

Recalls, Etc.

EXPORTING REPORTS FROM OFFICEMATE

1. Click on REPORTS in OfficeMate
2. Click on the ON DEMAND tab
3. Select and check the INTERNAL MARKETING report (if it is not listed, click on ADD button on bottom, highlight INTERNAL MARKETING, and click SELECT)
4. Scroll down the SELECTION FOR INTERNAL MARKETING bar to “Recall Date >=” and enter the beginning recall date. Then go to “Recall Date <=” and enter the ending recall date.
5. Click on PREVIEW.
6. Once you are able to view the report, verify that it is correct/accurate.
7. To export, click on the EXPORT ICON (envelope with red down arrow to right of print icon).
8. Select the appropriate FORMAT (EXCEL) and DESTINATION (A drive or C drive) for the file and click OK
9. Name and save the file.
10. Repeat these steps for each month you want to send recalls for. ie 12 months, 18 months, and 24 months.
11. Once you have all the months pulled email the lists to mary-claire@recallsetc.com