

Instruction Manual

**Accessing your
leads from the
USB Memory
Stick**



DirectLead™

**The Easy to Use,
Reliable Lead
Capture System.**



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Contained in this booklet are the instructions for importing the data captured at the Tradeshow into some popular applications. If you are not using one of these software packages, please consult your application's user manual and follow the list of instructions. The information you will need to import your leads from the diskette to the software can be found under the terms *IMPORT*, *IMPORTING*, *MERGE*, *ASCII*, or *DELIMITED*. Should you have any trouble importing your leads, please contact the registration company from the show; they will be able to help you.

WHAT IS ON YOUR USB MEMORY STICK?

- **VISITOR.TXT** contains all of your leads that you obtained at the show. These leads are in a *comma-delimited ASCII* format.
- **LAYOUT.TXT** describes the layout of the fields within each record. The section titled [Record Layout] has one line identifying each field in the VISITOR.TXT field's record, and the section titled [Demographic Tables] shows the decoding of every possible demographic code to its meaning. A copy of the registration form which was filled out by the show's visitors may be a helpful supplement for this section.
- **EXPAND.BAT** is a batch file to run MAPPER.EXE, and instructs it to use map.cfg (located on the USB stick) and VISITOR.TXT (also located on the USB stick) as its input files and output the expanded leads to LEADS.TXT. You run this batch file if you want to save your leads as LEADS.TXT. If you want to change the name of the file to something other than the default name of LEADS.TXT or if you want to change the directory from the default of the USB stick (usually drive E:), then you need to run MAPPER.EXE.
- **MAPPER.EXE** is used to expand the Y/N follow-up codes to include the original questions. It will also expand the demographic fields to their full meaning. This executable file is run if you want to change the name of the file from LEADS.TXT or if you want to change the directory to something other than the default of the USB stick (usually drive E:).
- **MAP.CFG** is a configuration file that MAPPER.EXE uses to expand the demographic and follow-up codes to their full meaning. This file is updated as questions are added or as the keyboard purchase option is changed.

IMPORTING LEADS INTO MICROSOFT OUTLOOK (2000-2003)

1. Insert the USB Memory Stick into your computer.
2. Open the Outlook program.
3. Click on FILE.
4. Click on IMPORT/EXPORT. The IMPORT/EXPORT WIZARD appears.
5. Click on IMPORT FROM SCHEDULE+ OR ANOTHER PROGRAM.
6. Click NEXT.
7. Click on COMMA SEPERATED VALUES.
8. Click NEXT.
9. At FILE TO IMPORT, Click BROWSE.
Go to the file that was created after you expanded the VISITOR.TXT file. This will either be LEADS.TXT or the name of the file you created.
**Please note: If the file names do not show, please type in the file name as leads.txt (or the name of the file you created using MAPPER.EXE) and then Click Open.
10. Under OPTIONS, choose any of the 3 options you would like; it is all a matter of personal/company preference.
11. Click NEXT.
12. Select the destination folder: CONTACT.
13. Click NEXT.
14. Click on the IMPORT LEADS.TXT (or the file you named) box. This will lead you into a screen where you will map the fields that you will import.
15. Follow the instructions at the top of the screen:
--Make sure the first record contains field names is UNCHECKED
--On the right side of the screen, the side labeled MICROSOFT OUTLOOK CONTACTS, Click on the + to expand the fields. You will need to do this especially with the address field so as to be able to map the street address, city, state, and zip as separate fields.
16. Once all of the fields have been mapped, Click OK.
17. Click FINISH; all of the leads will now be imported into your contact database.

IMPORTING LEADS INTO MICROSOFT EXCEL

1. Insert the USB Memory Stick into your computer.
2. Open Excel.
3. Click on File. Click Open.
4. Change Files of Type to Text Files.
5. Click on Look In then select the Removable Drive that contains the USB Stick.
6. Open the Visitor.txt.
You are now in the TEXT IMPORT WIZARD SCREEN
7. The DELIMITER is comma. Make sure this box is checked. Be sure that you UNCHECK any other boxes that are checked. The TEXT QUALIFIER should be a quotation mark (").
8. Click NEXT.
9. Under Column Data Format select Text.
10. Click Finish.
11. To name column headings refer to Layout.txt file and Ques.txt file.

FORMING LETTERS USING MICROSOFT WORD

Word 2000

1. Open Word.
2. Click on the TOOLS menu.
3. Click on MAIL MERGE. The MAIL MERGE HELPER DIALOG BOX appears.
4. To create a letter, click the CREATE button and choose FORM LETTERS. Select ACTIVE WINDOW.
5. Click the GET DATA button, and choose OPEN DATA SOURCE.
6. Select ALL FILES from the FILES OF TYPE drop down list.
7. Navigate to the LEADS.TXT file or the file you created if you used the MAPPER.EXE program.
8. Click the EDIT MAIN DOCUMENT button on the dialog box that will appear.
9. Type your letter.

FOR EXAMPLE:

Dear _____

Thank you for your interest in our product line. Enclosed is the information you have requested.

Sincerely,
Your Name

10. After you have finished typing your letter move your cursor to a location in your letter where you would like to insert a merge field and click on the INSERT MERGE FIELD button on the toolbar that appears above your document. You may continue adding additional merge fields using this method.
11. Once you have finished inserting all of your merge fields click on the TOOLS menu and choose MAIL MERGE again.
12. Click the MERGE button and select MERGE TO PRINTER.
13. Follow the onscreen prompts and your merged letters will print.

Congratulations you are now following up with your leads!.

Word XP/2002/2003

1. Open Word.
2. Click on the TOOLS menu.
3. Click on LETTERS AND MAILINGS then click on MAIL MERGE. The MAIL MERGE HELPER SCREEN appears on the right hand side.
4. To create a letter, make sure the LETTERS radio button is selected and then click "Next: Starting Document" at the bottom of the helper screen.
5. Make sure the "Use Current Document" radio button is selected and then click "Next: Select Recipients" at the bottom of the helper screen.
6. Make sure the "Use an existing list" radio button is selected and click on BROWSE.
7. Navigate to the LEADS.TXT file or the file you created if you used the MAPPER.EXE program.
8. The MAIL MERGE RECIPIENTS LIST DIALOG BOX will appear. Click the OK button. Click "Next: Write your letter" at the bottom of the helper screen.
9. Type your letter.

FOR EXAMPLE:

Dear _____

Thank you for your interest in our product line. Enclosed is the information you have requested.

Sincerely,
Your Name

10. After you have finished typing your letter move your cursor to a location in your letter where you would like to insert a merge field and click on "More Items" in the MAIL MERGE HELPER SCREEN to add in your merge fields.
11. Click the MATCH FIELDS button in order to map your data to the appropriate merge fields.
12. The MATCH FIELDS DIALOG BOX will appear. Select the correct field mappings from the drop down lists next to each merge field.
13. Once you have mapped all your fields, click the OK button. You will be returned to the INSERT MERGE FIELDS DIALOG.
14. Select the ADDRESS FIELDS radio box. Click on the field from the list that you would like to insert and click the insert button.
15. To insert more fields in this location repeat step 14. To insert more fields in a different location in your letter click the CANCEL button, move your cursor to the new location and perform steps 10 and 14.
16. Continue inserting fields into your letter as many times as you like following the directions in step 15.
17. Once you have finished inserting merge fields, click "Next: Preview your letters" at the bottom of the HELPER SCREEN.
18. Your letter will be shown replacing the merge fields with the data from your first record.
19. If you need to make changes you may click "Previous: Write your letter" at the bottom of the HELPER SCREEN. If everything looks satisfactory you may click "Next: Complete the merge" to finish your merge.
20. Click on PRINT and follow the onscreen prompts. Your letters will be printed.

The DirectLead Terminal is able to capture a great deal of information in each record. However, your database manager may not be equipped to handle it all. If this is the case, you will need to decide which pieces of information are the most important to your company. These are the fields that you will map into your software. Should you want to see all of the information you captured at the show, you can use a spreadsheet program such as Microsoft Excel. This way, each piece of information is entered into its own column.

If you have any comments, please send us an email at directlead@jspargo.com. We look forward to hearing from you!