Marketing & Outreach Custom Report

Background

Custom reports are a great tool to generate data for various purposes. This procedure will walk you through the process of extracting data on previously benefitted customers not currently benefitted for the current program year.

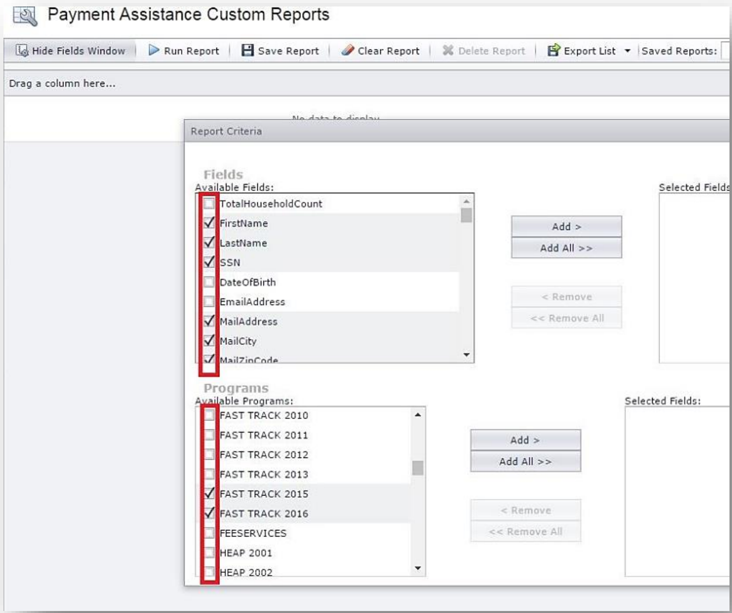
Step 1: Select Data Fields to Build Report

Under the Analytics tab, select *Payment Assistance Custom Reports*. **Click** on "Show Column Chooser" to gain access to the data output fields available.

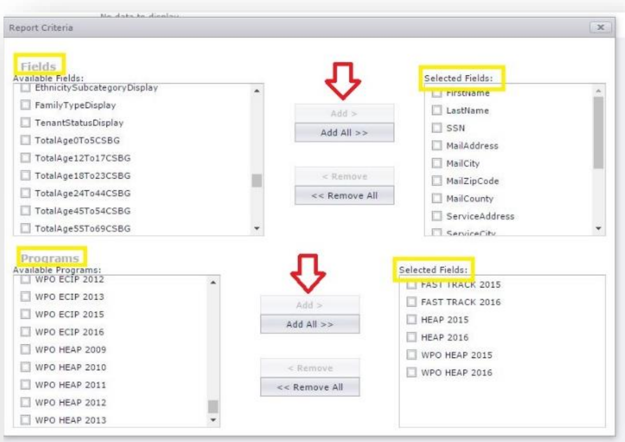
In the left hand box titled "Available Fields" select as many output fields as needed and click **Add>**. For this specific report the following output fields are recommended:

- Social Security Number
- First Name, Last Name
- Mailing Address, City, Zip Code
- Service Address, City, Zip Code
- Program Year
- Application Status

Next, select the payment assistance program years and click **Add>**. The program year selection is necessary to compare applicants served under one program year (i.e. FastTrack 2015) and not the other (i.e. FastTrack2016).



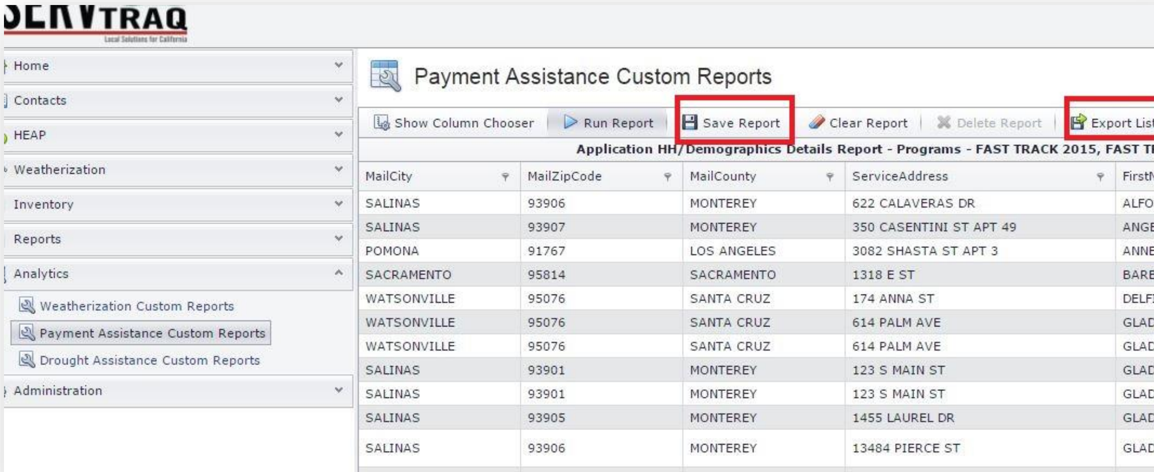
Once the selected output fields and programs have been added, click the "**X**" in the upper right corner to close the *Report Criteria* box.



Step 2: Extract the Data from ServTraq

Click the "**Run Report**" button to extract the data.

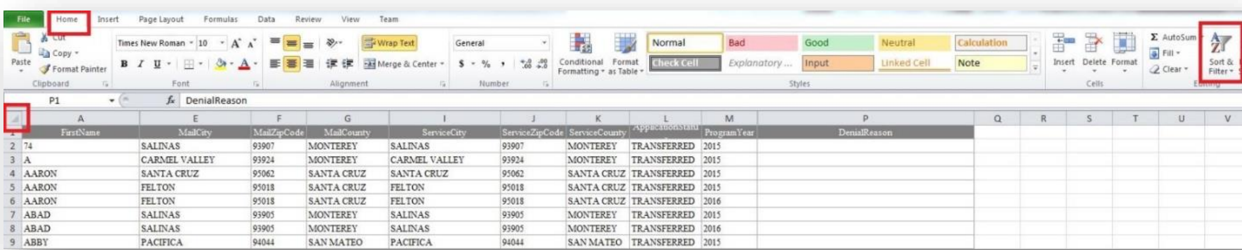
Optional step: We advise to **save** the custom report just in case ServTraq times out or doesn't export properly during the next steps. To save click on the "**Save Report**" button on the ribbon.



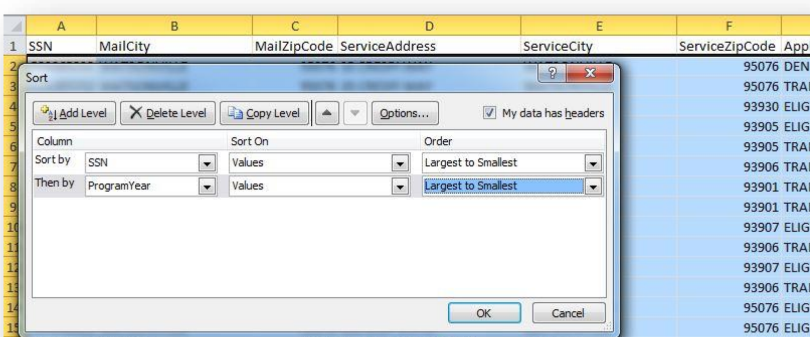
Place curser on the “Export List” drop down button and click “**Export to CSV**” format. Once it exports click “Enable Editing” and save the spreadsheet before going any further.

Step 3: Sort and Filter the Data

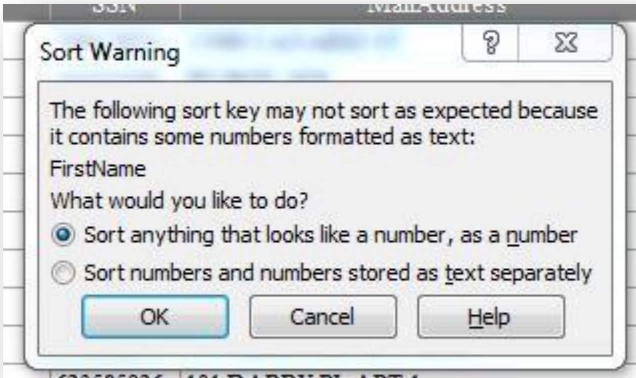
From the Excel Home tab, go to *Editing>Sort and Filter* and select **Custom Sort** from the available options.



Sort the data by **Social Security Number** from “Largest to Smallest”. Click the “Add Level” button and select “Program Year” and sort by “Largest to Smallest” and click OK.

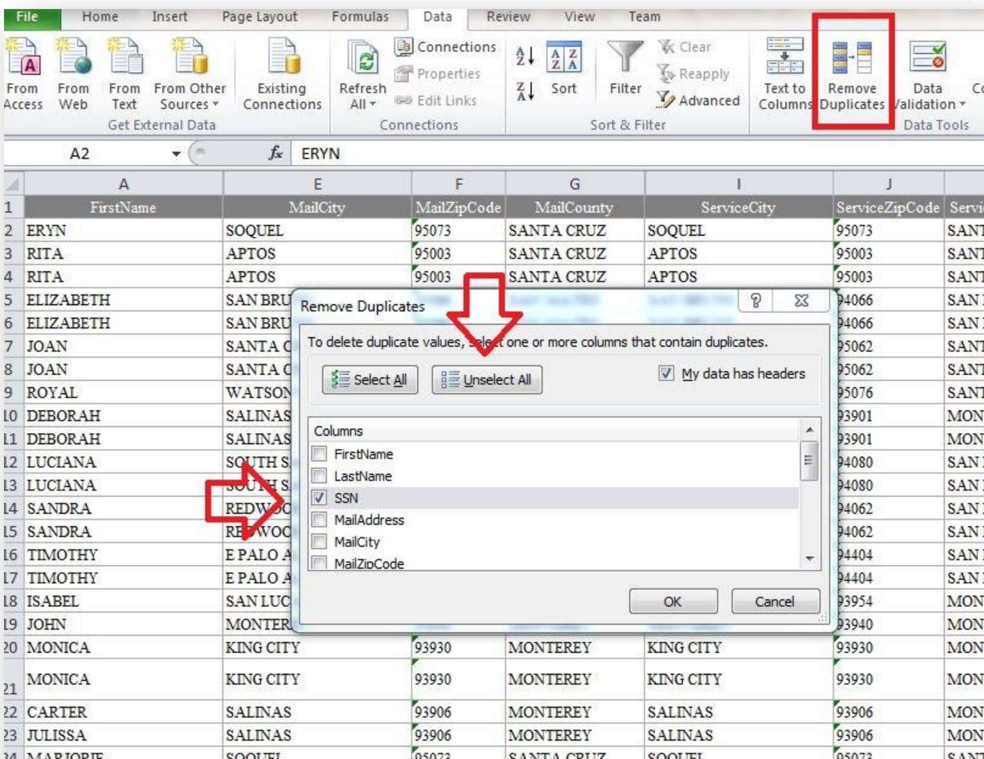


A “Sort Warning” may appear. Click “ok” to sort anything that looks like a number as a number.



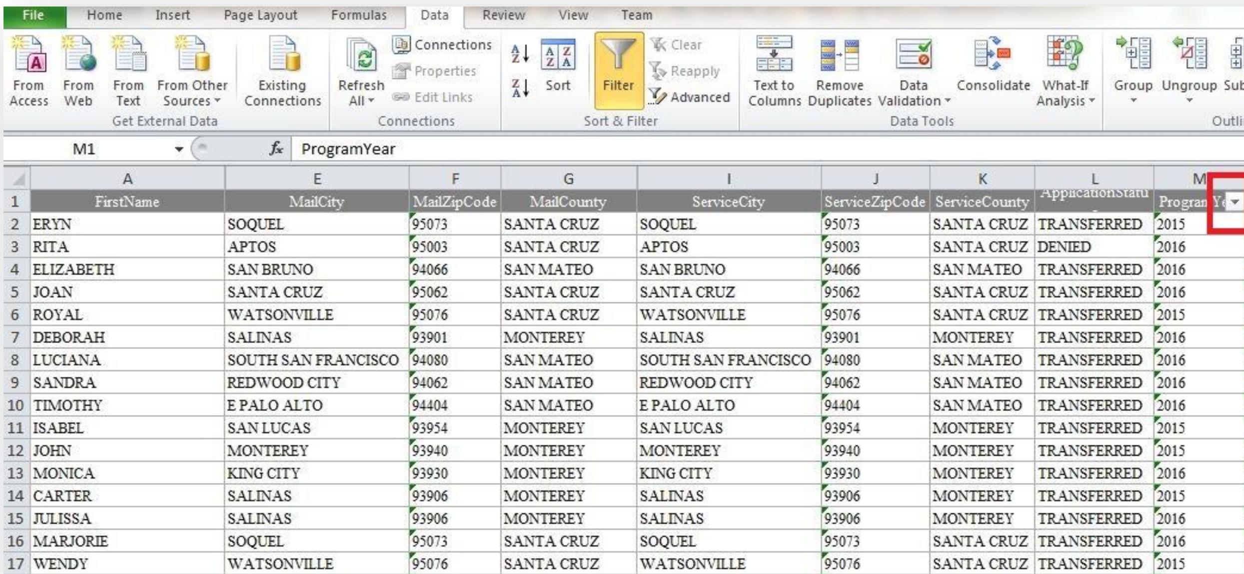
Step 4: Remove Duplicate Values

Go to the **Data tab** and click on the “Remove Duplicates” button. A menu will pop up with values for excel to check through for duplicates. Click “unselect all” and **only** checkmark the SSN box and click ok.



Step 5: Remove

Next, filter the Program Year column by “Smallest to Largest” and delete *all* 2016 Program Year records. Your list will now only have applicants benefitted in program year 2015, not assisted in Program Year 2016.

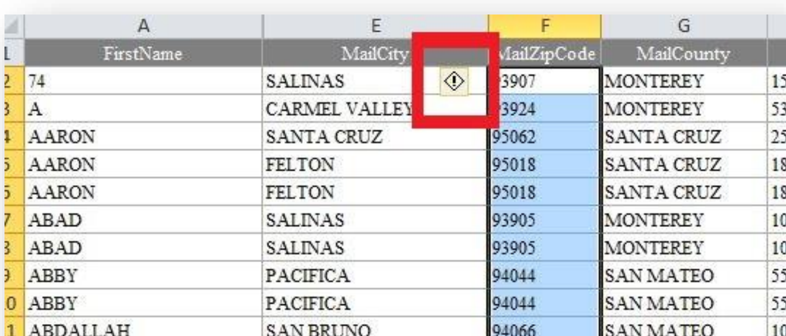


	A	E	F	G	I	J	K	L	M
1	FirstName	MailCity	MailZipCode	MailCounty	ServiceCity	ServiceZipCode	ServiceCounty	ApplicationStatu	Program Ye
2	ERYN	SOQUEL	95073	SANTA CRUZ	SOQUEL	95073	SANTA CRUZ	TRANSFERRED	2015
3	RITA	APTOS	95003	SANTA CRUZ	APTOS	95003	SANTA CRUZ	DENIED	2016
4	ELIZABETH	SAN BRUNO	94066	SAN MATEO	SAN BRUNO	94066	SAN MATEO	TRANSFERRED	2016
5	JOAN	SANTA CRUZ	95062	SANTA CRUZ	SANTA CRUZ	95062	SANTA CRUZ	TRANSFERRED	2016
6	ROYAL	WATSONVILLE	95076	SANTA CRUZ	WATSONVILLE	95076	SANTA CRUZ	TRANSFERRED	2015
7	DEBORAH	SALINAS	93901	MONTEREY	SALINAS	93901	MONTEREY	TRANSFERRED	2016
8	LUCIANA	SOUTH SAN FRANCISCO	94080	SAN MATEO	SOUTH SAN FRANCISCO	94080	SAN MATEO	TRANSFERRED	2016
9	SANDRA	REDWOOD CITY	94062	SAN MATEO	REDWOOD CITY	94062	SAN MATEO	TRANSFERRED	2016
10	TIMOTHY	E PALO ALTO	94404	SAN MATEO	E PALO ALTO	94404	SAN MATEO	TRANSFERRED	2016
11	ISABEL	SAN LUCAS	93954	MONTEREY	SAN LUCAS	93954	MONTEREY	TRANSFERRED	2015
12	JOHN	MONTEREY	93940	MONTEREY	MONTEREY	93940	MONTEREY	TRANSFERRED	2015
13	MONICA	KING CITY	93930	MONTEREY	KING CITY	93930	MONTEREY	TRANSFERRED	2016
14	CARTER	SALINAS	93906	MONTEREY	SALINAS	93906	MONTEREY	TRANSFERRED	2015
15	JULISSA	SALINAS	93906	MONTEREY	SALINAS	93906	MONTEREY	TRANSFERRED	2016
16	MARJORIE	SOQUEL	95073	SANTA CRUZ	SOQUEL	95073	SANTA CRUZ	TRANSFERRED	2016
17	WENDY	WATSONVILLE	95076	SANTA CRUZ	WATSONVILLE	95076	SANTA CRUZ	TRANSFERRED	2015

Additional Information

Excel Data Conversion

Excel provides different format types. In some cases, number columns may not be recognized as actual numbers. To convert column data to numbers, manually highlight the ENTIRE column and click on the little box that appears to the side of the column. Select “Convert to Numbers”. If the little box does not appear, you will need to double click inside one of the cells from that column, then click out of the cell. Finally reselect the entire column and it should appear.



	A	E	F	G	
	FirstName	MailCity	lailZipCode	MailCounty	
	74	SALINAS	3907	MONTEREY	15
	A	CARMEL VALLEY	3924	MONTEREY	53
	AARON	SANTA CRUZ	95062	SANTA CRUZ	25
	AARON	FELTON	95018	SANTA CRUZ	18
	AARON	FELTON	95018	SANTA CRUZ	18
	ABAD	SALINAS	93905	MONTEREY	10
	ABAD	SALINAS	93905	MONTEREY	10
	ABBY	PACIFICA	94044	SAN MATEO	55
	ABBY	PACIFICA	94044	SAN MATEO	55
	ABDALLAH	SAN BRUNO	94066	SAN MATEO	10

Additional Report Criteria

The most important step before running a Marketing and Outreach report is to identify the basic criteria necessary to create an accurate report. Below are additional options to consider:

Account Number – The Account Number field allows for a duplicate check on households assisted in different program years under different household members.

Denial Reason – The Denial Reason field allows for possible inclusion of certain customer denied for services which may now be eligible.
For example: Customers who were denied because of a “credit balance” who haven’t reapplied.