

Gain Additional Business with Stored Recommendations

Article Number: 79 | Rating: Unrated | Last Updated: Mon, Jul 14, 2008 at 11:50 AM

Many shops report that they can stay busy when they go back to their customer database and send out Recommendations letters. Typically they date-range back 6 months to a year and prompt customers about repair needs identified within that timeframe. Goes like this: NOTE: For this exercise, be sure Print to Screen is selected in Reports dialog box or results will go to your printer. 1) Go to **Reports**, select **Followup** tab2) Choose FL - Recommendation for Work 1 as the report 3) On the Recommend tab build the Search as desired: a) Date range back one year b) Try Category now; filter option for fewer results c) Keep Print Recommendations checked so they appear in letter d) Try with Vehicle Make and Zip Code set to for now 4) Click on **Search** to build a list of customers who qualify5) Click on **Print** and then Print Letters/Postcards to preview results. *Each customer would receive a custom letter that included their name, address, vehicle and recommendations with dates and details.* 6) Click the Red X in the upper RH corner to close print preview then **Cancel** and **Cancel** once more to close the boxes. In the actual process, a dialog box displays at the end, asking to Mark these as printed? Y/N By saying Yes, a system date stamp is placed on the Recommendation itself. When viewed from Vehicle screen, users can tell that a Followup letter was created and sent on that date.

Posted by: [Tim McDonnell](#) - Mon, Jul 14, 2008 at 11:50 AM. This article has been viewed 8326 times.

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