



Exporting HP Data



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Understanding Exporting HP Data

HP PurchasEdge is an easy-to-use program that provides rewards for purchasing original HP (Hewlett Packard) supplies. HP rewards points for each qualified purchase made. Once enrolled, users receive access to the PurchasEdge web site where points can be redeemed online for free HP products, including printers, digital cameras, and PDAs. Users enjoy exclusive HP promotions as well as a personalized website, quarterly statements and many special offers. PurchasEdge has been designed to help you build stronger relationships and drive supply sales by rewarding your customers with free HP products.

In order to track HP product information, ECI² has created a new program for use by HP PurchasEdge participating dealers. This program creates an output file that contains customer contact information as well as total sales dollars for HP products. By exporting the data to a file, you can target those customers who purchase less than a specified sales amount. After the data is exported, you can forward the file to HP, who in turn, can assist you with marketing campaigns targeted to increase HP product sales to the customer.

You run this program in the (Z) System Utilities screen. When you do, you can limit the procedure to specific company prefixes, invoice dates, sales amounts, and journalized files. After the program is executed, the system creates an output file with the information you specified. When viewing the file, some fields may be noted as not applicable, but are included as a blank space to maintain the file layout as requested by HP. Once built, you forward this data to HP.

Figure 1: The HP Customer Item Usage Screen

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09:31:34      HP Customer Item Usage (10/05/06)      10/24/06

Master Location [ 1 ]      G/L Location From [ ] to [ ]
Invoice Date From [09/01/06] to [09/30/06]
Company Codes [HPG      ,HEW      ,HEW-IS ,HEWLETT ,      ]
[      ,      ,      ,      ]

Exclude Customers with HP PIDS [N]      Minimum Customer HP Volume $ [      1]
___Mark "LGA" Sales Journals to use:___ ___Input Other Sales Journals to use:___
1) [X] [JOUR-PO ] Volume [CU ] [      ] Volume [      ]
2) [ ] [      ] Volume [      ] [      ] Volume [      ]
3) [ ] [      ] Volume [      ] [      ] Volume [      ]
4) [ ] [      ] Volume [      ] [      ] Volume [      ]
5) [ ] [      ] Volume [      ] [      ] Volume [      ]
6) [ ] [      ] Volume [      ] [      ] Volume [      ]
7) [ ] [      ] Volume [      ] [      ] Volume [      ]
8) [ ] [      ] Volume [      ] [      ] Volume [      ]
9) [ ] [      ] Volume [      ] [      ] Volume [      ]
10) [ ] [      ] Volume [      ] [      ] Volume [      ]
11) [ ] [      ] Volume [      ] [      ] Volume [      ]
12) [ ] [      ] Volume [      ] [      ] Volume [      ]

Use "CONTACT" File [N] Contact Type [      ]
Output File Name [HPUSAGE ] Volume [SR ]

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Running the Export Program

- 1 From the Ensite Pro Master Menu, double-click



- 2 Double-click



- 3 In the Enter Utility Type field, type **B**.
- 4 In the Enter Subset Number field, type **4**.
- 5 In the Enter File Name field, type **;SPC:HP**.
- 6 In the Enter Unit # field, press Enter.
- 7 The HP Customer Item Usage screen opens, as shown in Figure 1. The cursor moves to the Master Location field. Press Tab to accept the default location, or enter the location to use.
- 8 In the G/L Location From/To fields, you can limit the sales journals to specific general ledger locations. Enter the beginning G/L number in the range in the From field and the ending number in the range in the To field. If you enter fewer than two characters, press Tab.
- 9 In the Invoice Date From/To fields, you can limit the sales journals to specific invoice dates. Enter the beginning date in the From field and the ending date in the corresponding To field.
- 10 In the Company Codes fields, you can enter up to 10 product prefixes for this export. The first four prefixes default to HPG, HEW, HEW-IS and HEWLETT. You can accept the defaults or change them. You can enter up to six additional prefixes in the remaining fields.
- 11 In the Exclude Customers with HP PIDS field, you can exclude those customers who have assigned PID numbers. Customer PID numbers are stored in the C-SUPP file.
 - Type **Y** to exclude customers with assigned PID numbers.
 - Type **N (default)** to include both PID and non-PID customers in the export.
- 12 In the Minimum Customer HP Volume field, press Tab to accept the default sales dollar amount of \$1, or enter the minimum dollar amount of total HP customer sales to be saved to the output file. Any customer with total sales for HP products below the dollar amount you specify is not included in the export.

A PID number is a PurchasEdge member (end-user's) identification number. It is used as a unique identifier. PID numbers are obtained from HP.

All journals you select must be JO-INDEX type file. This index is used increase the processing of all the journals.

- 13** The cursor moves to the first Mark LGA Sales Journals to Use field. You can use these fields to mark one or more of the 12 journals set up in the (LGA) Sales Journals parameters screen. The system limits on the sales journal Item Company field. The system searches each journal you mark for HP product usage.
- To mark a field, type **X** beside the journal to use.
 - To not search a field, clear the **X** beside the journal and leave the field blank.
- 14** In the Input Other Sales Journals to Use fields, you can specify an additional 12 sales journals not listed in the (LGA) screen. Enter the sales journal name in the first field and the volume serial in the corresponding Volume field.
- 15** In the Use Contact File field, specify whether to search the C-INFO file or the CONTACT file when performing the export.
- Type **Y** to search the contract database. If you select the CONTACTS file, the system uses the following information during the export.
 - The contact name, e-mail address, and phone number are used from the CONTACT file for all accounts with qualifying sales.
 - If you select the CONTACT file, an e-mail address is not set up, the export program uses all contact information from the C-INFO file for the export.
 - Type **N (default)** to search the C-INFO file instead of the contacts database during the export. If you select the C-INFO file, the system uses the following information during the export.
 - The Info name value stored in the C-INFO file is used for the contact name in the output file.
 - The phone number is used from the C-MASTER file for the phone number field in the output file.
 - The e-mail address is used from the C-INFO file.
- 16** In the Contact Type field, specify the contact type the system searches for contact information, or press Tab and leave this field blank.
- 17** The Output File Name field defaults to the HPUSAGE file. This text file contains all the customer HP export data. Press Tab to accept the default file name or enter the file name to use. You can enter up to 10 alphanumeric characters in this box.

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- 18 In the Volume field, press Tab to accept the default volume serial, the work unit volume serial, or enter the volume serial where the output file will be saved.
- 19 At the Ready to Process prompt, press Enter or type Y.
- 20 The system examines each journal selected, applying any limits specified, and combines the total extended sales of the items that matched by customer. Credits and returns are subtracted from the sales totals. For each customer, sales totals and contact information is written to the text file in a standard .CSV format.

As the file is built, the system displays the beginning and ending times, along with the number of customer records written to the output file.

Viewing the Export File

- 1 To view the output file, scroll to the location on your hard drive where you specified to build the file, C:\DDMS\SR, for example.
- 2 Double-click the name of the output file, hpusage.txt, for example. The system opens the .CSV file in Notepad. The file contains the following information.
 - **Account Number:** The customer's number from the sales journal file.
 - **Department:** The four character department identification code from the sales journal file.
 - **First Name:** The contact name from either the C-INFO file or from the CONTACT file.
 - **Last Name:** This field does not apply; this field is blank.
 - **Email address:** The address from either the C-INFO file or from the CONTACT file.
 - **Phone Number:** The phone number from the Customer Master tab or from the CONTACT file.
 - **Phone Extension:** If a phone extension is entered in the CONTACT file, this field defaults to the extension. If a phone extension does not exist, this field is blank.
 - **HP PID:** If a customer to include does not have a PID with HP, this field is blank.
 - **HP Purchase Totals Sales:** Sales are included for the period specified. Credits and returns are subtracted from the total.
 - **HP Company Name:** The customer name from Customer Master tab.

- **HP Suite:** The customer's suite from the Customer Master tab.
 - **HP Address Line 1:** The customer address from the Customer Master tab.
 - **HP City:** The city in the customer's address from the Customer Master tab.
 - **HP State:** The state in the customer's address from the Customer Master tab.
 - **HP Zip Code:** The zip code in the customer's address from the Customer Master tab.
- 3** Once you have obtained, reviewed and approved your customer distribution list, you can send it by email or by direct mail.
- **Email:** Send it in excel format to the following email address: [http://www.resellersupport@purchasedge.com](mailto:www.resellersupport@purchasedge.com). PurchasEdge contacts you with possible distribution dates and arrangements to test the email.
 - **Direct Mail:** Send the list to a print and fulfillment provider of your choice, along with the PurchasEdge direct mail piece to use.