



Mail Merge – 201

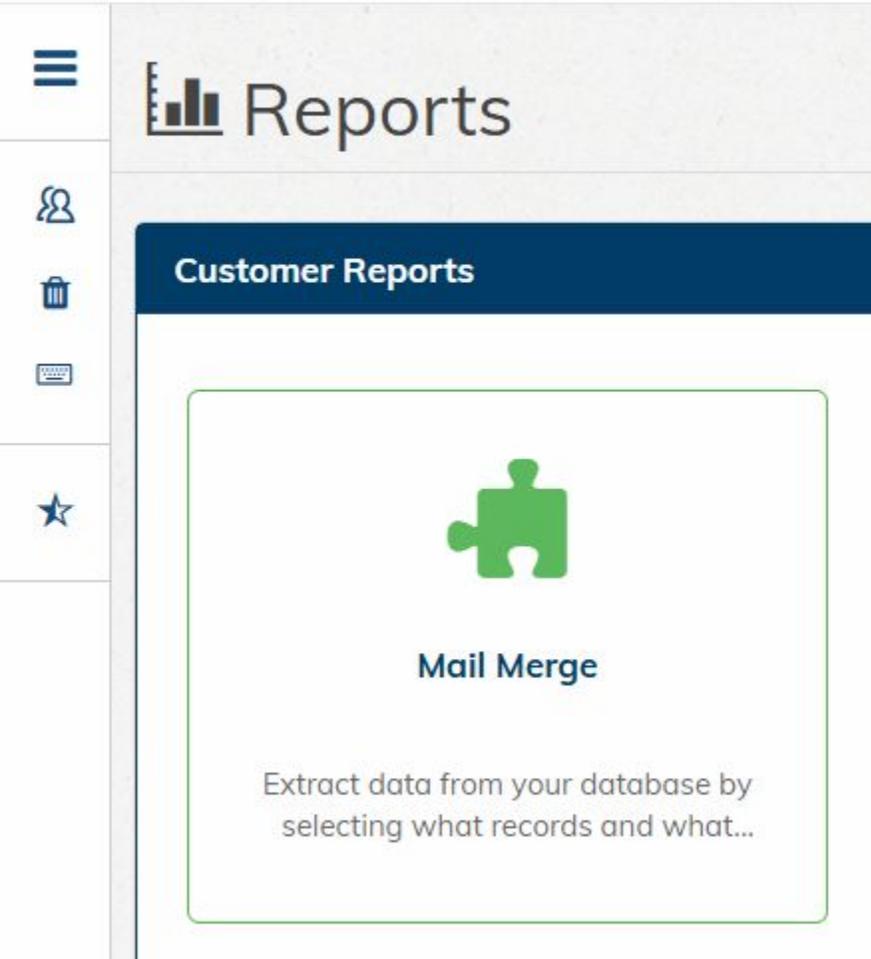
Generate a list that's all your own

Mail Merge - 201



Joe McPhail

VP, Franchises, Customer Advocate



Agenda

What is Mail Merge?

Common uses for Mail Merge.

How does it work?

Review how to create a mail merge query.

What is Mail Merge

Originally a way to create documents for;

- Sales and Cancel Confirmations
- Renewal Contracts
- Collections efforts
- Marketing Upsell Letters

These features were built into Lawn Assistant and Service Assistant to make it easier and faster to do.

Common uses for Mail Merge

Custom Renewal and Confirmation Letters or state service contracts

Marketing effort and upsell campaigns

- Collect details and export to Word or another tool for marketing

Custom Report generation

- Pull data when criteria is not available
- Pull data from customers not included in standard report exports

How it works... Step 1 - Selecting Customers



Choose your selection criteria from the fields from the Customer, their Program or their services.

Search:

Field Type:

- Customer
- Program/Job
- Service

How it works... Step 1 - Selecting Customers

Build your selection rules.

1. Pick the fields you want to evaluate.
2. Set the criteria.
3. Build your selection query.

Program/Job Field List

- Last Service Date
- Maximum Services
- Number of Services**
- Service Year

Details

Create List Select Range

Number of Services is

Between

And

Group	Type	Criteria	
	1 Customer	Status (Customer) (Active, Always Active)	<input type="button" value="edit"/> <input type="button" value="delete"/>
	2 Program/Job	and Program Code (TruMaintenance)	<input type="button" value="edit"/> <input type="button" value="delete"/>
<input type="text" value="2"/>	Program/Job	and Status (Program) (Active, Always Active)	<input type="button" value="edit"/> <input type="button" value="delete"/>
<input type="text" value="2"/>	Program/Job	and Number of Services is less than 6	<input type="button" value="edit"/> <input type="button" value="delete"/>

How it works...Step 2 - Review Results

Progress bar showing 5 steps: Step 1 (Select Fields), Step 2 (Review Results), Step 3 (Output Fields), Step 4 (Price & Upsells), and Step 5 (Review / Process). Step 2 is currently active.

Search: Search...

Status	Customer #	Customer Name	Address	Phone #	Email	Size	Balance	Company
9	682	Ralph Kraft	109 Nickerson Pkwy, Lafayette, ...	(337) 235-7777	office@grassroots-landscape.co...	5.00	\$60.50	Grass Roots
9	898	Lisa Breaux	114 Florida Ct, Lafayette, LA 70...	(337) 288-5427	lbreaux52@yahoo.com	3.00		
9	972	Karen Gambel	101 Oakwater Dr, Lafayette, LA ...	(337) 739-7351	khgambel@gmail.com	10.00		
9	17005	Kevin G...	17 Audubon Oaks Ave, Alexda...	(518) 709-22...	kdu...@...ok.com	8.00		
9	19041	Kristine McBride	2901 Marye St, Alexandria, LA 7...	(318) 481-9318	klm2901@bellsouth.net	17.00		

25 50 75 100

Page 1 of 9 (645 items) 1 2 3 4 5 6 7 8 9

Back

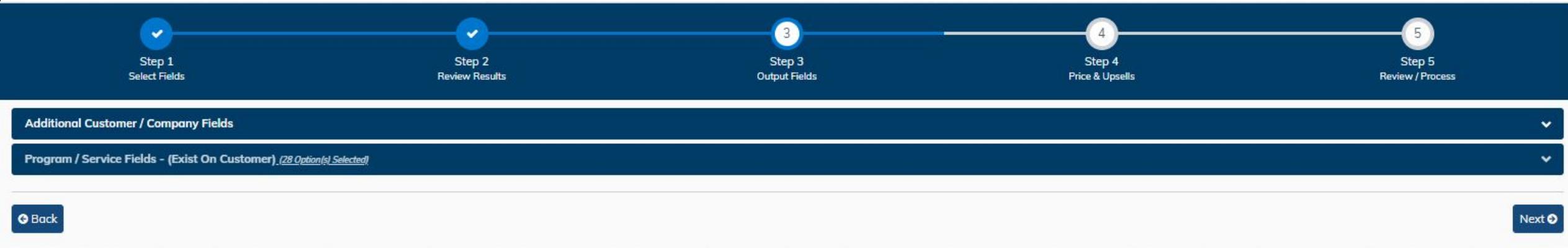
Next

These are standard output fields that can not be removed:

- Customer #
- Status
- Service Address
- Customer Name
- Company
- Phone Number
- Customer Size
- Email Address
- Billing Address
- Billing Company Name
- Billing Name

Preview the results and confirm your selections.

How it works...Step 3 – Output fields



These are standard output fields that can not be removed:

- Customer #
- Status
- Service Address
- Customer Name
- Company
- Phone Number
- Customer Size
- Email Address
- Billing Address
- Billing Company Name
- Billing Name

The basic standard fields are always included.

You then customize your output data based on your needs

How it works...Step 3 - Optional Fields

Additional Customer / Company Fields (6 Option(s) Selected)

Customer Output Fields

- Balance 1 - 30 Days
- Balance 31 - 45 Days
- Balance 46 - 60 Days
- Balance 61 - 75 Days
- Balance 76 - 90 Days
- Balance 91 - 120 Days
- Balance Over 120 Days
- Bank Routing & Transit #
- Billing House #
- Billing Post-Dir
- Billing Pre-Dir
- Billing Street Name
- Billing Street Suffix
- Billing Title Code
- Billing Type (Customer)
- Call Ahead
- Cancel By Emp. ID (Customer)
- Cancel Code (Customer)
- Cancel Date
- Carrier Route
- CAW Autopay
- CAW Registered
- Cell Phone Number
- Census Tract Info
- Checking Account #
- Collection Code
- Collection Date
- Company ID
- County Code
- Credit Card Expiration
- Credit Card Type
- Credit Limit
- Customer Memo
- Customer Since
- Customer Title
- Customer Type
- Decile
- Default Discount Code (Customer)
- Direct Mail
- Directions
- Do NOT Charge Interest
- Do NOT Put on Credit Hold
- Don't Direct Mail
- Don't Email Followup
- Don't Email Invoice
- Don't Email Market
- Don't Knock
- Don't Telemarket - Customer Request
- Don't Telemarket - Local
- Don't Telemarket - National
- Don't Text
- Don't Upsell

- Email Pre-Notify
- Email Statements
- Estimated House Cost
- Estimated Year Built
- Fax Number
- Flag Codes
- Group Billing
- Group Billing Cust #
- Hold Begin Date (Customer)
- Hold Code (Customer)
- Hold End Date (Customer)
- Home Phone Number
- Import Date
- Invoice Type
- Language Preference
- Last Aging Date
- Last Interest Charge Date
- Last Interest Charged
- Last Invoiced Service
- Last Statement Date
- Latitude
- Longitude
- Map Code
- Master Group Billing Account
- Memo Alert
- Other Phone Number

- Payment Alert
- pH
- Preferred Contact Method
- Prepay Balance
- Property Inventory
- Reference #
- Remit/Credit Balance
- Route (Customer)
- Route Description
- Source Code (Customer)
- Statement Type
- Subdivision
- Tax Code 1
- Tax Code 2
- Tax Code 3
- Tax Rate 1
- Tax Rate 2
- Tax Rate 3
- Tech. Invoice Note (Customer)
- Territory Code
- Text Phone Number
- Text Pre-Notify
- Tracking #
- Unit Of Measure
- Work Phone Number
- Yard Dimensions

Include Company Info

- Address
- Area Code
- Company Name
- Fax
- Latitude
- Longitude
- Phone 1
- Phone 2
- Tax 1
- Tax 2
- Tax 3
- Website / URL

How it works...Step 3 -Optional Fields

Select which program and jobs you want to see information for

Programs/Jobs: All Programs

- G1 - Grub Treatment
- G2 - Grub Treatment
- G3 - Grub Treatment
- G4 - Grub Treatment
- GR - Grub Control Program
- GRS - Grub Control Special App.
- LD - Exterminator

»

»

«

«

Selected Programs

L - TruMaintenance

Program Status: 2 of 10 Statuses Selected

Year: * 2026 to 2026

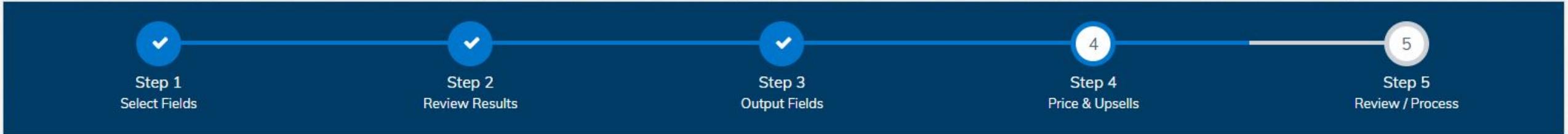
Program Fields

- | | | |
|--------------------------------------------------------------|---------------------------------------------------------|----------------------------------------------------------|
| <input type="checkbox"/> Automatic Renew | <input type="checkbox"/> Done To Date | <input type="checkbox"/> Reject Code |
| <input checked="" type="checkbox"/> Average Round Price | <input type="checkbox"/> End On | <input type="checkbox"/> Reject Date |
| <input type="checkbox"/> Average Time | <input type="checkbox"/> Est. Request Taken By | <input type="checkbox"/> Renewed |
| <input type="checkbox"/> Billing Type (Program) | <input type="checkbox"/> Estimate Done By | <input type="checkbox"/> Repeat Interval |
| <input type="checkbox"/> Call Ahead Code (Program) | <input type="checkbox"/> Estimate Given Date | <input type="checkbox"/> Route (Program) |
| <input type="checkbox"/> Callback Date | <input type="checkbox"/> Estimate Printed Date | <input type="checkbox"/> Route Description |
| <input type="checkbox"/> Cancel By Emp. ID (Program) | <input type="checkbox"/> Estimate Requested By | <input type="checkbox"/> Sequence # |
| <input type="checkbox"/> Cancel Code (Program) | <input type="checkbox"/> Estimate Requested Date | <input type="checkbox"/> Service Year |
| <input type="checkbox"/> Cancel Date | <input type="checkbox"/> Full Program | <input type="checkbox"/> Sold By 1 |
| <input type="checkbox"/> Complete | <input type="checkbox"/> Hold Begin Date (Program) | <input type="checkbox"/> Sold By 2 |
| <input checked="" type="checkbox"/> Confirmation Date | <input type="checkbox"/> Hold Code (Program) | <input type="checkbox"/> Source Code (Program) |
| <input type="checkbox"/> Confirmation Letter | <input type="checkbox"/> Hold End Date (Program) | <input checked="" type="checkbox"/> Standard Round Price |
| <input type="checkbox"/> Confirmed By | <input type="checkbox"/> Last Price Change | <input type="checkbox"/> Status (Program) |
| <input type="checkbox"/> Contact Date | <input type="checkbox"/> Last Service Date | <input type="checkbox"/> Tech. Invoice Note (Program) |
| <input checked="" type="checkbox"/> Cust Inv. Note (Program) | <input type="checkbox"/> Maximum Services | <input type="checkbox"/> Tech. Note Expiration (Program) |
| <input type="checkbox"/> Cust Note Expiration (Program) | <input type="checkbox"/> Next Scheduled Date | <input type="checkbox"/> Temporary Day Code |
| <input checked="" type="checkbox"/> Date Sold | <input checked="" type="checkbox"/> Number of Services | <input type="checkbox"/> Temporary Route |
| <input type="checkbox"/> Day Code | <input type="checkbox"/> Program Code | <input type="checkbox"/> Temporary Sequence Number |
| <input type="checkbox"/> Difficulty Factor | <input checked="" type="checkbox"/> Program Description | <input type="checkbox"/> Total Amount (Net) |
| <input checked="" type="checkbox"/> Discount Amount | <input type="checkbox"/> Property Size (Program) | <input checked="" type="checkbox"/> Total Price (Gross) |
| <input type="checkbox"/> Discount Code (Program) | <input type="checkbox"/> Purchase Order Number | |
| <input checked="" type="checkbox"/> Discount Description | <input type="checkbox"/> Referred By | |

Round (Service) Fields

- | | |
|------------------------------------------------------------------------|---------------------------------------------------------|
| <input type="checkbox"/> Call Ahead Code (Service) | <input type="checkbox"/> Program Discount Amount |
| <input type="checkbox"/> Cust Inv. Note (Service) | <input type="checkbox"/> Property Size (Service) |
| <input type="checkbox"/> Cust Note Expiration (Service) | <input type="checkbox"/> Reversed |
| <input type="checkbox"/> Date Posted | <input checked="" type="checkbox"/> Round Number |
| <input type="checkbox"/> Discount Amount | <input type="checkbox"/> Schedule Promised |
| <input type="checkbox"/> Discount Code (Service) | <input type="checkbox"/> Schedule Time |
| <input type="checkbox"/> Discount Description | <input checked="" type="checkbox"/> Service Code |
| <input type="checkbox"/> Discount Price with Tax | <input type="checkbox"/> Service Confirmed |
| <input type="checkbox"/> End Before Time | <input checked="" type="checkbox"/> Service Description |
| <input type="checkbox"/> Invoice Number | <input type="checkbox"/> Service Status |
| <input type="checkbox"/> Man Hour Rate | <input type="checkbox"/> Start After Time |
| <input type="checkbox"/> Next Price | <input type="checkbox"/> Target Start Date |
| <input type="checkbox"/> Prepaid | <input checked="" type="checkbox"/> Tax Amount 1 |
| <input type="checkbox"/> Prepay Amount | <input checked="" type="checkbox"/> Tax Amount 2 |
| <input checked="" type="checkbox"/> Prepay Price | <input checked="" type="checkbox"/> Tax Amount 3 |
| <input checked="" type="checkbox"/> Prepay Price with Discount | <input checked="" type="checkbox"/> Taxable Amount 1 |
| <input checked="" type="checkbox"/> Prepay Price with Tax and Discount | <input checked="" type="checkbox"/> Taxable Amount 2 |
| <input checked="" type="checkbox"/> Price (Service) | <input checked="" type="checkbox"/> Taxable Amount 3 |
| <input checked="" type="checkbox"/> Price with Discount | <input type="checkbox"/> Tech Inv. Note (Service) |
| <input checked="" type="checkbox"/> Price with Tax | <input type="checkbox"/> Tech Note Expiration (Service) |
| <input checked="" type="checkbox"/> Price with Tax and Prepay | <input checked="" type="checkbox"/> Total Amount |
| <input type="checkbox"/> Production Value | |

How it works...Step 4 - Price and Upsell Fields



Pricing Fields For Existing Services (Selected On Step 3)

There must be at least 1 program or job selected on step 3 for the scheduled pricing fields to be available.

Include Discounts Permanent

Prepay % 1 5.00

Prepay % 2

Use Renewal Price

- Work Order Pricing - Charge For Time And Materials Is Selected (Y/N)
- Include Pricing Fields For Scheduled Services - See All Standard Totals For Selected Scheduled Programs And Jobs That Exist On The Account
- Totals Grouped By Program - See Total Costs For Selected Scheduled Programs
- Include Savings - Will Create Fields Showing Total Savings Of Discounts, PP1, PP2 All With And Without Taxes

Select Services To Be Calculated As Upsells (if a customer has the service on their account, it will be listed with zero price information)

Service Code *	Prepay Discount 1	Prepay Discount 2	Include Tax	Include in Total	
G1 - Grub Treatment	Select...	Select...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	+

How it works...Step 5 - Review & Process



Customer Count:

Selected Field List:

Description	Database Field
Customer	cust_no
Status (Customer)	status
Service Address	servaddr
Customer Name	custnm
Company	company
Phone Number	phone_pref
Size (Customer)	size
Email Address	email
Billing Address	billaddr
Billing Company Name	b_company
Billing Name	b_custnm

 Print Full Output List

Note: The selected output field data will only be provided by doing an "Export to CSV" through the "Actions" tool in the left-hand panel.

 Back

 Preview

Generate

How it works...

Step 5 - Review & Process

Using the actions button on the left navigation bar provides powerful options.

- CSV
- Mass Service Assignment
- Call Log
- Master Documents
- Add/Remove Flag codes

The screenshot shows the 'Send To' dropdown menu in the Service Assistant interface. The menu is open, displaying a list of actions. A hand cursor is pointing to the 'Export to CSV' option. The background shows the 'Review Results' step of the mail merge process, with a 'Customer Count' of 645 and a 'Field List' containing various customer attributes.

Send To

Targets:

None

- None
- Export to CSV
- Customer Search
- Mass Service Assignment
- Send to Measurement Assistant
- Send to Call Log
- Send to Master Documents
- Send to Prepay Letters
- Add/Remove Customer Flags
- Add/Remove Customer Holds
- Add/Remove Program/Job Hold
- Email Report PDF
- Email Customers
- Send To Texting
- Send Simple List to CSV
- Send Basic Customer Info to CSV

Customer Count: 645

Field List:

Description
Customer
Status (Customer)
Service Address
Customer Name
Company
Phone Number
Size (Customer)
Email Address
Billing Address
Billing Company Name
Billing Name

Print Full Output List

How it works... Step 5 - Review & Process

When creating the export file you can create a record on the customer documents page to track who you contacted or when someone got a certain communication

Service Assistant > Reports > Mail Merge

Send To

Targets:

Export to CSV

Update Customer Contact History

Cancel Send

Letter	Print Date	Printed By	Linked
Export - Mail Merge	01/27/2026	joemac	

How it works... Save to Presets

Service Assistant > Reports > Mail Merge

Presets

Preset In Use

Select a preset...

Add New Preset

Preset Name:

Joemac Preset 1

+ Add

You can create multiple presets and select and run each when needed.

Service Assistant > Reports > Mail Merge

Presets

Available Presets

Select a preset...

Aeration Postcard Preset

Cancel Preset

Collections Preset

Joemac Preset 1

Session Feedback

- Login to the Event Mobile App
- Add this session to your schedule
- Click Survey
- Give it a rating 1-5 stars

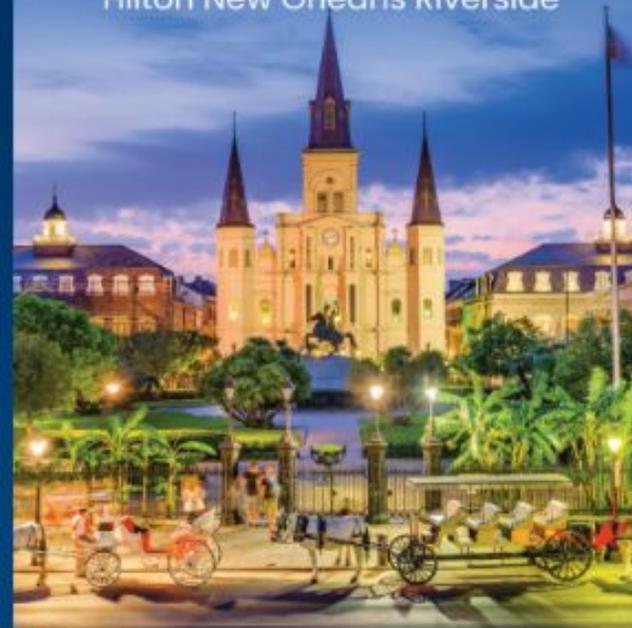
**Sign up on 2/4
and receive 20%
off your ticket!**

 **BEYOND SERVICE**
CUSTOMER CONFERENCE '27

**SEE YOU IN
NEW ORLEANS!**

Sunday, January 31, through
Wednesday, February 3, 2027

Hilton New Orleans Riverside



Questions?