

PestPac Marketing Text

Marketing Text allows you to print a message on Service Orders, Invoices, and Mobile Service Orders.

This document outlines how to set up Marketing Rules and Text for printing:

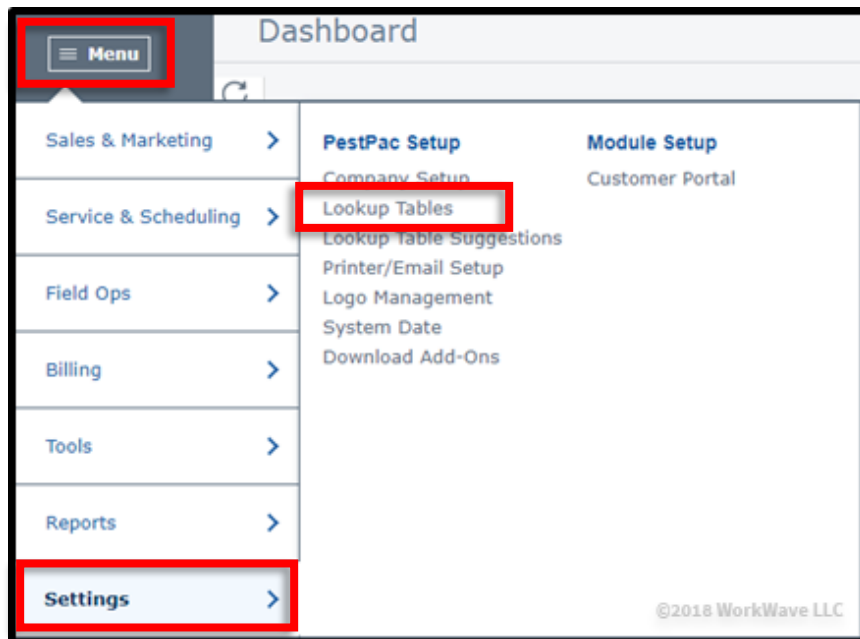
- [Setting Up Marketing Rules and Text](#)
- [Setting Up Marketing Text to Print for All Customers](#)
- [Setting Up Where Marketing Text Will Print / Display](#)

Setting Up Marketing Rules and Text

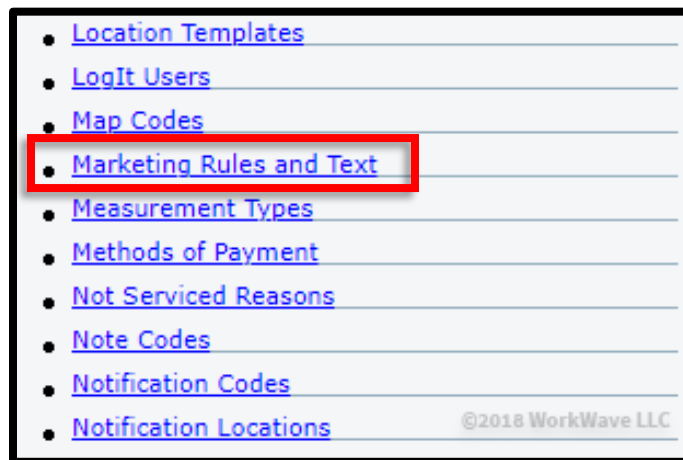
Marketing Rules and Text allow you to market services based on what services customers already have. Think of these rules as “if this and this, then that” statement. For example, if a customer already has Service A and does not have Service B, then market Service B.

To set up Marketing Rules and Text, complete the following steps:

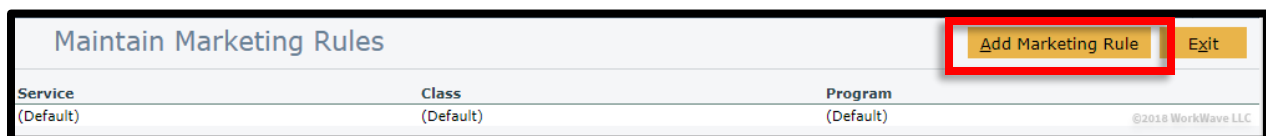
1. On the desktop, go to *Menu > Settings > Lookup Tables*.



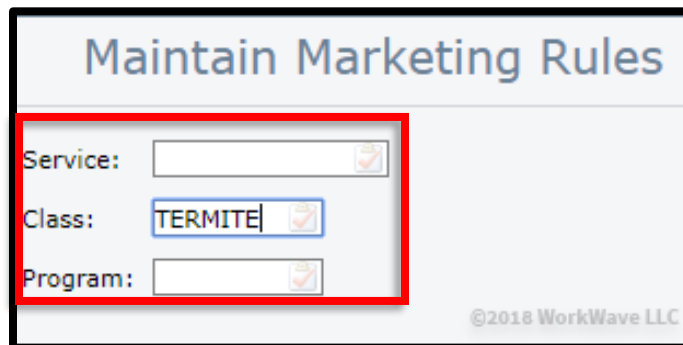
2. Click the blue link for *Marketing Rules and Text*.



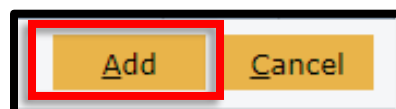
3. Click the *Add Marketing Rule* button in the top-right of the screen.



4. Populate the first Service, Class, or Program for which you are setting up the rule. Note that in this example, we are marketing to anyone who has TERMITE service (i.e., if the customer has Termite service).



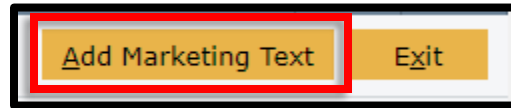
5. Click the *Add* button at the top-right of the screen. You have now added a rule that a customer should already have for the Marketing Text to appear.



6. Click the *Edit Marketing Text* button at the top-right of the screen.



7. Click the *Add Marketing Text* button at the top-right of the screen so that you can populate the text that will be shown for that Marketing Rule.



8. Enter the Service Code that you want to offer your customers, anticipating that they do not have it already. In this example, we are marketing to anyone who has TERMITE service but does not have PC service (i.e., if the customer has Termite service and does not have PC service, then market PC service).

Be sure to include the specific Marketing Text you would like the customer to see.

Maintain Marketing Text Add Cancel

Service:

Program:

Sequence:

Marketing Text:

Path: p

NOTE: <ENTER> inserts a paragraph, <SHIFT+ENTER> inserts a line break

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9. If this is the first rule you are setting up, enter *1* in the Sequence field. You can create additional sequences. For example, if a customer has both Termite and PC services, you can set up a Sequence 2 for a different service you would want to automatically have PestPac market instead.

PestPac will follow the sequential order as needed based upon the active services assigned to each Location.



Maintain Marketing Text

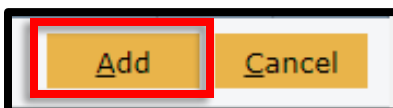
Service: PC-MONTHLY

Program:

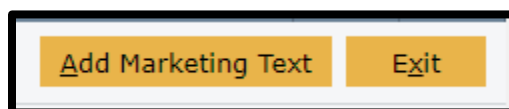
Sequence: 1

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10. Click the *Add* button in the top-right of the screen.



11. To add additional text rules, click the *Add Marketing Text* button again. If you are finished, click the *Exit* button.



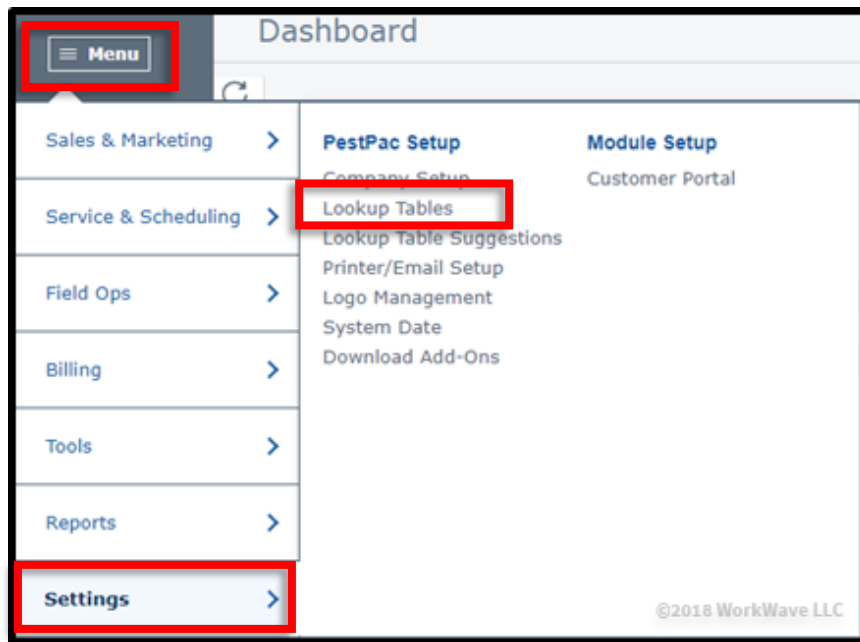
Setting Up Marketing Text to Print for All Customers

You can set up a message that prints for all customers regardless of what service(s) they currently have setup.

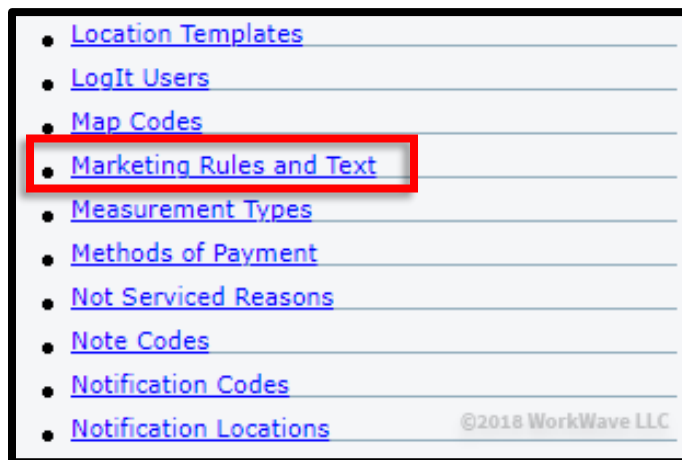
Note that if you leave everything blank, you cannot use the Marketing Rules to then market specific services because PestPac will not know to print both.

To set up this messaging, complete the following steps:

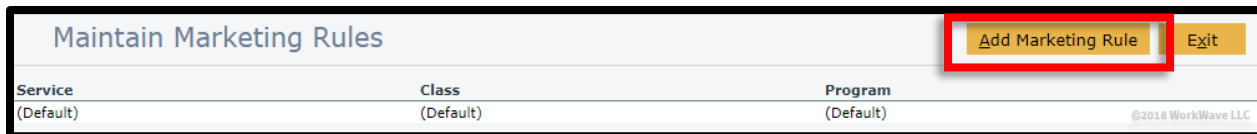
1. On the desktop, go to *Menu > Settings > Lookup Tables*.



2. Click the blue link for *Marketing Rules and Text*.



3. Click the *Add Marketing Rule* button in the top-right of the screen.



4. Leave all fields blank, and click the *Add* button in the top-right of the screen.



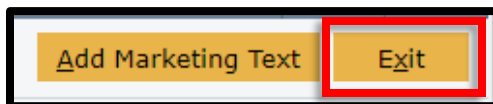
5. Click the *Edit Marketing Text* button at the top-right of the screen.

6. Click the *Add Marketing Text* button in the top-right of the screen.

7. Leave the Service and Program fields blank, and enter 1 in the Sequence field. Also include the specific Marketing Text you would like the customer to see.

8. Click the *Add* button in the top-right of the screen.

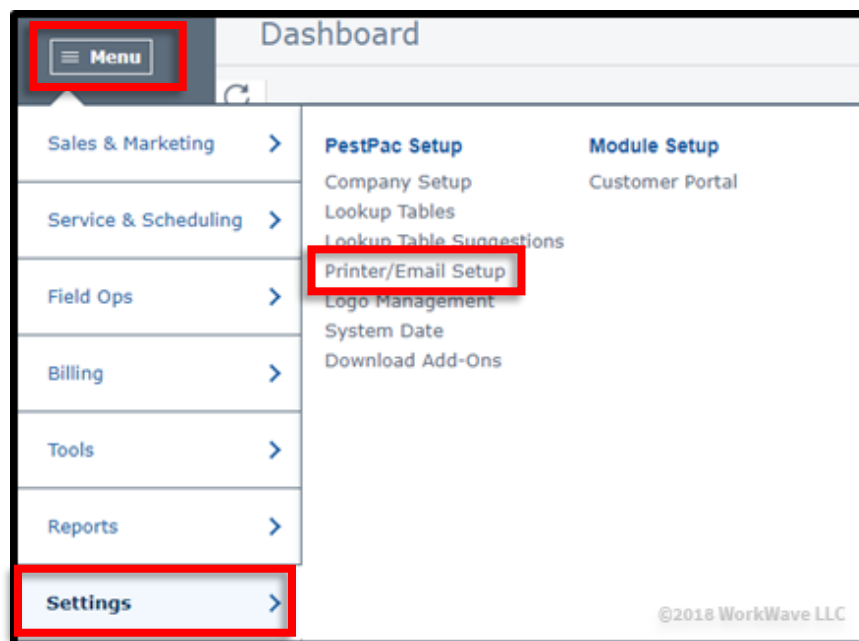
9. Click the *Exit* button in the top-right of the screen.



Setting Up Where Marketing Text Will Print / Display

To set up printing of this text, complete the following steps:

1. On the desktop, go to *Menu > Settings > Printer/Email Setup*.



2. You can select Marketing Text to print under the options for Service Orders, Invoices, and Mobile Service Orders. Check the *Marketing Text* option for each of the respective forms on which you want to print.

Defaults
[Service Order](#) :: [Invoice](#) :: [Statement](#) :: [Renewal](#) :: [Report](#) :: [Letter](#) :: [Label](#) :: [Post Card](#) :: [Collection](#) :: [Consolidated Invoice](#) ::
[Inspection Report](#) :: [Credit Card Receipts](#) :: [Tech Notifications](#) :: [Notifications](#)

Mobile Defaults
[Service Order](#)

Service Order Defaults

Service Order Form
 Standard Custom

[Click here to choose which form comments to print](#)

Print On Service Orders

<input checked="" type="checkbox"/> Work Date	<input type="checkbox"/> Balance Forward
<input checked="" type="checkbox"/> Work Time	<input checked="" type="checkbox"/> Prices on Billable Orders
<input checked="" type="checkbox"/> Last Work Date	<input checked="" type="checkbox"/> Prices on Production Orders
<input type="checkbox"/> Last Work Date for Service	<input checked="" type="checkbox"/> Tech Name/License
<input checked="" type="checkbox"/> Terms	<input type="checkbox"/> Company Header
<input checked="" type="checkbox"/> Price Totals	<input checked="" type="checkbox"/> Company Logo
<input checked="" type="checkbox"/> Material Info	<input type="checkbox"/> Use Branch Logo
<input checked="" type="checkbox"/> Material Qty.	
<input type="checkbox"/> Rep Code	
<input checked="" type="checkbox"/> Marketing Text	

Print On E-mail Service Orders

<input checked="" type="checkbox"/> HTML Format
<input checked="" type="checkbox"/> Company Header
<input checked="" type="checkbox"/> Use Branch Information

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3. Click the *Save* button in the top-right of the screen.



REMEMBER: For additional setup, training, and usage resources for Mobile and other topics for FREE, including live webinars and a robust video library, please visit [PestPac University](#).