

# DP EXTRACT

*(Excel-based data extraction tool for System Administrator, Accounts Payable,  
Accounts Receivable, Inventory Management, & Payroll)  
(PART #292)*

The **DP/EXTRACT** is a special application designed to “**extract**” data from a variety of **Infinity POWER** application data files, by company, for a variety of purposes. Among many of the top reasons to pull data from the **Infinity POWER** accounting data files is to integrate your accounting data with a variety of products, such as Microsoft’s Word, Access and Excel.

Whether using the data for Christmas Card labels for a Mail Merge in Microsoft Word or using it to generate special “**Bar Code Labels**” by **Bin Number** or against their **Alternative SKU Number**, this tool offers great convenience for users to get direct access to the data. Plus, the world has changed and our users have many other reasons to access their company’s proprietary data on a wide range of levels. Not the least of which is for “**e-mail marketing**” to their clients using various products, such as **Constant Contact**, **Stream Send** and **Mail Chimp**.

These products perform a wide range of “**e-mail blasting**” services, including detailed tracking of who is receiving their e-mails and providing statistical analysis. What these products don’t have is your ever changing data from your main **Infinity POWER Accounts Receivable** module!

**DP/EXTRACT** makes that extremely convenient for that to happen! As a special utility that sits inside **Microsoft Excel (required)**, **DP/EXTRACT** makes direct calls to the following **Infinity POWER** accounting modules using special “**POWERServer**” commands. **POWERServer** is an advanced technology that comes standard with every **Infinity POWER System Administrator** module. **System Administrator (either Part #100 or #695 for SQL)** is required to run any **Infinity POWER** module.

The **Infinity POWER** modules currently supported by **DP/EXTRACT** include:

- **Accounts Payable**
- **Accounts Receivable**
- **Inventory Management**
- **Payroll**
- **System Administrator (Address Book)**

E-mail marketing is just one possible use for this powerful software tool. Other users will want to take advantage of their direct access capabilities to other modules, such as **Accounts Payable** and **Payroll**. As a business owner or corporate manager, don't worry.

This product may be installed on virtually any user's desktop within your organization and you don't have to worry that the staff are going to be able to steal away your data in an unauthorized fashion!

That's because the software does use the **POWERServer** module to directly communicate with your company's data files. That means that all communication requires that only valid users that have been predefined in the **Infinity POWER Advanced Security Administrator** module can gain access to your data files based on the security rules that you have defined in advance. Plus, that also means that user rights are defined either on a "**group**" or "**user**" level, which means that management controls who gets access to specific program options and/or data files.

Thus, if "**User A**" doesn't have rights to the **Accounts Payable** or **Payroll** modules, they won't be able to "**extract**" any information at all from these modules. However, they may have rights to your customer files (*Accounts Receivable*). Therefore, you can install **DP/EXTRACT** on their desktop for the purpose of allowing them to perform mail merge marketing documents or create e-mail lists to be uploaded to your e-mail server for blasting out weekly e-mails to your clients!

Other companies may have their **SYSADM** control this module with full rights and simply save the various Excel data files on their network for specific users to use, when applicable. There are many ways to use this advanced tool!

Keep in mind, this is very valuable information that you are data mining from your accounting data files. Once "**extracted**," these new spreadsheets of data searches should be stored on your PC or Network with the same level of special security you view now for your accounting data files. Therefore, you need to make special considerations as to who can make these data "**extractions**" and where they can store this information.

The job of **DP/EXTRACT** is to provide you with the ability to "**extract**" data using many different criteria capabilities, depending on the specific accounting module involved. They will vary from module to module. The needs for the data, will vary as well.

Remember that one of the key features used through all **Infinity POWER** accounting modules is a concept called "**Masking**." That functionality is used heavily in **DP/EXTRACT** as well. "**Masking**" on a specific field allows you to define what to include in your search for data and what to "**exclude**."

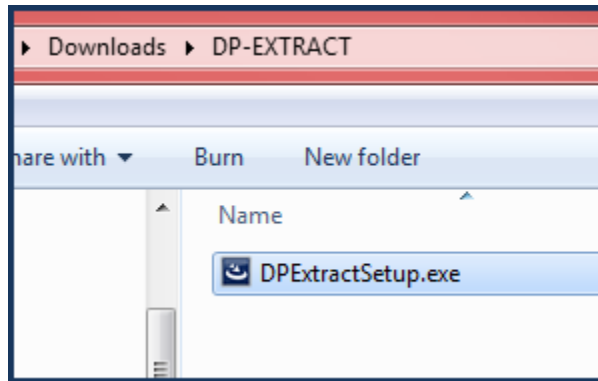
For example, if you select the "**State Mask**" in the **Accounts Payable** or **Accounts Receivable** modules, instead of leaving it blank, which would mean to give you all states, the state initials you

enter will be the criteria you are asking for the tool to bring back as a “**match.**” If you were to enter “**GA,**” for example, in the “**State**” field, then the **POWERServer** access to the data files will ignore all other **49** states and only look for customers or vendors in “**Georgia.**”

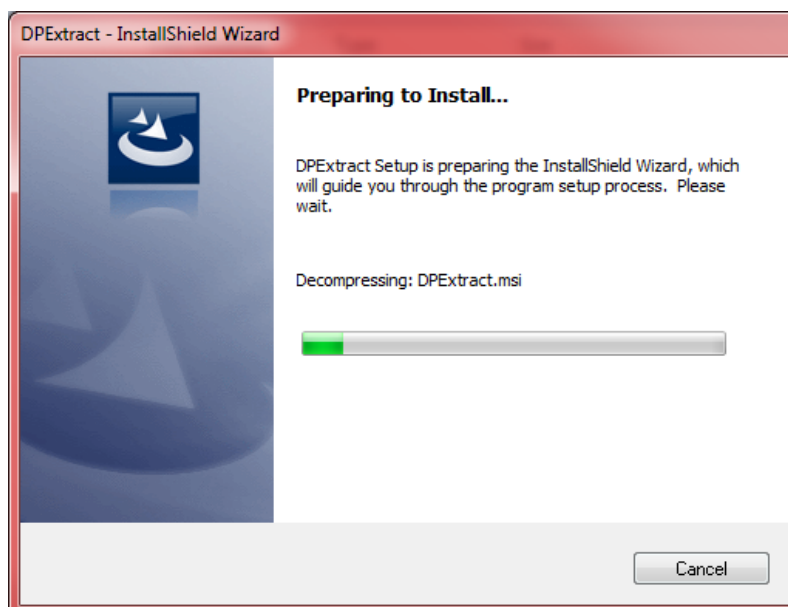
Let’s go through the installation process next and then we can further discuss the fine tuning use of **DP/EXTRACT** afterwards! There are special sections towards the end of the manual for performing Mail Merges in Microsoft Word (*Office 2013*) and for performing “**Bulk Uploads**” in **Stream Send** as an example of preparing for “**e-mail blasting!**”

## INSTALLING DP/EXTRACT

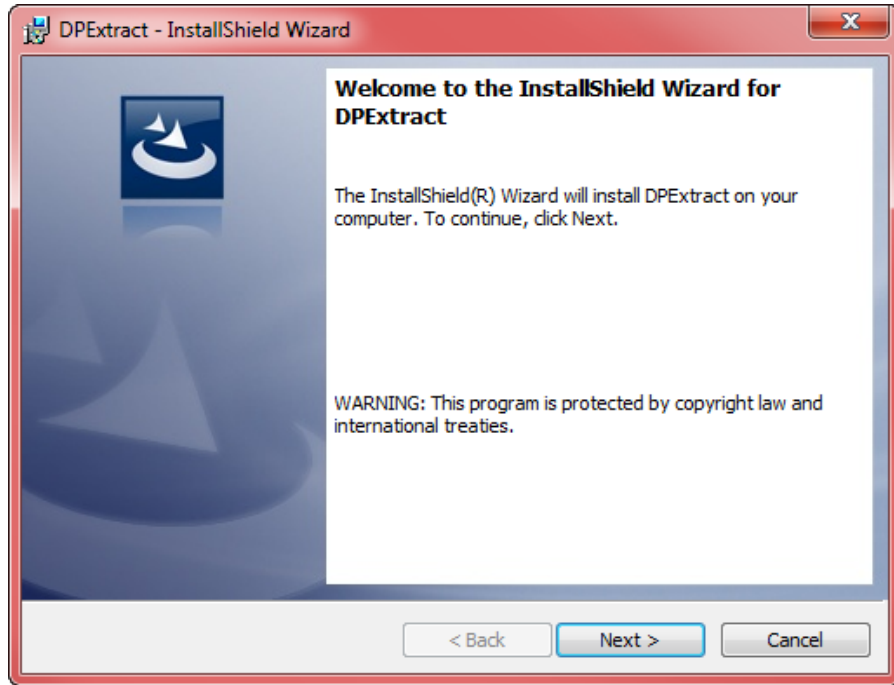
You may receive **DP/EXTRACT** on a CD-ROM or via download from the **Data Pro Accounting Software** web site ([www.dpro.com](http://www.dpro.com)). Either way, you will simply need to copy the main file (**DPEExtractSetup.exe**) to a directory on your PC or network as shown below:



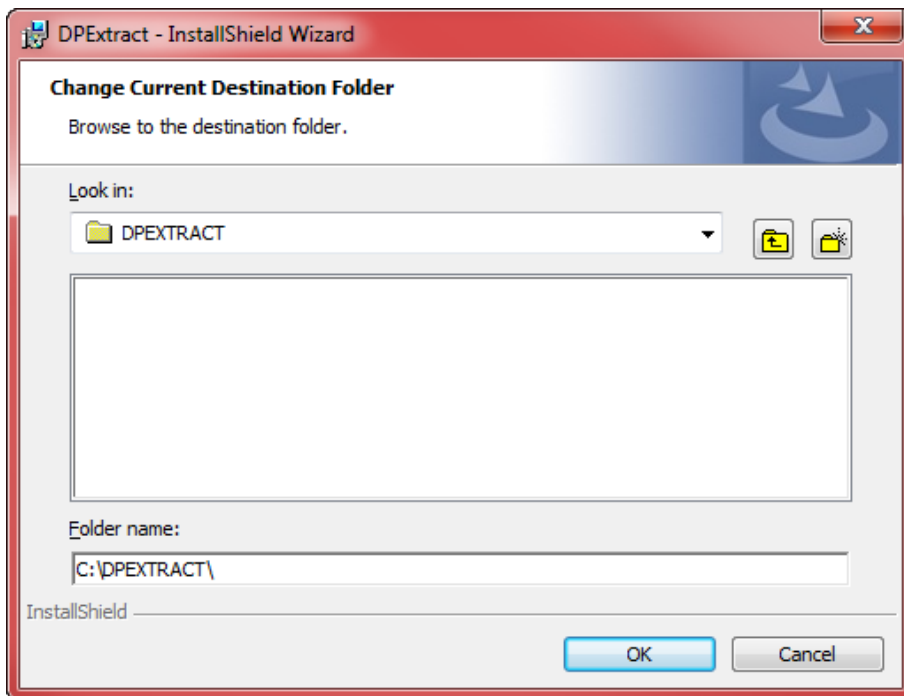
The name you select is up to you. Double click on the **DP/EXTRACT Setup** icon to begin the installation process. The following screen will appear:



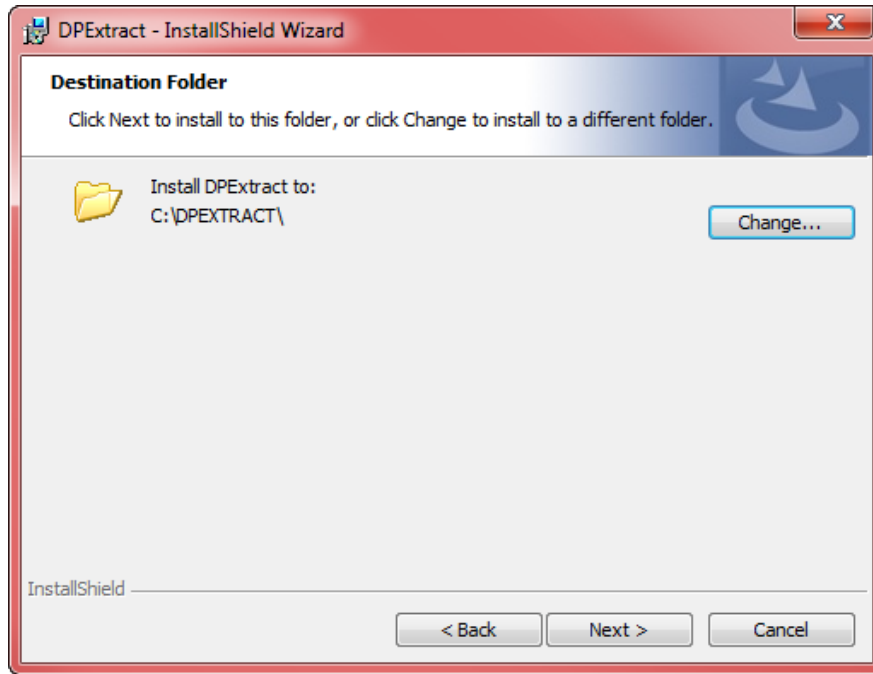
The system will exact a series of files and prepare the installation so that you may continue on the following screen.



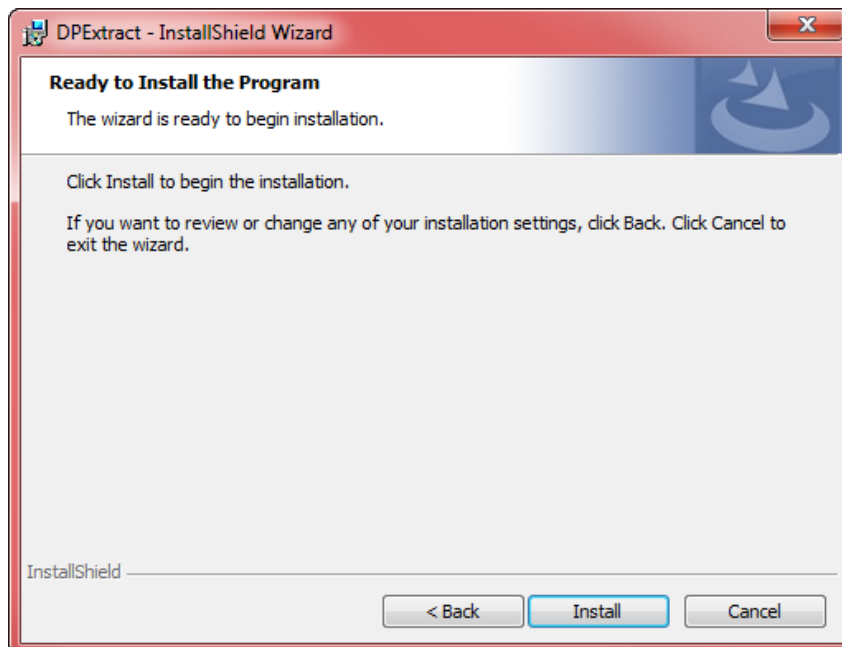
Click on the “**Next**” button to continue the installation or click on “**Cancel**” to halt the installation. The following screen will be displayed. It shows where the “**default**” location of the applications will be placed on your computer. If you click on “**Change**” you may elect to install the application in another directory or another drive on your PC or network.



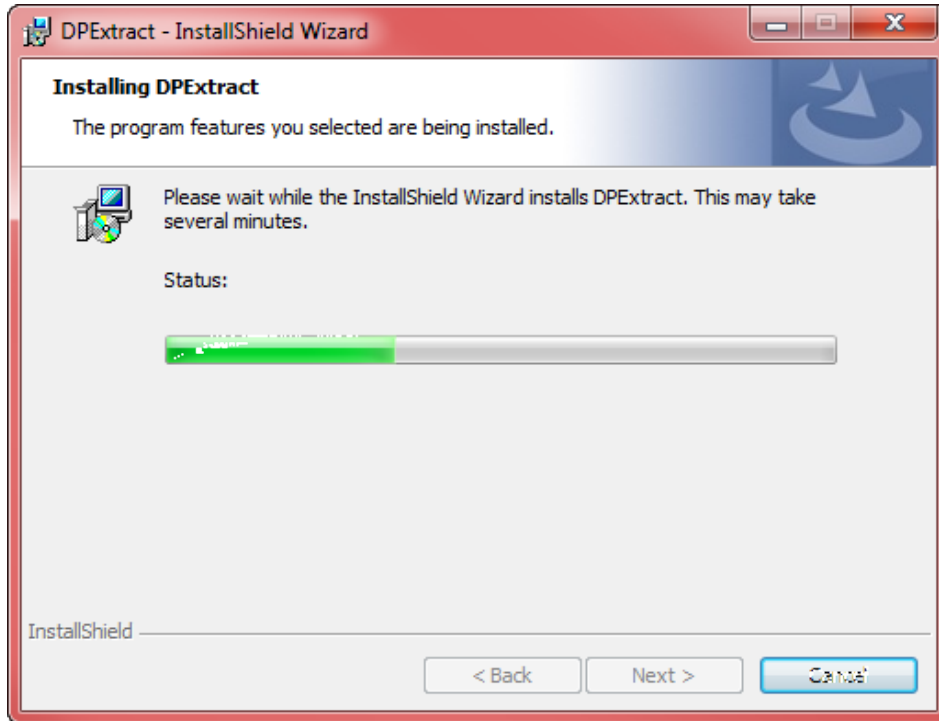
The next screen will confirm the “**Destination Folder**” that you have selected to install the application into. You may override this by clicking on the “**Change**” button or by clicking on the “**Next**” button to continue with the installation. You may click “**Cancel**” to halt the installation process.



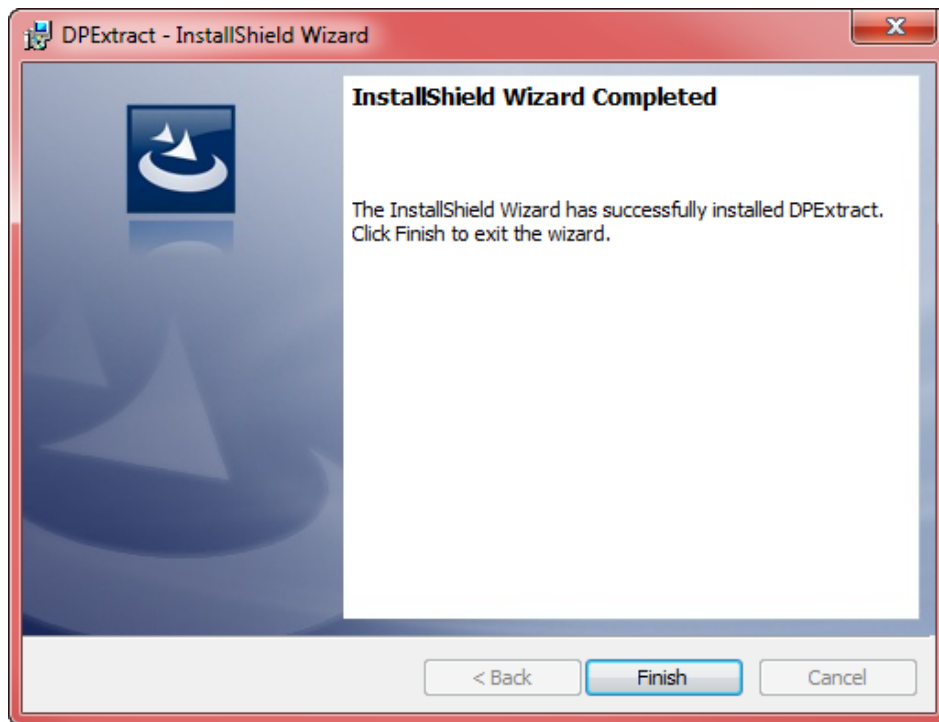
The next screen will confirm that the Installation is now ready to begin. Click on “**Install**” to begin, the “**Cancel**” button to halt the process or the “**Back**” button to make alternative selections on prior screens.



The software will now begin to install. This may take a minute or two. You can click on the “Cancel” button to halt the installation.

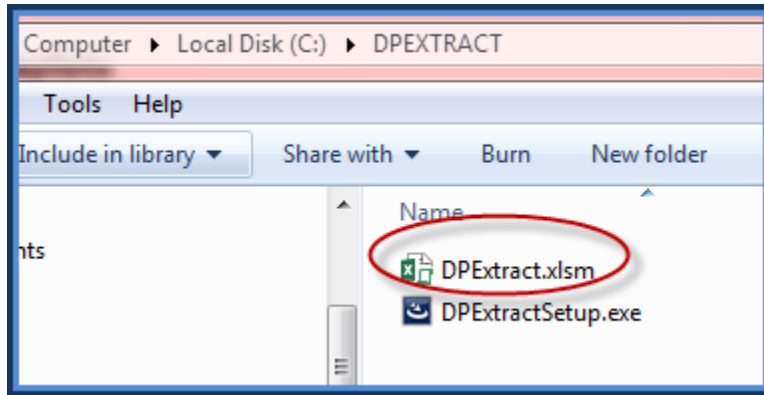


The installation will complete and you can just click on the “Finish” button to continue.

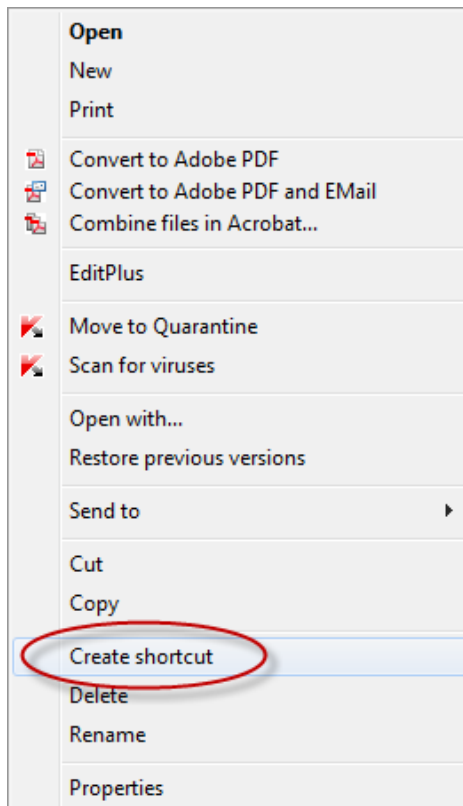


Once you are done, realize that what you have installed now is an Excel spreadsheet with special automation capabilities built into it that you can't see. You will find that because it is a spreadsheet and since you can basically install it wherever you want, you may want to create a “**shortcut**” on your desktop to make it easier for you to remember where to locate it in the future.

To do so, now go to the directory where you just installed the **DP/EXTRACT** utility. In the example below, this is **C:\DPEXTRACT**.



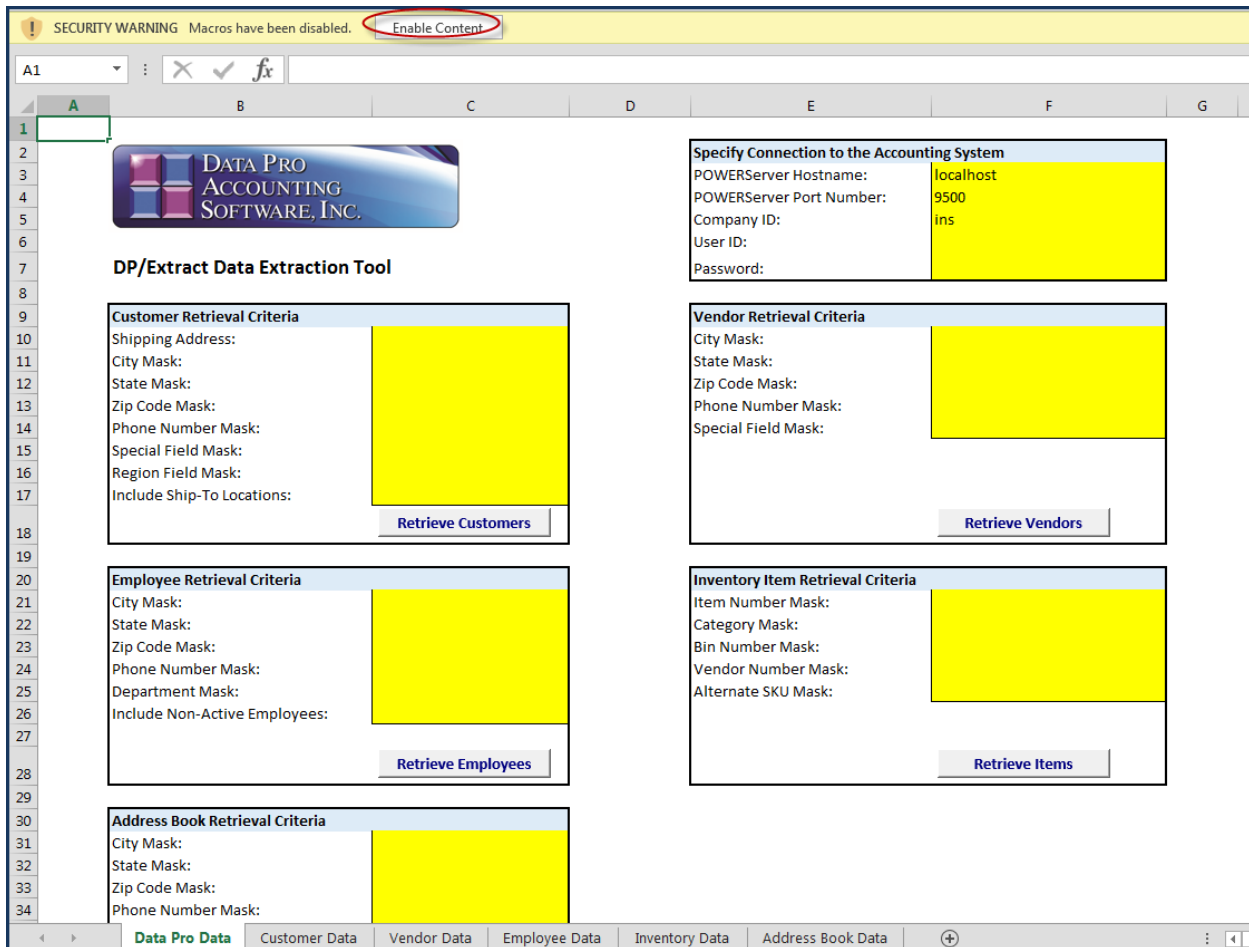
To create a shortcut on your desktop, highlight the file with your mouse and right click so that the menu appears as shown below:



This will have the effect of creating an icon on your desktop similar to the following image:



Now, you can simply double click on the shortcut and the system will launch **Microsoft Excel** and open the **DP/EXTRACT** file automatically. When it does, the opening screen will appear as shown on the following screen. If this is the first time you have loaded the file, you may get a **“Security Warning (as shown) that Macros have been disabled.”** Click on the **“Enable Content”** button to proceed.



Notice that this Excel spreadsheet opens with a series of boxes dedicated to a variety of accounting modules along with a series of tabs along the bottom of the screen. They are tied together. The upper boxes will make the request for data from the specific accounting module and will then extract and deposit the data into the associated tab below.



However, first things first! The top right box must be defined to communicate with your accounting server and then to specify which company you want to access (*Data Pro does support multi-company processing*).

Specify Connection to the Accounting System	
POWERServer Hostname:	accountingserver
POWERServer Port Number:	9500
Company ID:	INS
User ID:	*****
Password:	*****

In the “Specify Connection to the Accounting System” box, the first configuration option is to define the “POWERServer Hostname.”

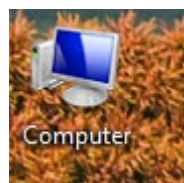
This would be the name of the computer where the **POWERServer** has been installed and is communicating directly with your accounting software modules. If this computer is the same computer as where you are installing **DP/EXTRACT**, you can use the default setting of “**Localhost**” which means it is calling the same computer that both applications are installed on.

If at this time, you have never set up the **POWERServer** as a feature of your **Infinity POWER** modules, then skip to the section of this document where there is documentation on how to set up the **POWERServer**, which is repeated here for convenience. It is normally found as part of the **Advanced Security Administrator** module setup in the **System Administrator** module.

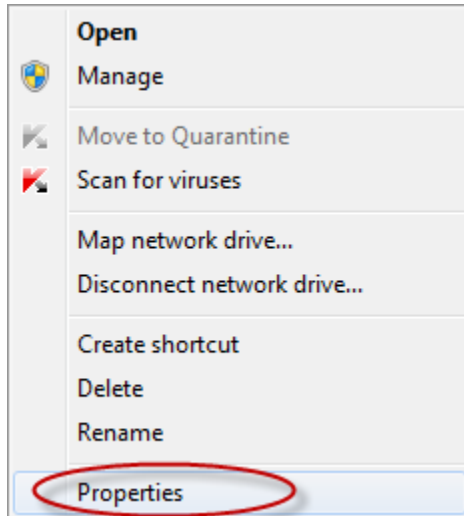
Likewise, if you do not have the **Advanced Security Administrator** feature turned on in your software and have been using the “**Standard Security**” feature, then you will have to first deploy this feature before you can proceed.

**Data Pro Technical Support at 727-803-1550 can assist users with this security reconfiguration.**

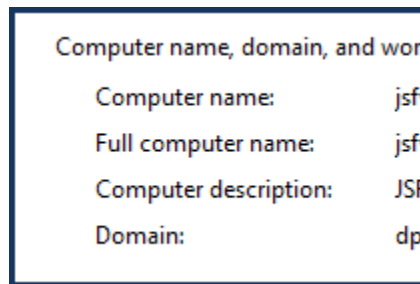
If you are not certain of the name of your accounting server or PC where the accounting data is hosted, go to that machine and right click on the “**COMPUTER**” icon on your desktop as shown below:



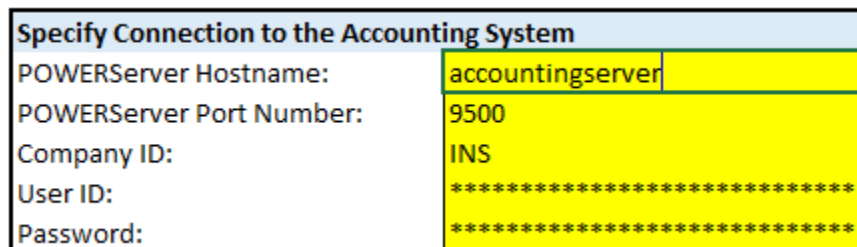
Click on the “**Properties**” option as highlighted on the following screen:



The next screen will have a section that will display the Computer Name, Description and whether you are attached to a Domain. Enter the **Full Computer Name**.



Do not enter the **IP Address** as it may change over time. The computer name most likely will not. Notice in the example below that it is “**accountingserver.**”



Next, enter the **POWERServer Port Number**. This is the **PORT #** on the network where the traffic may flow. This is part of the configuration of the **POWERServer**. **Port 9500** is generally the standard port number that is used.

You will next enter the three-character **Company ID**. This alpha/numeric identifier tells the software which company you are processing transactions on. You may have tens of thousands of combinations using the three-digit options.

You may also want to save **DP/EXTRACT** multiple times in the same directory using a naming structure associated to different Company IDs, if you plan to extract data regularly from differing companies. That way, you can configure each variation uniquely to each company once and then call it up based on a unique icon from your desktop as needed, or simply by its unique filename.

For instance, the default name of the file is: **DPEXtract.xlsm**. If you had three companies, you could name them: **DPEXtract100.xlsm**, **DPEXtract200.xlsm** & **DPEXtract300.xlsm**. You would open up each file separately and you would probably be calling the same **POWERServer Hostname** and **Port Number**, but would use a different **Company ID** for each implementation.

Next, you will enter the same **User ID** and **Password** you would use when logging into the **Infinity POWER** software.

This will control the **Advanced Security** rights that will be passed to **DP/EXTRACT** in the same way as they are passed to you when you login to the accounting software. Whatever rights you have in the accounting software, they will be the same in **DP/EXTRACT**.

If you do not have rights to **Accounts Payable** and **Payroll** in the software, you will not be able get access to any of that data in **DP/EXTRACT**. As mentioned earlier, keep in mind that if you do have all rights to all modules, once you have “**extracted**” data into a spreadsheet, you will want to save it in a network secure directory or on your local machine where you have proper security as the data is now in a Microsoft Excel file and no longer protected by the **Infinity POWER Advanced Security Administrator** module.

Much care must be exercised when utilizing this tool. Also, you may have rights in **Company 100**, but not in **Company 200** and **Company 300**. Therefore, different users may be configured for differing filenames.

## Integrated Modules

The modules that **DP/EXTRACT** currently supports are the following:

- **Accounts Receivable** (*Customer Retrieval*)
- **Accounts Payable** (*Vendor Retrieval*)
- **Payroll** (*Employee Retrieval*)
- **Inventory Management** (*Inventory Item Retrieval*)

- **System Administrator** (*Address Book Retrieval*)

## Accounts Receivable

Starting with the “**Customer Retrieval Criteria**” option, you will find the following fields:

Customer Retrieval Criteria	
Shipping Address:	
City Mask:	
State Mask:	
Zip Code Mask:	
Phone Number Mask:	
Special Field Mask:	
Region Field Mask:	
Include Ship-To Locations:	
	<input type="button" value="Retrieve Customers"/>

**Shipping Address:** This is a Y(es) or N(o) prompt. This is asking whether you want to return with the default “**Billing Address**” for the customer or whether you desire to have their “**Ship To Address**” instead. If you answer Y(es), you will get the customer’s “**Ship To Address.**”

**City Mask:** This field allows you to enter the name of a city that you are looking for and to “**mask**” out or “**exclude**” all other cities from the “**extraction.**” For example, if you were to enter “**Tampa,**” as the name of the city, only those customer records with “**Tampa**” as the city name will be retrieved.

**State Mask:** This field allows you to enter the name of a state that you are looking for and to “**mask**” out or “**exclude**” all other states from the “**extraction.**” For example, if you were to enter “**FL,**” as the name of the state, only those customer records with “**FL**” as the state name will be retrieved as shown in the following example. The customer records show up in the corresponding “**Customer Data**” tab along the bottom of the Excel screen once you click on the “**Retrieve Customers**” button.

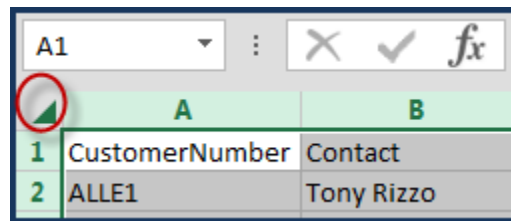
Customer Retrieval Criteria	
Shipping Address:	
City Mask:	
State Mask:	FL
Zip Code Mask:	
Phone Number Mask:	
Special Field Mask:	
Region Field Mask:	
Include Ship-To Locations:	
	<input type="button" value="Retrieve Customers"/>

The following are the results from click on the “Customer Data” tab:

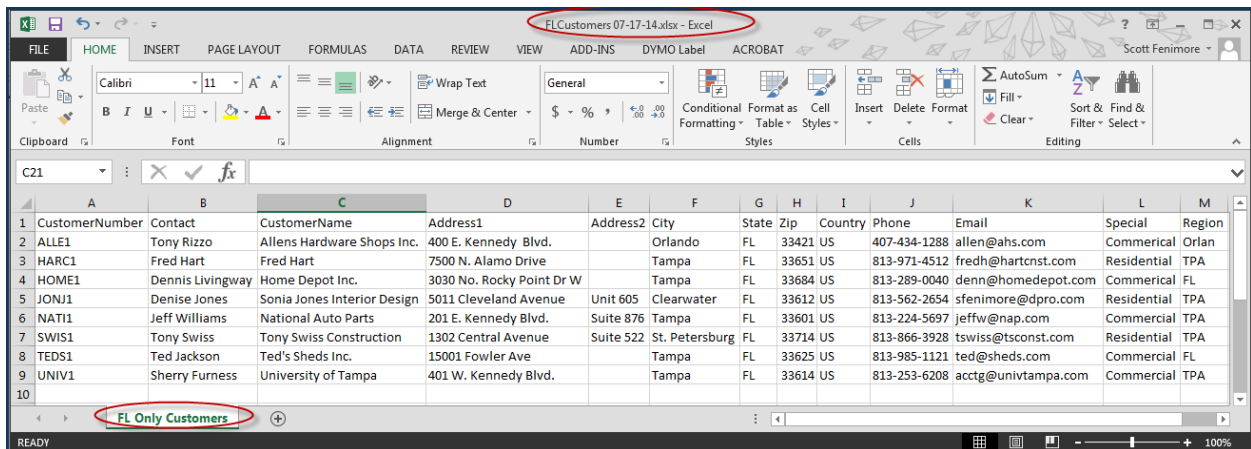
1	CustomerNumber	Contact	CustomerName	Address1	Address2	City	State	Zip	Country	Phone	Email	Special	Region
2	ALLE1	Tony Rizzo	Allens Hardware Shops Inc.	400 E. Kennedy Blvd.		Orlando	FL	33421	US	407-434-1288	allen@ahs.com	Commercial	Orlan
3	HARC1	Fred Hart	Fred Hart	7500 N. Alamo Drive		Tampa	FL	33651	US	813-971-4512	fredh@hartcnst.com	Residential	TPA
4	HOME1	Dennis Livingway	Home Depot Inc.	3030 No. Rocky Point Dr W		Tampa	FL	33684	US	813-289-0040	denn@homedepot.com	Commercial	FL
5	JONJ1	Denise Jones	Sonia Jones Interior Design	5011 Cleveland Avenue	Unit 605	Clearwater	FL	33612	US	813-562-2654	sfenimore@dpro.com	Residential	TPA
6	NATI1	Jeff Williams	National Auto Parts	201 E. Kennedy Blvd.	Suite 876	Tampa	FL	33601	US	813-224-5697	jeffw@nap.com	Commercial	TPA
7	SWIS1	Tony Swiss	Tony Swiss Construction	1302 Central Avenue	Suite 522	St. Petersburg	FL	33714	US	813-866-3928	tswiss@tsconst.com	Residential	TPA
8	TEDS1	Ted Jackson	Ted's Sheds Inc.	15001 Fowler Ave		Tampa	FL	33625	US	813-985-1121	ted@sheds.com	Commercial	FL
9	UNIV1	Sherry Furness	University of Tampa	401 W. Kennedy Blvd.		Tampa	FL	33614	US	813-253-6208	acctg@univtampa.com	Commercial	TPA
10													

Once the data has been “extracted” from your customer file into **DP/EXTRACT**, the recommended procedure is to now save this query off to a new Excel Spreadsheet with its own naming convention. This is because each time you perform a unique or different click on the “Retrieve Customers” button, a new query will be made.

When this occurs, whatever data was previously retrieved and sitting in the “Customer Data” tab will automatically be removed and replaced by the new “extraction.” Therefore, if you were pleased with the query that you made and wanted to use it for your Mail Merge or e-mail blast, then you should click on the triangle in the upper left of the Excel Spreadsheet.



This will automatically highlight all data in the current Excel tab. You can then click on the “Copy” option at the top of the screen or use the **CTRL C** function to copy the data. Then, click on “File,” “New,” and select “Blank Workbook” in Excel and “Paste” (**CTRL V**) the data into the new **Workbook** and save it with new filename as shown in the following screen.



Notice in red how you can uniquely name the tab and create the filename to have special meaning to the retrieval just performed.

This way you know what you are looking at and when it should be used. Just remember to save the files in a secure place on your PC or network drives. These are now normal Excel files and anyone can gain access to this sensitive data in Excel. You may not want everyone having full access to your entire customer list to send to your competitors!

**Zip Code Mask:** This field allows you to enter the zip code of the customers that you are looking for and to “**mask**” out or “**exclude**” all other zip codes from the “**extraction.**” For example, if you were to enter “**33603,**” as the zip code, only those customer records with “**33603**” as the zip code will be retrieved. However, masking is more flexible than that. If you only entered “**336**” in the first three characters of the zip code, you would get customers from a far wider range of zip codes throughout Florida.

**Phone Number Mask:** This field allows you to enter the Phone Number of the customers that you are looking for and to “**mask**” out or “**exclude**” all other Phone Numbers from the “**extraction.**” For example, if you were to enter “**305-681**” in the first seven characters of the phone number, only those customer records beginning with a “**305-681**” in the phone number will be retrieved. However, masking is more flexible than that. If you only entered “**305**” in the first three characters of the phone number, you would get customers from the entire “**305**” area code throughout Florida.

**Special Field Mask:** This field allows you to enter the Special Field data of the customers that you are looking for and to “**mask**” out or “**exclude**” all other customers from the “**extraction**” based on whether they meet the requirements of the **Special Field** data. The “**Special Field**” in the **Accounts Receivable** module is specifically designed to allow users to title it and use it for a wide range of “**sortable**” data. This field is a “**sort**” field in addition to the **Customer Number** and **Customer Name** fields. For example, many customers use this field to identify the “**types**” of customer they are. For instance, customers could be sorted by “**Retail,**” “**Wholesale,**” “**Manufacturer,**” “**Consultants**” and more. Having an additional “**sort field**” makes it easy to group them by “**Customer Type.**” Likewise, depending on your coding scheme, you can “**mask**” out groups of customers using this field.

**Region Field Mask:** This field allows you to enter the **Region Field** of the customers that you are looking for and to “**mask**” out or “**exclude**” all other Regions from the “**extraction.**” For example, if you were to enter “**SEFL**” in the first four characters of the **Region** field, only those customer records matching with a region field of “**SEFL**” will be retrieved. This could represent Dealers in the Southeast or whatever coding scheme that would make sense for your business. If you only entered “**SE**” in the first two characters of the **Region Field**, you would get customers from across the entire “**Southeast**” area and not just Dealers and not just in a single state such as Alabama, Georgia or Florida.

**Include Ship-To Locations:** This is a Y(es) or N(o) prompt. This is asking whether you want to return with not just the default “Billing Address” for the customer, but whether you desire to also incorporate any additional “Ship To Addresses” you may have defined for each customer record as well. If you answer Y(es), you will get everything associated with the customer’s “Billing Address” and all “Ship To Addresses.”

This can be a very powerful feature, particularly when used in conjunction with advanced features such as in the DP/DashBoard product. As shown on the screen below, one of the features that can be used in the DP/DashBoard product is to be able to conveniently add additional “contacts” to each customer for marketing purposes.

Particularly when you are trying to get your company’s messages out to as many of your customer’s contacts as possible, this feature allows you to store “Additional Contacts” for each company. It just uses the “Ship To Addresses” feature in Accounts Receivable to store these additional contact’s information.

<a href="#">Customer Aging</a>   <a href="#">View/Add Notes</a>   <a href="#">Payment History</a>   <a href="#">Inventory Sales History</a>   <a href="#">Schedule New Event</a>   <a href="#">Copy Customer to Company</a>				
Additional Contacts				
Contact (Select to Edit)	Phone #	Email	City/State/Zip	Delete
<a href="#">Pauline Strach</a>	727-540-0931	<a href="mailto:Paulinestrach@adamstank.com">Paulinestrach@adamstank.com</a>	Clearwater, FL 33762	<a href="#">Delete</a>
<a href="#">Dafene Adams</a>	727-540-0931	<a href="mailto:DafeneAdams@adamstank.com">DafeneAdams@adamstank.com</a>	Clearwater, FL 33762	<a href="#">Delete</a>
<a href="#">Amanda Tobeck</a>	727-540-0931	<a href="mailto:AmandaTobeck@adamstank.com">AmandaTobeck@adamstank.com</a>	Clearwater, FL 33762	<a href="#">Delete</a>
<a href="#">Add New Contact</a>				

This is very useful for including additional contacts in Newsletters, Mail Merges, E-Mail blasts and much more!

## Payroll

With the “Employee Retrieval Criteria” option, you will find the following fields:

**Employee Retrieval Criteria**

City Mask:

State Mask:

Zip Code Mask:

Phone Number Mask:

Department Mask:

Include Non-Active Employees:

[Retrieve Employees](#)



**City Mask:** This field allows you to enter the name of a city that you are looking for and to “mask” out or “exclude” all other cities from the “extraction.” For example, if you were to enter “Tampa,” as the name of the city, only those employee records with “Tampa” as the city name will be retrieved.

**State Mask:** This field allows you to enter the name of a state that you are looking for and to “mask” out or “exclude” all other states from the “extraction.” For example, if you were to enter “FL,” as the name of the state, only those employees’ records with “FL” as the state name will be retrieved as shown in the following example.

The employee records show up in the corresponding “Employee Data” tab along the bottom of the Excel screen once you click on the “Retrieve Employees” button.

	A	B	C	D	E	F	G	H	I	J	K
1	EmployeeNumber	EmployeeName	Address1	Address2	City	State	Zip	Phone	Department	Status	
2	CON-106	Conners, Charles S.	5422 N. Sheldon Road	Apt. 233	Tampa	FL	33635	813-895-8844	GEN. LABOR	1	
3	ELL-104	Elliot, Frank	7113 Henderson Blvd.	#208	Tampa	FL	33602	813-247-8422	GEN. LABOR	1	
4	FRA-102	Franklin, Albert T.	9833 N. Hanley Road		Tampa	FL	33637	813-877-9511	GEN. LABOR	1	
5	FRI-109	Jack Friedman	15519 Lake Shore Villa		Tampa	FL	33636	813-881-8108	SALES	1	
6	GOR-107	Gordon, Jim	4500 Tampa St.		Tampa	FL	33612	813-224-6363	GEN. LABOR	1	
7	HAR-101	Harris, Susan	445 S. Ford St.		St. Petersburg	FL	33517	813-334-1718	ADMIN	1	
8	MAG-108	Bill Maquire	14523 Halfway Lane		Tampa	FL	(Ctrl) -	685-1173	SALES	1	
9	ROU-103	Rouse, Stan	1422 S. Addison Drive	Bldg. #2	Tampa	FL	33601	813-238-7411	MANAGEMENT	1	
10	WRI-105	Wright, Ron	1212 W. Cypress Blvd.		Tampa	FL	33623	813-224-5466	GEN. LABOR	1	
11											

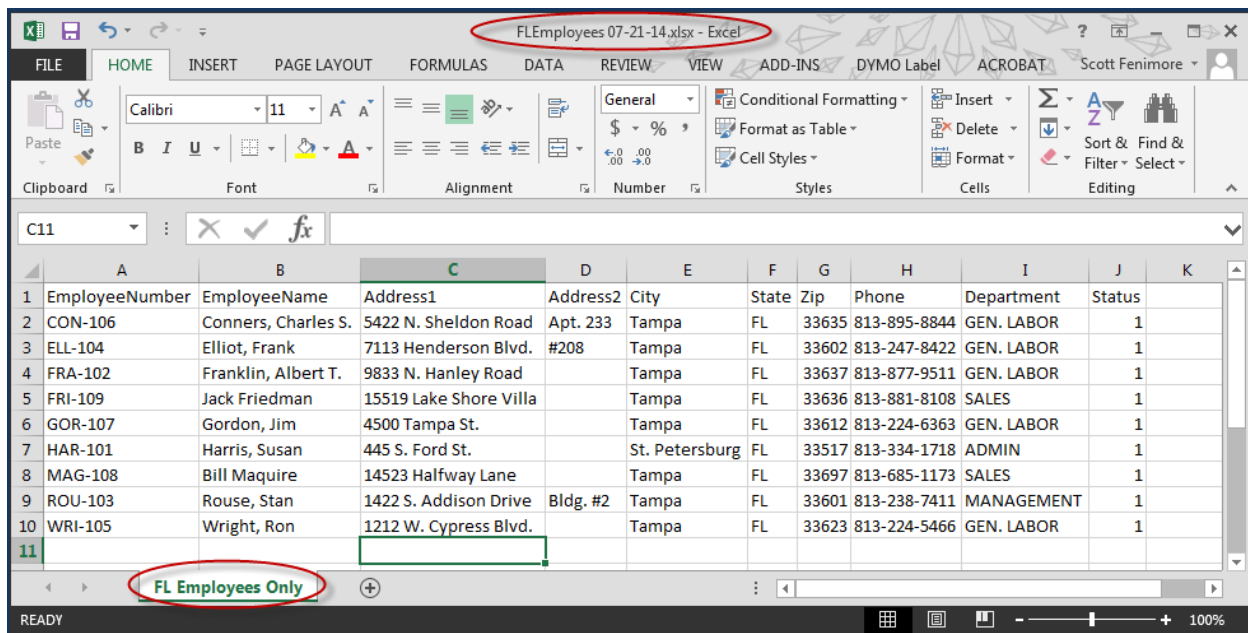
Once the data has been “extracted” from your employee file into DP/EXTRACT, the recommended procedure is to now save this query off to a new Excel Spreadsheet with its own naming convention. This is because each time you perform a unique or different click on the “Retrieve Employees” button, a new query will be made.

When this occurs, whatever data was previously retrieved and sitting in the “Employee Data” tab will automatically be removed and replaced by the new “extraction.”

Therefore, if you were pleased with the query that you made and wanted to use it for your Mail Merge or e-mail blast, then you should click on the triangle in the upper left of the Excel Spreadsheet.

	A	B	C
1	EmployeeNumber	EmployeeName	Address1
2	CON-106	Conners, Charles S.	5422 N. Sheldon Road

This will automatically highlight all data in the current Excel tab. You can then click on the “Copy” option at the top of the screen or use the **CTRL C** function to copy the data. Then, click on “File,” “New”, and select “Blank Workbook” in Excel and “Paste” (**CTRL V**) the data into the new **Workbook** and save it with new filename as shown in the following screen.



Notice in red how you can uniquely name the tab and create the filename to have special meaning to the retrieval just performed.

This way you know what you are looking at and when it should be used. Just remember to save the files in a secure place on your PC or network drives. These are now normal Excel files and anyone can gain access to this sensitive data in Excel. You may not want everyone having full access to your entire employee list!

**Zip Code Mask:** This field allows you to enter the zip code of the employees that you are looking for and to “mask” out or “exclude” all other zip codes from the “extraction.” For example, if you were to enter “33603,” as the zip code, only those employee’s records with “33603” as the zip code will be retrieved. However, masking is more flexible than that. If you only entered “336” in the first three characters of the zip code, you would get employees from a far wider range of zip codes throughout Florida.

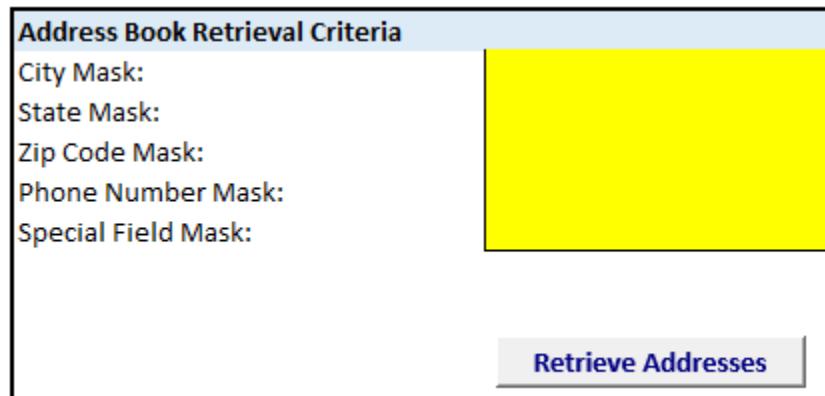
**Phone Number Mask:** This field allows you to enter the Phone Number of the employees that you are looking for and to “mask” out or “exclude” all other Phone Numbers from the “extraction.” For example, if you were to enter “305-681” in the first seven characters of the phone number, only those employee records beginning with a “305-681” in the phone number will be retrieved. However, masking is more flexible than that. If you only entered “305” in the first three characters of the phone number, you would get employees from the entire “305” area code throughout Florida.

**Department Mask:** This field allows you to enter the “Department Mask” of the employees that you are looking for and to “mask” out or “exclude” all other Departments from the “extraction.” For example, if you were to enter “Sales” in the first five characters of the Department Mask, only those employee’s records matching “Sales” in the Department field will be retrieved. However, masking is more flexible than that. If you utilize a partial numeric or alpha code as part of your Department identifier, such as “Sales01” in the first seven characters of the Department number, you would be able to retrieve Sales Department “01” which may be a region of a state or part of the country.

**Include Non-Active Employees:** This field is a Y(es) or N(o) prompt that allows you to include just “Active” employees by answering either N(o) or by leaving it blank. If you answer Y(es) in this field, you will be able to retrieve ALL employees in the Employee File and not just the ones that are currently active and employed. This would include any on “Leave of Absence,” “Terminated,” “Laid Off” or who have “Quit.”

## Address Book (*System Administrator*)

With the “Address Book Retrieval Criteria” option, you will find the following fields:



The screenshot shows a form titled "Address Book Retrieval Criteria" with a light blue header. Below the header, there are five text input fields: "City Mask:", "State Mask:", "Zip Code Mask:", "Phone Number Mask:", and "Special Field Mask:". To the right of these fields is a large yellow rectangular area, likely representing a redacted or placeholder image. At the bottom right of the form is a button labeled "Retrieve Addresses".

**City Mask:** This field allows you to enter the name of a city that you are looking for and to “mask” out or “exclude” all other cities from the “extraction.”

For example, if you were to enter **“Tampa,”** as the name of the city, only those address records with **“Tampa”** as the city name will be retrieved.

**State Mask:** This field allows you to enter the name of a state that you are looking for and to **“mask”** out or **“exclude”** all other states from the **“extraction.”** For example, if you were to enter **“FL,”** as the name of the state, only those address records stored in the **“Productivity Tools”** feature found within the **System Administrator** module with **“FL”** as the state name will be retrieved as shown in the following example.

**Address Book Retrieval Criteria**

City Mask:

State Mask: FL

Zip Code Mask:

Phone Number Mask:

Special Field Mask:

Retrieve Addresses

The **Address Book** records show up in the corresponding **“Address Book Data”** tab along the bottom of the Excel screen once you click on the **“Retrieve Addresses”** button.

	A	B	C	D	E	F	G	H	I	J
1	Name	Address1	Address2	City	State	Zip	Contact	Phone	Special	
2	Bob Jackson	1829 U.S. Hwy. 19		Spring Hill	FL	34606	Bob Jackson	352-448-5311	V1	
3	Jim Hamilton	4839 N. Orange Avenue	Suite 200	Orlando	FL	32818	Jim Hamilton	407-551-6791	V1	
4	Mary Swanson	3701 Manatee Avenue		Bradenton	FL	34207	Mary Swanson	941-851-6794	G1	
5	Terry Hanson	8840 N. Florida Avenue	Building #4	Tampa	FL	33614	Terry Hanson	813-784-1543	K1	
6										

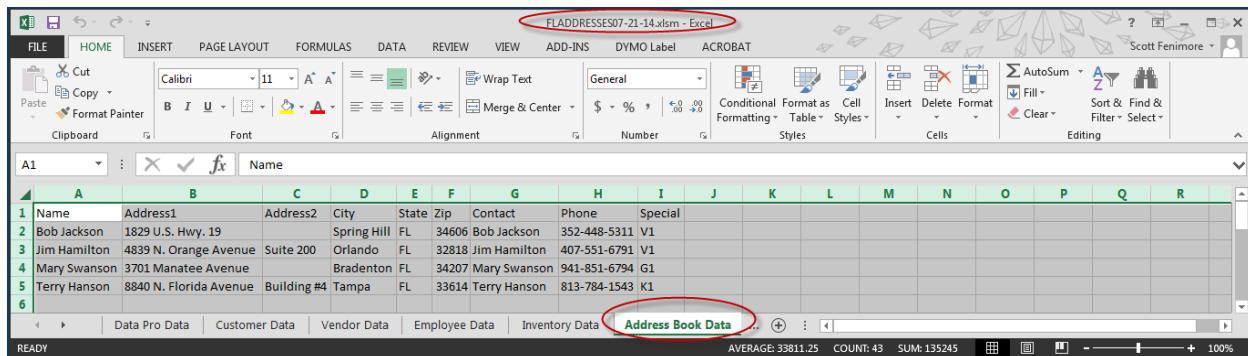
Navigation: Data Pro Data | Customer Data | Vendor Data | Employee Data | Inventory Data | **Address Book Data**

Once the data has been **“extracted”** from your **Address Book** file into **DP/EXTRACT**, the recommended procedure is to now save this query off to a new Excel Spreadsheet with its own naming convention. This is because each time you perform a unique or different click on the **“Retrieve Addresses”** button, a new query will be made.

When this occurs, whatever data was previously retrieved and sitting in the **“Address Book Data”** tab will automatically be removed and replaced by the new **“extraction.”** Therefore, if you were pleased with the query that you made and wanted to use it for your Mail Merge or e-mail blast, then you should click on the triangle in the upper left of the Excel Spreadsheet.

	A	B	C	D
1	Name	Address1	Address2	City
2	Bob Jackson	1829 U.S. Hwy. 19		Spring Hill

This will automatically highlight all data in the current Excel tab. You can then click on the “Copy” option at the top of the screen or use the **CTRL C** function to copy the data. Then, click on “File,” “New”, and select “Blank Workbook” in Excel and “Paste” (**CTRL V**) the data into the new **Workbook** and save it with new filename as shown in the following screen.



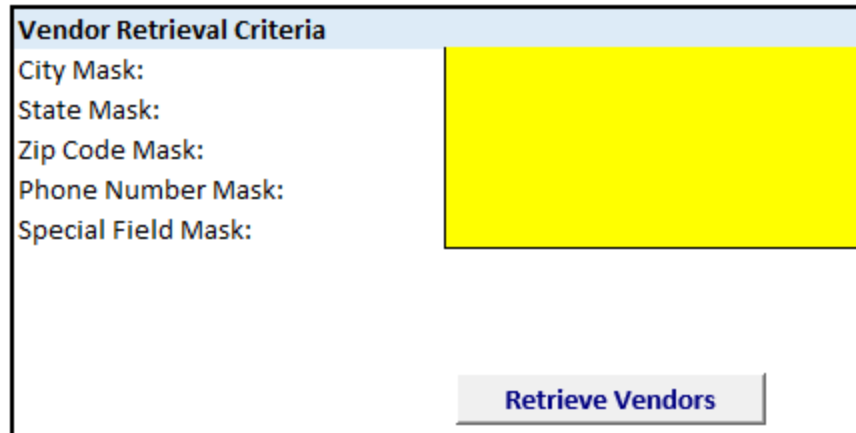
Notice in red how you can uniquely name the tab and create the filename to have special meaning to the retrieval just performed. This way you know what you are looking at and when it should be used. Just remember to save the files in a secure place on your PC or network drives. These are now normal Excel files and anyone can gain access to this sensitive data in Excel. You may not want everyone having full access to your entire Address Book list!

**Zip Code Mask:** This field allows you to enter the zip code of the contacts that you are looking for and to “mask” out or “exclude” all other zip codes from the “extraction.” For example, if you were to enter “33603,” as the zip code, only those contact’s records with “33603” as the zip code will be retrieved. However, masking is more flexible than that. If you only entered “336” in the first three characters of the zip code, you would get contacts from a far wider range of zip codes throughout Florida.

**Phone Number Mask:** This field allows you to enter the Phone Number of the contacts that you are looking for and to “mask” out or “exclude” all other Phone Numbers from the “extraction.” For example, if you were to enter “305-681” in the first seven characters of the phone number, only those contact records beginning with a “305-681” in the phone number will be retrieved. However, masking is more flexible than that. If you only entered “305” in the first three characters of the phone number, you would get contacts from the entire “305” area code throughout Florida.

## Accounts Payable

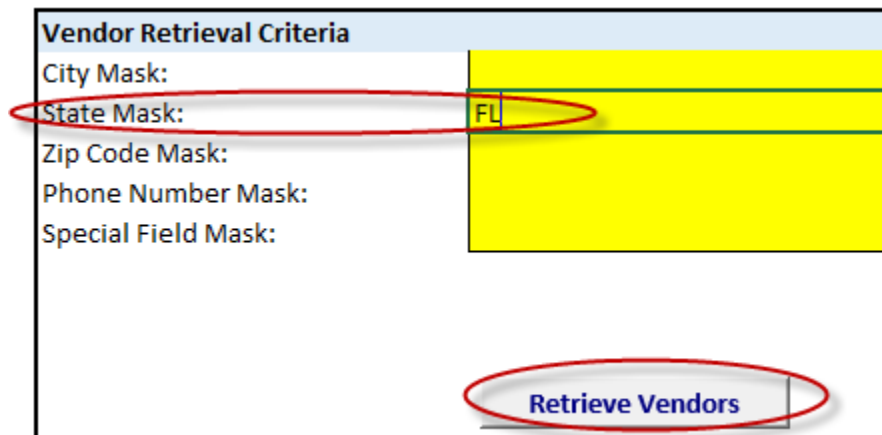
Starting with the “Vendor Retrieval Criteria” option, you will find the following fields:



The screenshot shows a form titled "Vendor Retrieval Criteria" with a light blue header. Below the header are five input fields: "City Mask:", "State Mask:", "Zip Code Mask:", "Phone Number Mask:", and "Special Field Mask:". The input area for these fields is highlighted in yellow. At the bottom right of the form is a button labeled "Retrieve Vendors".

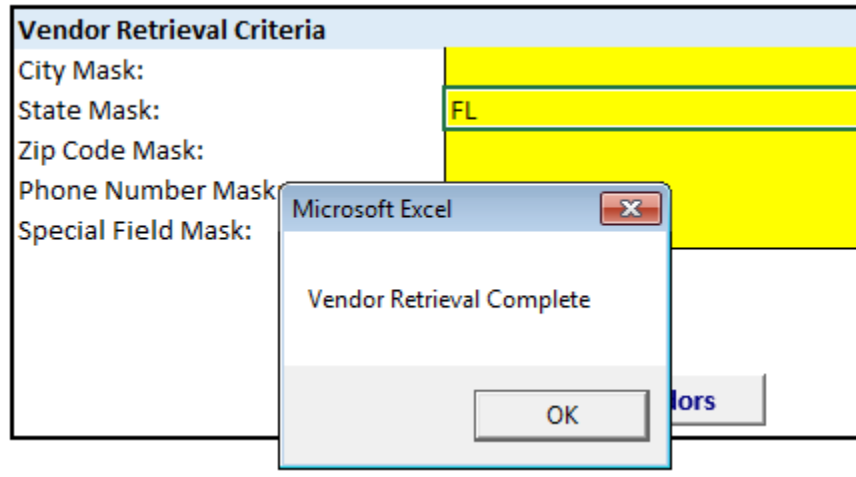
**City Mask:** This field allows you to enter the name of a city that you are looking for and to “mask” out or “exclude” all other cities from the “extraction.” For example, if you were to enter “Tampa,” as the name of the city, only those vendor records with “Tampa” as the city name will be retrieved.

**State Mask:** This field allows you to enter the name of a state that you are looking for and to “mask” out or “exclude” all other states from the “extraction.” For example, if you were to enter “FL,” as the name of the state, only those vendor records with “FL” as the state name will be retrieved as shown in the following example. The vendor records show up in the corresponding “Vendor Data” tab along the bottom of the Excel screen once you click on the “Retrieve Vendors” button.



This screenshot is similar to the previous one, but the "State Mask:" field is highlighted with a red oval and contains the text "FL". The "Retrieve Vendors" button at the bottom right is also circled in red.

Once the search for **Vendor** data has been completed, the following screen will appear:



By clicking on the **“Vendor Data”** tab at the bottom of the sheet, you can see the results:

VendorNumber	Contact	VendorName	Address1	Address2	City	State	Zip	Country	Phone	Email	Special
BOW1	Tom Hill	Bower's Roofing Supplies	1673 N. Nebraska Avenue		Tampa	FL	33613	US	813-247-8841	thill@brs.com	Roofing
CFS	Bob Clark	Clark Financial Services, LLC	9264 Hillsborough Ave.		Tampa	FL	33636	US	813-885-7166	cfs@aol.com	Financial
FLA-NAT'L	Lori Mets	Fla. Nat'l Bk - Fed Depository	P.O. Box 7500		Tampa	FL	33651	US	813-224-9906	lmets@flbank.net	Bank
FLO1	Jim Sampson	Florida Lumber, Inc.	6128 N. Florida Avenue	Suite 610	St. Petersburg	FL	33704	US	813-667-8893	Jim@floridalumber.com	Lumber
GEN1	Accounting	General Telephone Company	100 N. Madison Street	P.O. Box GTE	Tampa	FL	33601	US	813-223-5461		Telephone
NCNB	Dan Thomas	NCNB National Bank	P.O. Box 201		Tampa	FL	33701		813-224-1202	dan14@aol.com	Bank
S&S	Tom Hanks	S & S Sub Contractors	P.O. 700		Clearwater	FL	32455	US	813-447-1232	thanks@sssubcontractors.com	Sub Contractors
SCO1	Don Waterman	Scotty's Building Supplies	8765 W. Hillsborough Ave.		Tampa	FL	33635	US	813-887-4621	dwater181@gmail.com	General
State-Fl		State of Florida Tax Dept.	400 Collins Ave.	Suite 505	Tallahassee	FL	39810	US	850-224-6321		Government
STATE-UNEM		State Unemployment Office	1600 N. TRAIL DR.		Tallahassee	FL	39810		850-852-9364		Government
SUN1	Susan Harris	Suncoast Concrete Supplies	8483 N. Ulmerton Road	Bldg. #2	Clearwater	FL	33704	US	813-585-6611	sharris@suncoast.com	Concrete
TAM1	Terry Jackson	Tampa Electrical Supplies	9833 N. Kennedy Blvd.	#100	Tampa	FL	33602		813-875-1243	terry.jackson@tes.net	Electric
TECO	Accounting	Tampa Electric Co.	5400 N. Ashley St.		Tampa	FL	33610	US	813-236-88000	accounting@teco.com	Power Co.
UNI1	Donna Jackson	Unified Supply Company	1011 N. Benjamin Road	Suite 302	Tampa	FL	33634		813-248-9511	donna@unified.com	General
WATER	Accounting	Tampa Water & Sewage Co.	P.O. Box 4000		Tampa	FL	33410	US		accounting@TWS.net	Water Co.
WORK	Mike Green	Work Place	2000 Hillsborough Ave		Tampa	FL	33625	US	813-882-1700	mikeg1093@workplace.com	Office Supplies

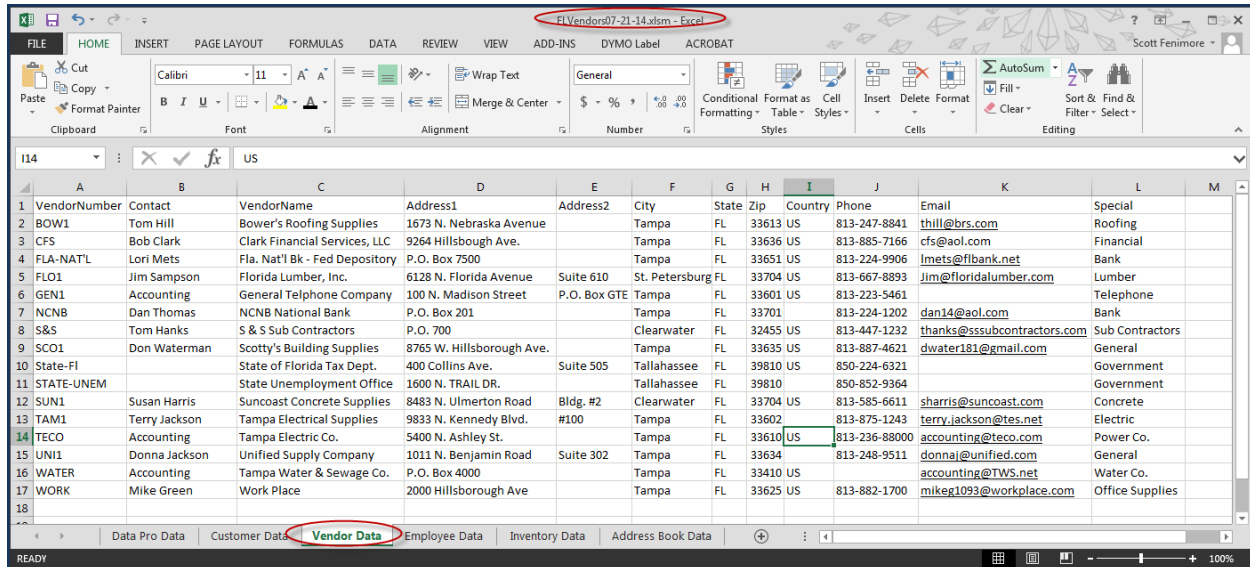
Once the data has been **“extracted”** from your **Vendor** file into **DP/EXTRACT**, the recommended procedure is to save this query off to a new Excel Spreadsheet with its own naming convention. This is because each time you perform a unique or different click on the **“Retrieve Vendors”** button, a new query will be made.

When this occurs, whatever data was previously retrieved and sitting in the **“Vendor Data”** tab will automatically be removed and replaced by the new **“extraction.”** Therefore, if you were pleased with the query that you made and wanted to use it for your Mail Merge or e-mail blast, then you should click on the triangle in the upper left of the Excel Spreadsheet.

	A	B	C
1	VendorNumber	Contact	VendorName
2	BOW1	Tom Hill	Bower's Roofing Supplies

This will automatically highlight all data in the current Excel tab. You can then click on the **“Copy”** option at the top of the screen or use the **CTRL C** function to copy the data.

Then, click on “File,” “New”, and select “Blank Workbook” in Excel and “Paste” (CTRL V) the data into the new **Workbook** and save it with new filename as shown in the following screen.



Notice in red how you can uniquely name the tab and create the filename to have special meaning to the retrieval just performed. This way you know what you are looking at and when it should be used. Just remember to save the files in a secure place on your PC or network drives. These are now normal Excel files and anyone can gain access to this sensitive data in Excel. You may not want everyone having full access to your entire vendor list to send to your competitors!

**Zip Code Mask:** This field allows you to enter the zip code of the vendors that you are looking for and to “mask” out or “exclude” all other zip codes from the “extraction.” For example, if you were to enter “33603,” as the zip code, only those vendor records with “33603” as the zip code will be retrieved. However, masking is more flexible than that. If you only entered “336” in the first three characters of the zip code, you would get vendors from a far wider range of zip codes throughout Florida.

**Phone Number Mask:** This field allows you to enter the Phone Number of the vendors that you are looking for and to “mask” out or “exclude” all other Phone Numbers from the “extraction.” For example, if you were to enter “305-681” in the first seven characters of the phone number, only those vendors’ records beginning with a “305-681” in the phone number will be retrieved. However, masking is more flexible than that. If you only entered “305” in the first three characters of the phone number, you would get vendors from the entire “305” area code throughout Florida.

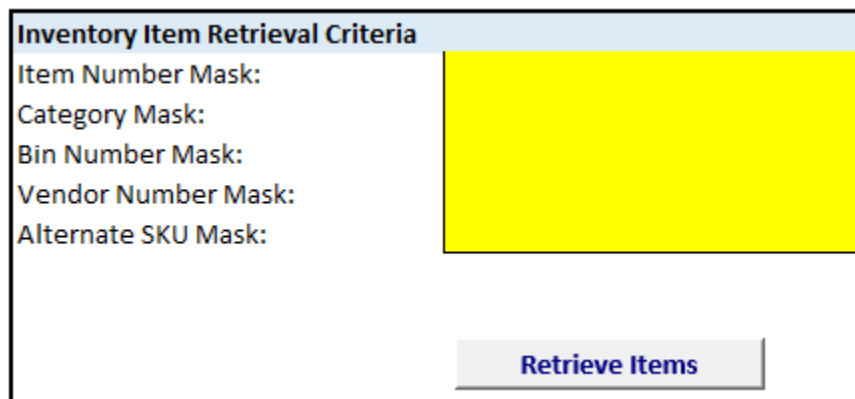


**Special Field Mask:** This field allows you to enter the **Special Field** data of the vendors that you are looking for and to “**mask**” out or “**exclude**” all other vendors from the “**extraction**” based on whether they meet the requirements of the **Special Field** data. The “**Special Field**” in the **Accounts Payable** module is specifically designed to allow users to title it and use it for a wide range of “**sortable**” data.

This field is a “**sort**” field in addition to the **Vendor Number** and **Vendor Name** fields. For example, many people use this field to identify the “**types**” of vendors they are or what types of products or services they provide. For instance, vendors could be sorted by “**AC Repair,**” “**Landlord,**” “**Wholesale,**” “**Manufacturer,**” “**Consultants**” and more. Having an additional “**sort field**” makes it easy to group them by “**Vendor Type.**” Likewise, depending on your coding scheme, you can “**mask**” out groups of vendors using this field.

## Inventory Management

Starting with the “**Inventory Item Retrieval Criteria**” option, you will find the following fields:



The screenshot shows a dialog box titled "Inventory Item Retrieval Criteria". It contains five input fields for masks: "Item Number Mask:", "Category Mask:", "Bin Number Mask:", "Vendor Number Mask:", and "Alternate SKU Mask:". A "Retrieve Items" button is located at the bottom right of the dialog.

**Item Number Mask:** This field allows you to enter the **Inventory Item Number** that you are looking for and to “**mask**” out or “**exclude**” all other **Inventory Items** from the “**extraction.**” For example, if you were to enter “**53804,**” as the first five characters of the item number, only those item records with “**53804**” in the first five characters of the item number will be retrieved, regardless of how long the rest of the item number is. Or, the “**53804**” portion may represent the “**fifth, sixth, seventh, eighth and ninth**” position of the item number. Just remember as shown below, if you have anything preceding that you want to “**mask out,**” insert the “**?**” beforehand:

**Inventory Item Retrieval Criteria**

Item Number Mask:

Category Mask:

Bin Number Mask:

Vendor Number Mask:

Alternate SKU Mask:

It doesn't matter what precedes that section of the item number, if there is an exact match of the positioning of the mask, only those item numbers that match the mask will be included in the retrieval as shown in the following screen:

Item Number	Description1	Description2	Description3	Description4	UOM	Category	BinNumber	Vendor	AltSKU
200053804-105	Red Tiles - Spanish Flavor	Home Designer Series			Each	Tiles	B-506	SUN1	74610012
364053804-908	Green Tiles - French Flavor	Home Designer Series			Each	Tiles	B-510	SUN1	74610158
634153804-228	Brown Tiles - American Flavor	Home Designer Series			Each	Tiles	B-620	SUN1	74610840
738153804-881	Gray Tiles - Canadian Flavor	Home Designer Series			Each	Tiles	B-665	SUN1	74610957

Notice in the example above that although all of the item numbers start with a differing four digit sequence, they all have "53804" in common in the middle of their item number in the same position. Therefore, they can be masked from a list of **100** items or **100,000** items.

**Category Mask:** This field allows you to enter a "Mask" based on information stored in the "Category" field. This is normally used in the **Inventory Management** module to identify the "types" of products so you can group "like" products together for easier selections.

Enter the description of the "Category" that you are looking for and to "mask" out or "exclude" all other items from the "extraction." For example, if you were to enter "Tiles," as the **Category** as shown in the example below, only those item records with "Tiles" in the **Category** field will be retrieved as shown in the following example.

**Inventory Item Retrieval Criteria**

Item Number Mask:

Category Mask:

Bin Number Mask:

Vendor Number Mask:

Alternate SKU Mask:

**Retrieve Items**

Once the search for **Category** retrieval has been completed, the following screen will appear:

Microsoft Excel

Item Retrieval Complete

OK

**Retrieve Vendors**

**Inventory Item Retrieval Criteria**

Item Number Mask:

Category Mask:

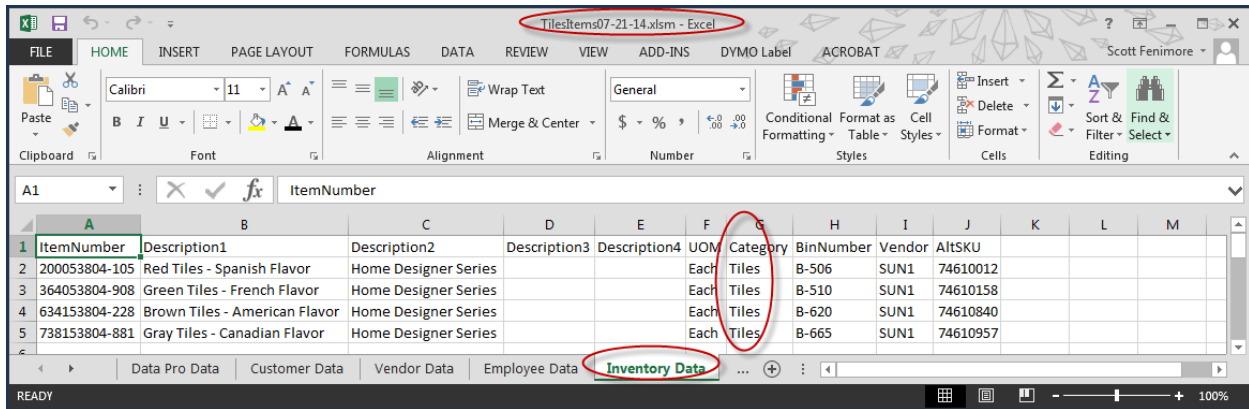
Bin Number Mask:

Vendor Number Mask:

Alternate SKU Mask:

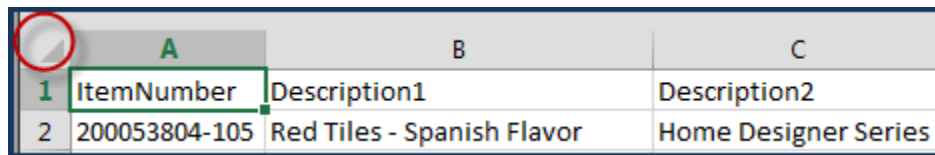
**Retrieve Items**

The item records show up in the corresponding **“Inventory Data”** tab along the bottom of the Excel screen once you click on the **“Retrieve Items”** button. By clicking on the **“Inventory Data”** tab at the bottom of the sheet, you can see the results:



Once the data has been “**extracted**” from your item file into **DP/EXTRACT**, the recommended procedure is to save this query off to a new Excel Spreadsheet with its own naming convention. This is because each time you perform a unique or different click on the “**Retrieve Items**” button, a new query will be made.

When this occurs, whatever data was previously retrieved and sitting in the “**Inventory Data**” tab will automatically be removed and replaced by the new “**extraction.**” Therefore, if you were pleased with the query that you made and wanted to use it for your Mail Merge or e-mail blast, then you should click on the triangle in the upper left of the Excel Spreadsheet.



This will automatically highlight all data in the current Excel tab. You can then click on the “**Copy**” option at the top of the screen or use the **CTRL C** function to copy the data. Then, click on “**File,**” “**New,**” and select “**Blank Workbook**” in Excel and “**Paste**” (**CTRL V**) the data into the new **Workbook** and save it with new filename as shown in the previous screen.

Notice in red how you can uniquely name the tab and create the filename to have special meaning to the retrieval just performed. This way you know what you are looking at and when it should be used. Just remember to save the files in a secure place on your PC or network drives. These are now normal Excel files and anyone can gain access to this sensitive data in Excel. You may not want everyone having full access to your entire Inventory Listing to send to your competitors!

**Bin Number Mask:** This field allows you to enter the **Bin Number Mask** that you are looking for and to “**mask**” out or “**exclude**” all other **Inventory Items** from the “**extraction**” that aren’t located in the “**Bins**” that you have specified. For example, if you were to enter “**B-6,**” as the **Bin Number Mask**, only those item numbers with a **Bin Number** such as “**B-665**” will be retrieved.

**Inventory Item Retrieval Criteria**

Item Number Mask:

Category Mask:

Bin Number Mask:

Vendor Number Mask:

Alternate SKU Mask:

When you click on the “**Retrieve Items**” button, you could get results such as the following:

ItemNumber	Description1	Description2	Description3	Description4	UOM	Category	BinNumber	Vendor	AltSKU
634153804-228	Brown Tiles - American Flavor	Home Designer Series			Each	Tiles	B-620	SUN1	74610840
738153804-881	Gray Tiles - Canadian Flavor	Home Designer Series			Each	Tiles	B-665	SUN1	74610957

The retrieval excludes any items that start with a “**B-5**” in their Bin Number Location.

**Vendor Number Mask:** This field allows you to enter the **Vendor Number Mask** of the items that you are looking for and to “**mask**” out or “**exclude**” all other items from the “**extraction.**” For example, if you were to enter “**UNI1**” in the first four characters of the **Vendor Number**, only those items with a vendor assigned to them of “**UNI1**” in the **Primary Vendor** field will be retrieved.

**Inventory Item Retrieval Criteria**

Item Number Mask:

Category Mask:

Bin Number Mask:

Vendor Number Mask:

Alternate SKU Mask:

When you click on the “**Retrieve Items**” button, you could get results such as the following:

ItemNumber	Description1	Description2	Description3	Description4	UOM	Category	BinNumber	Vendor	AltSKU
364053804-908	Green Tiles - French Flavor	Home Designer Series			Each	Tiles	B-510	UNI1	74610158
738153804-881	Gray Tiles - Canadian Flavor	Home Designer Series			Each	Tiles	B-665	UNI1	74610957

**Alternative SKU Mask:** This field allows you to enter the **Alternative SKU** number for items that you are looking for and to “**mask**” out or “**exclude**” all other items from the “**extraction**” based on whether they meet the requirements of the **Alternative SKU** field. The “**Alternative SKU Field**” in the **Inventory Management** module is specifically designed to allow users to find inventory items both by their internal item number coding scheme as well as either their “**Vendor’s Item Number**” scheme or by **UPC codes** (*Universal Product Codes*). The system will automatically find the correct number when scanned in a bar code reader by searching either field for the correct number and cross referencing both fields.

When you click on the “**Retrieve Items**” button, you could get results such as the following:

ItemNumber	Description1	Description2	Description3	Description4	UOM	Category	BinNumber	Vendor	AltSKU
200053804-105	Red Tiles - Spanish Flavor	Home Designer Series			Each	Tiles	B-506	SUN1	74610012
364053804-908	Green Tiles - French Flavor	Home Designer Series			Each	Tiles	B-510	UNI1	74610158
634153804-228	Brown Tiles - American Flavor	Home Designer Series			Each	Tiles	B-620	SUN1	74610840
738153804-881	Gray Tiles - Canadian Flavor	Home Designer Series			Each	Tiles	B-665	UNI1	74610957

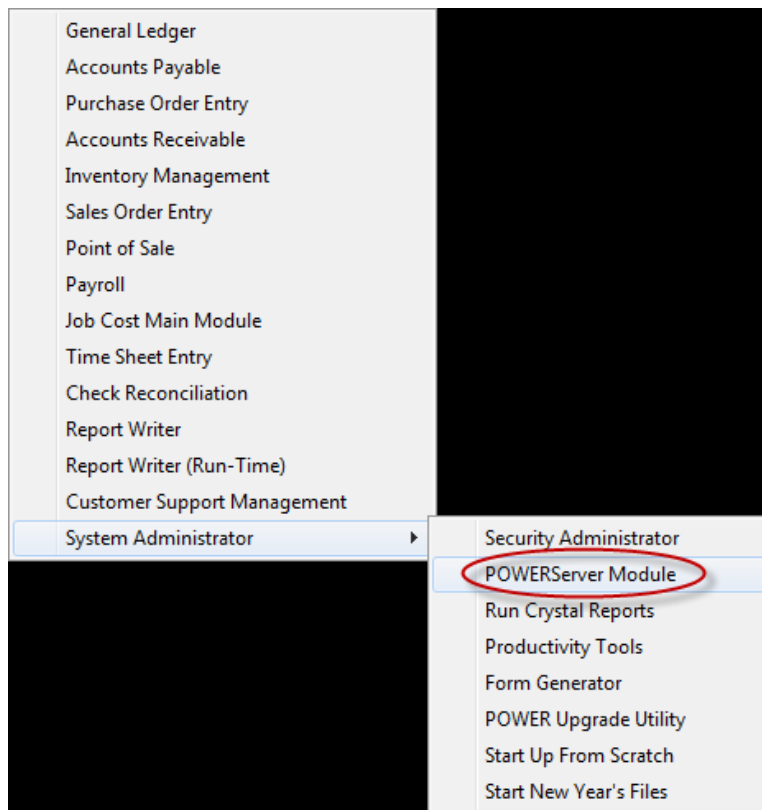
# POWERServer

This section will cover the general concepts of the **POWERServer** module which is included as a core component of the **System Administrator** module. It is included here as it is required that the **POWERServer** be configured and running for the **DP/EXTRACT** module to be able to function.

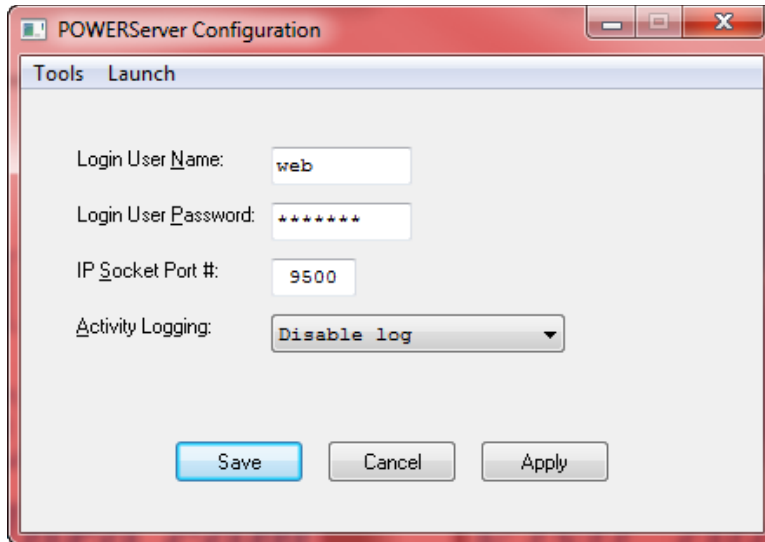
The prerequisite required to use the **POWERServer** module is the **Advanced Security Administrator** module. It must be installed and running. You cannot use “**Standard Security**” with the **POWERServer**. Instead, you must be able to specify a **User ID** to be assigned to handle the **TCP/IP** calls from **DP/EXTRACT** to the **POWERServer**, which passes along the specific users’ rights and permissions to access data from the various modules.

## POWERSERVER CONFIGURATION

The **POWERServer** may be accessed from the “**Systems**” menu as shown below:



Once you select the **POWERServer Module**, there are four data items that need to be set up for the **POWERServer Configuration**.

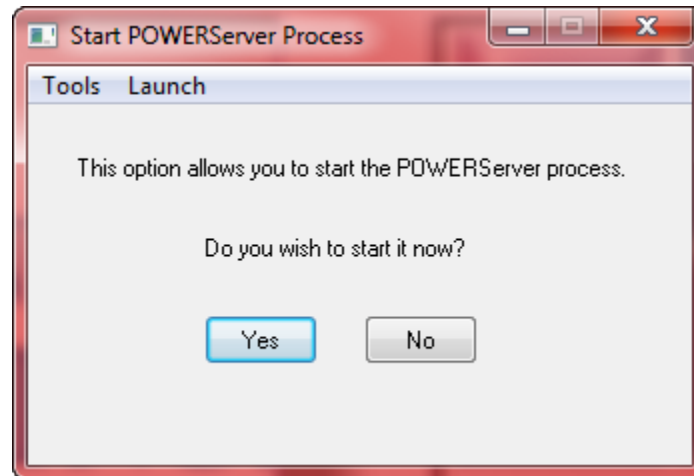


<b>LOGIN USER NAME</b>	The <b>Login User Name</b> is the <b>User ID</b> set up in the <b>Advanced Security Administrator</b> module for the specific user to be called to communicate between the client and the <b>POWERServer</b> . “ <b>Web</b> ” is a common User ID used for defining web servers and other automated communications.
<b>LOGIN USER PASSWORD</b>	The <b>Login User Password</b> is the password that was assigned to the specific <b>User ID</b> in the <b>Advanced Security Administrator</b> that corresponds with the <b>Login User Name</b> .
<b>IP SOCKET PORT</b>	The <b>IP Socket Port</b> is the port number that is defined to use to communicate through the <b>TCP/IP</b> protocol. This port number should match the port number, used by the client application when initializing the <b>TCP/IP</b> connection to the <b>POWERServer</b> . Commonly, <b>Port 9500</b> is used by Data Pro applications.
<b>ACTIVITY LOGGING</b>	<p>The <b>POWERServer</b> module can create a log file, which contains information about user logins and their activity (<i>requests and responses made to and from the POWERServer</i>). There are three choices for logging the <b>POWERServer</b> activity.</p> <ul style="list-style-type: none"> <li>• <b>Disable Log</b></li> <li>• <b>Log Connections Only</b></li> <li>• <b>Log All Activity</b></li> </ul> <p><b>NOTE:</b> When you choose to log “<b>All Activity</b>” the <b>POWERServer</b> log file can become very large in size. It is suggested that this should only be done during a testing or debugging phase of the client application.</p>

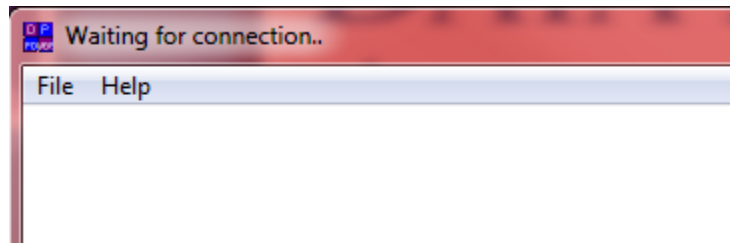


## START POWERSERVER PROCESS

Once the configuration section is completed and saved you may then start the **POWERServer** process. The system will display a box on your screen and ask “**Do you wish to start it now?**” Click on the “**Yes**” button and a new application window will appear on your desktop.



This window must be kept open as it is waiting to receive requests from the client. That is why it is generally better to set up **POWERServer** as a “**Windows Service,**” which allows it to run in the background all of the time, even if you should have to reboot your computer.

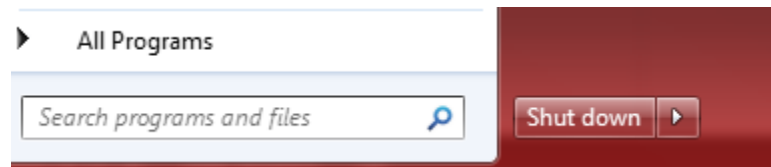


## SETUP POWERSERVER AS A WIN32 SERVICE

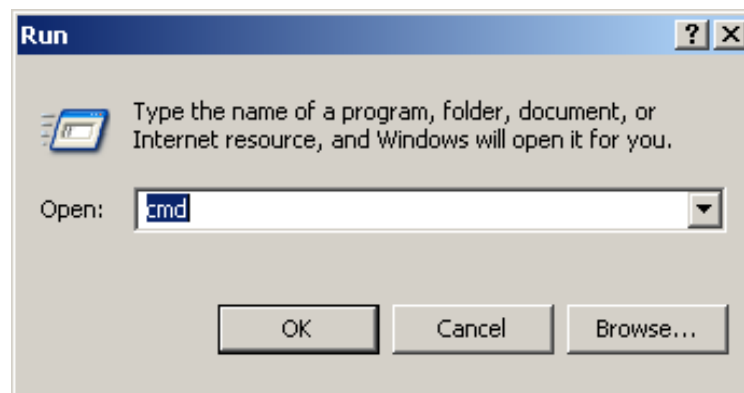
One of the servers or workstations on your network must now be chosen as the **POWERServer “server.”** This is the server that runs the **POWERServer** process in the background, listening for connection requests from the client application (*like DP/EXTRACT*) and then accessing the accounting system. It is recommended that you choose the same network server that the accounting system is installed on.

### SETTING UP POWERSERVICE:

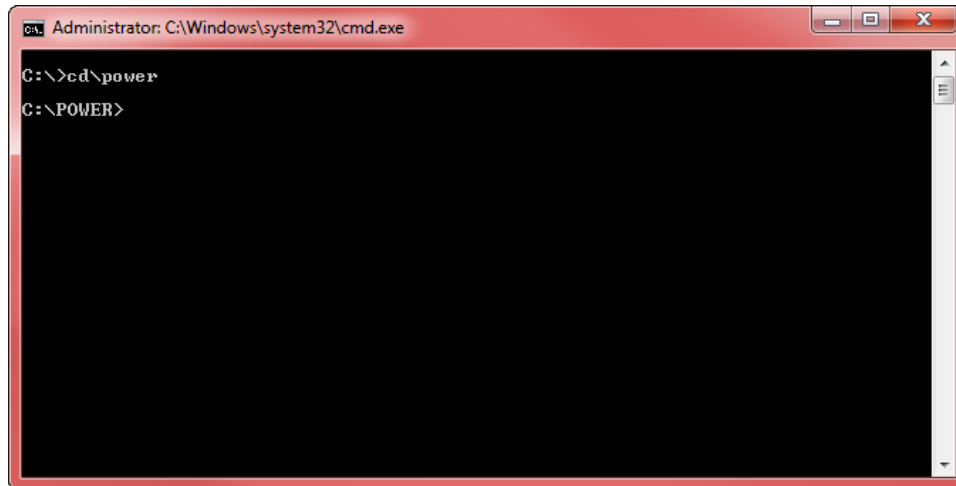
1. From the **Accounting Server**, <click> the **Start** button and select the **Run** menu option or “**Search Programs and Files**” from your desktop as shown below.



Or



2. Type “**cmd**” in the **Open** text box.
3. <Click> the **OK** button or Magnifying Glass. The Command Prompt window displays.



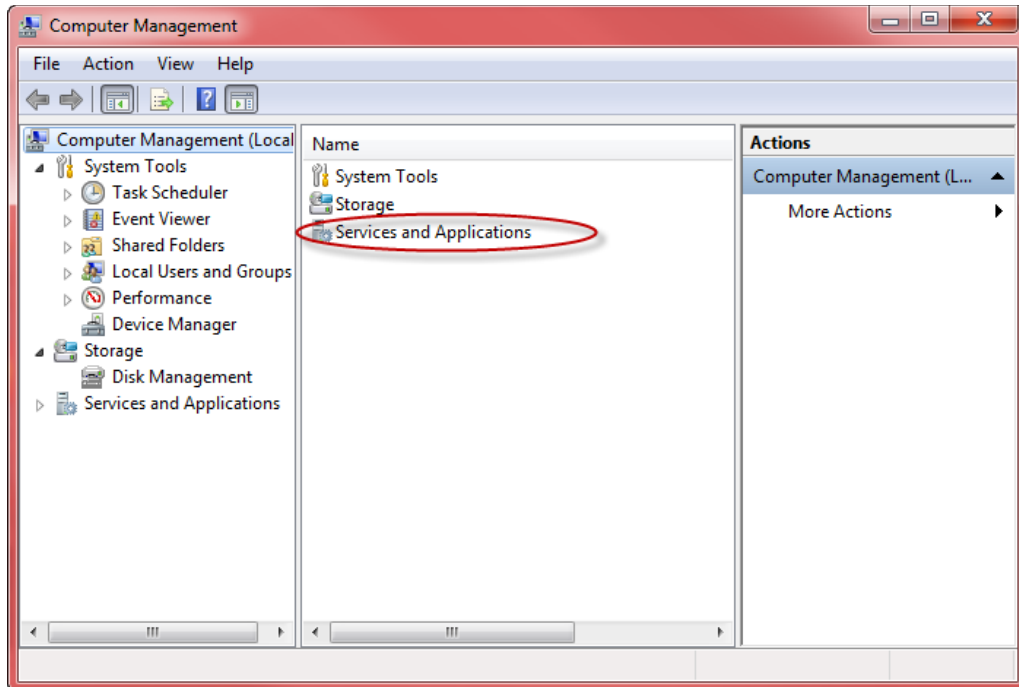
4. Change the directory to where the accounting system is installed (i.e. `cd c:\power`). The prompt changes to the accounting software directory.
5. From the command prompt in the accounting software directory, type “**POWERService install**” and press **Enter** on the keyboard. This command installs the **POWERServer** module as a **Windows Service** which automatically starts whenever your server is turned on or rebooted.
6. Type “**exit**” and press **Enter** on the keyboard to close the command prompt window.

## STARTING THE POWERSERVER FOR THE FIRST TIME

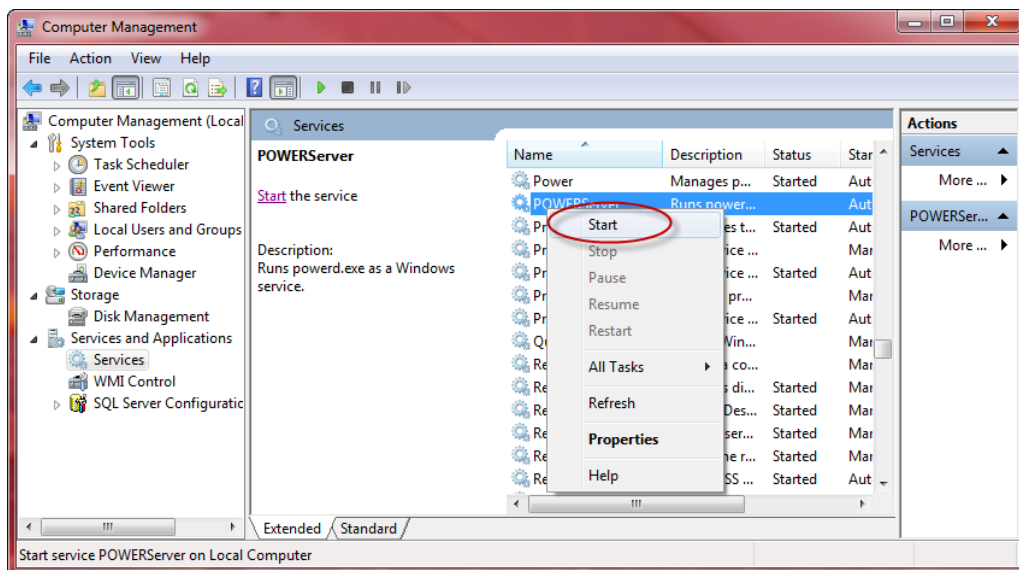
Once the **POWERServer** has been installed as a service, you must start the process for the first time.



1. From your Windows desktop, <right-click> on the **My Computer** icon and select the **Manage** menu option. The Computer Management window displays as shown on the following screen.

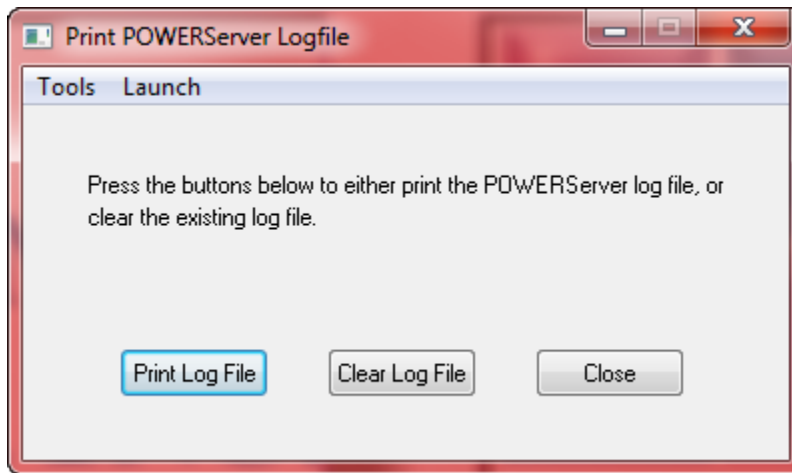


2. From the menu on the left, <click> the **Services and Applications** option and then select the **Services** sub-option. A list of services installed on your system displays in the right window.
3. Scroll down to the **POWERServer** service, <right-click> and then select the **Start** menu option. The **POWERServer** utility starts and returns to the **Computer Management** window.



## PRINT POWERSERVER LOG FILE

You may print the **POWERServer** log file at any time by choosing this option. This option will also allow you to remove the **POWERServer** log file. When you remove the log file, it will be re-created upon the next call to it from the client (**i.e. DP/EXTRACT**). Please keep in mind that if you are logging “**All Activity**,” this file can become very large in size.



Below is a sample portion of one page out of hundreds of a “**printed log file.**”

```
                                Data Pro Accounting Software, Inc.
                                POWERServer Log

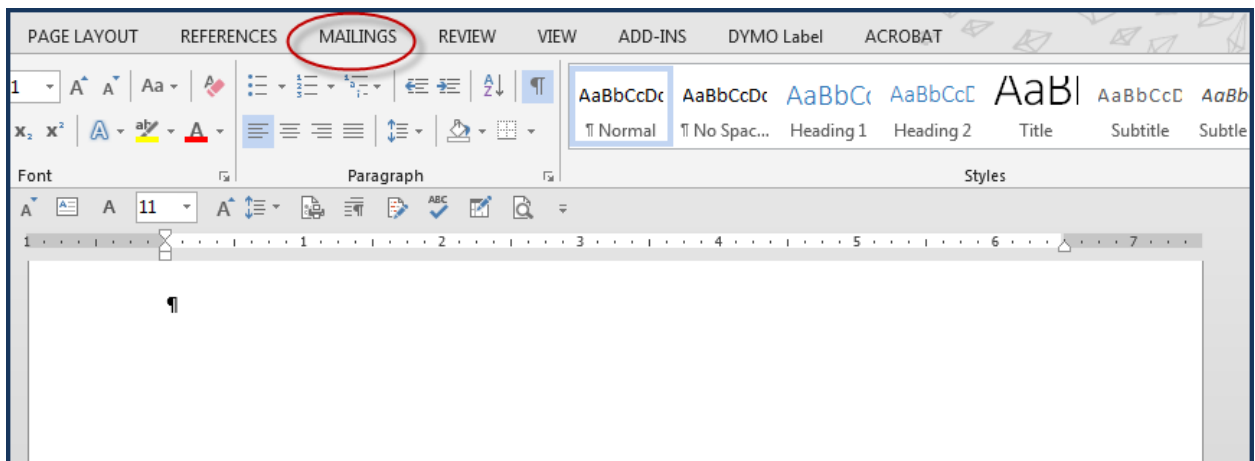
010914 11:53A RECV: <getrec~stop> received from client
010914 11:53A SEND: <0> send to client
010914 11:53A RECV: <format~datavalue=050107.format=("%s^d")> received from client
010914 11:53A SEND: <0~05/01/2007> send to client
010914 11:53A RECV: <format~datavalue=110107.format=("%s^d")> received from client
010914 11:53A SEND: <0~11/01/2007> send to client
010914 11:53A RECV: <getrec~filetype=sd03.keyno=2.begkey=(8138764707,#),endkey=(8138764707,#),fields=(maint,type,minremain,enddate
)> received from client
010914 11:53A SEND: <-5~sd03> send to client
010914 11:53A RECV: <getrec~filetype=sd02.begkey=(8138764707),endkey=(8138764707),keyno=2.fields=(num,sonum,date,contact,status,supr
ep,billcust)> received from client
010914 11:53A SEND: <0~453705~010914~1~8138764707> send to client
010914 11:53A RECV: <getrec~next> received from client
010914 11:53A SEND: <-5~sd02> send to client
010914 11:53A RECV: <DISCON> received from client
010914 11:53A SEND: <0> send to client
```

# PRINTING LABELS USING THE MAIL MERGE FEATURE IN MICROSOFT WORD (*OFFICE 2013*)

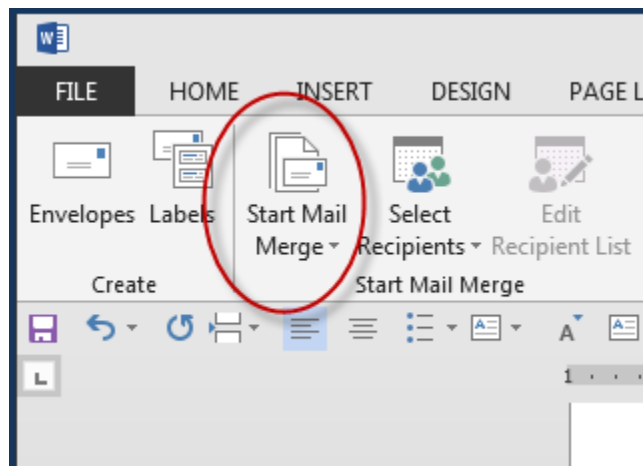
The example below illustrates how to use the data retrieved using the **DP/EXTRACT** application to merge into Microsoft Word for the purpose of creating Mail Merge letters and Marketing documents. This would include address information from a variety of accounting data files such as your **Customers, Vendors, Address Book Contacts and Employees.**

To get started, load the **Microsoft Word** application. This example uses the **Office 2013** version of the product for screen captures and guidelines although the same principals apply to the other versions of Microsoft Word, though the screens will look different.

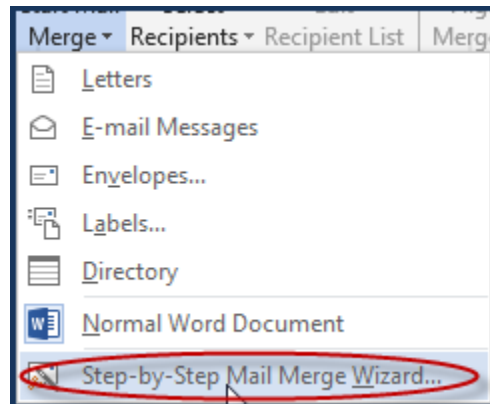
On a blank document in **Microsoft Word**, select the Menu option “**Mailings.**”



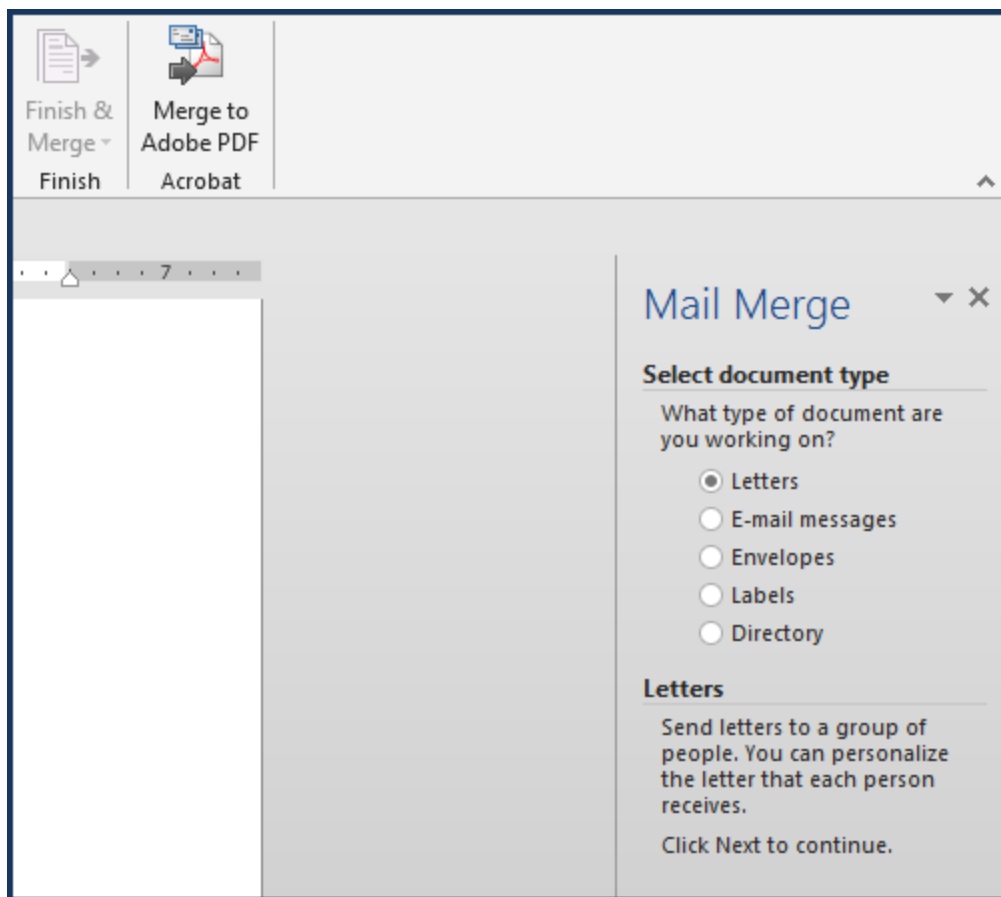
Next, click on the “**Start Mail Merge**” button in Word.



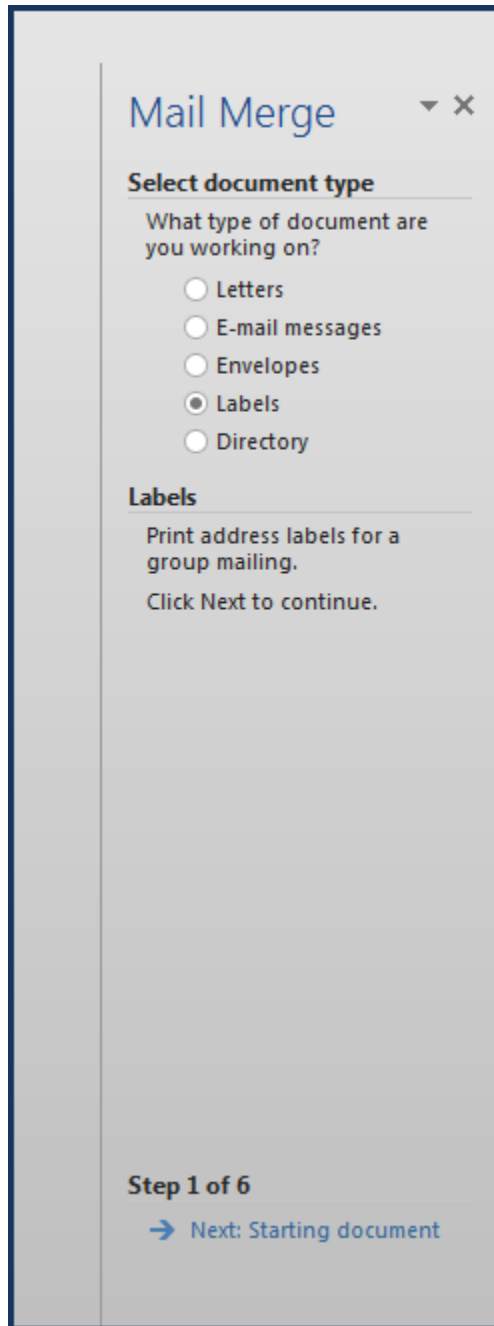
Select the “Step by Step Mail Merge Wizard.”



Follow the instructions and menu options on the right hand side of the document.



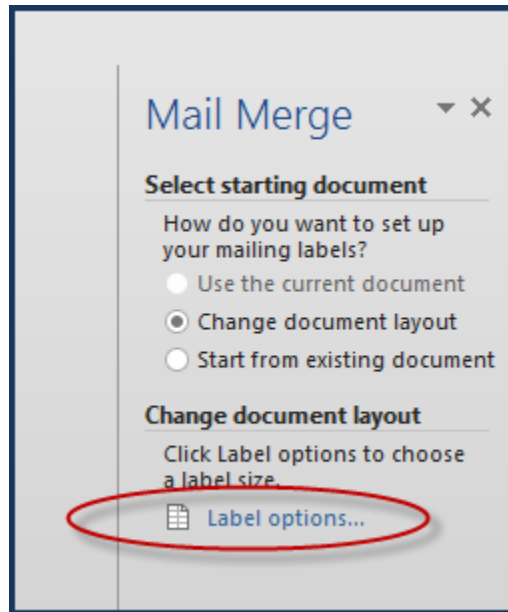
Select the “**Labels**” option. This is **Step 1** of the process as shown below:



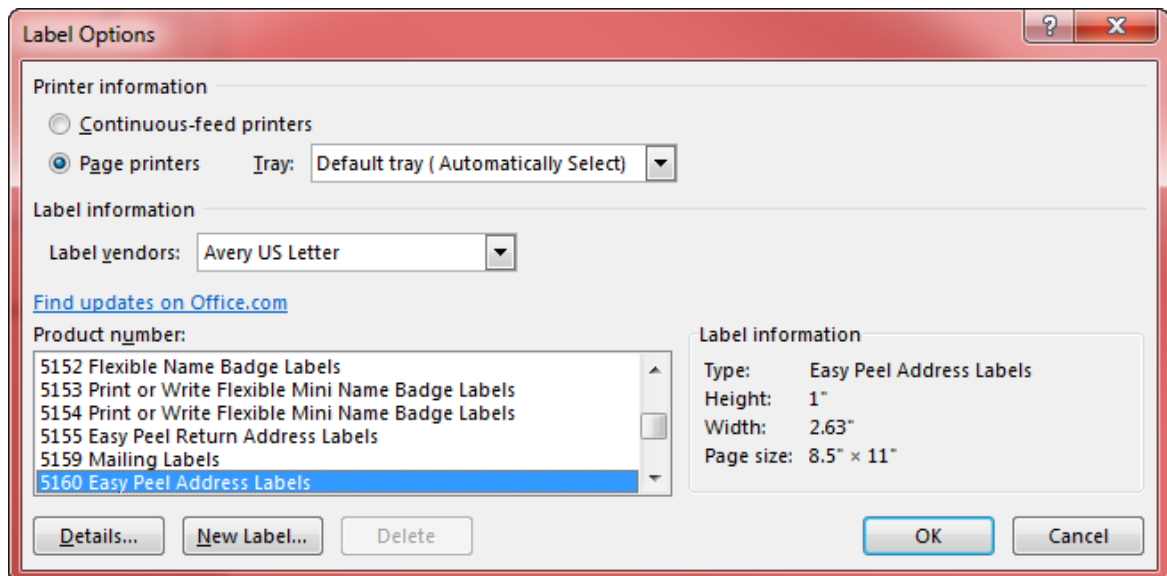
Select “**Next: Starting document.**” The new screen will appear prompting you to choose the current document or whether to “**Change Document Layout.**”



Select this option and then click on **“Label Options”** to select the format for your labels.

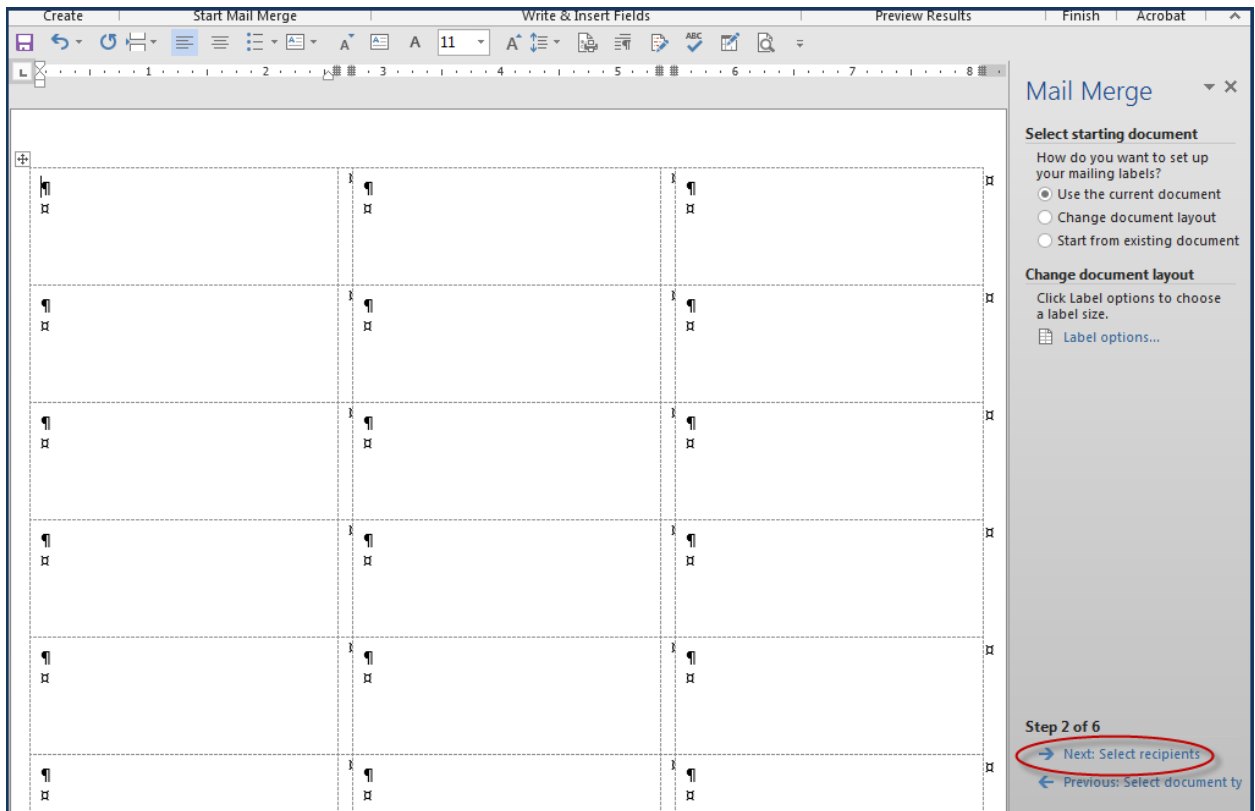


Choose **“Avery US Letter”** as the Label vendor and then select **“5160 Easy Peel Address Labels”** as the **“Product number.”** This will provide you three across labels on an **8.5” x 11”** sheet of paper which is standard for all LaserJet style printers. It will provide you a **1” high x 2.63”** wide label.

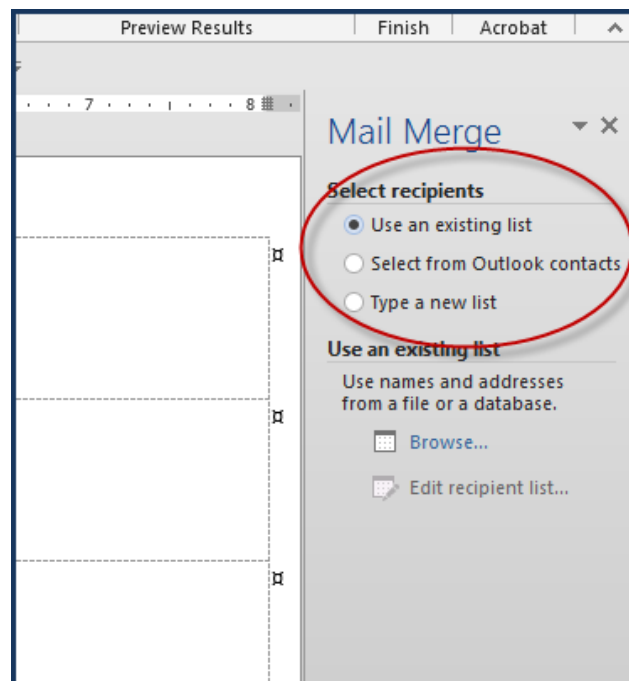


Click on **“OK”** to continue.

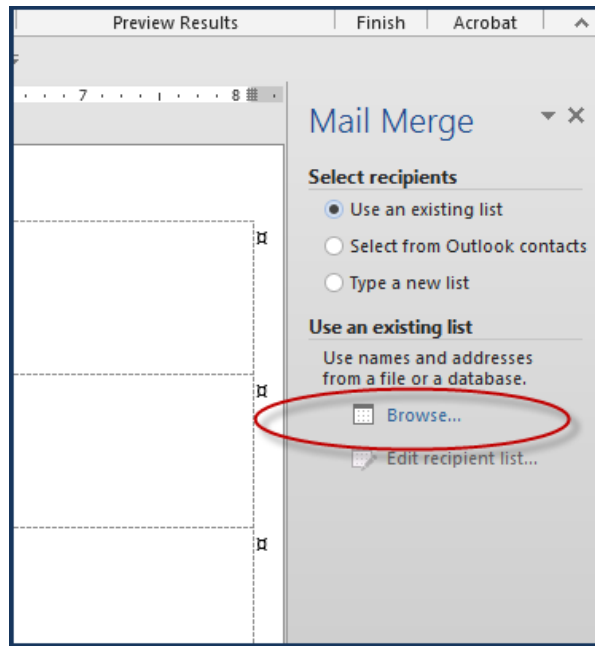
The following screen should appear:



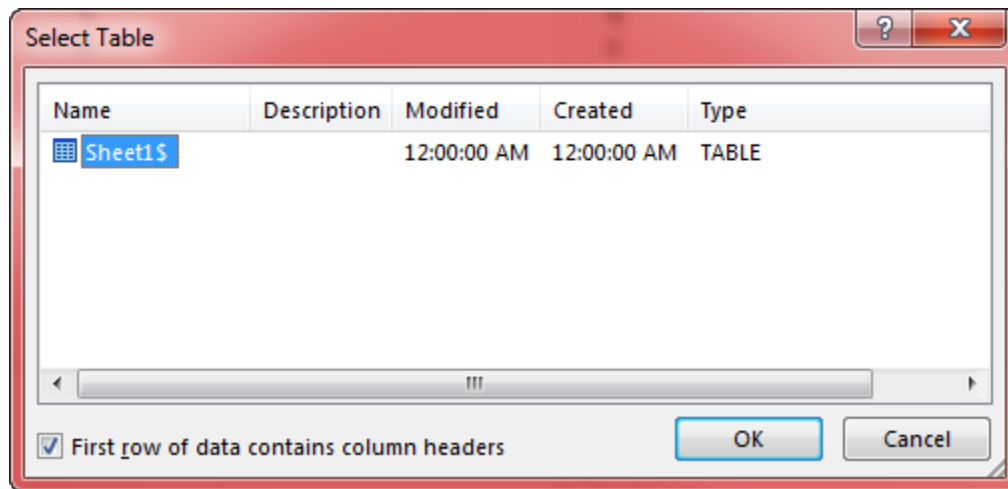
Proceed to click on “Next: Select recipients.” Your choices will appear as shown below:



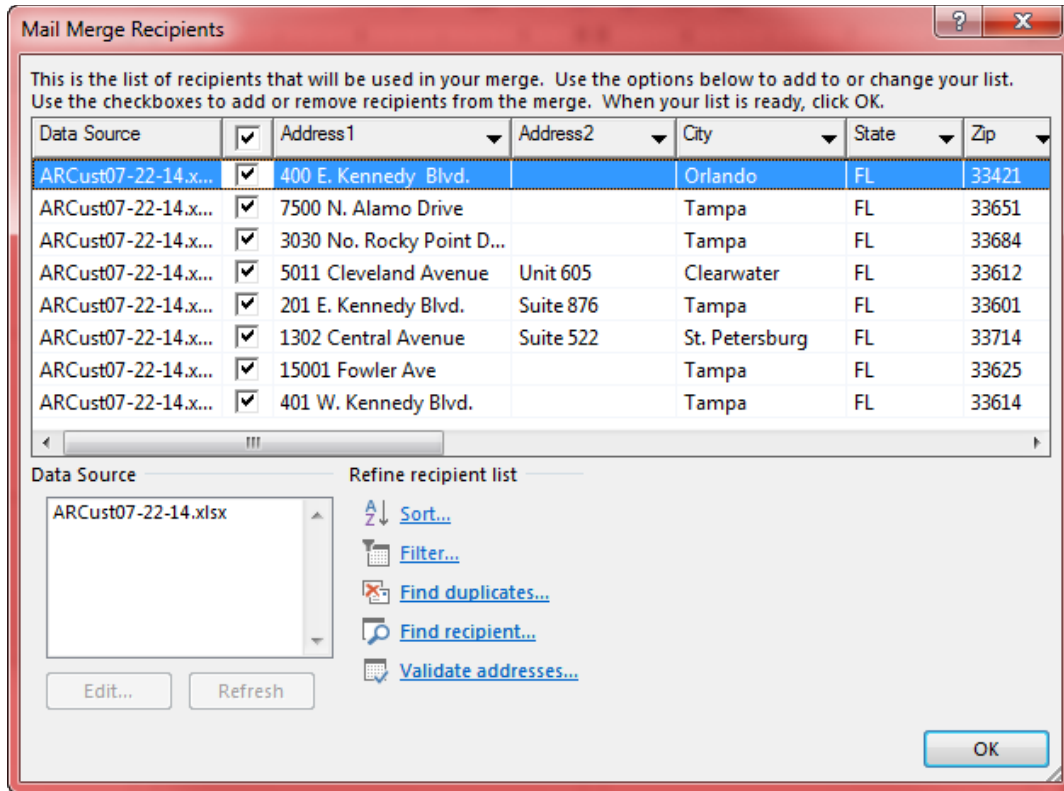
Choose the **“Use and existing list”** menu option. This will be followed by clicking on the **“Browse”** button:



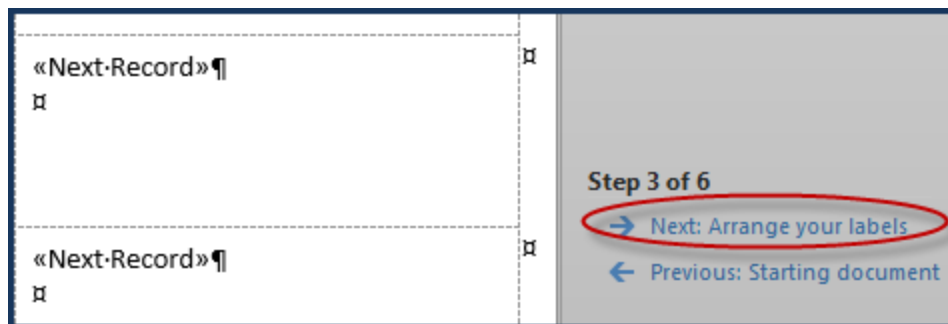
Find the file you want to use as your data source that you created from **DP/EXTRACT**. Then, the following screen will appear. Click **“OK”** to continue.



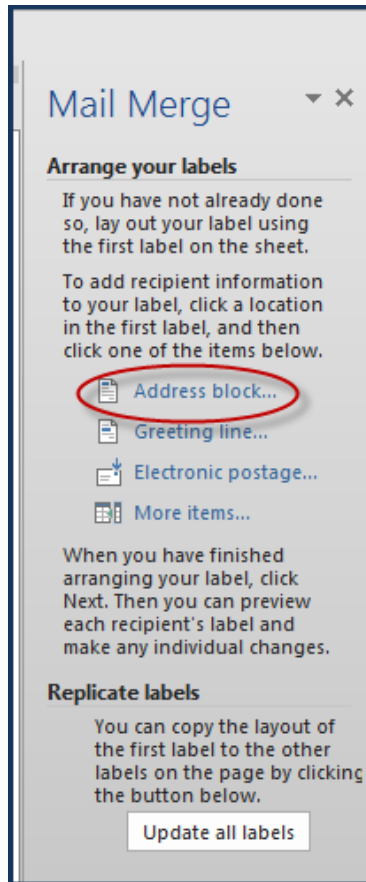
When the file opens next, it will display a listing of **Mail Merge Recipients**. You can actually **“click on and off”** those you may want to include or not in this printing of labels for whatever your reason may be. If you want the whole list, keep them as is and click on **“OK”** to continue.



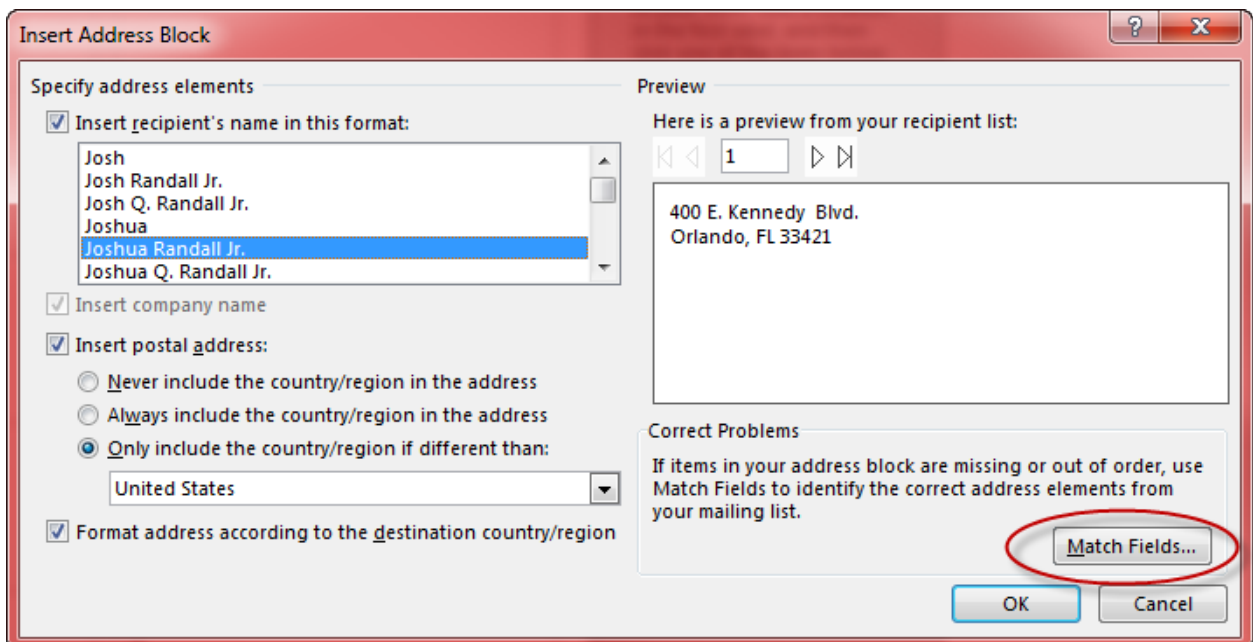
Proceed to **Step 3** by clicking on “**Next: Arrange your labels**” as shown below.



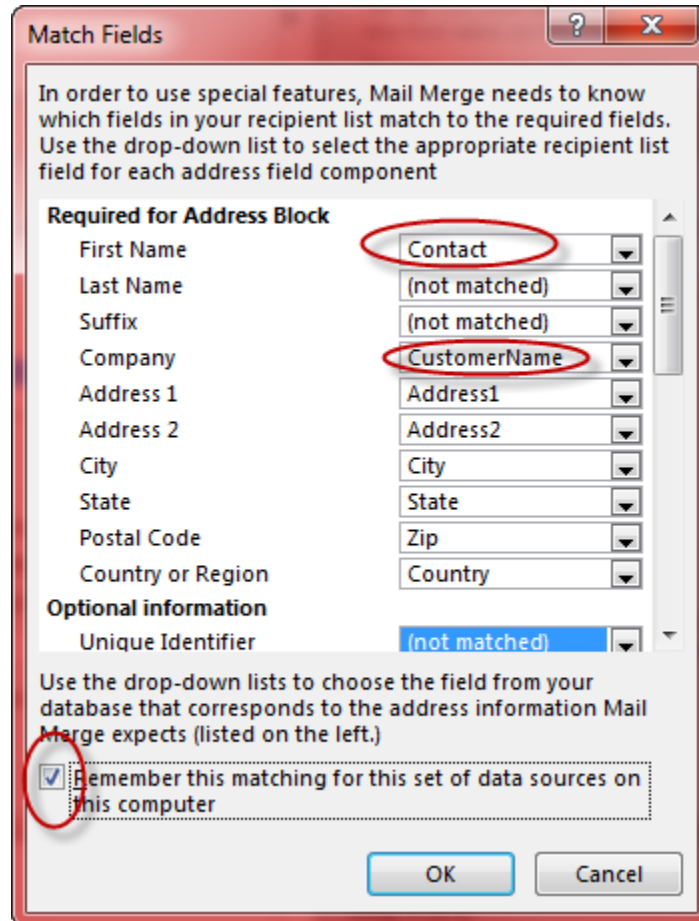
The next screen will prompt you with four items. Select the “**Address Block**” choice.



Once you select this option, the next screen will appear prompting you with more questions but also **“Previewing”** for you how your addresses will be looking on your labels as shown on the following screen:



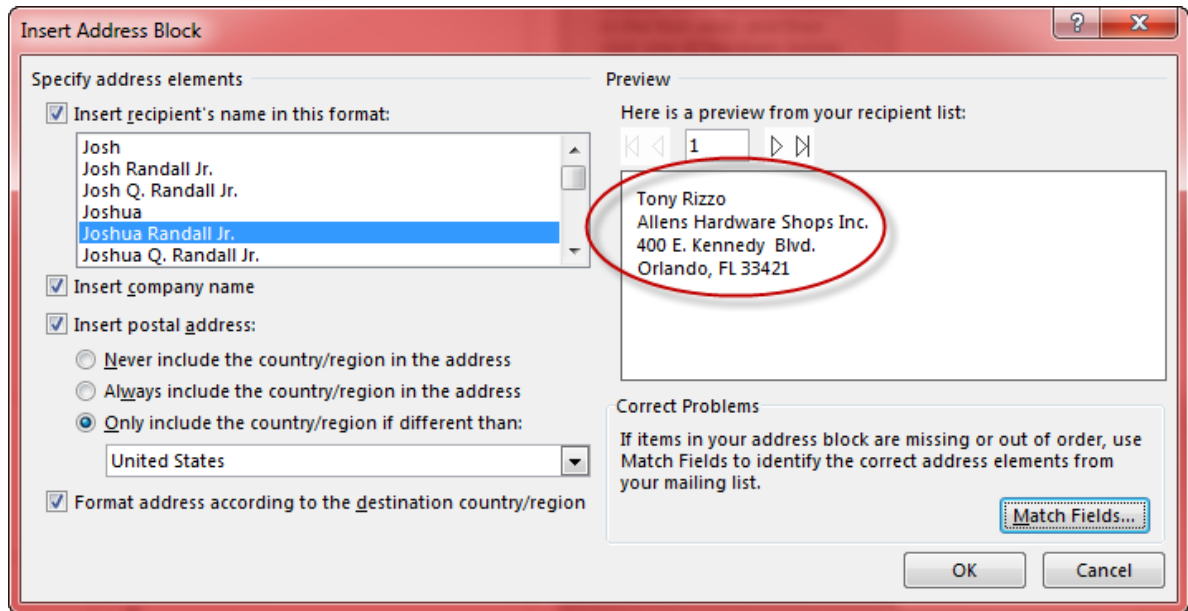
Under the “**Correct Problems**” section in the lower right of the screen, choose the “**Match Fields**” button. Notice that some of the fields like **Address 1** and **Address 2**, plus **City**, **State**, **Zip** and **Country** all defaulted automatically. However, others like **First Name**, **Last Name** and **Company** didn’t because there was no exact name matching of fields.



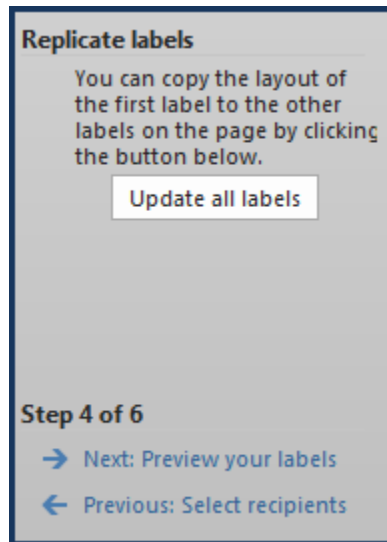
Use the pull down arrow to get a list of available fields and select “**Contact**” for the “**First Name**.” The Accounts Receivable data files stores “**Contact**” as **First** and **Last Name** in one field. Therefore, if you simply match it to the **First Name** field, it will automatically print both on your labels.

For the “**Company**,” use the pull-down list to choose “**CustomerName**.” This will give you the name of the company on your labels. Finally, if you are happy with these selections, click on the “**Remember this matching for this set of data sources on this computer**” option so the next time you perform this function, you don’t have to go through this process. Click “**OK**” to continue.

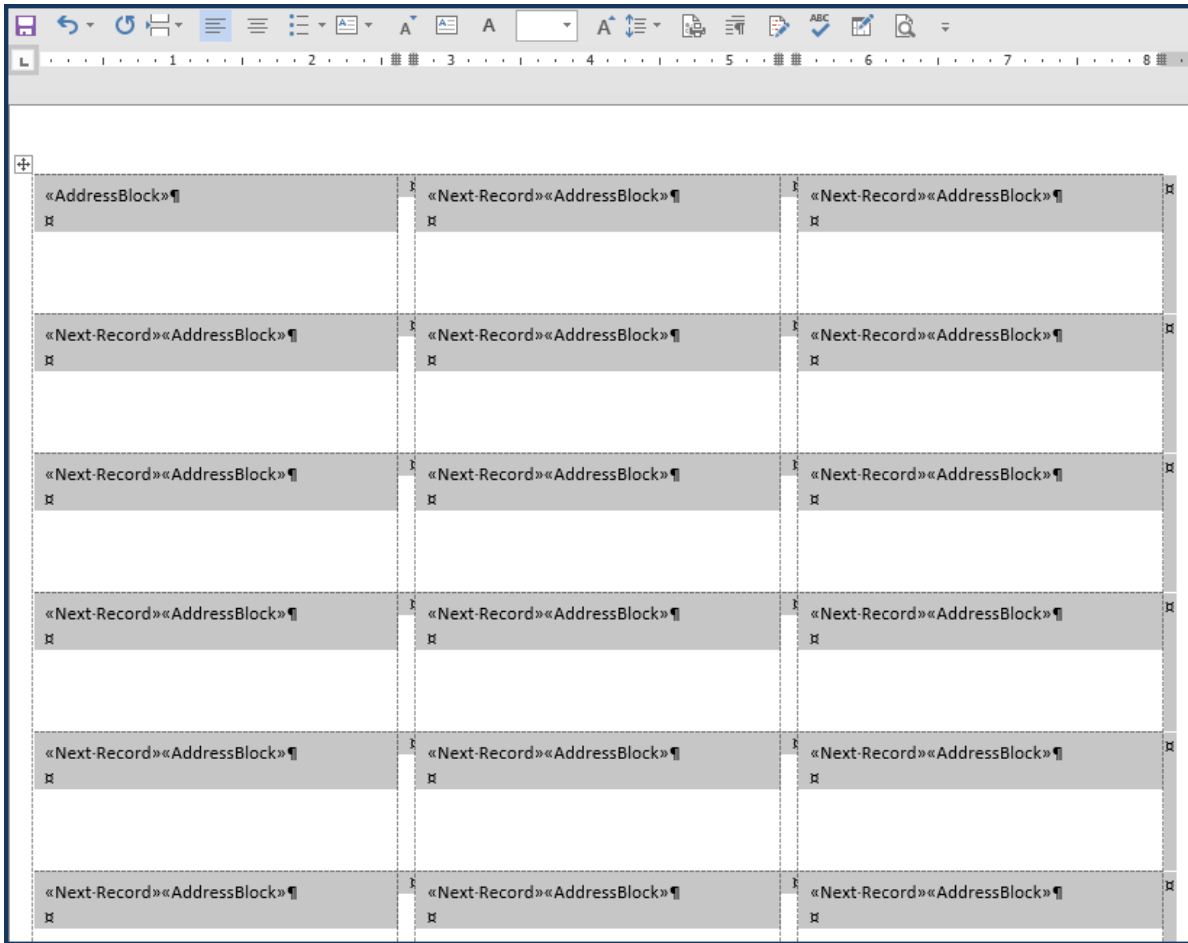
Notice on the following screen that in the “**Preview**” section of the screen that you now get the full contact, company name and address displayed for your labels.



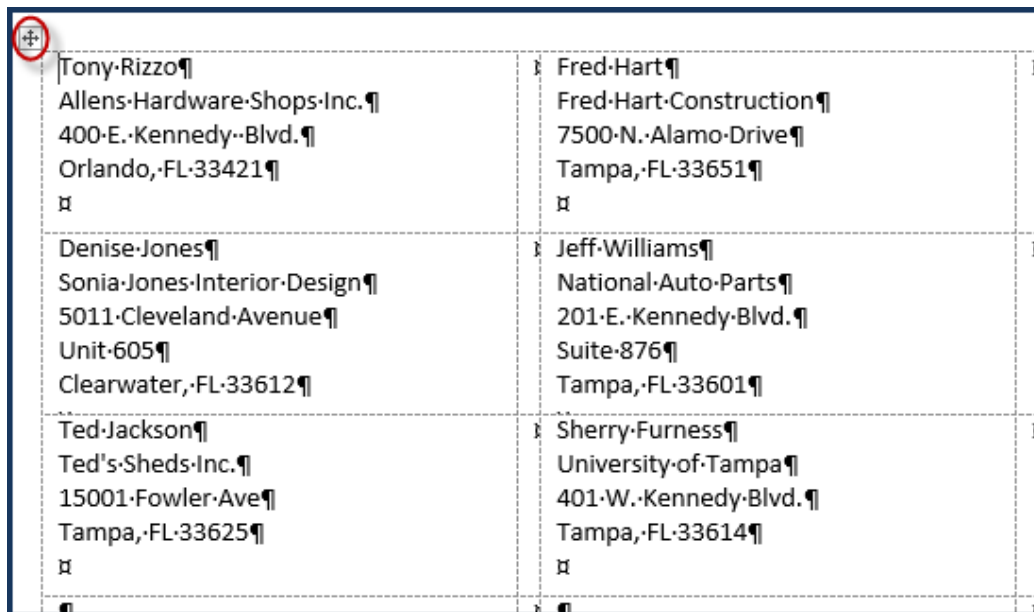
Click on “OK” to go to the next step. This will allow you to use the “Replicate Labels” option which will populate this layout to all label sections on the page. Click on the “Update all labels” button to make this happen.



Notice that it will insert the “Next Record” and then the “Address Block” in each of the label layouts automatically for you as shown in the following image. The “Next Record” tells the software to proceed to each new customer, vendor or employee as it goes through the file.



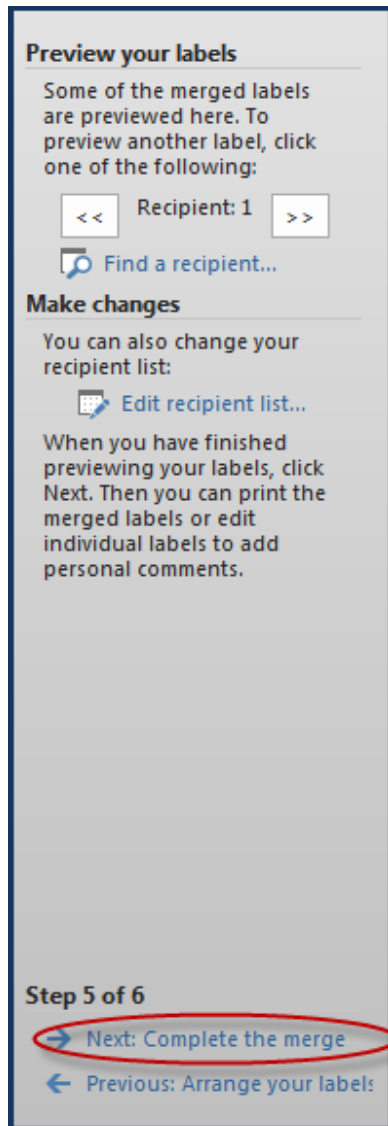
When you are done, click on “Next: Preview your labels” to proceed to **Step 4**.



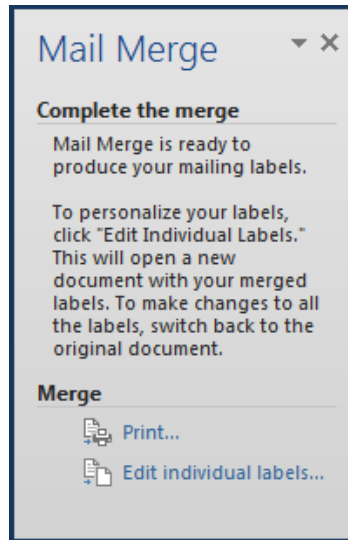


Notice that some of the labels in the merge have four lines and others have five lines. Keep in mind that spacing on your labels is also a function of Microsoft Word. The highlighted area allows you to click once which will select all labels in your file. Once you have done this, you can then globally increase or decrease the font size or the line spacing in Word to your desired specifications. You may also want to use a different set of fonts for a unique look. That is all personal and company preferences. The data is now there in the label formatter and the rest is up to you.

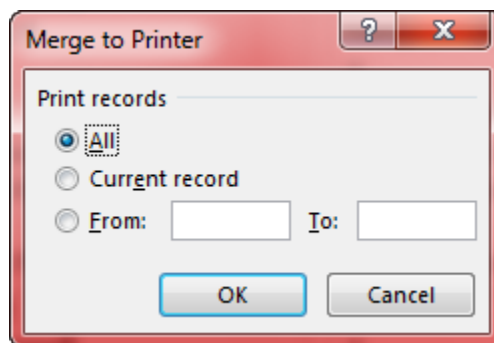
Click on “**Next: Complete the merge**” to go to **Step 5**.



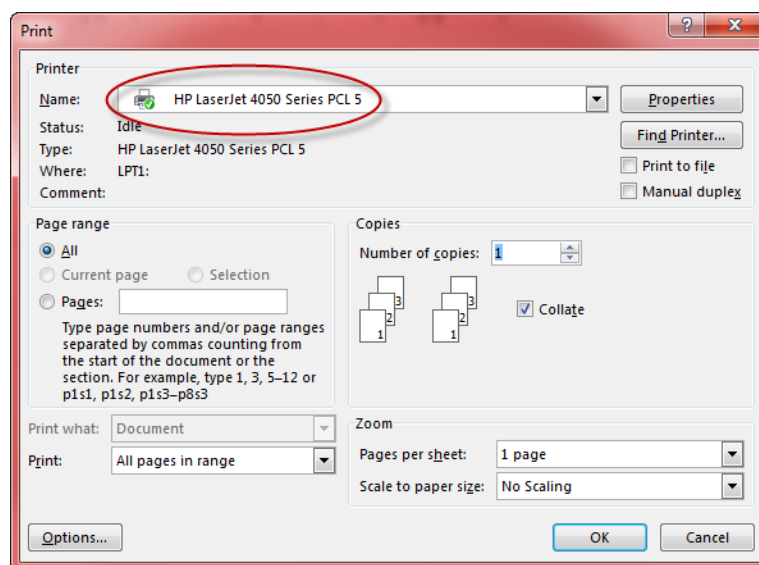
If you need to “**Edit individual labels**” for any reason, at this point you may do so. Otherwise, you would click on the “**Print**” option to finish up the Mail Merge.



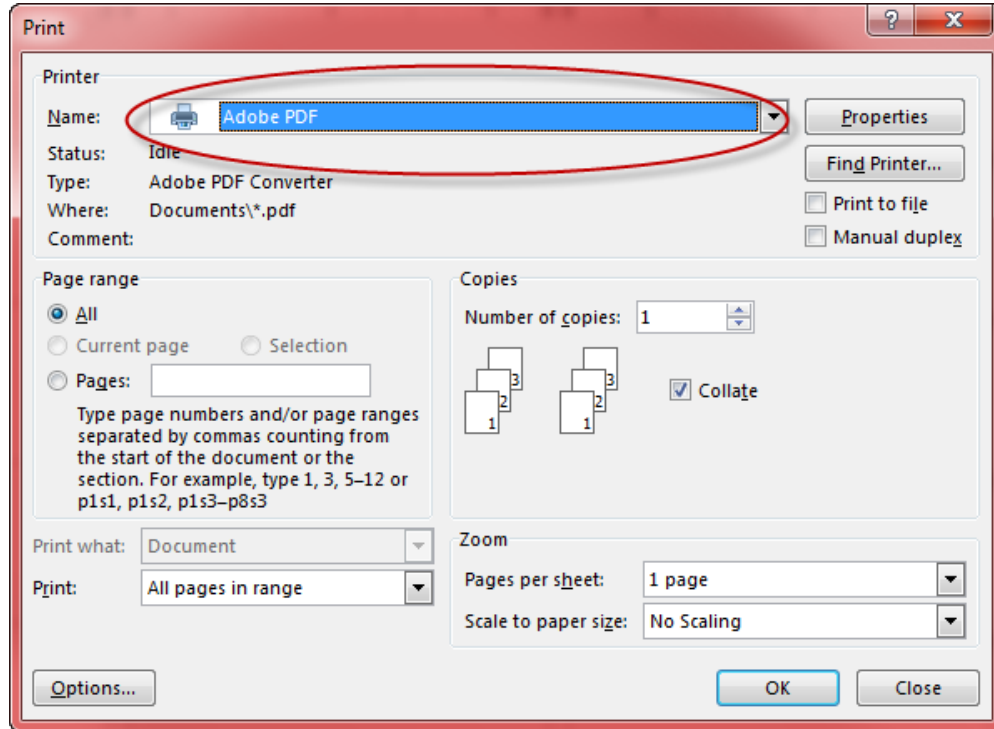
The following screen will pop up to ask whether you print all records, the current record only or a range of records. Click “OK” after you have made your selection to continue.



Choose the printer where you have your labels loaded.



If this is a group of labels that you think you may need to reprint over and over in the future without changes, then, if you have a **PDF** product installed as one of your Printer Drivers, such as **Adobe Acrobat**, you may select it to generate a **PDF** file that can be opened and printed repeatedly.



**Your Mail Merge is Complete! Congratulations!!!**

# USING DP/EXTRACT FILES FOR E-MAIL BLASTS

One of the more popular functions of **DP/EXTRACT** is to be able to keep your current customers, vendors and employees updated via “**e-mail blasts.**” This can be done through a variety of methods including subscription service products such **Campaigner, Mail Chimp** and **Constant Contact.**

These products offer a variety of services for composing and sending e-mails out to “**e-mail lists**” with the ability to track statistics for receipt, delivery, # of bounced e-mails, how many unique viewers, social viewers, unique clickers, unsubscribers, social shares and much more.

However, you still must get your data into these services for them to work. Keeping on top of this can be very time consuming and expensive without the right tools. **DP/EXTRACT** makes this functionality far simpler and available on demand!

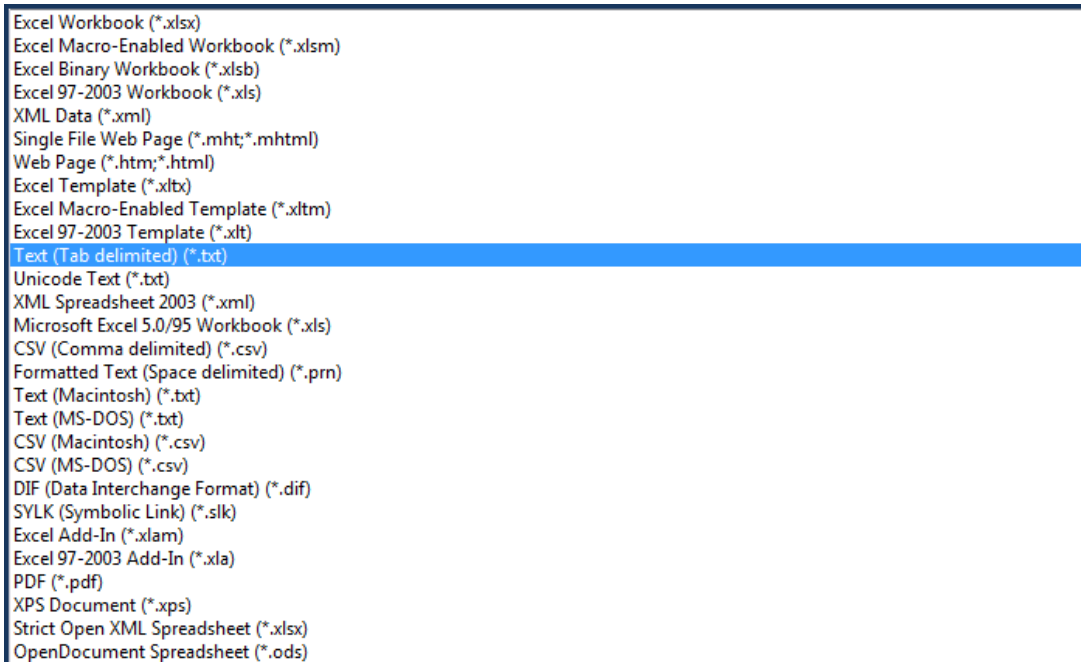
Using a product like “**Constant Contact,**” for example, their software will allow you to manually enter a “**Subscriber**” to their system to be e-mailed to. However, this would be a very slow and manual process.

The screenshot shows a web interface for adding a new contact. The window title is "Contact Details" with a close button (X) in the top right. The main heading is "New Contact" with a "Cancel" button and a blue "Save" button. The form is organized into several sections:


- Campaign channel:** Includes a text input for "Email address" containing "hstutsman@popstops.com" and a checkbox for "I have permission to send email. [Learn More](#)".
- Basic details:** Contains input fields for "First name", "Last name", "Job title", and "Company". It also has "Birthday" (Month and Day dropdowns) and "Anniversary" (MM/DD/YYYY input).
- Physical addresses:** A section at the bottom for adding addresses.
- \* Lists:** A list of checkboxes for selecting email lists: "DPA-EIP-09-03-23", "General Interest", and "Web Site Contacts". A "Create list" button is at the top right of this section. The bottom of the list shows "0 selected".
- Tags:** A section with a checkbox for "EIP" and a "Create tag" button. The bottom shows "0 selected".

It would be far more efficient to use **DP/EXTRACT** to go and retrieve the latest update of **Customers, Vendors, Address Book Contacts** or **Employees**, depending on what you desire. Once you have “retrieved” your information using **DP/EXTRACT**, you will want to save each special extraction into a “new” Excel workbook where you can store that data (*and date it*) for use with one of these kinds of products.

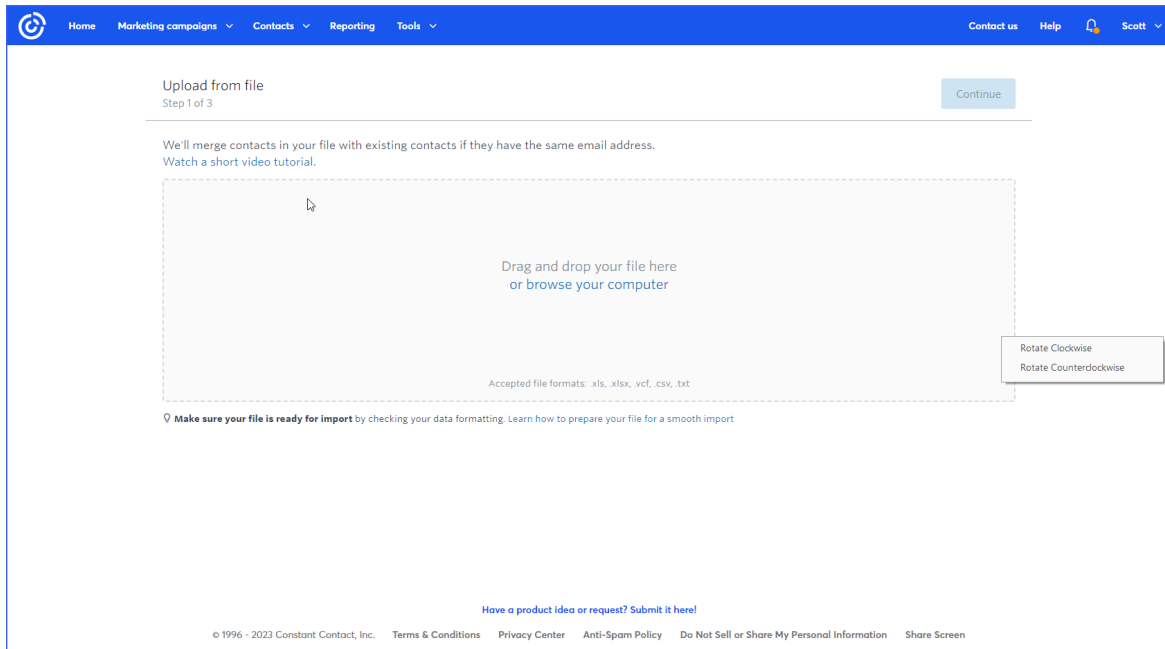
“**Constant Contact**,” will work fine with Excel files and other formats. Once you have opened your saved extraction in Excel or a CSV file format, you simply need to click on the “**Save As**” option and use the pull-down option for file type at the bottom of the screen which shows all of the variations the file can be stored as:



Name the file and date it so you can track when it was downloaded.

Name	Date modified	Type
 DPAConstantImport-Combo-08-31-23.xlsm	9/3/2023 11:13 AM	Microsoft Excel M...
 DPAConstantImport-Combo-09-3-23.xlsm	9/7/2023 6:25 PM	Microsoft Excel M...

Once you have prepared your file(s) for uploading into **Constant Contact**, then you would select the “**Upload from file**” option to get your data into their server.



Next, you would follow the various choices they offer for uploading files into their system.

The file path will be specified along with the actual filename. Click on “**Continue.**” The following screen for “**Bulk Upload (Import)**” will appear where it will default to fields that it can automatically match to. This now becomes a user decision as to how much information you want stored and maintained on the Constant Contact server.

You won’t be performing Mail Merges from these web sites, therefore, if you load the address information, it is for cross referencing purposes only. The key data you actually need is the **First Name, Last Name, Customer Name** and **Email**. Primarily, the **Email** is what will be sent out and it will be the content of your e-mail that will be doing the talking for you. Unless you plan to merge in their address information to the e-mail, then that becomes completely optional on your part.

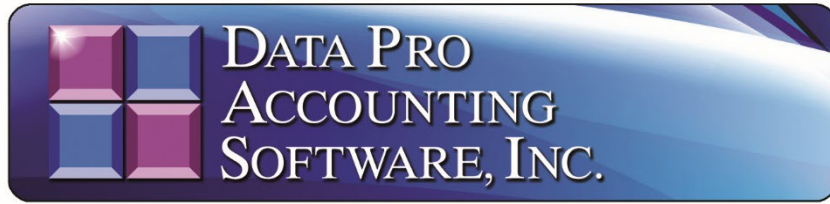
There are a couple of additional questions at the bottom of the screen to be answered based on your needs, such as the merging of matching records and whether you should keep the first row?

The answer to the last question should be **Y(es)** since the first row in each **DP/EXTRACT** file automatically creates all of the header information with the names of each field for each column. You can align each field within Constant Contact so it knows which field belongs where.

The summary screen will show you what you are about to perform as a **“Bulk Upload”** and will display three questions whereby you must agree to their terms. Otherwise, they will not allow you to upload the data to their server. E-mailing is a very important matter and these companies take these kinds of issues very seriously.

Once you have confirmed your file is ready and have agreed to their terms, and more importantly, you agree that you have permission from these contacts to send e-mails to them, click on the **“Start Import”** button to begin.

Once your data has been successfully **“retrieved”** using **DP/EXTRACT** and **“bulk uploaded”** into **Constant Contact** and/or another similar type of e-mail broadcasting product, you can continue to use it over and over! You can now proceed to use their templates or your own **HTML** files that you also upload to their server to communicate your marketing messages to your clients, vendors and / or employees!



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