



Proximity Pro™  
© Zipwise Software  
www.zipwise.com

<b>About Proximity Pro</b>	<b>2</b>
<b>Installing</b>	<b>2</b>
<i>Installing on Windows</i>	2
<i>Installing on Mac</i>	3
<b>Launching</b>	<b>3</b>
<i>Launching on Windows</i>	3
<i>Launching on Mac</i>	3
<b>Using Proximity Pro</b>	<b>4</b>
<i>Preparing Your Data Files</i>	4
<i>Importing Your Data Files</i>	6
<i>Performing the Search</i>	8
<i>Interpreting the Results</i>	10
<i>Example Results</i>	11
<b>Updating Proximity Pro</b>	<b>11</b>
<b>Getting Help</b>	<b>13</b>
<b>Uninstalling</b>	<b>13</b>
<i>Uninstalling on Windows</i>	13
<i>Uninstalling on Mac</i>	13
<b>System Requirements</b>	<b>13</b>
<i>Windows System Requirements</i>	13
<i>Mac System Requirements</i>	13

# About Proximity Pro

Version 1.0

Proximity Pro is an easy program for matching records in one list (your "source records") with the geographically nearest records in another list (your "target records").

Proximity Pro provides this action in bulk, not one at a time. Your lists of source records and target records can be any size. They are limited only by the amount of time it takes to process the results.

*Proximity Pro is accurate to ZIP codes only, not to individual street addresses; and it provides results based on straight-line "as the crow flies" distance, not driving distance.*

## Installing

Once you've purchased and downloaded Proximity Pro, it needs to be installed on your computer before you'll be able to use it.

### Installing on Windows

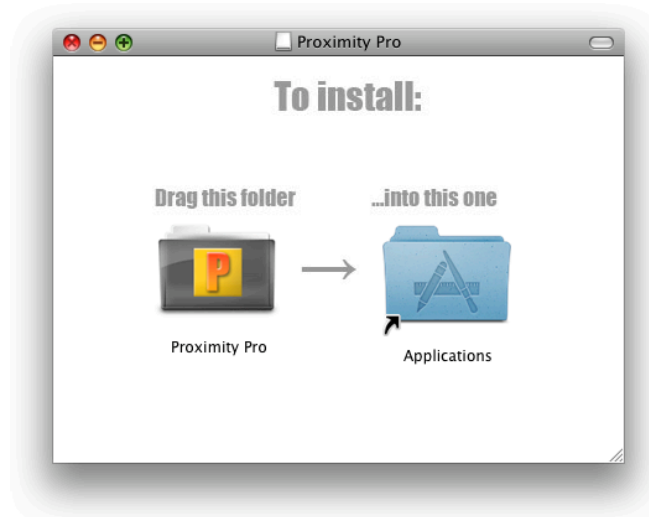
Locate the installer that you downloaded:



Double click it to launch the installer. You should not need to change any of the options in the installer program. It takes a few moments to run, and once it's finished, you're all set.

## Installing on Mac

When you download the disk image called "Proximity Pro.dmg", it should automatically open as a disk image, as if you had inserted a CD. If it doesn't automatically open, find it in your Downloads folder, double-click it, and it will. Once it's open, you'll get a window like this:



And as it shows, simply drag the folder on the left into the folder on the right. This will copy it into your computer's Applications folder. Once you've done this, you can safely eject the disk image and delete the Proximity Pro.dmg file.

## Launching

Once you've installed Proximity Pro, you need to launch it whenever you want to use it.

### Launching on Windows

The installer will create a desktop shortcut, which you can double-click to launch Proximity Pro.

Alternately, you can choose Start > Programs > Proximity Pro > Proximity Pro.

### Launching on Mac

From any Finder window on your desktop, click the Applications icon. If you've properly installed Proximity Pro as described above, you should now have the Proximity Pro folder inside your Applications folder.

Inside the Proximity Pro folder, you should see the Proximity Pro application. Double click it to launch it.

Once it's running, you'll see the Proximity Pro icon in your dock. Right-click (or control-click) on the icon and select "Keep in Dock", and the icon will remain there for easy access, even after you quit the program.



*Even though Proximity Pro runs on both Mac and Windows, most of the screenshots in this documentation show its use on Windows. But don't worry, the screens and functions are all basically the same.*

## Using Proximity Pro

The main function of Proximity Pro is to start with a list of *source records*, go through each of them, and find the *target records* that are closest to each one. It then returns to you a list of all your source locations, each with all its nearest target locations.

*Proximity Pro determines locations at a ZIP code level. It does not use street addresses. Two locations that are within the same ZIP code, even though they might be far apart, are considered to be in the same place by Proximity Pro.*

Understanding the difference between *source records* and *target records* is important. *Source records* are those for whom you want to find nearby locations, and *target records* are those that will be matched to nearby sources. Some examples:

- ❖ If you want to give your customers a list of their nearest service centers, customers are your *source records* and service centers are your *target records*.
- ❖ If you want to give your sales reps a list of their nearest customers, sales reps are your *source records* and customers are your *target records*.
- ❖ If you want to assign your sales reps to ZIP codes closest to them, sales reps are your *source records* and ZIP codes are your *target records*.

*Proximity Pro uses straight-line "as the crow flies" distances between the ZIP codes of different locations. It does not calculate driving distances.*

In order to use Proximity Pro, you will first need to prepare and import two separate data files containing your source records and target records.

### Preparing Your Data Files

To begin, you will need two data files, one containing your source records, and one containing your target records. These can be in most any common data format: Excel files, tab delimited files, comma delimited files, etc.

Be sure to name your two files in such a way that you can easily recognize which are your source records and which are your target records.

*There is no practical limit to the number of records you can include in your source records and target records. It is limited only by the time it will take to process the results.*

You can include whatever fields you want in both files, but two fields are absolutely required for Proximity Pro to work correctly:

- ❖ **A unique identifier.** This can be a store number, a serial number, a customer number, a phone number or social security number, even a business name, so long as it is *absolutely unique* to each record. Each of your source records, and each of your target records, *must* have a unique identifier of some kind. If you don't have one, you must create one.
- ❖ **The ZIP code.** Each of your source records and each of your target records *must* have a 5-digit ZIP code. If you have 9-digit ZIP+4 codes in your data, you must truncate them to just the first five digits. When you create your files, verify that ZIP codes beginning with a zero appear with all five digits: i.e., make sure that ZIP code 00354 does not appear as simply 354.

All other fields are optional. Name, address, phone, or anything else you wish to include, you may; up to a maximum of 10 total fields.

*Proximity Pro can handle the unique identifier, the ZIP code, and up to 8 additional fields of your choice.*

If you are a programmer, or if the Proximity Pro results are going to be used by a programmer, it may not be necessary to include any other data fields. It all depends on how you plan to use the results.

You do not need to worry about what order the fields are in. Proximity Pro will handle that in the next step.

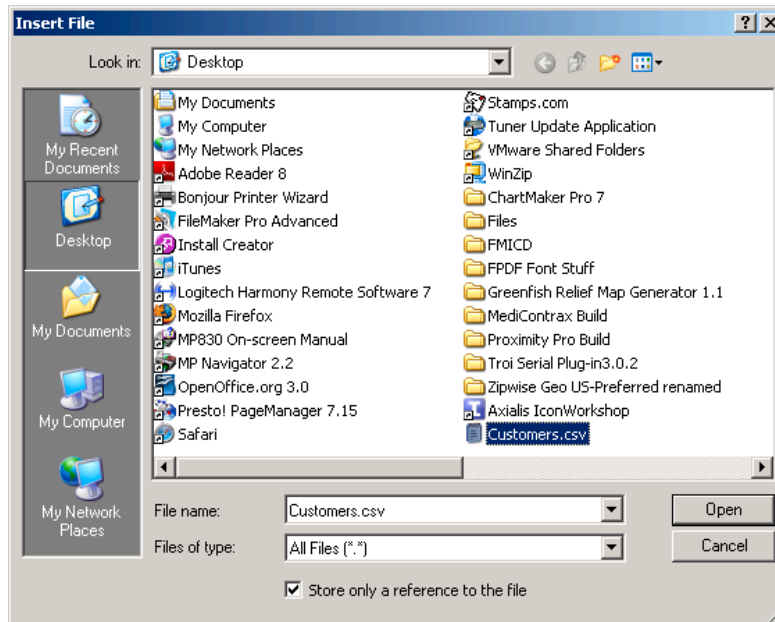
## Importing Your Data Files

Importing your source records is exactly the same process as for importing your target records. You'll need a separate data file for each.

Start by clicking "Import new source records". This brings up the *Import Source Records* window.

If your data file of source records is not yet ready, please go back up to the previous section, Preparing Your Data Files. If it is ready, go ahead and click "Click here to bring up the import window when you're ready".

Use this file selection dialog to select your source records file:



Click Open, and you'll be taken to the Import Field Mapping window. This is the most important screen in Proximity Pro, and it's critical that you map the fields correctly:

On the left, the fields from your data file are shown. On the right are shown Proximity Pro's internal fields. Your job here is to drag the Proximity Pro fields up and down to match the ones in your data file.

Beside each of the Proximity Pro field names is a small up/down arrow icon. Grab this with your mouse and drag it up or down until each field matches.

The "5 Digit ZIP Code (Required)" field MUST match a 5-digit ZIP code field in your data file.

The "Unique Identified (name or number, required)" field MUST match a field in your data file that uniquely identifies that record -- a store number, social security number, or anything that will be different for each of your records and that you can use to locate a record.

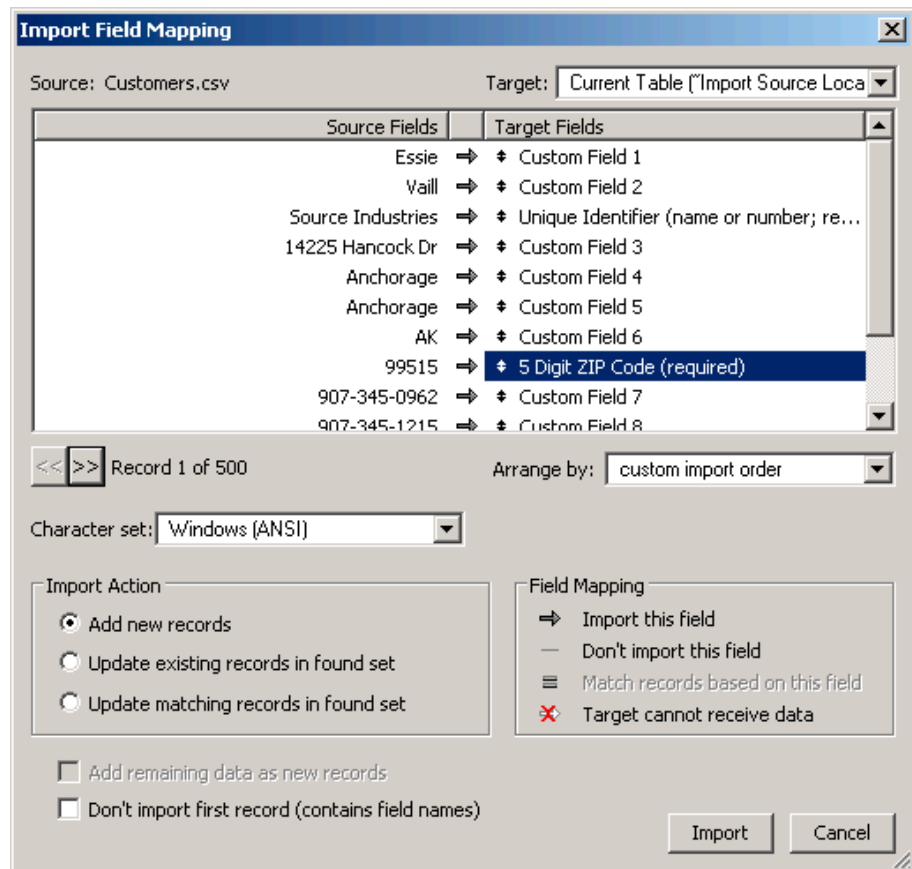
All of the other fields are optional. Any of your fields that you match up to one of Proximity Pro's "Custom" fields will be included in the results file, if you want them. Depending on how you intend to use the results file, you may or may not need any of them.

Notice there is a large right-pointing arrow in the middle of each row on the screen. If that arrow is shown, that field will be mapped and imported. Click the arrow to toggle it on or off. If you don't need to import a particular field, go ahead and toggle it off.

If the first row in your data file contains the names of your fields, click the checkbox at the lower left, "Don't import first record (contains field names)".

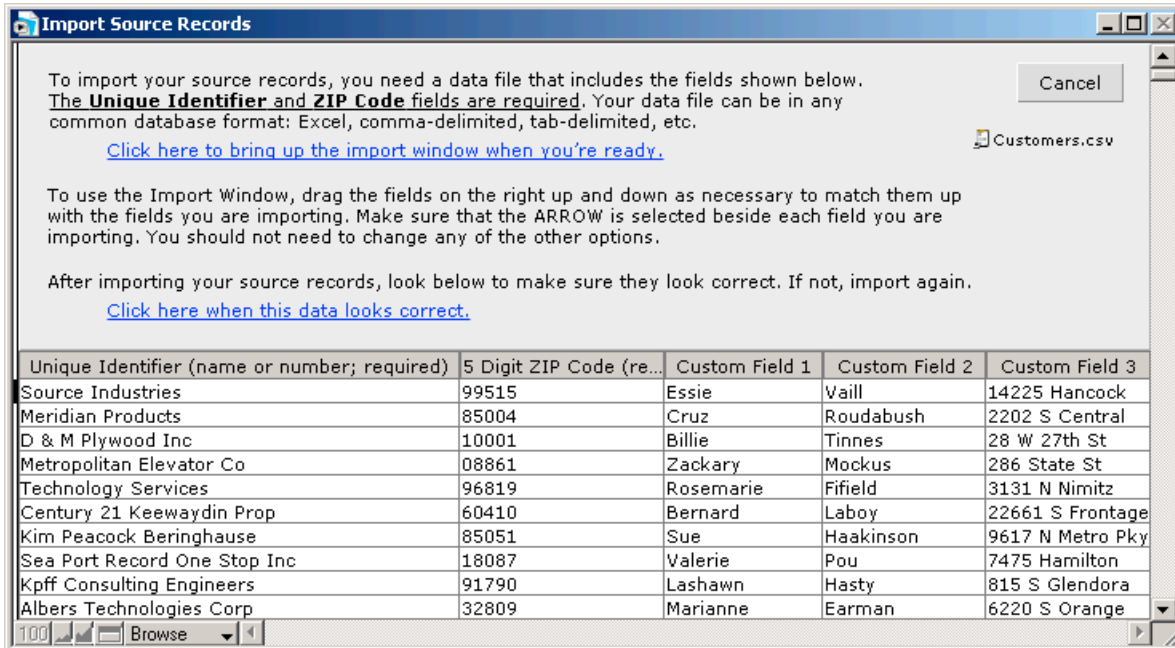
The other fields in this window should be left alone, just as they're shown in this screenshot.

When everything looks right, go ahead and click the "Import" button. If your import was successful, it will tell you so. If there was some problem, it will tell you what it was.



*Importing new source or target records completely replaces the ones currently in the system. You cannot edit the records once they're imported. To make changes, you must import a new replacement file.*

Following a successful import, your data will not be previewed in the *Import Source Records* window:



***This is only a preview!!*** If everything looks right, you ***MUST*** click "Click here when this data looks correct." If the columns don't look correct, then go back and follow this step again until they do.

Proximity Pro will now import your previewed data into its main system.

Follow the same procedure to import your target records. You're now ready to go.

## Performing the Search

Once your source records and target records are both properly imported, simply click the big yellow and orange "Go" button.



A dialog box will ask you how many target records you would like to find for each source record. Enter a number between 1 and 100. Fewer matches may be shown for some source records if there are not enough target records within your maximum distance.

A second dialog box will ask you the maximum number of miles away each target location can be from each source location. Each source record will include only target records that are within this maximum radius.

When you click OK, a progress bar will keep you updated on the progress.

Keep in mind that if you have a large number of source records or target records, the search might potentially take a very long time, even several hours. There is a huge amount of number crunching going on behind the scenes.

*There is no practical limit to the size of source record and target record data files that Proximity Pro can work with. The size is really only limited by the length of time it takes to process. It's difficult to predict this in advance, the only way to really find out is by trying it.*

Once Proximity Pro is finished with its calculations, the results will be saved as a CSV (comma delimited) text file to your computer's desktop. The file will be named "Proximity Pro" followed by the date and time.

CSV is a common, cross-platform, universal text/spreadsheet format. You can import it into any spreadsheet program or database, or even view it in a word processor or text editor.

## Interpreting the Results

Proximity Pro outputs a single text file with all the results. Be aware that some programs, like Microsoft Excel, have a limit to how much data they can hold. Excel can only hold 65,536 rows, which may be inadequate to view a large result file from Proximity Pro.

The first row gives the column headings. This table explains each column:

Column Name	Description
SOURCE_IDENTIFIER	Your unique identifier that uniquely identifies each Source Record.
Source_ZIP	The ZIP code of each Source Record.
Custom_1	Whatever data you selected to appear in these columns when you set up your Source Records import file.
Custom_2	
Custom_3	
Custom_4	
Custom_5	
Custom_6	
Custom_7	
Custom_8	
TARGET_IDENTIFIER	Your unique identifier that uniquely identifies each Target Record.
Match_Number	This Target Record's position in the number of matches found for this Source Record.
Miles_Away	The number of miles separating this Source Record from this Target Record.
Target_ZIP	The ZIP code of each Target Record.
Target_Custom_1	Whatever data you selected to appear in these columns when you set up your Target Records import file.
Target_Custom_2	
Target_Custom_3	
Target_Custom_4	
Target_Custom_5	
Target_Custom_6	
Target_Custom_7	
Target_Custom_8	

## Example Results

Here is part of an example results file. For clarity, all of the custom fields were left blank:

SOURCE_IDENTIFIER	Source_ZIP	TARGET_IDENTIFIER	Match_Number	Miles_Away	Target_ZIP
Meridian Products	85004	Smith Sons Welding	1	0	85004
Meridian Products	85004	Gem Tec Inc	2	3	85034
Meridian Products	85004	Barrett Bindery Co	3	3	85034
Meridian Products	85004	Printing Factory Inc	4	3.5	85009
Meridian Products	85004	Constantino, James P Esq	5	4.8	85008
D & M Plywood Inc	10001	Ford Motor Company	1	0	10001
D & M Plywood Inc	10001	Tax Office	2	0.4	10018
D & M Plywood Inc	10001	Callaghan, Kathleen M Esq	3	0.6	10011
D & M Plywood Inc	10001	Monsanto Chemical Company	4	0.7	10036
D & M Plywood Inc	10001	Smith Capital Management	5	0.9	10175

Results for two of the source records are shown (Meridian Products and D&M Plywood). Five matching target records were found for each, sorted by distance.

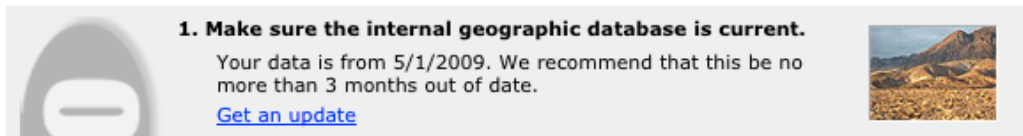
Custom fields could have been included, if desired, to show complete address or contact information for either (or both) the source records and the target records.

## Updating Proximity Pro

Proximity Pro is able to perform its calculations because it maintains an internal geographic database of the latitude and longitude of each of the more than 42,000 US ZIP codes.

*Periodically, the US Postal Service adds, changes, or eliminates ZIP codes. There are usually around a half dozen such changes per month, on average.*


Proximity Pro ships to you with the current ZIP code data, as of the first of the month in which you purchase it. For accurate results, it is necessary to keep Proximity Pro periodically updated. We recommend updating it about every three months. Proximity Pro will still work even if you never update it, but there will be an increasing number of errors in its results. The home screen of Proximity Pro tells you exactly how old the data is.



**1. Make sure the internal geographic database is current.**

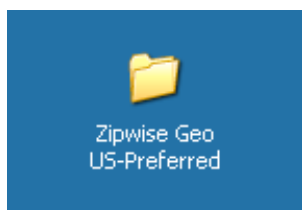
Your data is from 5/1/2009. We recommend that this be no more than 3 months out of date.

[Get an update](#)



To get an update, click the "Get an update" link on Proximity Pro's home screen. It will open your web browser to a page on the Zipwise.com web site. Available update files are listed, and you have the option to save money by purchasing quarterly or monthly updates at a discount.

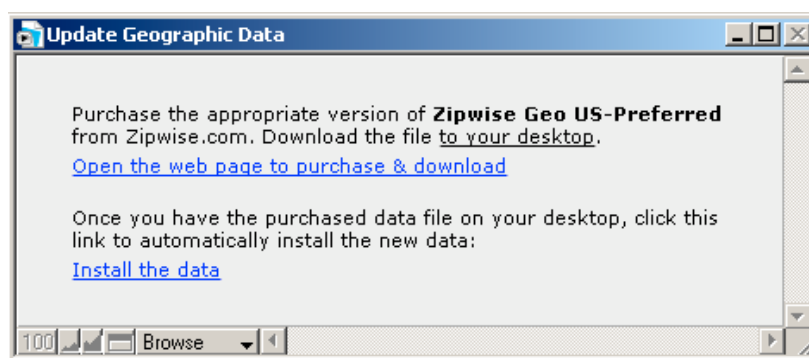
Once you complete the purchase, download the data to your computer's desktop. This makes it easy for Proximity Pro to easily find and automatically import the update. When you have successfully downloaded the file, you should see a folder on your desktop called:



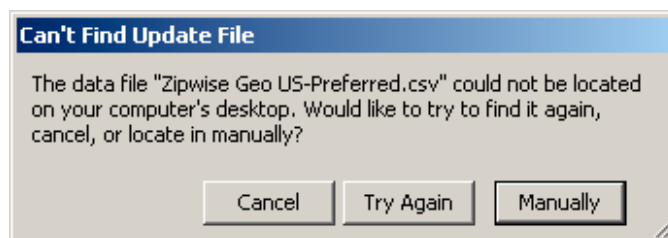
*If you do not see that folder on your desktop, stop and do not proceed until you do. Search your computer, see if it possibly downloaded to some other location, and then move it to your desktop.*

*The file you purchase will be a compressed ZIP archive (.zip) of the folder. Most computers will unzip this archive and convert it into a regular folder automatically. If yours does not, you will need to manually unzip it. You can probably do this by right-clicking on the folder and selecting the Unzip, Expand, or Decompress option. If you are not offered such an option, please check your computer's documentation to learn how to expand a .zip file.*

Once you have the Zipwise Geo US-Preferred folder on your desktop, proceed to click the "Install the data" link in the window you see here.



Usually this will go off without a hitch, and you'll get a message that the update was successful. However, if the update folder was not properly expanded or was not found on your desktop, you may see this message instead:



Please try searching for the folder again, or if necessary you can even re-download your purchase from Zipwise by clicking on the link in your confirmation email, being especially

careful to download it to your desktop this time. You do *not* need to re-purchase the data each time you try.

Once you download it to your computer, it's on there somewhere, you'll just have to find it. Zipwise is unable to help you locate your download once it's on your computer.

## Getting Help

Choose the Help menu to open this documentation. Granted this instruction sounds a little redundant, since you're already reading it.

If you have any further trouble using Proximity Pro, we're here to help you. Please visit Zipwise Software's web site (<http://www.zipwise.com>) for our support options.

## Uninstalling

If you wish to uninstall Proximity Pro, making it no longer accessible (this is permanent, unless you kept the installer for later re-installation), follow these simple steps.

### Uninstalling on Windows

Select Start > Programs > Proximity Pro > Uninstall Proximity Pro. The program will be automatically removed from your computer.

### Uninstalling on Mac

Drag the Proximity Pro folder from your Applications folder to the Trash. It will be permanently removed from your computer the next time you empty your trash.

## System Requirements

Proximity Pro should run fine on just about any reasonably modern computer. If you're having some problem launching it, please verify that your computer meets these specifications.

### Windows System Requirements

- ❖ Windows XP Professional, XP Home Edition (Service Pack 3), Windows Vista Ultimate, Vista Business, Vista Home (Service Pack 1), Windows 7 (any version)
- ❖ 800 MHz or faster processor
- ❖ 512 MB of RAM

### Mac System Requirements

- ❖ PowerPC G4, G5, or Intel-based Mac
- ❖ Mac OS X 10.4.11 or later
- ❖ 512 MB of RAM