



TRAINING NOTES

Setting up Initial Views in youGROW

Glossary:

View: A “View” is simply a way of looking at your database in **youGROW**. Whilst you have all of the information stored about a contact within their individual contact folders, you can change the way this displays onscreen to show any information you want. When you change a view, you are not changing the database at all, only changing what information is displayed in the summary view. A view will show all of your contacts, unless the view is “Filtered”.

Filter:

There will be many times when you only want to see, or communicate with, a section of your database, i.e., just those new customers who bought from you for the very first time last week, or just those customers who have bought a certain product, or just those customers who live in a certain street or state. To find just a section of our database or a particular group of customers, we apply a “Filter”, to filter out that particular group of customers. We can run filters on an ad-hoc basis, or use them with views to save these queries.

Standard Views:

Once you have installed and synchronised **youGROW**, there are a number of Standard Views which you will want to set up:

- **youGROW Master View**
This will be your standard view, showing all customers, including Default and Cash Customers.
- **youGROW Query View**
This is a copy of the **youGROW** view, filtered to take out your Cash, Default and other accounts you do not wish to contact – such as purchases from other stores associated or owned by you. This is also the view you will use to run other queries.
- **New Customers Last Week**
So that you can easily find your new customers to send Thank You letters to.

You can create and save as many views as required – the above are the standard views which most customers will require.

Customising the Outlook Toolbar:

To make it easier to access commands we use frequently, we will first customise the Outlook toolbar (these steps can be followed in any of the Office programmes).

1. In Outlook, go to View | Toolbars | Customise
2. Click on the “Commands” tab.
3. On the left-hand side under “Categories”, select “View”.
4. Select “Define Views” and drag this up with the mouse to one of the standard Outlook toolbars (not the **youGROW** toolbar).
5. For other than Outlook 2003, also select and drag up “Current view” (your current views are already listed in the left hand panel in Outlook 2003).
6. Use the vertical scroll bar to scroll down and select “Field Chooser”, and drag this up to the toolbar.



TRAINING NOTES

7. Still on the right-hand side, under “Commands”, use the vertical scroll bar to scroll down to almost the end, and select “Filter” – drag this up to the toolbar.
8. Now go back to the left-hand side under “Categories”, and select “Tools”.
9. On the right-hand side under “Commands”, use the vertical scroll bar to scroll almost to the end, select “Mail Merge”, and drag this up onto the Outlook toolbar.

Your toolbar is now customised with all of the commands you will use regularly with **youGROW**.

Setting up the **youGROW** Master View:

1. Open your **youGROW** Contacts Folder
2. Under “Current View”, select “Phone List” (this is the main “Table” view in Outlook, and makes it much easier to see more details about your contacts, you may want to adopt this view for your other Outlook contact folders).
3. Click on “Define Views” on your customised toolbar.
4. “Current View Settings” is highlighted.
5. Click “Copy” on the right-hand side.
6. Where “Name of New View” is listed, change this to “**youGROW** Master View”.
7. Under “Can be used on”, select the first option, “This folder, visible to everyone”.
8. Click “OK” the “View Summary” box will open.
9. Click “OK”.
10. Click “Apply View”.

We are now selecting the “fields” of information we want to show in this view. First, we will drag off the fields we don’t need:

1. Select the “File As” column heading with your mouse, and just drag this up off the toolbar. When the “X” appears, you can unclick your mouse. The “File As” field is no longer shown in the view.
2. Do the same with the “Business Fax”, “Home Phone”, “Mobile Phone”, “Journal” and “Category” fields. You should now only have the “Full Name”, “Company”, and “Business Phone” fields showing in the view.
3. Click “Field Chooser” on your customised toolbar.
4. Click on the down arrow to the left of “Select Available Fields From”, and scroll down to select the second last heading – either “**youGROW (MYOB)**” or “**youGROW (MYOBRM)**”.
5. Select “Av \$ Sale”, click “Add”.
6. Do the same with the following fields: “Date 1st Sale”, “Last \$ Sale”, “Date Last Sale”, “Total \$ Sales”, and “Total No. Sales”.
7. Click “OK” to close Field Chooser box.

We will now change the column heading order, and names to shorten them and fit in the view, and change the Date formats so that we can sort on them.

1. Now select the “Av \$ Sale” column heading, and drag this to just before the “Total \$ Sales”.
2. Select the “Total No. Sales” column heading and drag this just in front of the “Total \$ Sales”.
3. Right click on the “Date 1st Sale” column heading, and select “Format Columns”.
 - a. Next to “Label”, select this text, and overtype with “1st Sale Date”.
 - b. Next to “Format”, select the drop down arrow, and select the date format “2-May-06”.
 - c. Click “OK”.
4. Right click on the “Date Last Sale” column heading, and select “Format Columns”.
 - d. Next to “Format”, select the drop down arrow, and select the date format “2-May-06”.
 - e. Click “OK”.

Your **youGROW** View is now complete. You can click on any of the column headings to sort Ascending or descending. You should spend some time looking at your highest spending customers, your



TRAINING NOTES

customers who spend the most on an average sale, your customers who buy from you the most number of times, and your customers who have been with you the longest length of time (do this by simply clicking or double clicking on each of the column headings).

Setting up the **youGROW** Query View:

1. Show your **youGROW** View (in OL 2003, select this from the list on the left hand side, in other versions of OL, click on "Current View" on your customised toolbar, and ensure the "**youGROW** Master View" is selected).
2. Click on "Define Views", on your customised toolbar.
3. "Current View Settings" is highlighted.
4. Click "Copy" on the right-hand side..
5. Where "Name of New View" is listed, change this to "**youGROW** Query View".
6. Under "Can be used on", select the first option, "This folder, visible to everyone"
7. Click "OK" the "View Summary" box will open.
8. Click "OK" .
9. Click "Apply View".
10. Now select your Cash, Default and any other customers you do not wish to contact by letter or email. Use Shift and select to select contiguous entries, use Ctrl and select to select non-contiguous entries.
11. When you have selected each of the contacts you don't wish to include in any marketing, right click, and select "Categories".
12. Click on the "Master Category List" button.
13. Delete all of the categories which come standard with MS Outlook except for "Personal" and "Suppliers".
14. Type in "Do Not Contact" as a new category
15. Click "Add".
16. Click "OK".
17. Now check the box next to the "Do Not Contact" category, to apply this category to the selected contacts.
18. Click "OK".
19. Now click on the "Filter" command on your customised toolbar.
20. Select the "Advanced" Tab.
21. Click the down arrow next to "Field", and select "Frequently Used Fields".
22. Select the "Category" field.
23. Select the down arrow next to "Condition", and select "doesn't contain".
24. Next to "Value", type in "Do Not Contact".
25. Click "OK".

You have now filtered the view to exclude those contacts you do not want to market to.

Setting up the "New Customers Last Week View":

1. Show your **youGROW** View (in OL 2003, select this from the list on the left hand side, in other versions of OL, click on "Current View" on your customised toolbar, and ensure the **youGROW** Master View is selected).
2. Click on "Define Views" on your customised toolbar.
3. "Current View Settings" is highlighted.
4. Click "Copy" on the right-hand side.
5. Where "Name of New Vies" is listed, change this to "New Customers Last Week".
6. Under "Can be used on", select the first option, "This folder, visible to everyone".
7. Click "OK", - the "View Summary" box will open.
8. Click on "Filter".



TRAINING NOTES

9. Click the "Advanced" Tab.
10. Click on the down arrow next to the "Field" box, and select either "**youGROW (MYOB)**" or "**youGROW (MYOBRM)**".
11. Select the "Date 1st Sale".
12. Under "Condition", select "last week".
13. Now click on "Add to List".
14. Click "OK".
15. Click "OK" again.
16. Click "Apply View".

This is the view we will select, to mail merge our welcome letters to thank new customers.

