Mail Merge - 201

Generate a list that's all your own

BEYOND SERVICE
CUSTOMER CONFERENCE '26

Mail Merge – 201

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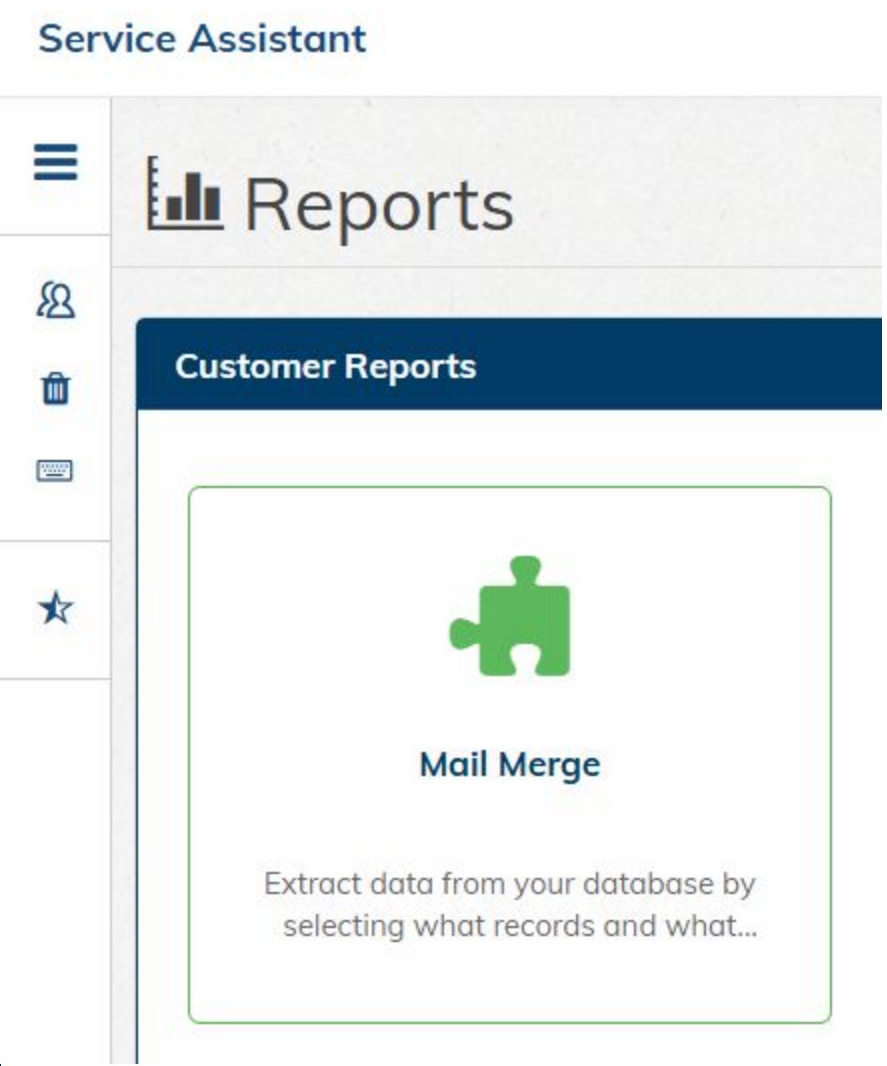


Agenda

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

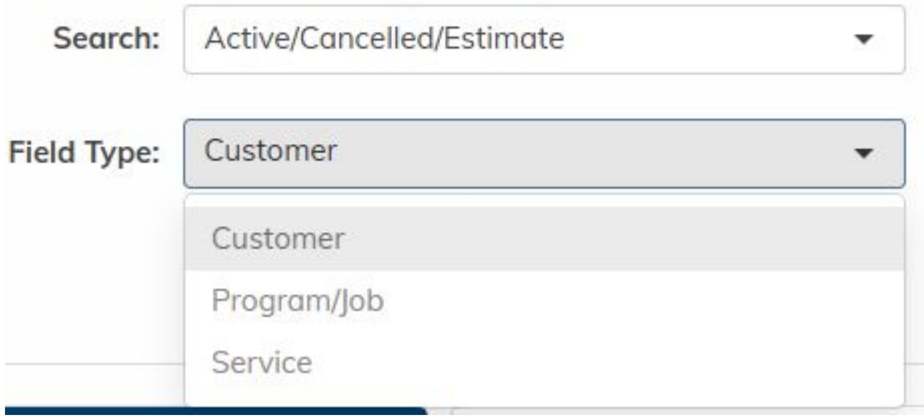
- Collect details and export to Word or another tool for marketing

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

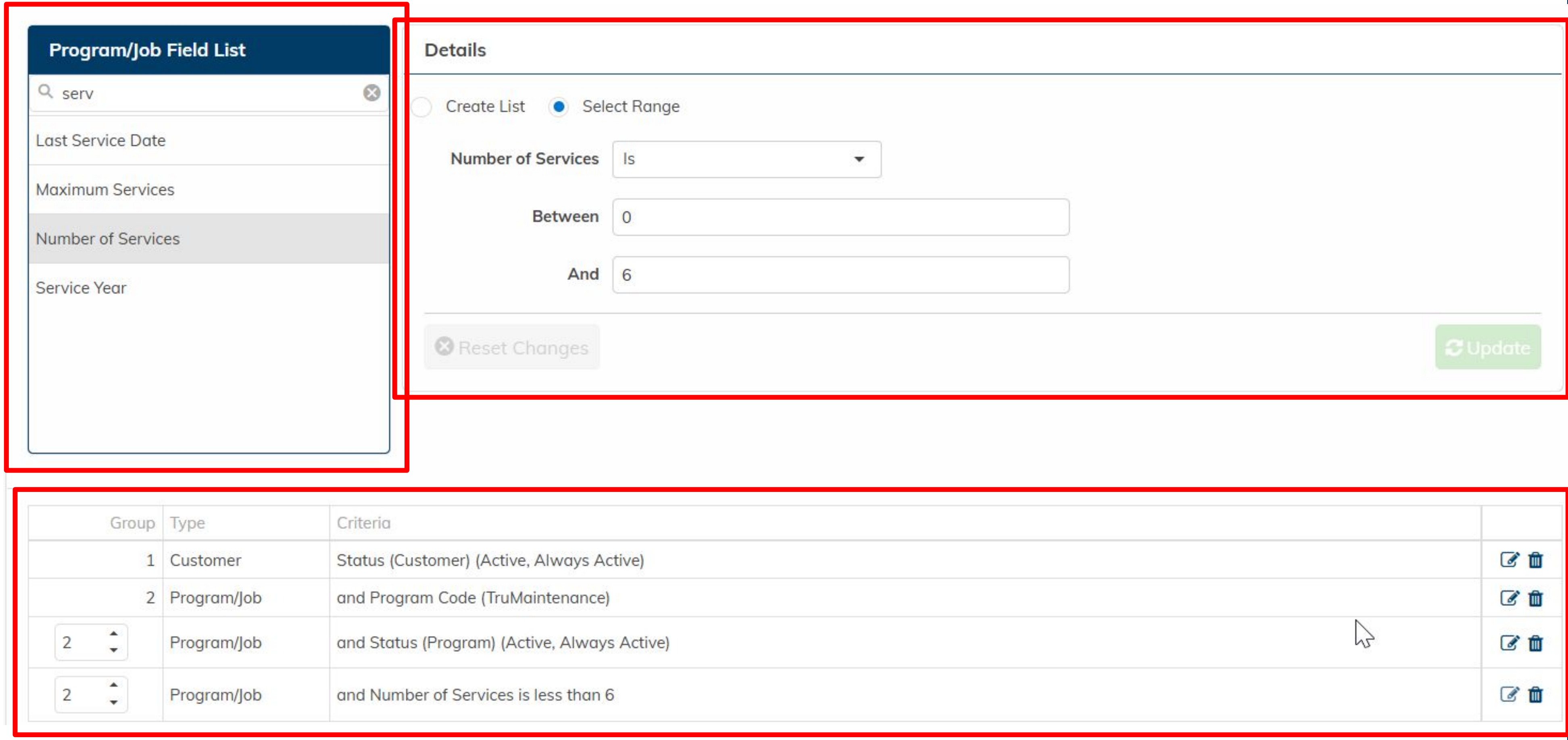
Choose your selection criteria from the fields from the Customer, their Program or their services.



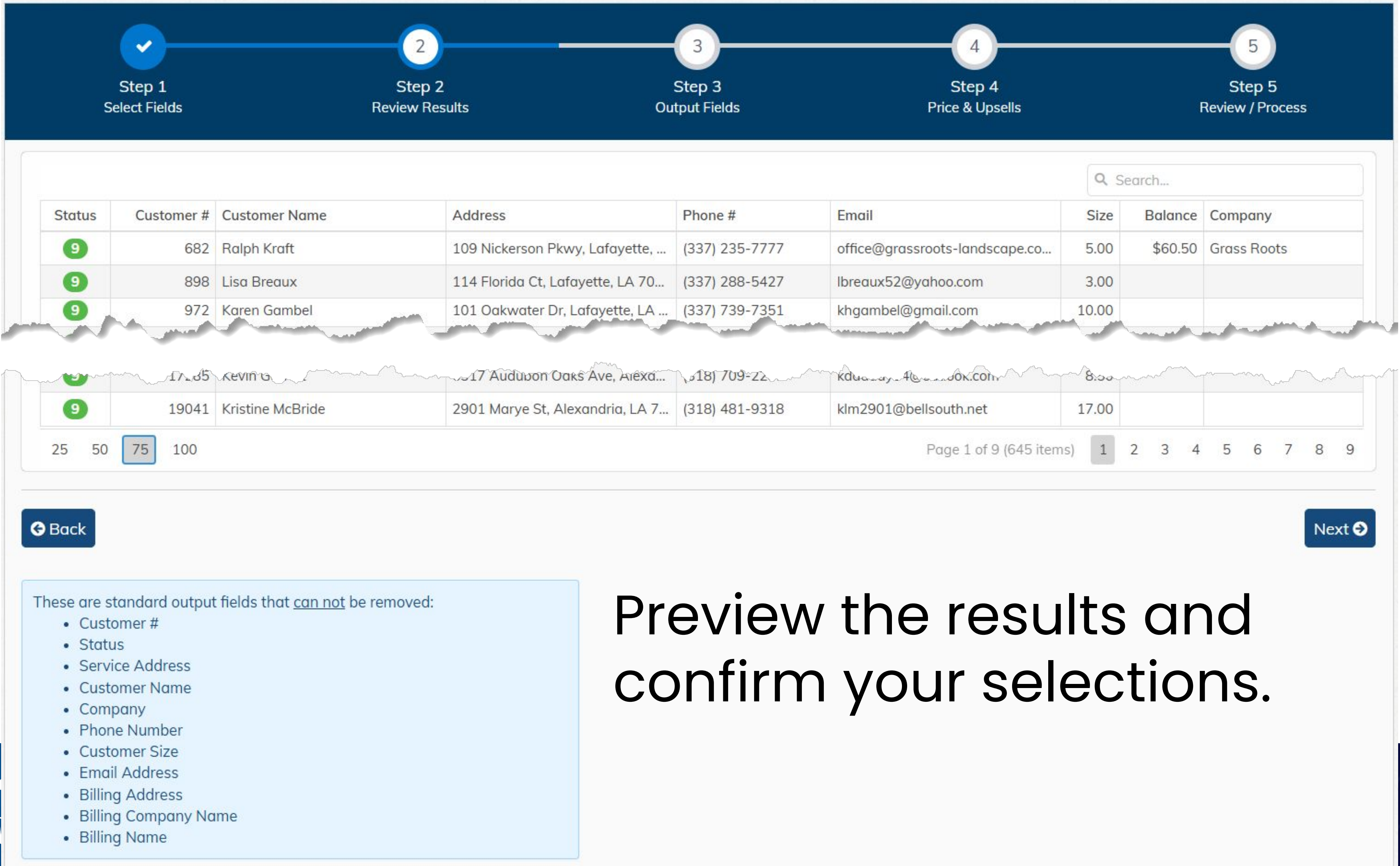
How it works... Step 1 - Selecting Customers

Build your selection rules.

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

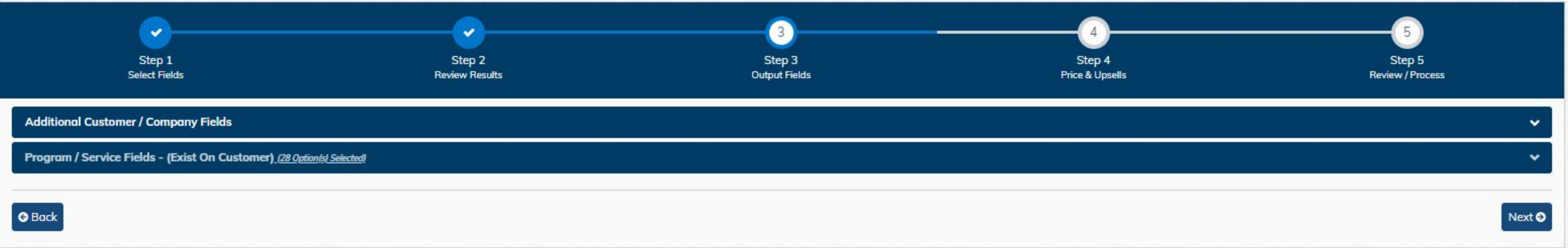


How it works…Step 2 – Review Results



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 #
- [x] 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

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

How it works…Step 3 -Optional Fields

Program / Service Fields - (Exist On Customer) (28 Option(s) Selected)

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.

Selected Programs

- L - TruMaintenance

Program Status: 2 of 10 Statuses Selected

Year: * 2026 to 2026

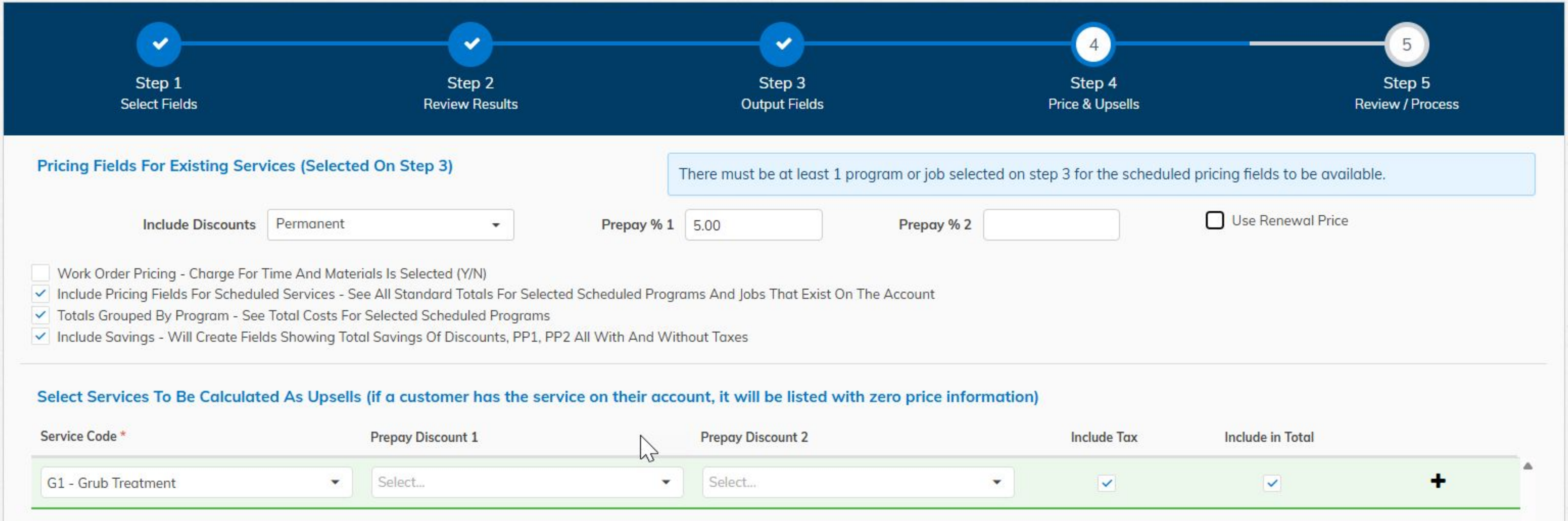
Program Fields

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

Round (Service) Fields

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

How it works…Step 4 – Price and Upsell Fields



How it works…Step 5 – Review & Process

Step 1
Select Fields

Step 2
Review Results

Step 3
Output Fields

Step 4
Price & Upsells

5
Step 5
Review / Process

Customer Count: 645

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

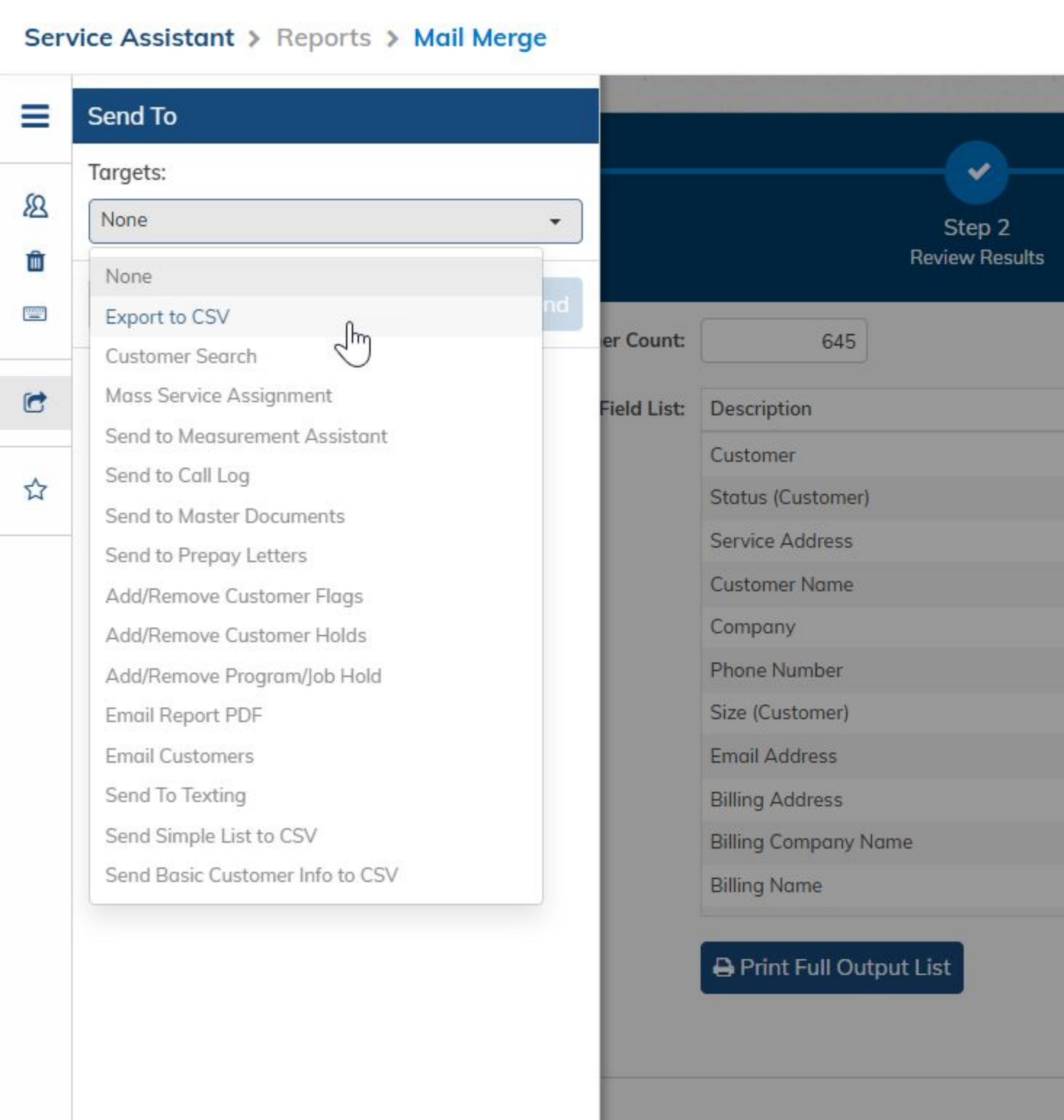
Preview

Generate

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

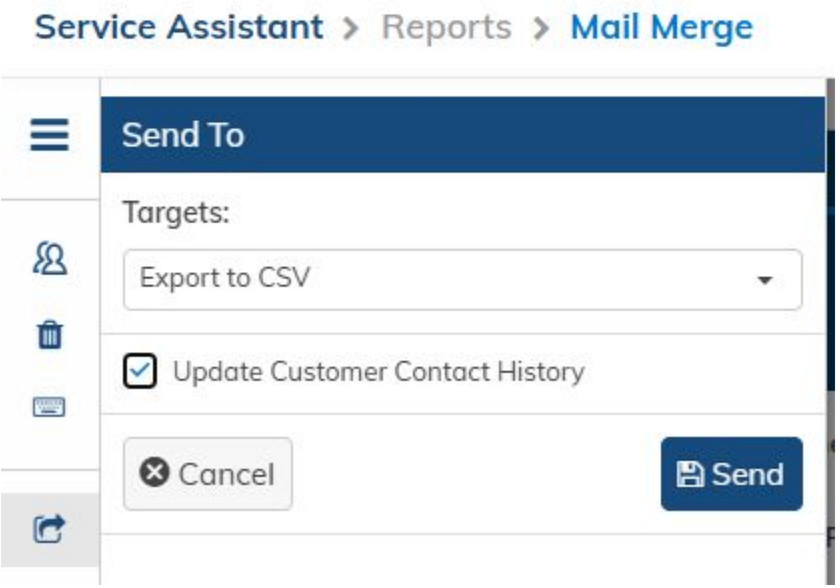
Using the actions button on the left navigation bar provides powerful options.

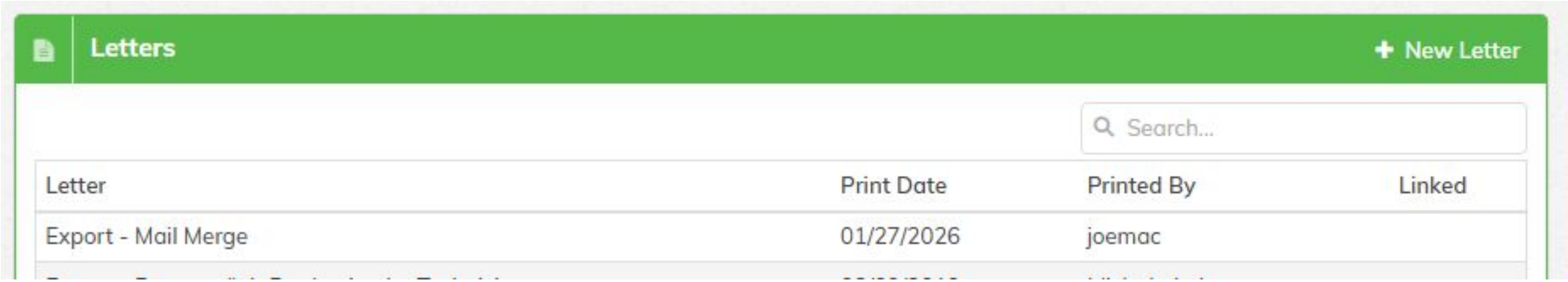
- CSV
- Mass Service Assignment
- Call Log
- Master Documents
- Add/Remove Flag codes



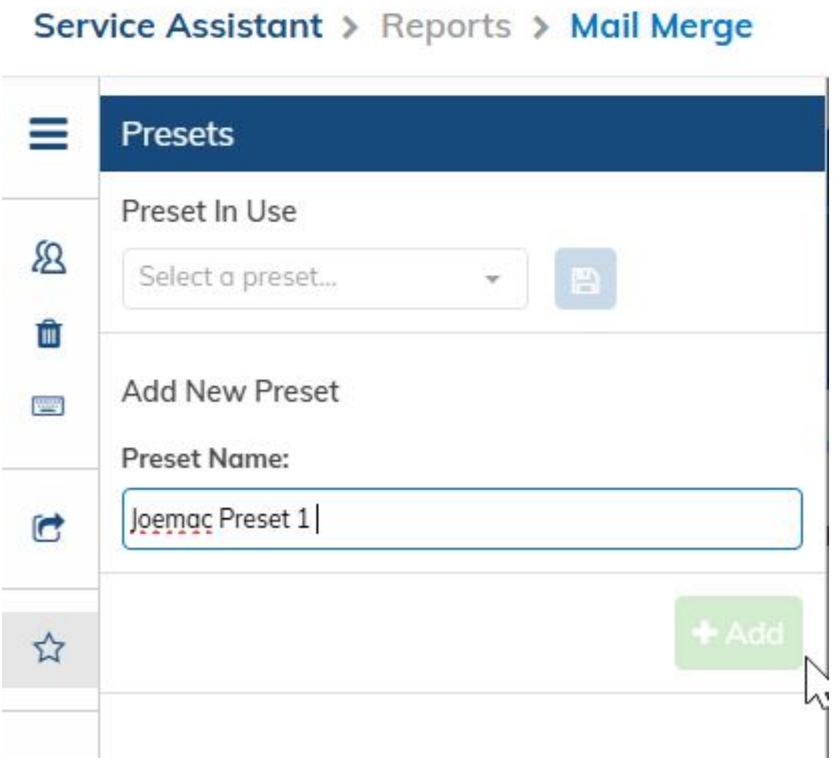
How it works… Step 5 - Review & Process

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

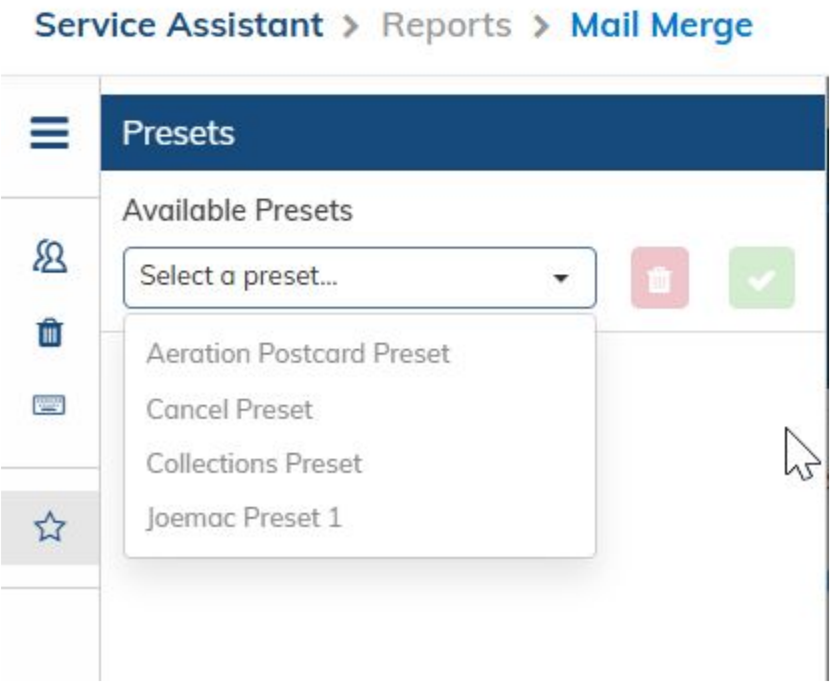




How it works... Save to Presets



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



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
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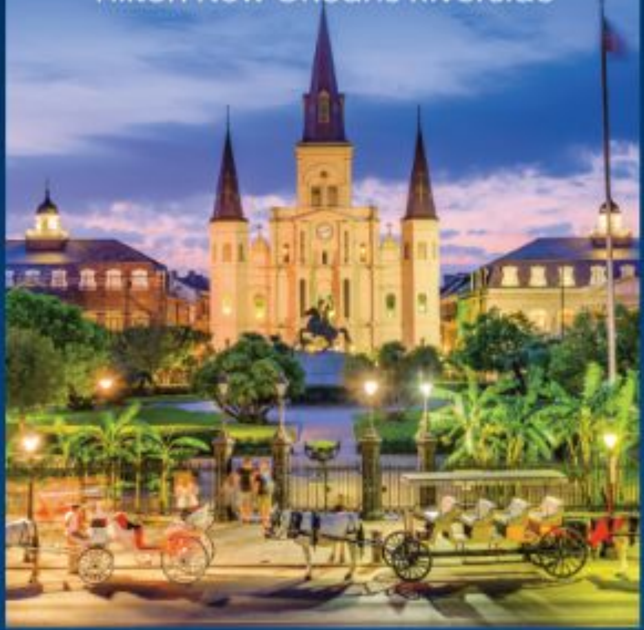
SEE YOU IN NEW ORLEANS!

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

Hilton New Orleans Riverside



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Questions?