

Office Buildings Mail List Manual

OFFICE BUILDINGS MAIL LIST MANUAL

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I. Creating the Mail List

- All necessary files should be located in the relevant folder in [Server/Mailsub/Books](#)
- Begin work on each mail list at least one month before due date. Refer to OB Schedule for correct date.
- All files must match the ob maillist format.

1) Read Me File

- A) Find applicable Read Me file from previous year
- B) Provide last year's totals and projected for this year
- C) Inquire into any source where origin is unknown

2008 NEW JERSEY OFFICE BUILDINGS MAILING LIST COMPARISON

2007				2008				
Description	Path	Proj	Actual	Source	Description	Path	Proj	Actual
Asset Managers		122	122	ASST	Asset Managers		83	83
HR Private		292	362	HRPL	HR Private		292	
Industrial Research Development Council		232	231	IDRC	Industrial Research Development Council		220	220
Dun & Bradstreet NJ		5973	5645	DBNJ	Dun & Bradstreet NJ		5910	5910
OB Managers		362	585	MNGA	OB Managers		559	559
		64	64	NARE			62	62
		146	145	NCREI			145	145
Top-List				NJTL	Top-List			
NJ Brokers		1206	1308	NJBK	NJ Brokers		1206	
NJ Mailing		516	664	NJML	NJ Mailing		516	
NIOP		180	174	NJNP	NIOP		180	
OB Owners		13	32	NJOVW	OB Owners		35	35
NY Brokers		1116	1243	NJMB	NY Brokers		1116	
Paid Subscribers		6		PAID	Paid Subscribers		6	
Real Estate Investment Trusts		105	105	REIT	Real Estate Investment Trusts		253	253
Real Estate Investment Trusts 2		168	168					
YR Seed		9	9	YRSD	YR Seed		7	7
		10510	10857				10590	7274

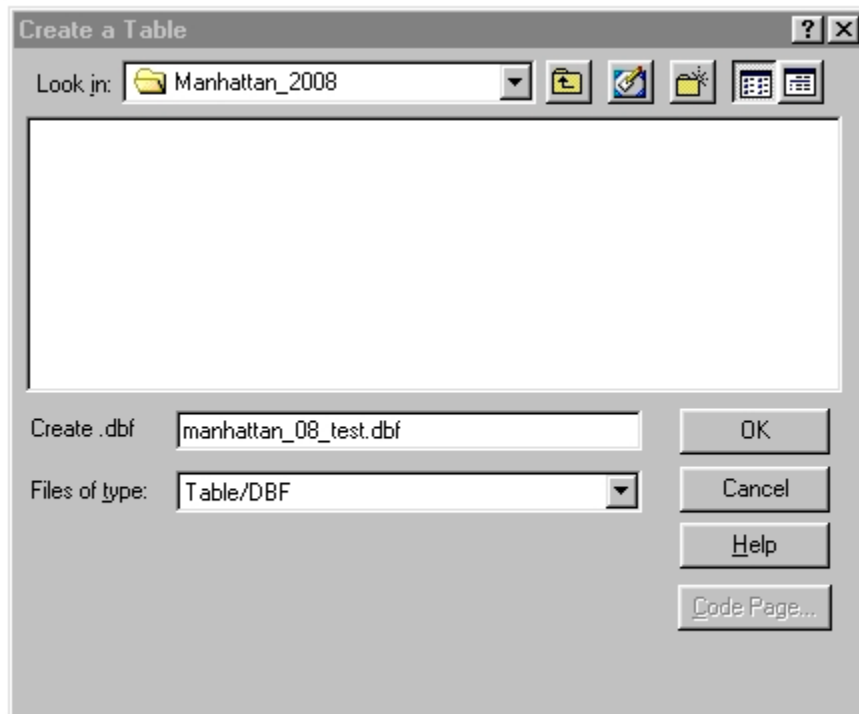
2) Obtain and clean new and perennial files

- A) Work in Excel before creating as dbf
 - i) Save only cells needed, not entire sheet and delete other sheets
 - ii) Be aware of truncated fields and effect when created as a dbf. Allow more than enough room for columns.
 - iii) Be conscious of zip codes. Data may get lost due to alignment. Excel will also drop off the first zero in a zip code. This can be fixed in the MailList program.
- B) Find all applicable files to be used this year
 - i) [REIT, ASST, IDRC, NCRE and NARE](#) files should be updated annually. These can be found in the Constants folder. All should be researched at the end/beginning of the year.
 - ii) Look for any sources that are specific to particular book and obtain
- C) Save in year appropriate folder in Server/Mailsub/Books
- D) Brokers and Mail (developers) will be provided by Dianne Ramphal. Some formatting changes will have to be made.
- E) Create tenants list from master [D&B tenants list](#). Ian Goodwin will obtain this list quarterly.
 - i) Sort by state (s) included in book and by Employees Here heading (no. of employees at local location).
 - ii) Copy and paste selected records into new file.
 - iii) Try to at least match number of tenant records from previous year (see ReadMe).
 - iv) Major formatting will be involved

- (a) Use Text to Columns feature in Excel to split Name column into 3 separate columns. Combine column where appropriate (Mc + Mahon should be McMahan).
 - (b) Use Concatenate function to combine several street columns into one.
 - (c) Use Concatenate function to combine multiple suite columns into one.
 - F) Obtain Paid Subscribers list for each book from Accounting at least one week before list is due. Minimum clean up will be involved with this.
 - G) Obtain private list from HR. These are his contacts for this book. List will require some cleanup and research (missing zip codes, etc.).
- 3) *Create tables in Maillist*
- A) Follow instructions in [Using Maillist Program to create OB Mail List](#)
 - B) Before sending to Cadmus, send ReadMe File to HR and get approval and total print count.
 - C) Send zipped completed file to Steve Rothman (or to Cadmus representative directly).
- 4) *Post-mail list creation*
- A) Extract individual source tables from final mail list and save in folder called Source Code
 - B) Clean up folders by deleting any unnecessary files
 - C) Update Read Me file
 - D) Keep track of returns and address changes
 - i) Make sure to change all that were part of one of the [Constant files](#) described in 2.B.i. above
 - ii) Make changes to Manhattan file since that file will be used four times and should be up to date. If changed, file will have to be re-run through Maillist for next book. You also have the option of rebuilding the file for subsequent books.

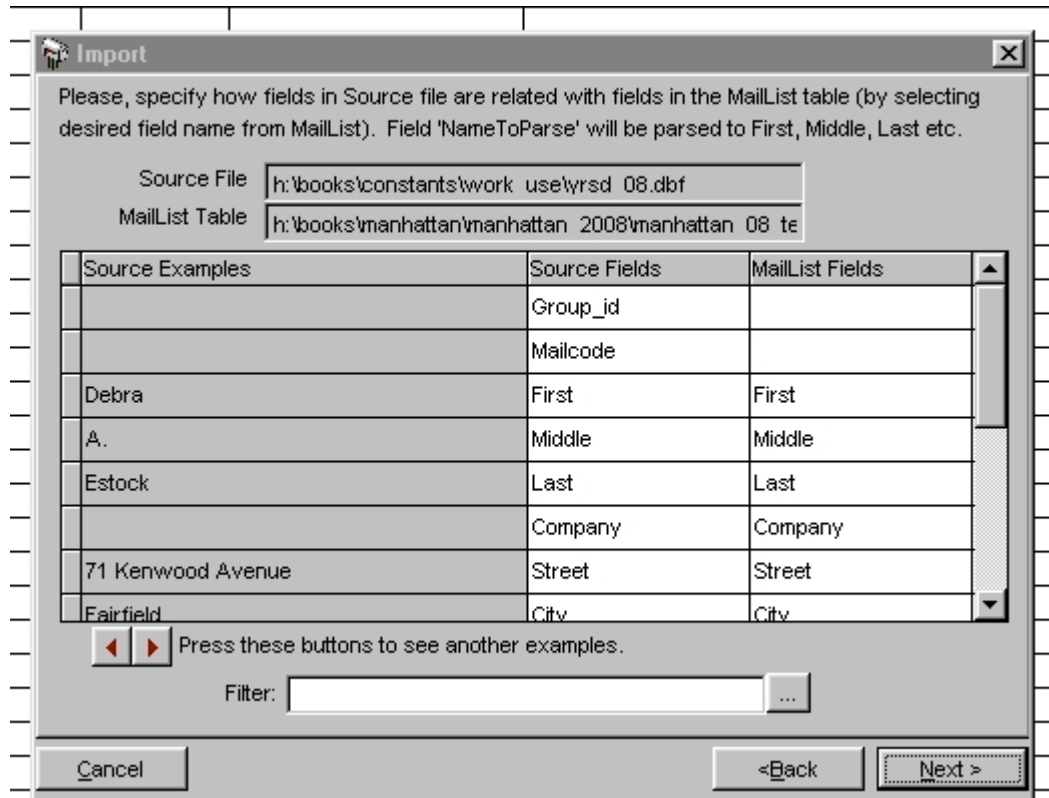
II. Using the Maillist Program to Create OB Mail List

- 1) Creating a file
 - A) File
 - i) New
 - B) Create dbf
 - i) Name file and choose folder for location



- C) Data
- D) Import
- E) Select file to import
- F) Confirm source file and target file
- G) Specify fields

- H) Ensure relationship to field is consistent
 - i) Review records by using arrow keys



- I) If field name is empty, select matching name from drop down menu
- J) Next

2) Specify Source and Description

- A) Source must be 4 characters
- B) Only select from drop down menu if you are replacing an existing source
- C) Describe source in description field
- D) Uncheck “Includes records with empty Company names” in most cases. YR Seed will likely be the only list with records without company names.

Import

Please, specify the Source and the Description, describing the new set of data.

Source: YRSD

Description:

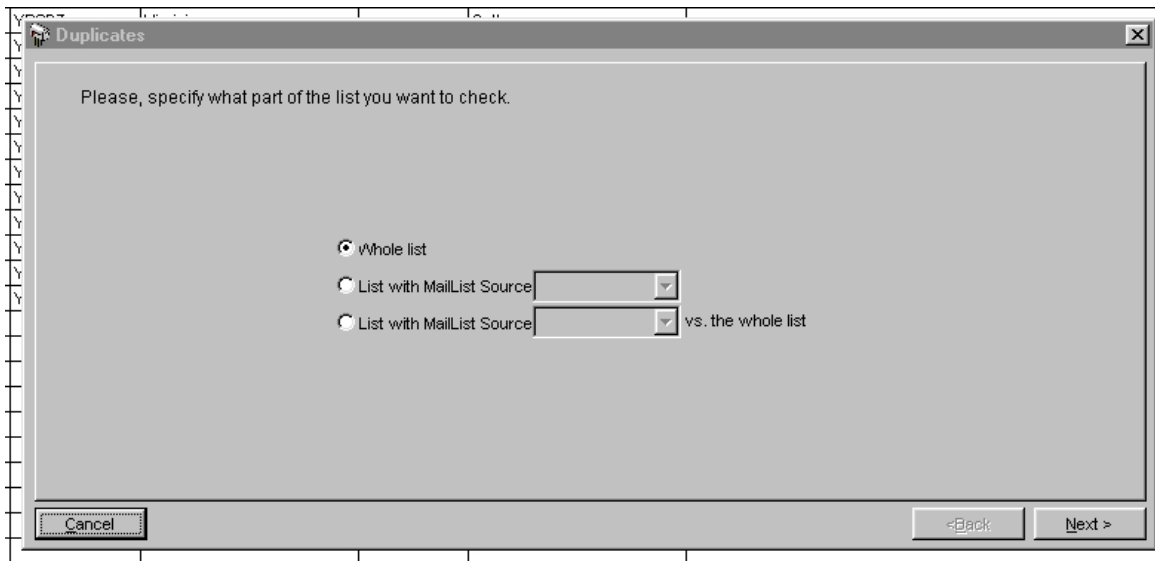
Yale Robbins' In House List

Include records with empty Company names

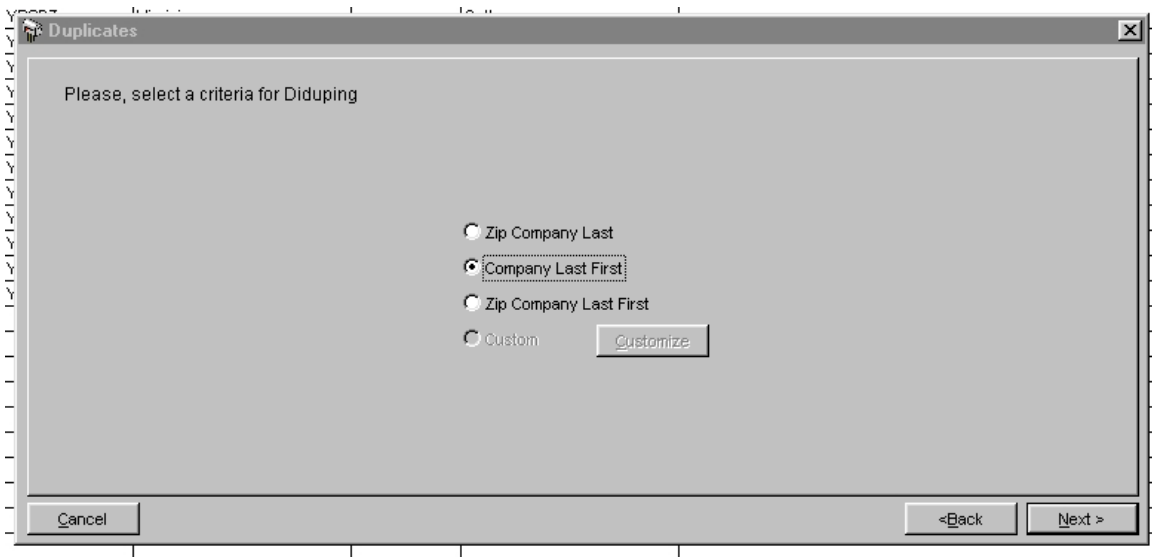
Cancel <Back Finish

- E) Finish
- F) Ignore error “Since field LIST_ID was not...”
- G) Information pop up listing # of records
- H) Ok

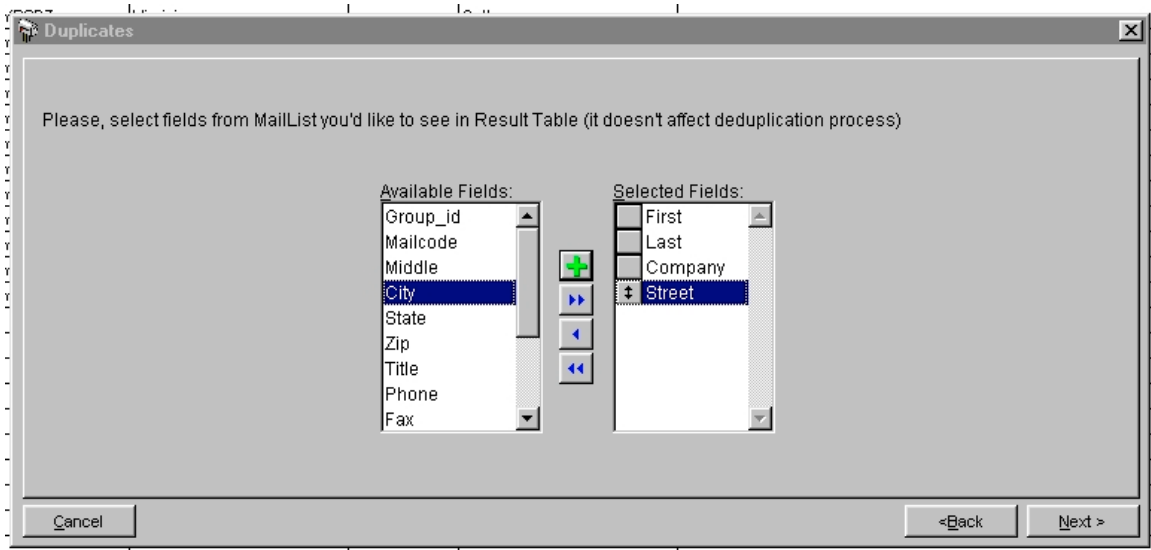
- 3) Deduplication
 - A) Specify part of list to check
 - B) Whole list
 - i) List with Maillist Source (from drop down menu)
 - ii) List with Maillist source vs Whole List



- C) Next
- 4) Criteria for Deduping
 - A) Zip Company Last
 - B) Company Last First- *Use this as the default.*
 - C) Zip Company Last First

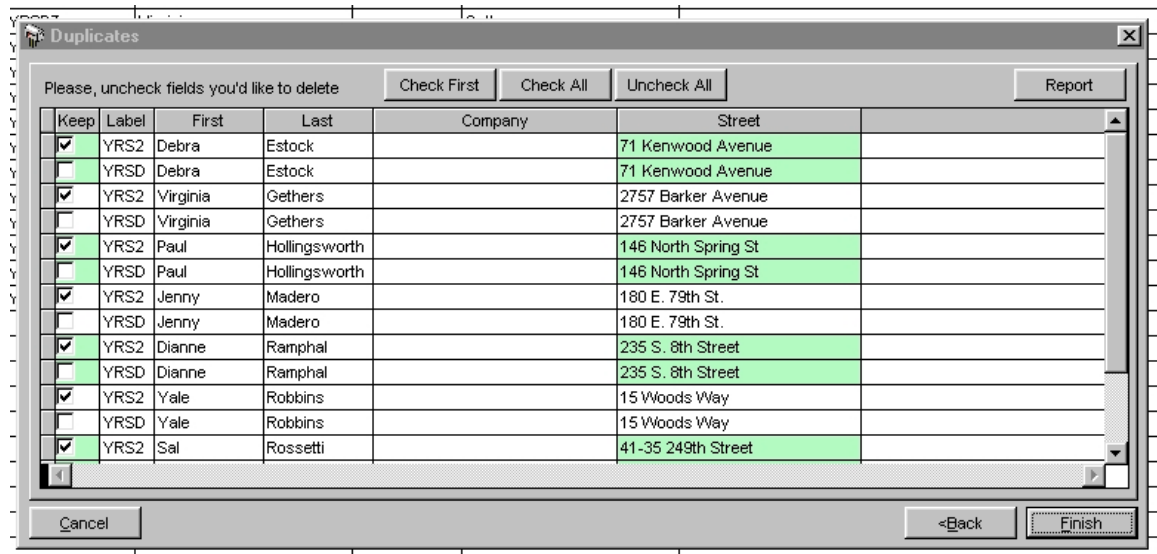


D) Next

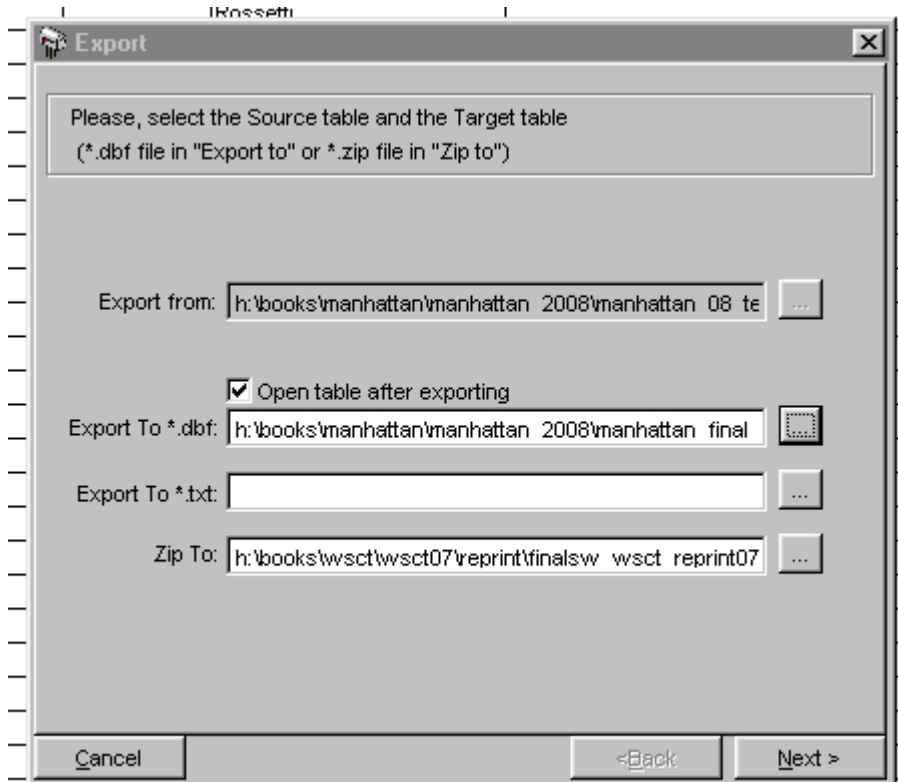


- 5) Select fields to view in Results Table
A) Results Table

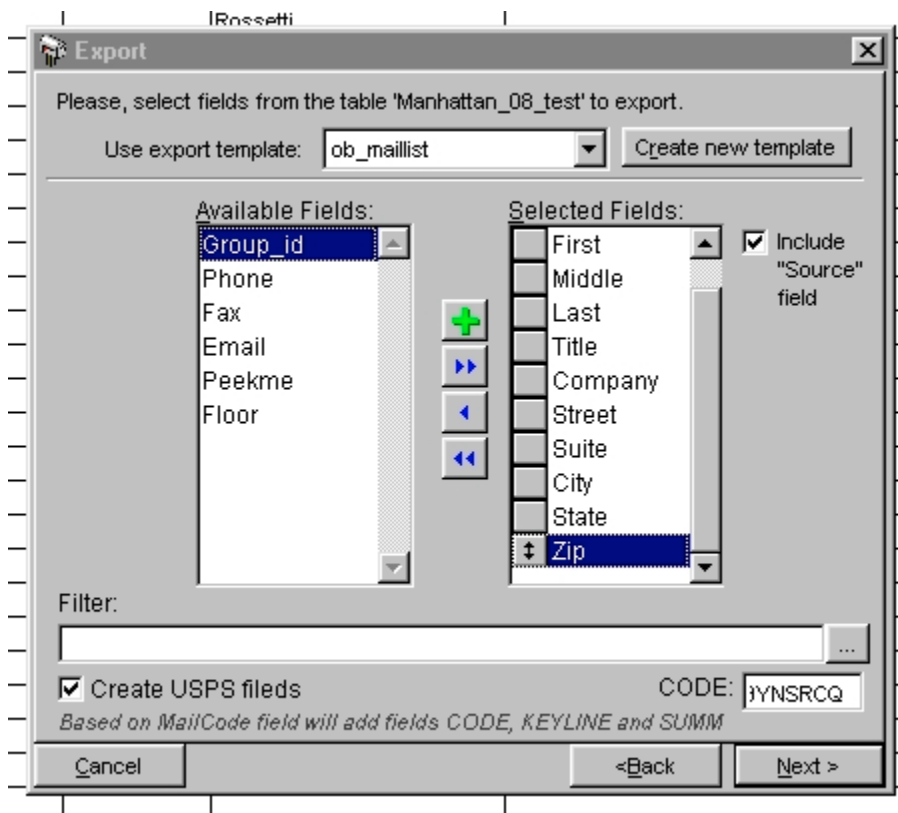
- B) Checked fields will be kept
- C) Unchecked fields deleted
- D) Dupe determined by program will be highlighted in green
- E) Can create Excel report of dedupes by choosing Report. Briefly review this report to determine how many records will be deleted.
- F) In general, keep records from the brokers, developers (mail) and paid subscribers lists.



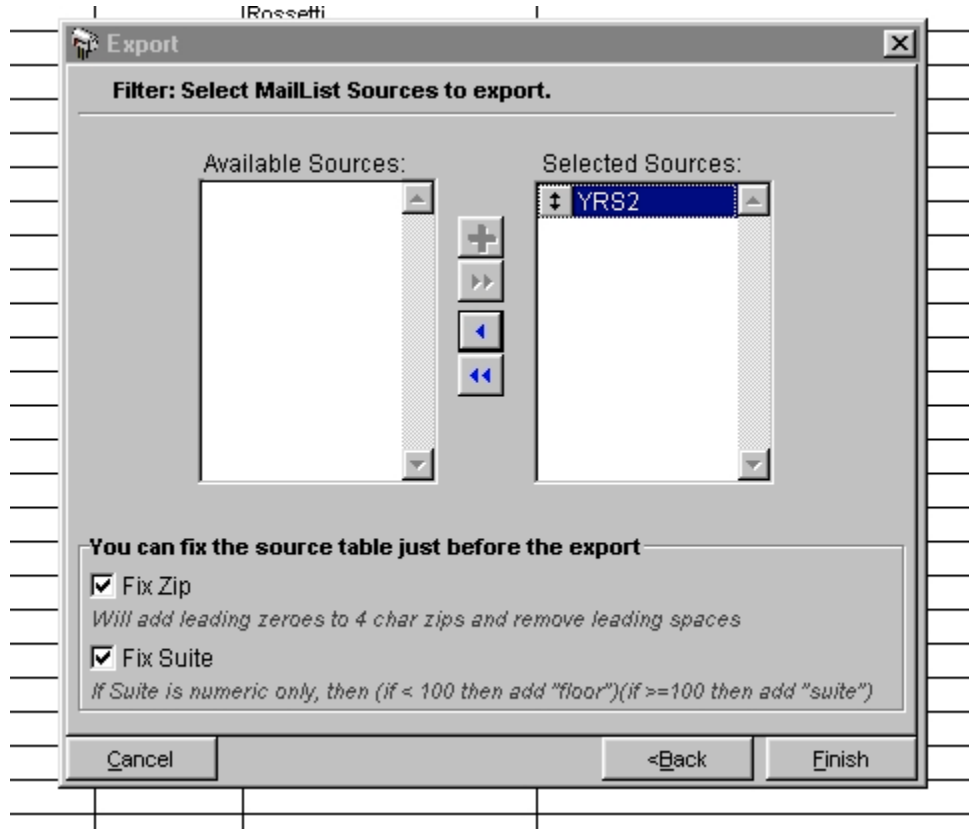
Export final table to YR mailing format



- G) Export table to proper template table for OB mailing purposes
- H) Select destination and type of file to be exported to
- I) Select template: ob_maillist



- J) Enter appropriate code for book
 - i) Refer to [US Postal Service Codes List](#)
- K) Next



- L) Select source
- M) Choose Fix Zip and Fix Suite
- N) Finish

- O) Two files will appear- the original and the newly created file. The title/location for the original will be shaded in dark gray and the new in light grey.

h:\books\manhattan\manhattan_2008\manhattan_08_test.dbf (9 rs)			h:\books\manhattan\manhattan_2008\manhattan_final_2008.dbf (9 rs)			
Source	Mailcode	First	Middle	Last	Title	
YRS2	YRS21	Debra	A.	Estock		
YRS2	YRS27	Virginia		Gethers		
YRS2	YRS29	Paul		Hollingsworth		
YRS2	YRS22	Jenny		Madero		
YRS2	YRS23	Dianne		Ramphal		
YRS2	YRS24	Yale		Robbins		
YRS2	YRS25	Sal		Rossetti		
YRS2	YRS28	Jill		Rotanelli		
YRS2	YRS26	Steven		Rothman		

III. Constant Files – Definitions

1. REIT- Real Estate Investment Trusts
 2. ASST- Asset Managers
 3. IDRC- Industrial Research Development Council
 4. NCRE- National Club of Real Estate Investors
 5. NARE- National Association of Real Estate Investment Managers
- These should all be researched after Cleveland has been mailed and before Philadelphia.

IV. Book-Specific Notes

PA

Used [Chambers of Commerce](#) for several counties. These should be researched at the end/beginning of year.

NJ

Obtain NIOP list from HR. He will instruct you as to what parts to use (usually only Principals).

NY

Match WS VIP Brokers List companies to previous year's.
Same list can be used for Manhattan Review, Midtown South and Downtown since they all are less than one pound in weight. Midtown will have to be recreated since it is over one pound, there will be a new D&B tenants list by that point (obtained in September) and it should reflect any changes in address and returns from the previous three NY books.

BC/BS

Select Hartford brokers from WSCT brokers list.
Unsure about future status of Mass Tech List.
Obtain NIOP list from HR. May be a separate mailing.

OH

Check on status of NEOS List. COSE is the small business division of the Greater Cleveland Partnership (a chamber of commerce). The list consists of IT/Software firms in the Greater Cleveland area. The company has a membership with the organization, but it may have to be renewed to obtain the member directory for the list. Check with Ian Goodwin.

Tenants

Select from Dun & Bradstreet tenant data list. [See instructions above.](#)

Saved under [\\Server\prgmdata\Users\Manuals\OB\OB Mail List.doc](#)