

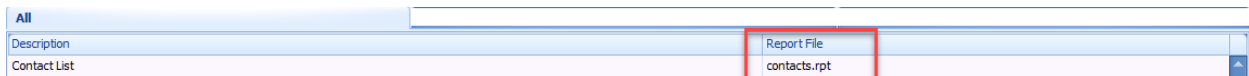
Tech Tip Tuesday—January 12, 2021

Contact Report

As we start into 2021, we have had a few questions from clients about the easiest way to export a contact list so that you can, for example, email all your clients about what you're doing to keep them safe, or that you're running a promotion, or for some other marketing activity.

While there are a few ways to do this, the simplest way is to run our Contact Report, and then (from within the report), export the data (which you can do even if you don't have the export module).

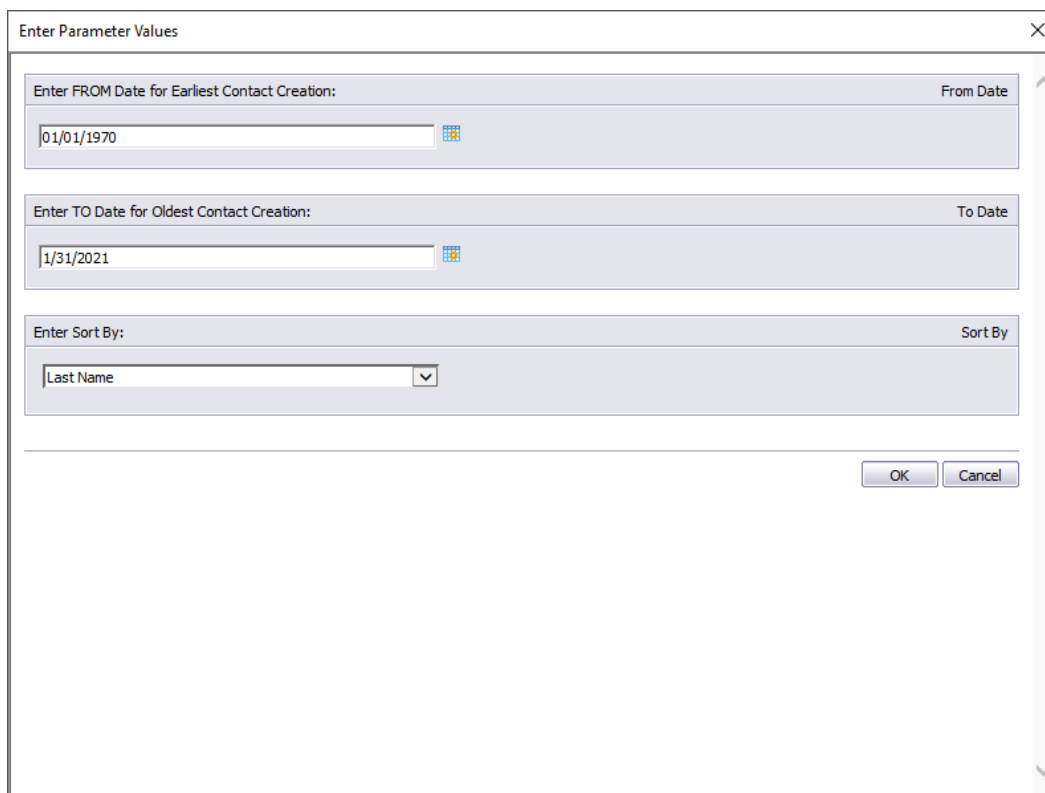
The report file you are looking for is called contacts.rpt (depending on your system, you might have named it something else).



If you can't find this report in your menu, skip to the end of this Tech Tip to learn how to install it.

When you run the report, it will pop up a menu where you can enter a date range of when the contacts were created, and how you would like the report sorted.

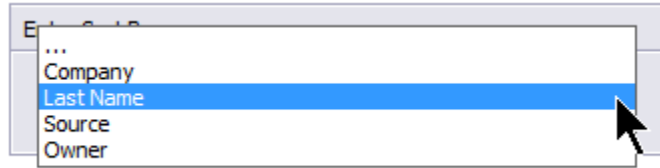
The date range is useful if, for example, you only want a report of those contact profiles that were created this month, or this year. If you want all contacts, we suggest just typing in a ridiculously early start date (like 01/01/1970 or earlier) and using an end date later than today.

A screenshot of a dialog box titled 'Enter Parameter Values'. The dialog box has a close button (X) in the top right corner. It contains three sections for input:

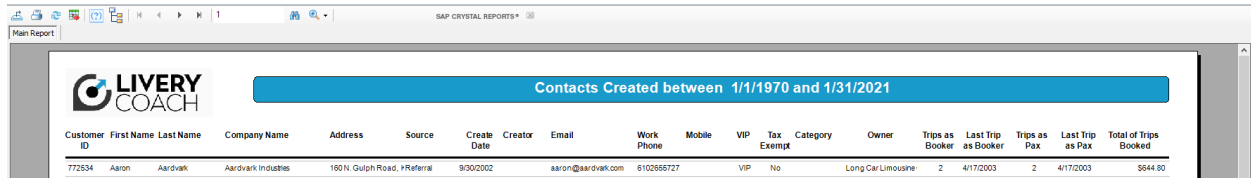
- The first section is labeled 'Enter FROM Date for Earliest Contact Creation:' and has a 'From Date' label on the right. The input field contains '01/01/1970' and has a calendar icon to its right.
- The second section is labeled 'Enter TO Date for Oldest Contact Creation:' and has a 'To Date' label on the right. The input field contains '1/31/2021' and has a calendar icon to its right.
- The third section is labeled 'Enter Sort By:' and has a 'Sort By' label on the right. The input field is a dropdown menu with 'Last Name' selected.

At the bottom right of the dialog box, there are two buttons: 'OK' and 'Cancel'.

Note that the third choice allows you to sort this report by Company, Last Name, Source, or Owner.



Once you are happy with your selections, click on OK to see the results.



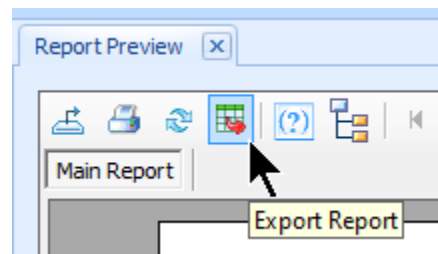
Customer ID	First Name	Last Name	Company Name	Address	Source	Create Date	Creator	Email	Work Phone	Mobile	VIP	Tax Exempt	Category	Owner	Trips as Booker	Last Trip as Booker	Trips as Pax	Last Trip as Pax	Total of Trips Booked
772534	Aaron	Aardvark	Aardvark Industries	160 N. Gulph Road, #Referral		9/30/2002		aaron@aardvark.com	6102656727		VIP	No		Long Car Limousine	2	4/17/2003	2	4/17/2003	\$644.90

What you will see is, along with some basic information like first and last name, company name, customer ID (the internal ID that Livery Coach uses to identify profiles and keep them straight), you will also see when the profile was created, by whom, some phone numbers, and some other information, including how many trips that profile has had as a booker and as a passenger, the last date for each, and the total value of booked trips.

Note that, depending on your system and the age of some of the profiles, some of these fields might be blank for some of your contacts.

To export this report to Excel (for further analysis, sorting, use in other programs, etc), it's quite simple.

With the report previewed on your screen, click on the Export button on the top left of the screen.

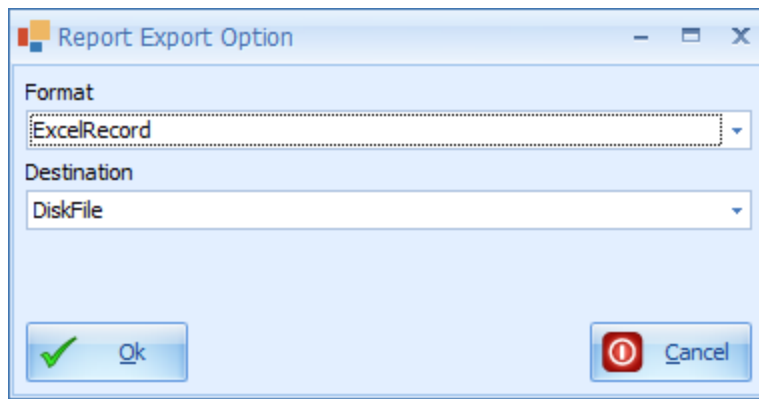


You will then be presented with a wide variety of Formats to choose from, and choices for where/what you want to do with the file.

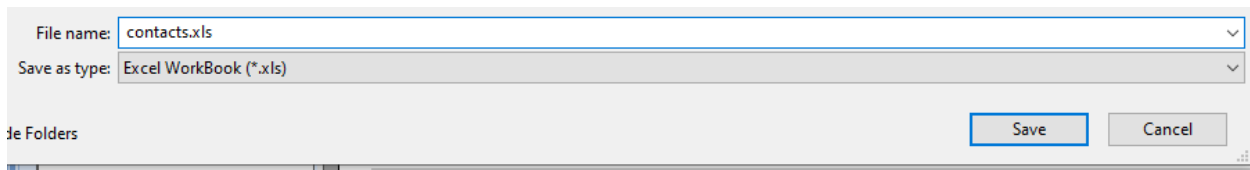
We recommend choosing "ExcelRecord" and "DiskFile".

ExcelRecord will export the data only, without the headers and footers and extra formatting (like blank lines) which will just get in your way in Excel.

DiskFile lets you pick a folder on your computer to save the file you are about to create.



You will then get the File menu to select the name of the file, and the destination.

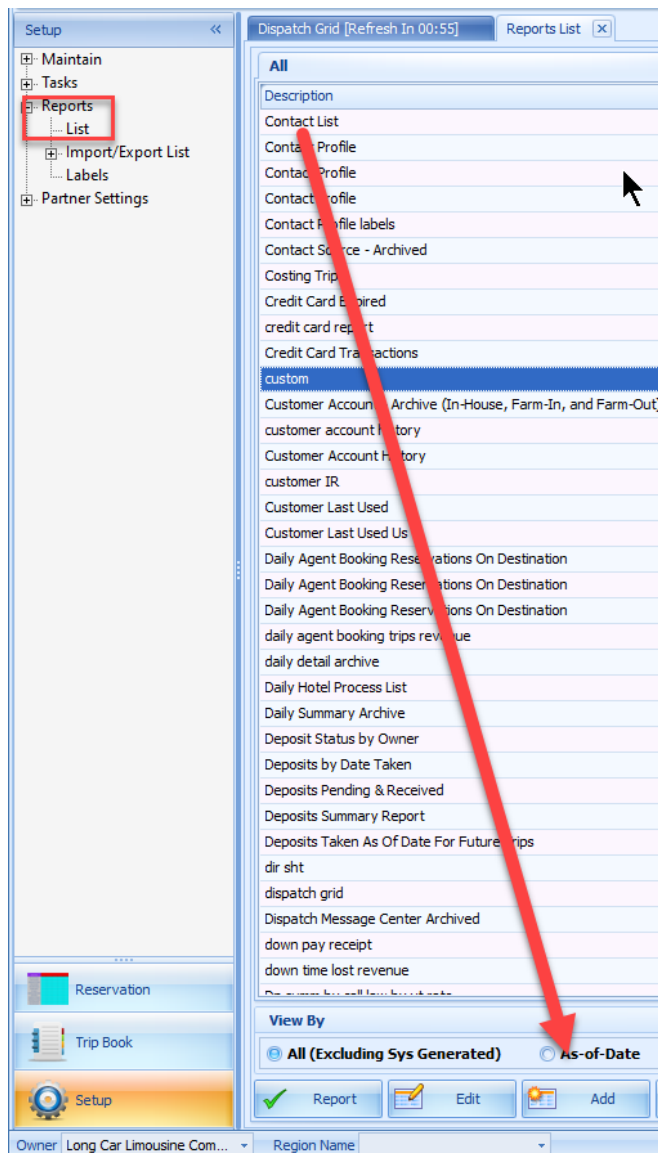


Once it's saved, you can navigate to that folder, and open that file in Excel.

	A	B	C	D	E	F	G	H	I
1	CustomerID	First Name	Last Name	Company Name	Address	Source	Create Date	Creator	Email
2	772534	Aaron	Aardvark	Aardvark Industries	160 N. Gulph Road, King of Prussia, PA, 19406	Referral	9/30/2002		aaron@aardvark.com

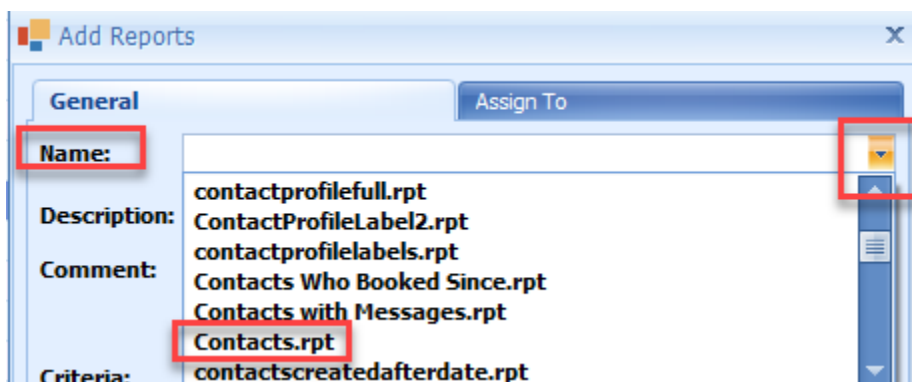
I don't seem to have the Contact Report!

If you don't seem to have this report installed in your system, you should be able to add it. Simply navigate to Setup->Reports->List (if you aren't there already) and click on Add at the bottom.



Once you have opened the Add/Edit Report window, you should select the Contacts.rpt file from the dropdown. (In the unlikely event that you don't have a contacts.rpt in your reports directory, please contact our support team and they can copy it over to your system.)

Then, select the Contacts.rpt name from the dropdown.



Once you have selected it, now click on the Get Default button to populate the other fields. If you'd like to change the Description field (name of the report in your system), you can also do that here.

The screenshot shows the 'Add Reports' dialog box with the following details:

- General Tab:** Active.
- Name:** Contacts rpt
- Description:** Contact List By Created Date
- Comment:** Query Contact By Created Date, Order By First Letter Of Last Name, As-Of-Date
- Criteria:** As of Date
- Category:** Enter multiple report categories by separating the categories with a comma, but with NO SPACES on either side of the comma. Example: Category 1,Category 2
- Get Default:** A button highlighted with a red box.
- Option Section:** Contains checkboxes for Occasion, Company Name, Group Name, Vendor Name, Contact Name, and Account Name / Number.
- Buttons:** Ok (with a green checkmark icon) and Cancel (with a red 'X' icon).

Once you are done, click OK and now the report is installed and ready to run.