

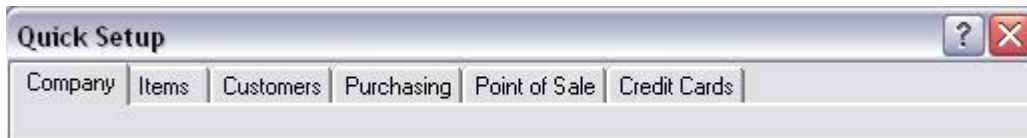
Track a Customer's Birth Month

Use this information to send your customer a special mailing the month of their birthday!

Step 1 : Setup CounterPoint SQL to track a Customer's Birth Month

CounterPoint SQL / Setup / System / Quick Setup

Click the Customers tab



Select the Profile to Activate

[What is the difference between the 4 profile types?](#)

Specify the user-defined fields you want to use and their display labels.

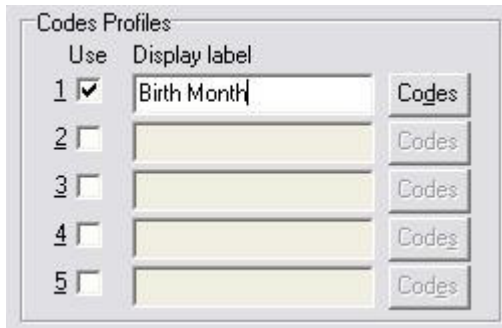
Codes Profiles			Date Profiles		
Use	Display label		Use	Display label	
<input type="checkbox"/>		Codes	<input type="checkbox"/>		
<input type="checkbox"/>		Codes	<input type="checkbox"/>		
<input type="checkbox"/>		Codes	<input type="checkbox"/>		
<input type="checkbox"/>		Codes	<input type="checkbox"/>		
<input type="checkbox"/>		Codes	<input type="checkbox"/>		

Alphanumeric Profiles			Numeric Profiles		
Use	Display label		Use	Display label	
<input type="checkbox"/>			<input type="checkbox"/>		
<input type="checkbox"/>			<input type="checkbox"/>		
<input type="checkbox"/>			<input type="checkbox"/>		
<input type="checkbox"/>			<input type="checkbox"/>		
<input type="checkbox"/>			<input type="checkbox"/>		

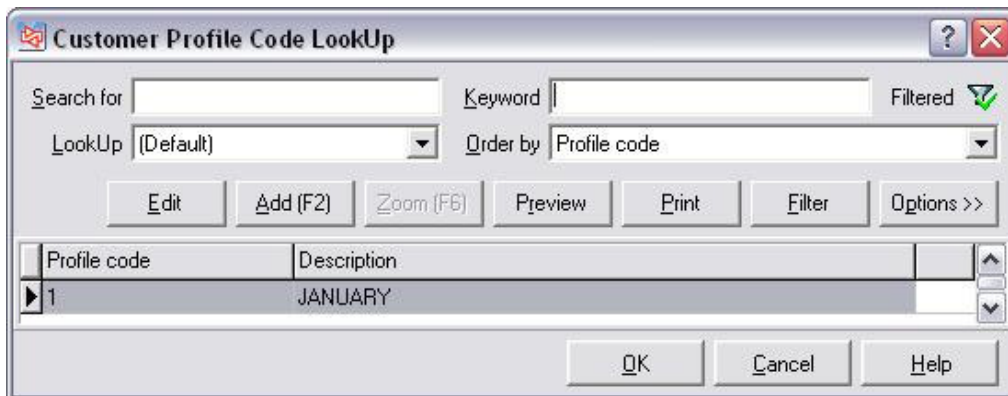
Select the check box to activate

Type in the Label or 'question' under Display Label

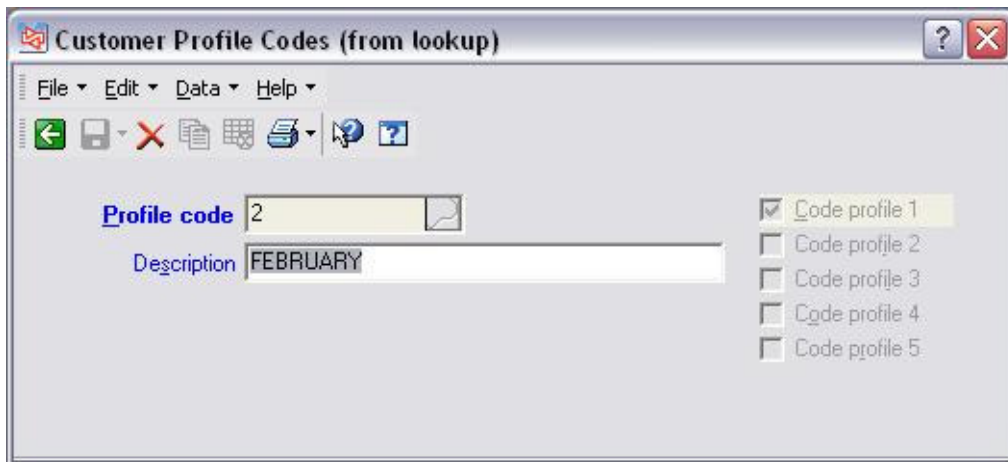
Since the 'answer' can be pre-defined, we'll setup a Profile Code.



Click on Codes (ALT+D) to define the 'answers'



If the profile code does not exist, click Add (F2 or ALT+A).



When finished Close Quick Setup.

Step 2 : Check Your Work!

Open CounterPoint SQL / Customers / Customers

Click on the Profile Tab



Your custom profile now appears!



Lookup possible answers or enter the code into the Birth Month field.



Step 3: Print Labels for your Mailing

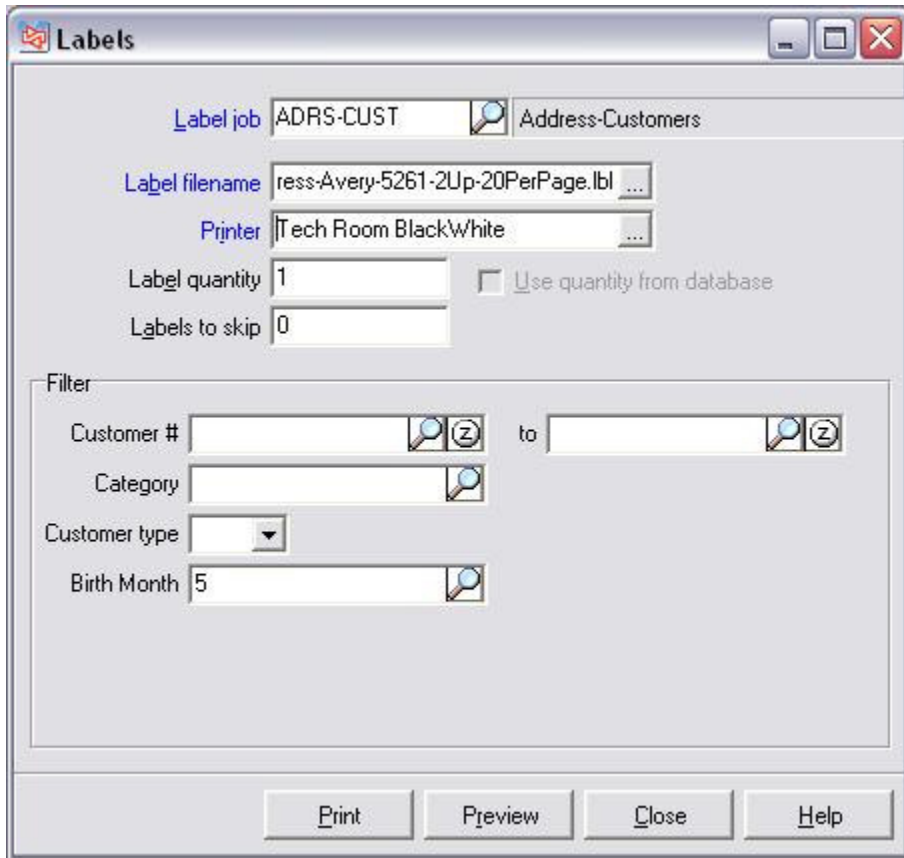
CounterPoint SQL / System / Labels

Use the pre-defined Avery (5261) Label Job ADRS-CUST to print the customer address'.

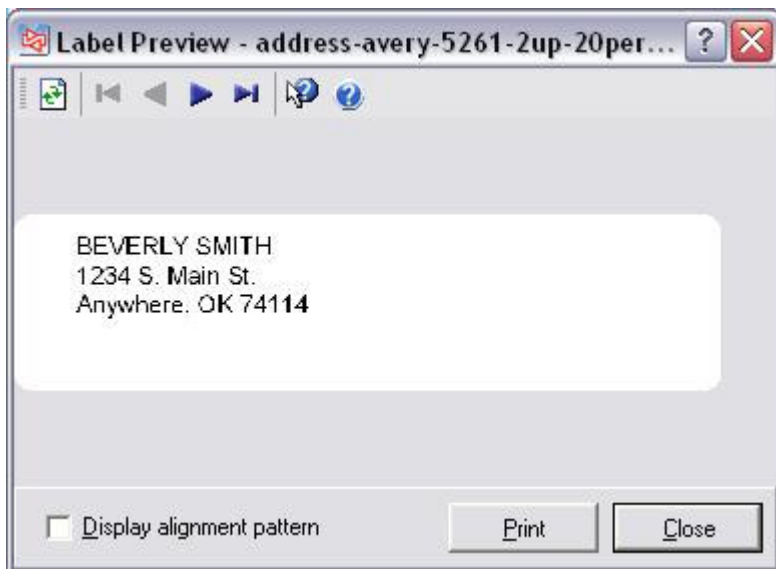
Label Quantity - Set to 1 if only 1 label is desired per customer.

Filter the customers that print.

This customer filter will only print customers with a birth month of 5-May.



Print the Labels



Affix the Labels to your birthday mailer!

Glossary [back to top](#)

Code Profile -

This type of profile allows only pre-defined values ('answers') to be entered. If the user tries to enter a value that is not defined, they will receive an error. They will not be able to make changes until the info is resolved.

Alpha Profile -

This type of profile allows any alpha/numeric value to be entered.

Date Profile -

This type of profile allows only a date value to be entered.

Numeric Profile -

This type of profile allows only a number value to be entered.