

Match External to Internal

PROGRAM NAME: YPMTCH00

MENU OPTION TITLE: Match External to Internal

MAIN MODULE: EXTERNAL MAILING LIST

HELP KEY ACTIVE: YES

PROGRAM OVERVIEW

This program allows you to selectively match up your imported customers to your live customer data file. The selection process is based on matching up customers based on zip code. As identical customers are identified using this program, you are able to then set a match flag that exists in both the internal and external datafiles. After this process has been completed, you can then print or view a listing of unmatched live customers, print or view a listing of unmatched external potential new customer, or print mailing labels for the unmatched external customers.

PROGRAM OPERATION

ENTER ZIP CODE TO VIEW: You must first enter the zip code that you are going to work with. When you do this, you will be looking at all the customers in that zip code from your live working customer database. The program displays the business name, phone number, and address. Additionally, two flags are displayed. The first flag tells you whether or not your existing customer is a storefront operation and has extended demographic information on the system or not. The second flag is the type of customer, retail, dealer, or wholesale.

You can use <PageUp> and <PageDown> or the up and down arrow keys to highlight the customer you want to attempt to find the match for. You will probably start at the top and then press the enter key to change screens. Once you change screens, the live customer you are working with will be displayed at the top of the screen. Now the main body of the screen will display all the external customers that are in the imported database. You can now find any matched up names. If there is no match, then you will press the escape key to return to the first screen that will still be displaying all the live customers from the zip code you previously chose. If there is a match, you will press return on the external customer which will prompt you to press return one more time to set the matching flag to <Y> in both the live customer database and the external customer database. Once you confirmed the match, neither the live customer nor the external customer will display in this program.