EXTRACTING DATA FOR

MAILING LISTS OR REPORTS

The data stored in your files provide a valuable source of information.   There are many reports in Lakeshore but sometimes you may need something unique or you need to export the data to another program.

You can use the "Create-A-Report" module to extract this data, export to it to Excel or another program, or to create your own reports.   The "Marketing Letters & Labels" module uses the same technique to extract address-related data from files such as the customer file or the order file.

This discussion will explain how to generate and update a list of addresses or other data.   As an example, we will pull a list of all customers for salesman 002, sorted by zip code.   Additional examples are found in the online manual under "Help" at the bottom of the main menu.

The screen shots below are from the Marketing Letters and Labels menu.   However, you may extract mailing lists from either the Marketing Letters and Labels menu or from the Create-A-Report menu.   The process and the files are identical.

Select the list of addresses to be included

You will need to tell the system what records you want included. For example, if you want only customers for salesman 2, you will need to specify that.

Here are the steps you need to go through to create the list:

Step 1 - Ask for "Extract/Sort report data from the Create-A-Report menu OR ask for "Create mailing list" from the Marketing Letters & Labels menu.

Step 2 - **Fill out the file name and other information on the first screen.**

A list of the customers, orders, etc. that contain the information you want are placed in a temporary file that is given the name you enter. You will need to use that file name when you are ready to export the data, print labels or letters, or use the extracted data in any way.

Indicate that you want to **CLEAR** the file if you are starting a new list. Indicate that you want to **ADD ON** to the list if you are adding to an existing list.   The online manual contains examples of adding on to a list.

If you frequently use the same criteria for selecting the list, you can save them and recall them each time. See the help file for more detailed information on how to save and recall selection criteria.

Create Mailing List

Name the list.

You will need to remember the file name later when you print labels or letters.

File name of list:	example1 🔍
Description of list:	All customers for salesman 002
Type file:	Customer ▼
If file already contains data	⦿ Clear old data ○ Add to existing data
Specification Number:	🔍

(To use previously saved set of Specifications)

Save these specifications?	⦿ Don't save ○ Sav... ...ion
If saving, description:	

Pick the type of file on which the mailing list will be based.

Use "clear old data" if you are starting a new list. You can reuse a file name if you remember to clear old data before reusing the name.

Use "Add to existing data" if you need to make multiple passes to get the data you need. See example 2.

Submit   **Exit**

Step 3 - On the second screen, enter the RESTRICTIONS on what data is to be selected.

If you do not enter any restrictions, ALL customers, vendors, etc. will be selected.

Some files require you to specify the level of data you want to extract. For example, on the customer file, you can select just one record for each customer or one record for each contact set up for the customer. For orders, you can select one record for each order or one record for each line item on the order. Which level of detail you select depends on how you will be using the data.

Some files require you to indicate the level of detail you need and some do not.

Selection level: Do you want to ○ Extract only one record for each customer? ◉ Extract a record for each customer/contact?

Enter up to 10 ways to select the data.
Leave begin value blank to start at the lowest value.

Click on [   ] ng values.

You need to indicate whether you want the system to pick one address per customer, even if you have some additional contacts set up for that customer.

Or, pick addresses from the additional contacts also.

Selection field		End with

You will need to specify the other restrictions you want to place on the data.   You may specify up to 10 fields to use to restrict the data.   Each record selected must meet ALL the criteria you enter.

Data fields are selected by clicking on the look up icon to find the one you want to use. Or, if you know the field number, you can just type it in.

The following screens illustrate how to specify the salesman number as one of your selection criteria.

Look Up Data Element

Start with field [   ]

If you do not enter any selection criteria, ALL customers will be selected.

Selection field

When you click on the look up icon, you will be prompted for a description of the field you want to use as one of your selection criteria.

[Submit]   [Exit]

customer/contact?

End with

Look Up Data Element

Selection level: Do you want to

Start with field [salesman   ]

[Submit]   [Exit]

Selection field

Enter a starting point. For example, to look up "salesman number", you can just type the word "salesman"

customer/contact?

End with

Data dictionary

Code	Description
6467	Salesman Number
6470	Salutation
6476	Second Salesman Number
6477	Selection Code - Pos'n 1
6478	Selection Code - Pos'n 2
6479	
6480	
6481	
6482	
6483	
6484	
6485	Selection Code - Pos'n 9
6486	Selection Code - Pos'n 10
6487	Selection Code - Pos'n 11
6488	Selection Code - Pos'n 12

Selection level: Do you want to ... customer/contact?

Selection field ... End with

Find the description of the field you want to use to select your data and click on the code shown in red in the left column.

For example, the code for "salesman number" is "6467"

Prev   Exit   Next

Once you have selected the field you want to use to restrict the data, enter the beginning and ending value you want to include in the list.   In this case, we want only salesman 2.

Selection level: Do you want to   ○ Extract only one record for each customer?   ● Extract a record for each customer/contact?

Enter up to 10 ways to select the data.
Leave begin value blank to start at the lowest value.
Leave end value blank to go to the largest value.
Click on help for additional methods of specifying beginning and ending values.

Selection criteria

Selection field	Begin with OR Keyword	End with
6467 Salesman Number	002	002

Enter the range of salesman numbers from which you want to select addresses.

If from only one salesman, you can make the ending salesman the same as the beginning salesman by clicking on the clipboard icon.

Each customer selected must meet **ALL** of the restrictions you enter. For this reason, you can enter a particular restriction only once. So, if you wanted records for customers of salesman 2 and salesman 5, you could not put salesman as your restriction on one line with begin and end values of 2 and also put the same restriction on a second line with begin and end values of 5. No customer would be assigned to both salesman 2 and salesman 5 at the same time so no customers would be selected. You would have to select the customers for salesman 2, then do a second pass to get the customers for salesman 5. See the online manual for an example of how to do this.

See the Help file for additional information on the rules for the selection criteria including special values such as "notzero" and "keyword".

Also on the second screen, you may indicate how you want the data sorted.

If you do not enter any sort criteria, the list will be in customer, vendor, etc. order.

You may specify up to five levels of sort. Enter the highest level of sort first. For example, if you wanted the list sorted by state, then city, you would enter "state" as the first sort field and "city" as the second.

For each sort field, you can specify whether the smallest value comes first (ascending order) or the largest value comes first (descending order). For example, you might want to sort salesman in ascending order but year-to-date sales in descending order.

If you are doing a second pass to add on to a list that was created earlier, you must use the same sort criteria as the first pass.

Some types of files and selection or sort criteria require additional information.

For example, if you want to select customers based on "year-to-date" sales, you will need to enter the date range on which you want to use to base the sales totals plus whether you want to pull the data from the order (booked sales) or invoice (billed sales) file.

Step 4 - **When you click "Submit", the requested file will be searched and the data that meet your selection criteria will be placed in the file you named.**

The number of **NEW** records found will be reported on the screen. So, if you make two passes and some of the records meet the criteria in both the first and second pass, the record would be added and counted in the first pass. On the second pass, since the record has already been added, it would not be added a second time and it would not be counted on the second pass.

Step 5 (optional) - **If you are extracting data for an address list and you think there are duplicate addresses, ask for the "purge" option to delete the duplicates.**

Note that the addresses must be identical in every way EXCEPT CASE to be counted as a duplicate. Differences in upper/lower case ("Baton Rouge" versus "BATON ROUGE") are ignored.

This option is relatively new. If you need it and don't have it on your Marketing Letters and Labels menu, contact Lakeshore Technical Support to have it added.

Step 6 (optional) - **You can display the list of data selected and delete any you don't want included in your list.**

Go to   Marketing Letters & Labels
                       Display/Edit Extracted List

and enter the name of the file containing your data.

TIP!!   If you have a large mailing list that has the potential for duplicates
                       that may not be caught by the purge step described above, sort
                       your list by zip, company, street when you extract it.   Then, call
                       them up under the "Display/Edit" option.   Similar addresses will
                       appear together and you can delete additional duplicates.

Once your data is selected, you can use it to export data or to create your report. These procedures will be described in subsequent newsletters.