

How to Export Your Guest Data

GuestBridge allows you to export all or a specified subset of your guest data at any time from the Administrator. Reaching the Export Wizard is slightly different in Version 6.0 and Version 6.3 or later.

If You Are Running Version 6.0

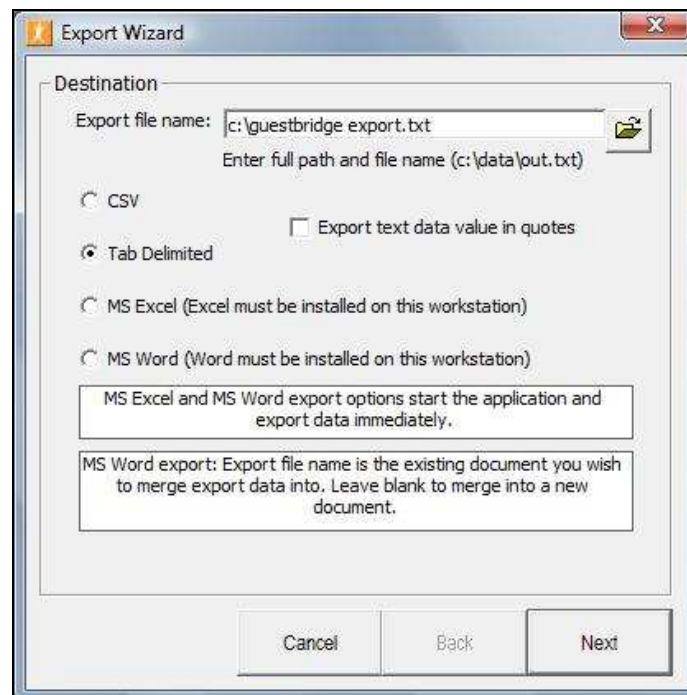
The EXPORT WIZARD utility is located in the Administrator's DATABASE SETUP window. To reach this window, just choose *Guest* and then *Database Setup* from the top menu bar.

Click the *Export Guest Data* button under the GUEST UTILITIES heading at the bottom of the DATABASE SETUP window. The GUEST IMPORT window will appear.

If You Are Running Version 6.3 or Later

The EXPORT WIZARD utility is located in the Administrator's FILE IMPORT window. To reach this window, just choose *File* and then *Import* from the top menu bar.

Note: Your system may be configured to prompt for a user PIN prior to opening the Export Wizard.



Export Wizard

1. **Name the Export File** – If you are exporting to a comma separated values text file (.csv) or a tab-delimited text file (.txt), type the full name of the file for the exported database in the EXPORT FILE NAME field. If you are exporting to an Excel file, leave this field blank.

NOTE: *If you are going to export to Microsoft Excel, Excel MUST be installed on the PC where you are performing the export. If you do not have Excel on this PC, export the file to a .csv or .txt file and open that file with Excel on another machine.*

2. **Select the File Type** – Click the radio button next to the file type you want to use. Click *Next*.
3. **Field Selection** – Select the names of the fields you wish to export. To select all the fields, click *Select All*. When you have finished your selection, click *Next*.
4. **Select Filter Criteria** – If you do not want to export your entire guest list, you can use this window to define the categories of guests you wish to export. Criteria include the date of their first or last visit, VIP status, and how many times they have visited. When you have finished your selection, click *Next*.
5. **Select Guest Categories** – If you only want to export guests with one or more categories, check the box next to ONLY THOSE GUESTS WITH THESE CATEGORIES. Then the category list will become active and you can select the one(s) you wish to export. Use *Select All* to highlight all of the categories. When you have finished your selection, click *Next*.
6. **Select Mailing Criteria** – If you only want to export guests with an e-mail address, check the box next to ONLY CUSTOMERS WITH E-MAIL ADDRESSES. If you only want guests with a mailing address, check the box next to ONLY CUSTOMERS WITH FULL MAILING ADDRESSES. When you have finished your selection, click *Next*.
7. **Select External Sources** – If you have imported all or part of your guest database from external sources, and you only want to export the guests who came from one or more of these sources, check the box next to ONLY THESE EXTERNAL SOURCES. The list of sources will become active and you can select the one(s) you wish to export. When you've finished your selection, click *Finish*.
8. **Confirm the Export** – For CSV for tab-delimited files, the Export Wizard will now tell you how many guests were exported. For Excel files, the Export Wizard will warn you that the export process may take several minutes, depending on how many guests are being exported. When the export process is finished, Excel will open and the results will be displayed. You can now save this file to the location of your choice.

If you have any questions, please call GuestBridge Technical Support at 414-918-7550 or email support@guestbridge.com.

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