

Cleaning up MYOB RetailManager Database

Applies to: RM Version 6.5 and above

Issue:

Prior to commencing communication with clients, most retailers will need to clean up their existing RetailManager databases to ensure information is entered in correctly. As **youGROW** maps information from specific fields in the RetailManager database into specific fields in Outlook and then uses those fields for customer communication, it is essential that the correct information is entered in the right places.

Resolution:

The easiest way to clean up a database is in Microsoft Excel. In Excel, you can easily see all of your customer information at once, in columns. The way in which we handle this is to export our RM database into Excel, clean it up accordingly, and re-import back into RetailManager.

Instructions:

Exporting the Customer file from RetailManager

Open RetailManager

Go to File | Import and Export

MYOB RetailMYOB Manger Question window is displayed.

MYOB RetailManager Question window is displayed asking you if you are happy to close your shopfront. If you are happy to close your current shopfront click [Yes], if you need to save first click [No] do what you need to do then go start from step 2.

You will receive a message saying that it is highly recommended you backup your shopfront database – click [Backup], and select a file name and location for where you would normally back-up your shopfront files.

Click [OK] when requested after your backup has been successfully performed.

The MYOB RetailManager Import and Export Wizard will now appear.

Select [Export Data].

Click [Next>].

Select the particular shopfront you would like to export from.

Click [Next].

In Step 3 of the Wizard, select [Customers] from the drop down list, as the table you wish to export.

Click [Next].

Step 4 will show you all of the fields which will be exported.

Click [Export].

Choose a location and name for the exported file – leave .txt as the file type.

Click [Save].

Click [Finish].

Opening up the file in Excel.

1. Open Excel.
2. Go to File | Open – under Files of Type, select Text Files and then find the location and the file name of the customer file you just exported from MYOB Accounting.
3. Choose **Delimited** as the **File type which best describes your data**.
4. Click [Next>].
5. Select **Tab**, as the **Delimiter Type**.
6. Click [Next>].
7. Step 3 of the Import Wizard has some important settings you need to change. Scroll across to the **Postcode** field, select it and change the format to **Text** (If you don't do this you'll lose any leading zeroes). Do the same for your **telephone/fax** fields otherwise Excel will guess at the format and you could end up with things that look like dates or numbers.
8. Click [Finish] on the next menu. Your customer list will now open in Excel.
9. In order to make it easier to ensure the correct information is in the correct fields, or columns, highlight Row 2, and go to Window | Split. This will keep the field/column headings at the top of the screen as you scroll through.
10. Do not delete or change any of the field headings in Excel which you have exported – most of the time you will just work on the name and address fields. When you have finished cleaning up your file, save it as a .txt file, and close the file. (Excel will ask if you want to save as a .txt and that if you do, you will lose some of the features of Excel – just click OK through these prompts – RetailManager will only accept .txt files as an import.)

NB: Comments Field in RetailManager:

If you have used the Comments field in RetailManager, you need to be aware of an issue which can have unwanted consequences when re-importing back into RetailManager. If you have used hard returns in the comments section to make individual comments easier to read, each Hard Return creates a new record when you export. You will be able to easily see which records are affected when you open your exported file in Excel, as the first column will have the text notes from RetailManager, instead of the Customer ID. By far, the easiest way to correct this, is to go into the relevant record in RetailManager, delete the hard returns in the Comments section for the relevant customer, and then re-export the file again, then clean up any inconsistencies as per the following.



TRAINING NOTES

Cleaning up the file in Excel.

For **youGROW** purposes, we will only be considering the following fields in your exported RetailManager Excel file – **do not delete any of the other fields, as your file will not be able to be imported back into RetailManager.**

1. First Name
2. Surname
3. Company Name
4. Inactive – if there is a “0” in this column, this denotes an active customer. If the customer is inactive, change this to a “1”. (**youGROW** synchronises only Active Customers.)
5. Address 1, 2 and 3.
6. Suburb
7. State
8. Postcode
9. Email
10. Comments

In order to make it easier to ensure the correct information is in the correct fields, or columns, highlight Row 2, and go to Window | Split. This will keep the field/column headings at the top of the screen as you scroll through.

There is no easy way in which to clean up your data – you will need to go through the list manually and move data into the right column. However, there are a few conventions to be aware of:

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TRAINING NOTES

Guidelines for Entering Contact Information in MYOB RetailManager

The MYOB RetailManager Customer Card File

Customers
✕

Customer >>

Surname

Given Names >>

Company >>

Salutation >>

Position >>

Grade ▾

Status

General
Information
Purchases
Credit
Invoices
IV Pay
Lay-bys
LB Pay
CSO
SO/Quote
SO Pay
Groups

Contact Details

Address

Suburb >> State >>

Post Code Country >>

Phone Fax

Mobile

Email

Print ▾ transaction documents and statements

Customer Registered for GST

A.B.N.

Hide in Searches / Reports

Overseas Customer

Show Account Details - F3

Input Customer No or name, F2 to Search, F5 for New

Sort By ...

Commit - F10

Explanation of Fields:

RetailManager Field Name	Description/Comments	Name of Field in Excel Spreadsheet	Synched to youGROW?
Customer ID	Automatically Generated	Customer_ID	Yes
Given Names	Customer's first name/s	Given_Names	Yes
Surname	Customer's Last Name	Surname	Yes
Company	Company Name	Company	Yes
Salutation	We do not use this field – see our notes following for entering contact information	Salutation	No
Address (1)	Use for street address – try to enter the entire street address in line 1	Addr1	Yes
Address (2)	Use for street address – try to enter the entire street address in line 1	Addr2	Yes

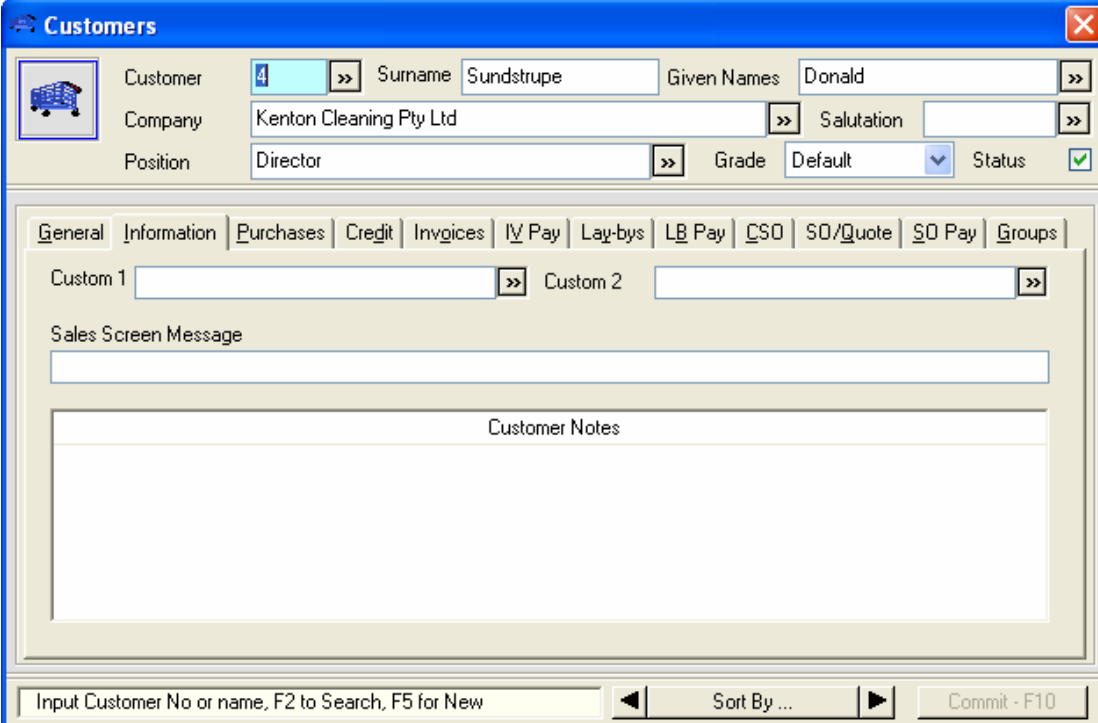


TRAINING NOTES

RetailManager Field Name	Description/Comments	Name of Field in Excel Spreadsheet	Synced to youGROW?
Address (3)	Use for street address – try to enter the entire street address in line 1	Addr3	Yes
Suburb	Enter in CAPS	Suburb	Yes
State	Enter as per our instructions overleaf	State	Yes
Postcode	Post Code	Postcode	Yes
Country	Country – leave blank if most of your clients are in Australia – only complete if overseas – one less field to have to worry about, and we can easily find all clients in Australia by running a filter to find where company field is blank	Country	Yes
Status	Used to denote whether a customer is or is not of a certain criteria – eg, Account Customer, Club member. “0” if unchecked, “1” if checked.	Status	Yes
Hide in Searches/Reports	Used in RM to denote an inactive customer. “0” if unchecked, “1” if checked.	Inactive	Inactive customers are not synced

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The MYOB RetailManager Information tab for a Customer Card



Customers

Customer: 4 Surname: Sundstrupe Given Names: Donald

Company: Kenton Cleaning Pty Ltd Salutation:

Position: Director Grade: Default Status:

General | Information | Purchases | Credit | Invoices | IV Pay | Lay-bys | LB Pay | CSO | SO/Quote | SO Pay | Groups

Custom 1: Custom 2:

Sales Screen Message

Customer Notes

Input Customer No or name, F2 to Search, F5 for New | Sort By ... | Commit - F10

Both The Custom 1 and Custom 2 Fields are synched in **youGROW**.

Importing your Cleansed Customer file back into RetailManager:

NB: You should create a test shopfront in RetailManager and import this file into this shopfront in the first instance, in case there are any errors or mistakes, which could create new Customer ID's.

1. Open RetailManager
2. Go to File | Import and Export
3. Select [Import Data].
4. Click [Next].
5. Select the .txt file you have cleaned up, and the name of the shopfront (i.e. Test) you wish to import to. (You will need to select the "recent.mdb" file listed under the shopfront.).
6. Click [Next].
7. Select [Customer] as the **type of information you want to import**.
8. Click [Next].
9. Under **Import Type** select [Update].
10. Click [Next].



11. In Step 5, under **Field Matching**.
12. Click [Match All].
13. Click [Import].
14. Click [Finish]. (NB – RetailManager will advise you where any errors in the import can be found. Check this file if there are any errors and make the necessary changes, and re-import back into the Test shopfront.)
15. Check a random sample 3 of the Test Shopfront customers against your actual shopfront – particularly check that they have the same customer ID. If the customer ID is the same in each, you can then go ahead and import into your Actual shopfront, following the steps above.



Entering Contact Names:

1. Entering Husband and Wife details:
2. If you communicate jointly with both husband and wife, it is best to enter John & Mary in the Given Names field, and their surname in the "Surname" field. In this way, your merged letters, when selecting the First Name field in the merge, will be addressed Dear John & Mary.
3. Entering partner details when different surnames:
4. John Smith and Mary Jones are a couple. Enter John and Mary in the Given Names field, and then Smith/Jones in the Surname field.
5. Entering Titles:
6. Titles are very rarely used these days in addressing letters. Even on the front of the envelope, we will use John & Mary Smith, not Mr and Mrs. The only exceptions may be Dr and Professor. In this case, enter Dr John or Professor John in the Given Names field, and their last name in the "Surname" field.. If a contact has told you that they are a Dr or Prof when you have asked for their name, they will generally want that to be acknowledged!
7. Entering Initials and Surnames: If you have JC entered in the Given Names field, and Smith in the Surname field, then any letters or email we send using the First name field in the mail merge, will be addressed as simply Dear JC. Our experience has shown that it is *generally* males who do not provide their first name – in this case, we need to enter Mr Smith in the Given Names field, or alternatively, JC Smith, with nothing in the Surname field.

Entering State Details:

When cleaning up in Excel, and for entering data in future into MYOB, always use the same format for states – i.e.

- SA
- NSW
- QLD
- NT
- VIC
- TAS
- WA
- ACT

N.B: You can use search and replace in Excel to Standardise.

Entering Suburb Details:

We follow Australia Post addressing Guidelines, and enter all suburbs IN CAPS – WITH NO FULL STOPS

Case Formatting:

It is important to understand that however you enter names into MYOB Accounting, will be how they are used in your communication. e.g. If you enter JOHN in the Salutation field, and SMITH in the Contact Field, your letters will be addressed to “Dear JOHN”. Except for Suburbs and States, all other details should be entered in “Title Case” – i.e., only the first letter of the name is capitalised. See our tips following for easy ways to change the case for multiple records in Excel.

Entering Initials and Surnames: If you have “JC” entered in the first name field, and “Smith” in the last name field, then any letters or email we send using the “First name” field in the mail merge, will be addressed as simply “Dear JC”. Our experience has shown that it is generally males who do not provide their first name – in this case, we need to enter “Mr Smith” in the first name field, or alternatively, “JC Smith”, with nothing in the surname field.

Entering First and Last names where you have a company name in either of these fields. Shift the Company name to the “Company Column”, and type in “Office Manager” in the first name field, so that communications will be addressed to “Dear Office Manager”.

Entering Address Information:

Always enter the **STATE** as per Australia Post’s desired formatting – in Abbreviation with no full stops. Use SA, VIC, NSW, QLD, NT, TAS, WA and ACT **always** to maintain consistency. (You can use Excel’s “Find and Replace”, to change all entries with say “N.S.W.” to “NSW”. Go to “Edit | Replace” on the main menu.)

1. Always enter the **SUBURB** in Upper case.
2. If the contact lives in Australia, and the majority of your contacts are Australian based – enter nothing in the Country field. (Saves time – one less entry – when you want to filter on contacts to select just those in Australia, then we set the conditions for the Country field to “is empty”.)
3. If you have the Suburb, State and Postcode entered in the one column, and will not ever need to sort or filter your contact database based on the State or Postcode – you can leave these as is. However, if you have the time, it is always best to standardise wherever possible.

Entering new Customer details in Retail Manager:

Now that you have your existing data cleaned up, you will need to note that the customer contact data and address data, are entered in the same format as covered here when adding future customers to RetailManager as per the following:



TRAINING NOTES

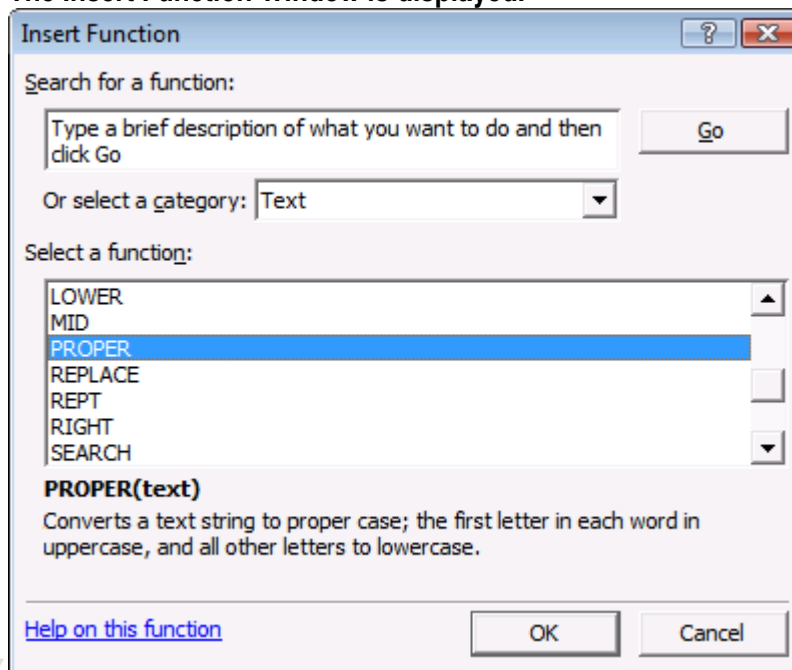
1. If company, ask for customer contact details – enter the first name and last name into Retail Manager. If they do not wish to give you their contact name – and this is very rare – then enter “Office Manager” in the First name field.
2. Follow the guidelines stated on page 1 for other name types including surname only.
3. Enter the Suburb and State in their respective fields in CAPS, with no full stops – states abbreviated as per AusPost guidelines – i.e. SA; NSW, QLD; WA; TAS etc.
4. Enter the Postcode in the postcode field.
5. Enter in all comments with no hard returns.



Tips & Tricks for Cleaning up in Excel

- 1 To change the case of a field
 - 1.1 Insert 2 columns next to the field which requires correct case formatting – eg – “First Name”
 - 1.2 Go to the first cell in line 2 of the first column you inserted – leave Row 1 for the Title.
 - 1.3 Go to Insert | Function,

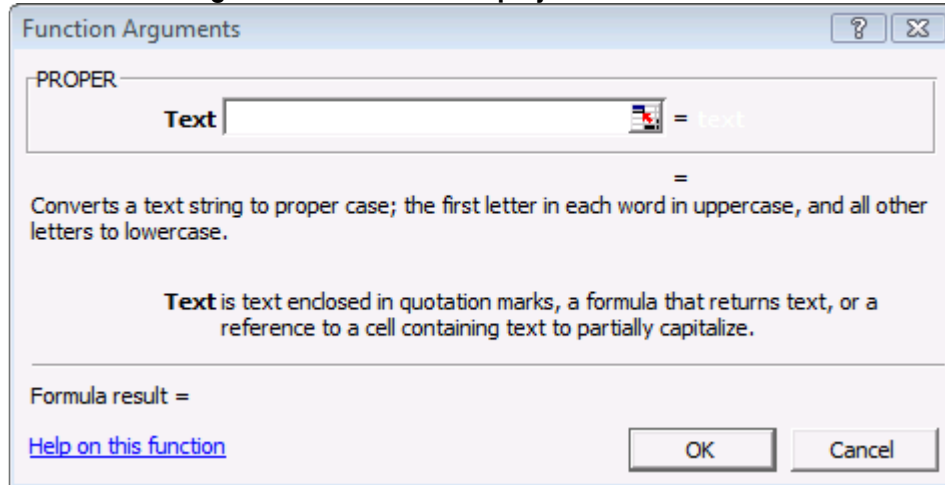
The Insert Function Window is displayed.



- 1.4 Change ‘Or select a category:’ to Text.
- 1.5 Select PROPER for ‘Select a function:’.
- 1.6 Click [OK].

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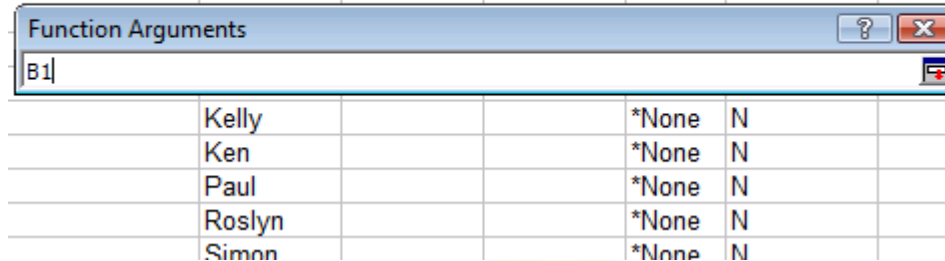
The Function Arguments window is displayed.



1.7 Click .

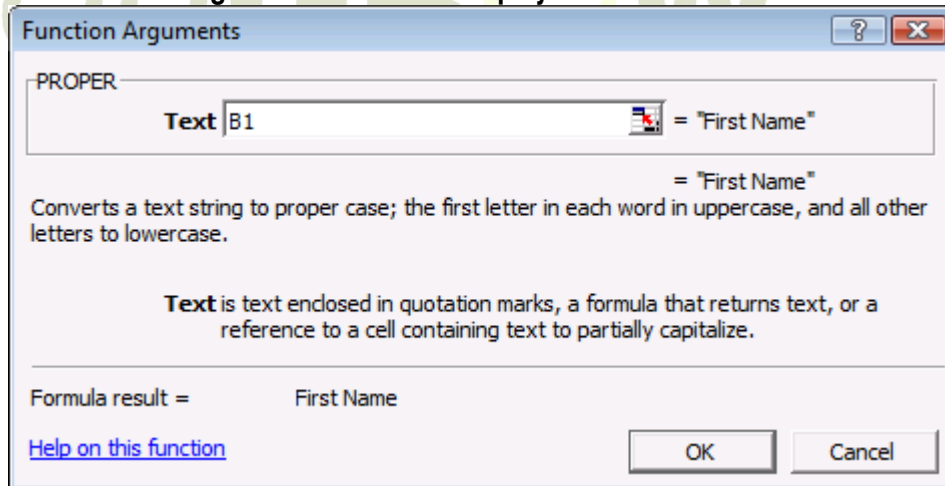
1.8 Select the cell next to this with the First Name in

	B	C	D	E	F	
	First Name	PER(B1)		Card ID	Card Status	Current
	Alex			*None	N	
	Kelly			*None	N	
	Ken			*None	N	
	Paul			*None	N	
	Roslyn			*None	N	
	Simon			*None	N	



1.9 Click .

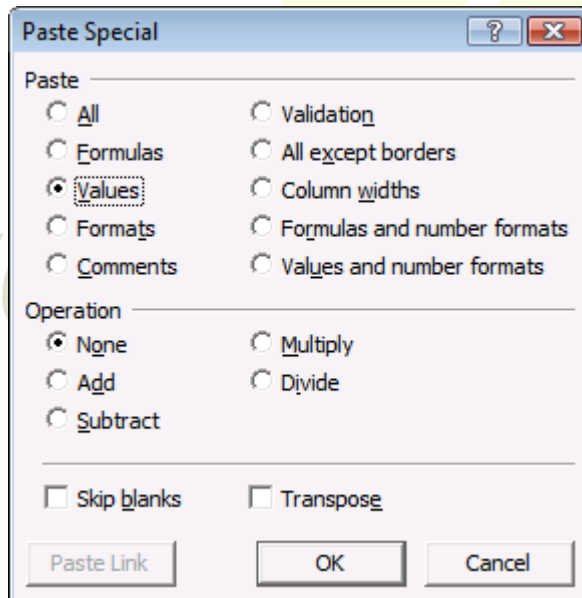
The Function Arguments window is displayed.



- 1.10 Click [OK].
- 1.11 The cell will now be showing the first name with the first letter Capitalised.
- 1.12 Copy the formula down to the end of the entries. (Grab the bottom right hand corner of cell and drag down it will look like image below.)

B	C
First Name	First Name
Alex	Alex
Chris	Chris
Janet	Janet
John	John
Kelly	Kelly
Ken	Ken
Paul	Paul
Roslyn	Roslyn
Simon	Simon

- 1.13 Select this column with the correctly formatted text.
- 1.14 Go to Edit | Copy.
- 1.15 Now select the additional blank column you added in step 1.
- 1.16 Go to Edit | Paste Special.



- 1.17 Now select "Values", under the Paste selection as in the illustration above, and click [OK].
- 1.18 Delete the original column with the incorrectly formatted names in, and the 2nd column you created with the "Proper" formula.

