long name: "Total

Dollars of Customer Service Join Records Calc" Whew! What a field name! Sort Descending. When the sort is done your most valuable customer will be record number one. And all the others will follow in order! Slide the record 'slider' to the last one you want, or click your way there. (For example, to number 50) Then select 'Omit Multiple' from the Records menu and type in a huge number like 999999999. Omit those and you'll be left with the ones you need!

## Example 4- Using One Service to Market a New Service

Perhaps you want to expand your business by offering a new service. Maybe you are going to offer the new rodent traps on an Agreement basis. You need to find anyone that has used your existing rodent control service in the past, OR is just a good customer whose sales are greater than some number.

From any Customer's Info screen enter Find mode and click into the History tab. Type the name of the old service you want look for. Type Command-N (or Control-N on Windows) to start a new request. Type '> 1200' in the 'Dollars' field (or any other number you want). Perform the Find. This operation will find two types of records at the same time: those that have used a specific service, AND those above a certain dollar volume.

## Additional Ideas

You could add 'Current' to your found criteria so that your count will be accurate before clicking the print or export script.

All of the above examples can be combined with other variables to better target your marketing.

The key to complex finds is to remember that the qualities you want are always combined into the first request(s), while the qualities you do NOT want are placed in subsequent (multiple?) requests where you select the 'omit' function.