

## Course Description

This course provides a working knowledge of TRACS Customer Export features.

## Course Objectives

By the end of this course, you should be able to:

1. Find the correct Customers needed for this project.
2. Export the file.
3. Open and Use the file with Microsoft Excel.

## Find Customers

The export will only contain the Customers who are found with a specific search.

1. Open the Customer Icon to see the COMPLETE list of Customers in the database.
2. Select the “Find” Action Button.
3. Enter your search criterion. For example:

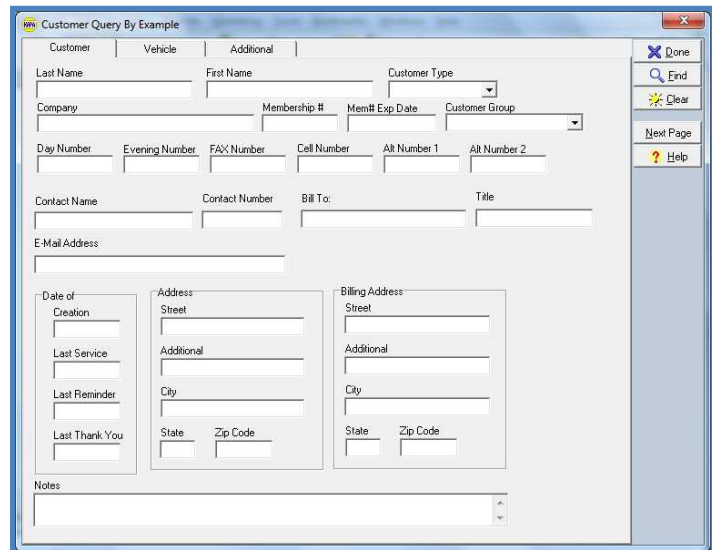
a) Last Service Date for “Thank You” letters

b) Zip Codes for a specific mailer.

**c) Customers WITH email addresses for customer survey email.**

d) Dollars spent by Customer during a specific period of time.

e) ANY COMBINATION of any Customer and Vehicle data.



4. Click the “Find” Action Button to see the results.

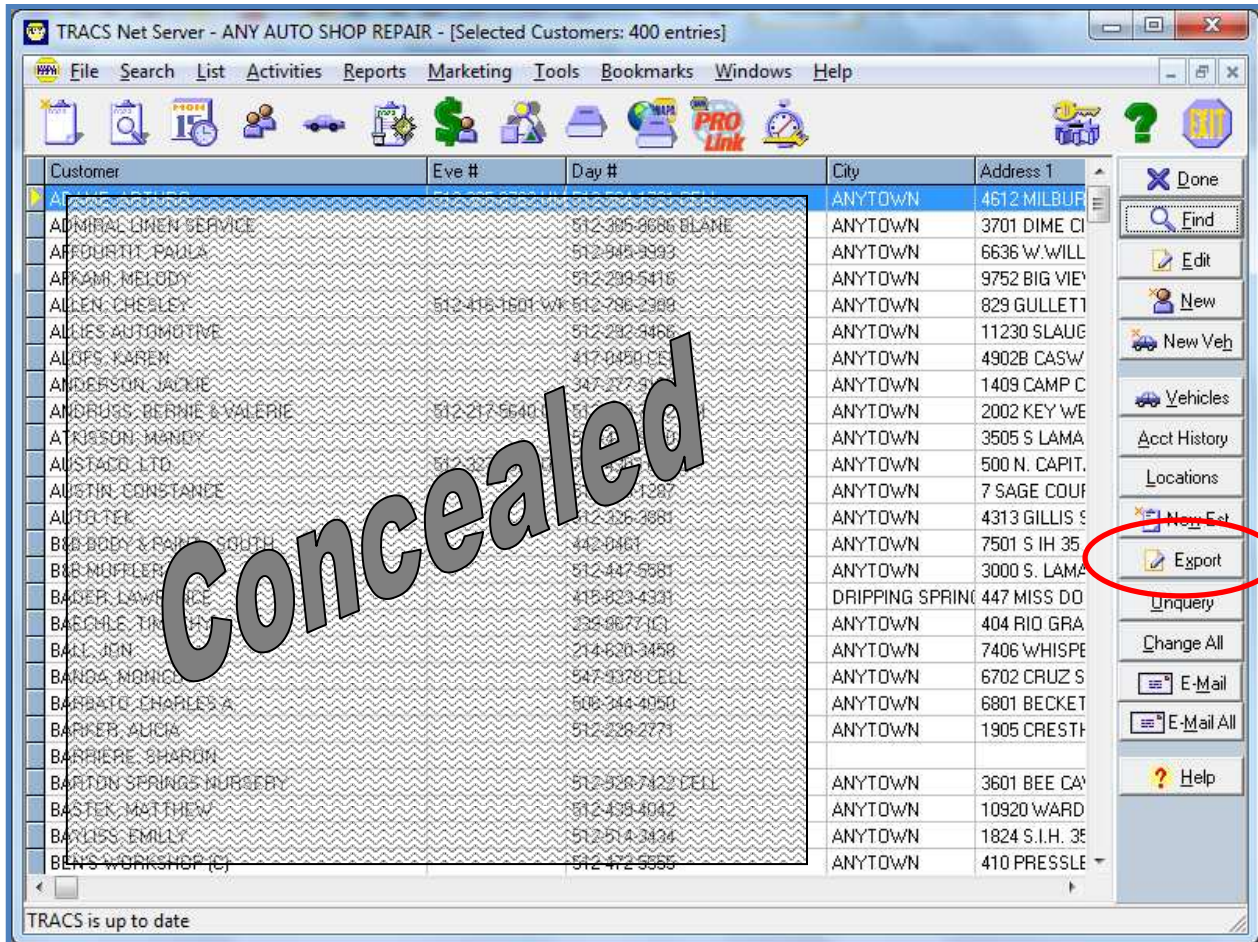
Using the email search as our example:

1. Enter the date format mm/dd/yyyy:mm/dd/yyyy into the “Last Service” field. Using the colon as a search tool will return the beginning date THROUGH the ending date.

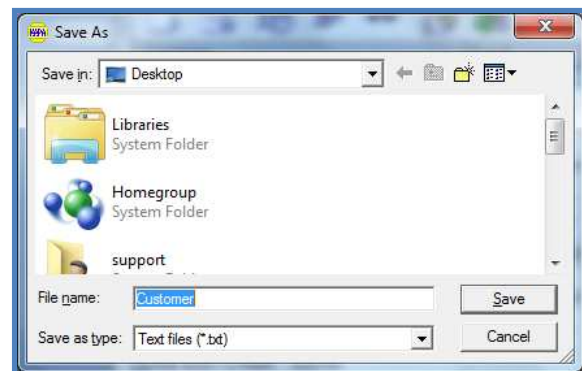
2. Enter the “\*@\*” formula into the “E-Mail Address” field.

## Search Results

The “Selected Customers” screen will show a total number for the search results.



1. Click the “Export” Action Button.
2. Save the file to the Desktop with a file name that makes sense to you.
  - \*\*You could also create a file folder specifically to hold these Export files.\*\*



## Open the Text File with Excel

1. Open Microsoft Excel.
2. Open a Folder from Excel's main menu.
3. Change the File Type at the lower right of the screen from "All Excel Files" to "Text Files".
4. Find the "Customer" Text Document and select with a double click to open.

The image shows a sequence of steps in a Windows Explorer window and the Excel Text Import Wizard. In the Explorer window, the file type is initially set to "All Excel Files". A red circle highlights this dropdown menu, and a red arrow points to a second instance of the same dropdown menu where it has been changed to "Text Files", also circled in red. A yellow arrow points to the "Customer" text document. Below, the Text Import Wizard is shown in three steps. Step 3 shows the "Column data format" section with "General" selected for all columns. A red circle highlights the "Finish" button at the bottom right of the wizard.

Keep the default settings that Excel recommends and click:  
 "Next",...  
 "Next",...  
 "Finish".

*Excel now displays your Customer search results.*

General	General	General	General
CUSTOMERNAME	EVENINGNUM	DAYNUM	ADDRESS1
ADAMS, ARTURO	512-385-8762 HM	512-584-1721 CELL	4612 MILBURN LANE
ADMIRAL LINEN SERVICE		512-385-8686 BLANE	3701 DIME CIR.
AFFOURTIT, PAULA		512-945-9993	6636 W.WILLIAM CA
AFFKAMI, MELODY		512-299-5416	9752 BIG VIEW DR