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Email Function Does Not Work

While not professional looking, this method at least gets the surveys to the participants.

1. In Filemaker Pro, click **File, Export Records**.
2. At the top of the dialog box enter a name for the .csv file and select the folder of the list that is not working. Click Save.
3. Click **Clear All**. Scroll through the fields on the left and select **ScontactEmail**. Click **Move**, then click **Export**.
4. If the email sent anything, open the sent email and move the .pdf survey to the Desktop. Rename it [List Name] Survey.pdf.
5. If the email did not send, recreate the survey in Word then save it as a .pdf file. Note that in Filemaker, the survey is a Word document in a text box with two picture files, one for the newspaper's logo and one for the newspaper's title. Copy the Word document part into a blank Word document, then copy each of the pictures into the Word document and arrange them as needed. Save the file then use Adobe to convert it to a .pdf file.
6. In Entourage, start a letter. Put your email in the To.
7. Open the .csv file. Delete any blank lines. Copy the email addresses into BCC.
8. For Subject, enter Newspaper Name "[Survey Name] Inquiry "
9. For the Body, copy the email body from the list database.
10. Send the survey.

Cleaning the Databases and Creating a Backup of Deletions

As noted in the **List Hints** document, if you don't have a contact name, phone, fax and email then you don't have a viable record. If an email is missing, when you send the surveys by email, the system hits the missing email and stops the whole send process because it (the system) can't determine where to send the blank. Although you can eliminate sending an email to a company without an email address (**Survey Contact** layout, **Sendby** field, uncheck **Email**), you'll never know if the listed contact is good because a fax to a non-existent employee will just get thrown out. Therefore, emails are essential.

I've found the steps below to be the most efficient for cleaning a database because you don't check things that may already be correct. It doesn't have to be done this way as long as the objective of a database with correct contacts and email addresses is reached.

1. Delete the duplicates.

    a. Sort the Survey Contact list by **BusinessName** to find and eliminate duplicates. Note that some duplicates will have different addresses that are both wrong so don't delete either until you've verified information either through their web site or by calling.

    b. If one of the duplicates has an email address, delete the one without the email address. If the email address is good, the contact may return the survey and you can update the address, etc. from the survey. If the email address is bad, you can update the information when you research the bounced email address after sending out the surveys.

    c. If there is no email address, delete the duplicate with the least information.

2. Once the duplicates have been deleted, verify the office address, phone, etc. through the company's web site.

    a. The company's URL might be in the **Data Entry** layout; check there first.

    b. If there is no URL in the record, search the Internet by typing the company name in quotes. This usually, but not always, brings up the URL while restricting the many hits you'll get without the quotes.

    c. If no URL appears but you think the company should have one, search the company's name on Nexis for the URL to ensure you've touched all bases.

3. If an URL is found, and the company has a local office,

    a. Enter the address, phone and fax numbers in both the **Survey Contact** layout and the **Data Entry** layout.

    b. If there are Top Executive, Marketing and/or Human Resources names, enter those in the **Data Entry 2** layout. The address and phone numbers for the **Data Entry 2** layout are not needed as they are never used in the survey reports or in the on-line version of the survey reports. Call the company for the local contact and their email address.

    c. If the company will not provide a contact and email address, get the person's name who is making that decision then mark the company for deletion as follows.

        i) In the **Survey Contact** layout type a **#** in front of the business name in the **BusinessName** field.

        ii) In the **Notes** field, same layout, note the date and *Refused to provide contact per [name]*.

4. If information on the website indicates no local office and the survey conclusion is based on there being a local office, mark the company for deletion per 3. c. In the **Notes** field, enter the

date and *No local offices*.

5. If no URL, mark the company for deletion and in **Notes**, enter the date and *No web site*. While a company might exist with an office or offices in our area, if it has no web site, the probability it will be big enough to be noted in the survey is pretty remote. Since it is pointless to send a survey, mark the company for removal from the database.

6. Check websites for companies that have email addresses but do not have phone and fax numbers. You need the phone numbers to check on bounced emails.

   a. Sort the database by **ScontactEmail** and **BusinessName**. This puts all the existing emails at the bottom in alphabetical order.

   b. Check the **Data Entry** layout for address, phone, and fax. If they are there, copy the information to the **Survey Contact** layout.

   c. If the information is not there, follow steps 2 through 5.

7. Check the email addresses against the Bounced List (**Editorial/Survey Files Need Clean Up/Email Rejects.xls**). This list was developed when we sent emails from a number of the databases for two completed surveys. Checking gives you a head start on emails that will bounce.

   a. For bounced emails, call the company for the new contact information.

   b. If you are trapped in an electronic answering system, try the company's web site.

   c. If you leave messages asking for the new contact and no one responds, mark the record for deletion and note the reason in **Notes** (date and *no response to contact request*).

8. When all the email address companies have been "cleaned" sort the list by **BusinessName** and check the companies without email addresses using the same techniques as outlined above.

10. Once the database has been "cleaned" place the cursor in the **BusinessName** field and use **View, Find** to find the marked records. Enter the criteria as "#"* (that's quote pound quote asterisk). Press the Enter key and all the marked records will appear.

11. Export the records to an Excel worksheet.

    a. **File, Export**.

    b. Click the drop-down list at the Type dialog box and select **WKS.**

    c. Type the name as [List] Deletes. Click **Save**.

d. Click the **Move All** button then **Export**.

e. Open the file in Excel and resave as a Microsoft Excel Worksheet (found at the top of the list of file types). This is to avoid the run around you get when trying to save in anything else but Excel format.

12. In Filemaker Pro, click **Records, Delete Found Records**.

13. Prepare the database for the new surveys by deleting the old data used for the previous year's surveys. Delete the data by selecting the field in the first record, deleting the contents, pressing Apple = then clicking **Replace**. Do this for the data fields in the **Data Entry** layout and, in the **Survey Contact** layout, the dates in **FaxSentDate** and **EmailSentDate**.

14. Check the **Notes** record by record and delete references to leaving messages and other information not pertinent to the record (i.e. do not delete someone's name and/or cell phone number).

15. After you send the surveys via email, you will probably have a number of "bounces" to check out. Update the records as needed, including addresses, new phone numbers, etc. If you find more businesses need to be deleted, follow the above steps EXCEPT resaving the WKS file as an Excel file. Open the main Excel file for the List and the new WKS file and copy the newly deleted records from the WKS file into the main Excel file. Then delete the WKS file.

Preparing Data for Import into the Master File

Some surveys are developed or updated from data downloaded from the net usually as an Excel spreadsheet or a text file. This data must be properly formatted for it to import correctly into the Filemaker Pro **Master** table or the individual survey table if the old system is still in use. Note that these instructions are premised on the concept that data coming from Nexis and other companies such as Dun & Bradstreet is not always current.

DO NOT import data into the **Master** for companies already in the database. If the imported data has blank fields it will delete data already in the database. If a company name has even a period out of place, it will create a duplicate record. Input the data manually. However, if the import is to add new companies or create a new database, use the following steps to prepare the data.

1. Open the data file in Excel. (It's easier to clean data in Excel than Filemaker Pro.) If the data is a text file (.txt), **NOTE HOW THE DATA ELEMENTS ARE SEPARATED**. During the process, an Excel dialog screen displays data separators and a sample of the data. The default separator, **Comma**, is checked. Look at the data to verify that the separator is a comma. If not, uncheck the comma and check or enter the correct separator.

2. Compare the downloaded companies to the Excel spreadsheet that holds the names of companies deleted while cleaning the database being updated or the deleted company Excel spreadsheets for other databases similar to this survey. In the download file, delete any companies found in these other spreadsheets by highlighting the rows and clicking **Edit**,

Delete.

3. Compare the downloaded companies to the **Master** for duplicates. If the duplicates have been added to the **Master** recently, delete the duplicate in the spreadsheet. If the duplicate in the **Master** is more than nine months old, check the company's web site to see if you can verify which record is accurate or call a contact in the downloaded file to see if they are current. *Note that some companies will have duplicates in the Master because their address and/or contacts are list dependent. When in doubt, DO NOT delete.* Based on the results of contact verification, leave the Master record as is or manually update it from the download file. Then delete the company data in the download file.

4. In the download spreadsheet, each row must be a complete record for one company. For example, when company data is downloaded from Nexis, everything about the company, including URL, revenue, number of employees, description, etc. is displayed in the top row. Usually the top executive is also in this top row. That is the company record. Other company executives are displayed on rows under the main one. If all these rows were imported into the **Master** you would have multiple records for the same company. Therefore data on the Marketing, Human Resources and Survey Contacts has to be moved into the top row with the other data. If the data is as described, continue with these instructions. Otherwise go to step 4.

   a. Insert columns for the Contacts noted above and name each field with the field names in the **Master** (**MktgContactFirst**, **MktgContactLast**, etc.)

   b. Move or retype the names to the appropriate column on the same line as the business data. Separate first name from last, etc. Move only the needed names. Delete the rest by deleting the rows they are on.

   c. After the above step has been completed for ALL companies in the dataset, separate the top executive's name into First, Middle, Last, Suffix by inserting three columns to the right of the name.

      i) Highlight the **Executive names** column by clicking the top of the column. On the menu, click **Data, Text to Columns**. A screen displays with **Delimited** checked. Click **Next**.

      ii) The screen displays a check next to **Comma**. Uncheck that and check **Space**. Click **Next** then click **Finish**.

      iii) Most of the last names will be in the second column. This is the **Middle Initial** column so move all the last names to the next column. Highlight a group of last names then move the pointer until a hand appears. Hold down the left mouse button and move the names to the right.

      iv) Label the columns with the **Master** field names for **TopContact**.

   d. When each row is a complete record (business name, address, etc.) delete any blank rows between the heading and the first record. Then highlight all the data and sort on the first field in Ascending order. This pushes blank lines to the bottom of the data.

e. Rename the remaining columns using the field names in the **Master** and **Related** tables. For example, **Company** is **BusinessName**.

f. By inserting and moving columns, arrange the columns in alphabetical order so they better match the field order in the FP Research Master table.

g. When all columns are moved, delete any empty columns.

5. Import the data into the **Master** using the instructions in **Research/Procedures/Using the Master Database.doc**.