



SA5 Letter Setup and Processing 101

SA5 Letter Setup and Processing



Yvonne Orrin

Training Specialist, RealGreen by WorkWave

Agenda

- Document Template Setup for Collection, Cancel and Confirmation Letters
- Collection Letter Processing
- Cancel Letter Processing
- Confirmation Letter Processing

Document Template Setup

Use the search field to easily find the letter you want to work with. Collection and Cancel letters are similar since they can both have the form layout edited.

Service Assistant > Settings > Document Templates

78 69 EE

Document Templates (169)

collection Show System Templates

Showing: 25 Results

Description	Template Type	Category	Available	Branches	System Template	
Automatic Collection 31-60	Letter	Collection	✓	5		Q ☰ ✎ 🗑
Automatic Collection 61-90	Letter	Collection	✓	All		Q ☰ ✎ 🗑
Automatic Collection 91-120	Letter	Collection	✓	All		Q ☰ ✎ 🗑
Automatic Collection Over 120	Letter	Collection	✓	0		Q ☰ ✎ 🗑
Collection letter - level 5	Letter	Collection	✓	All		Q ☰ ✎ 🗑
Collection letter level 3 with logo	Letter	Collection	✓	All		Q ☰ ✎ 🗑
Collection letter level 4, no header	Letter	Collection	✓	All		Q ☰ ✎ 🗑
collection way way past due	Letter	Collection	✓	All		Q ☰ ✎ 🗑
Collection s 31-60 with logo	Letter	Collection	✓	All		Q ☰ ✎ 🗑
RGS_Letter_ Collection _Basic_Aging_2_Logo_V1	Letter	Collection	✓	All	✓	Q ☰ ✎ 🗑
RGS_Letter_ Collection _Basic_Aging_2_NoHeader_V1	Letter	Collection	✓	All	✓	Q ☰ ✎ 🗑
RGS_Letter_ Collection _Basic_Aging_2_V1	Letter	Collection	✓	All	✓	Q ☰ ✎ 🗑
RGS_Letter_ Collection _Basic_Aging_3_Logo_V1	Letter	Collection	✓	All	✓	Q ☰ ✎ 🗑
RGS_Letter_ Collection _Basic_Aging_3_NoHeader_V1	Letter	Collection	✓	All	✓	Q ☰ ✎ 🗑
RGS_Letter_ Collection _Basic_Aging_3_V1	Letter	Collection	✓	All	✓	Q ☰ ✎ 🗑
RGS_Letter_ Collection _Basic_Aging_4_Logo_V1	Letter	Collection	✓	All	✓	Q ☰ ✎ 🗑
RGS_Letter_ Collection _Basic_Aging_4_NoHeader_V1	Letter	Collection	✓	All	✓	Q ☰ ✎ 🗑
RGS_Letter_ Collection _Basic_Aging_4_V1	Letter	Collection	✓	All	✓	Q ☰ ✎ 🗑
RGS_Letter_ Collection _Basic_Aging_5_Logo_V1	Letter	Collection	✓	All	✓	Q ☰ ✎ 🗑
RGS_Letter_ Collection _Basic_Aging_5_NoHeader_V1	Letter	Collection	✓	All	✓	Q ☰ ✎ 🗑

Letter Setup - Collection and Cancel

There are generic templates that can be cloned and edited. The main differences is the layout (header): logo, no header or generic.

COMPANY_LOGO_CONTAINER	
Logo	
[[COMPNAME]] [[COADDRESS1]] [[COADDRESS2]] [[COADDRESS3]] [[COPHONE1]] [[COURL]]	
[[DATE_CURRENT]]	Account #: [[CUST_NO]]
Billing Address: [[BILLADDR]]	Service Address: [[SERVADDR]]

No Header	
[[DATE_CURRENT]]	Account #: [[CUST_NO]]
Billing Address: [[BILLADDR]]	Service Address: [[SERVADDR]]
Dear [[FIRSTNAME]],	

[[COMPNAME]] [[COADDRESS1]] [[COADDRESS2]] [[COADDRESS3]] [[COPHONE1]] [[COURL]]	
Generic	
[[DATE_CURRENT]]	Account #: [[CUST_NO]]
Billing Address: [[BILLADDR]]	Service Address: [[SERVADDR]]
Dear [[FIRSTNAME]],	

Basic will print company information at top

Logo - pulls in the company logo

No header - blank at top for pre-printed paper.

Letter Setup – Collection and Cancel

Both Collection and Cancel Letters can have multiple versions created with different letter text to match the aging bucket or cancel reason.

Select the template layout you prefer, select 'clone', give it a name, and save.

Find the new template and select to edit.

The data fields can be moved and deleted.

Data fields can be added by dragging and dropping from the left side panel.

Create / edit the letter text and save.

Letter Setup – Confirmation Letters

Unlike the Cancel and Collection letters, only the text can be added or edited for Confirmation letters.

You can quickly create a new template by adding a name, selecting the type and category then adding your own text.

Document Template Setup (Read only)

Confirmation B Letter - Prepay

Name * Confirmation B

Template Type * Letter

Category * Prepay

Branch * Any Nothing selected

Available

Page Layout Letter

Letter Text:

I would like to take this opportunity to thank you for the trust you have placed in our company to care for your landscape. Its a responsibility we won't take lightly.

Below you will find a description and price for each application your landscape is currently scheduled for.

If throughout the season you have any questions please do not hesitate to call me. Our goal is to have the landscape looking beautiful throughout the season for you to enjoy.

Please note that our service is continuous. We will return each year unless you notify us in writing or by phone of your desire to discontinue service.

Again, thank you for the trust you have placed in us and we look forward to seeing you soon.

Collection Letters

It is recommended to create different letters for each of the aging categories you would like to send letters to.

Letters can be printed individually or in bulk.

For a single letter you have the option to select the letter from a drop down list. If you print letters in bulk you have the option to select the appropriate letter for each aging bucket.

Collection Letters

Print: Bulk Letters

Employee: * EH - EBETH

Print Bulk Letters

Branch: * 1001 - Your Company Name Customer Status: * 9 - Active

Customer Type: Both Billing Type: * Regular / Invoice, Statement Only, Credit Card, ACH, In: *

Don't send letter to customers who owe less than: 30.00 Exclude customers who never get statements

Days since last collection letter: 30 Days since last statement: 15

Age Bucket	Send Letter
<input type="checkbox"/> 31 - 45 days	(None)
<input checked="" type="checkbox"/> 46 - 60 days	Automatic Collection 91-120
<input checked="" type="checkbox"/> 61 - 90 days	Automatic Collection 91-120
<input checked="" type="checkbox"/> 91 - 120 days	Automatic Collection 91-120
<input type="checkbox"/> 121 - 180 days	(None)
<input type="checkbox"/> Over 180 days	(None)

More filters

+ Flag Codes

+ Advanced Options

Linked Documents

Save Linked Documents Email Documents

Cancel Letters

It is recommended that letters with different text are assigned to the cancel reasons.

Only assign a letter to the cancel reasons that you are planning to send to your customers.

Letters can be pulled in bulk or for an individual customer.

ice Assistant > Letters > Cancel Letters

Cancel Letters Cancel Letter Setup Cancel Reason Setup

Employee: * EH - EBETH Print: Bulk Letters

Print Bulk Letters

Branch: 5 of 8 Branches Selected Customer Status: 3 Selected

Cancel Dates: All Customer Type: Both

<input checked="" type="checkbox"/>	Cancel Reason	Send Letter
<input type="checkbox"/>	Bad Debt	Select...
<input type="checkbox"/>	Bad Debt Collections	Select...
<input type="checkbox"/>	Changed Mind	Select...
<input checked="" type="checkbox"/>	Customer Unemployed	Cancel - Financial
<input type="checkbox"/>	Died	Select...

More filters

+ Flag Codes

+ Advanced Options

Linked Documents

Save Linked Documents Email Documents

Confirmation Letters

- Confirmation Letters have a set format that currently can't be edited.
- They are created more like prepay letters than the other letter forms.
- A wizard format starts with picking data related to the general customer settings
- The next step uses the customers from step 1 to filter down to those with selected program/job settings
- The last step is how the information is to be displayed
- Program/Services can be selected to be shown on step 2, and only if the details of the services are selected on step 3 will they be shown.
(Essentially, if not selected on step 3 the jobs are the same as 'group by program' within prepay letters)
- It's best to preview the possible views to determine the best one for you.

Confirmation Letters - step 1 and 2

> Letters > Confirmation Letters



Select Customers

Print: Bulk Letters

Print Bulk Letters

Branches: 2002 - MY OTHER COMPANY NAME GOES HERE

Customer Type: Both

Print for Zip/Postal Code: Nothing selected

Days since last letter: 30

More filters

+ Flag Codes

+ Advanced Options

Cancel

> Letters > Confirmation Letters



Select Programs/Jobs

Program/Job Status: 9 - Active

Program/Job: All Programs Selected

Use Date: Sold Date

Date Range: All

Service Year: 2021

With Program Confirmation Only

Cancel

Back

Next

Confirmation Letters - step 3

✓
Step 1
Select Customers

✓
Step 2
Select Programs/jobs

3
Step 3
Letter Details

Letter Details

Confirmation Format:

Program/Job Detail:

Employee Name:

Printer Offset: inches

Show Grand Total

Show Discount Amounts

Group Rounds Together

Show Alternate Dates

Alternate Days: days

Confirmation Letter:

Sort Letters By:

Date on Letter:

Schedule Date: days

Show Subtotal

Show Taxes

Group Services by Pesticide Usage

Override Show Service Parameter Start Date

Include Title

Include Signature

Show Start Date

Linked Documents

Save Linked Documents Email Documents

✕ Cancel
⬅ Back
🔍 Preview
📄 Generate

10/28/2021
Customer # 44

Lisa Cuddy
986 House Dr
Fictional City, ID 12365

Dear Lisa Cuddy,

Thank you for your business!!

Below you will find a list of the services that we have scheduled for you. You will find the best in service with our platinum services. You will have access to unlimited service calls whenever you see an issue. We will also schedule 2 extra visits where our manager will do a complete analysis on the health of your lawn. If you have any questions please don't hesitate to contact us.

Apple Pie

Apple Pie
Lil Squirt

Description	Price	Discount	Tax	Net Price
Fall Aeration (1 @ 510.00)	510.00	0.00	25.50	535.50
Total	510.00	0.00	25.50	535.50
Best Lawn Program (6 @ 151.50)	909.00	0.00	45.48	954.48
Total	909.00	0.00	45.48	954.48
Weekly Mowing (1 @ 86.50)	86.50	0.00	0.00	86.50
Total	86.50	0.00	0.00	86.50
Total Scheduled 8	1505.50	0.00	70.98	1576.48

Session Feedback

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

Questions?