

VECTOR

MAILING LIST

User's Manual

MEMORITE III

Version 1.1

MAILING LIST

USER'S MANUAL

Revision A

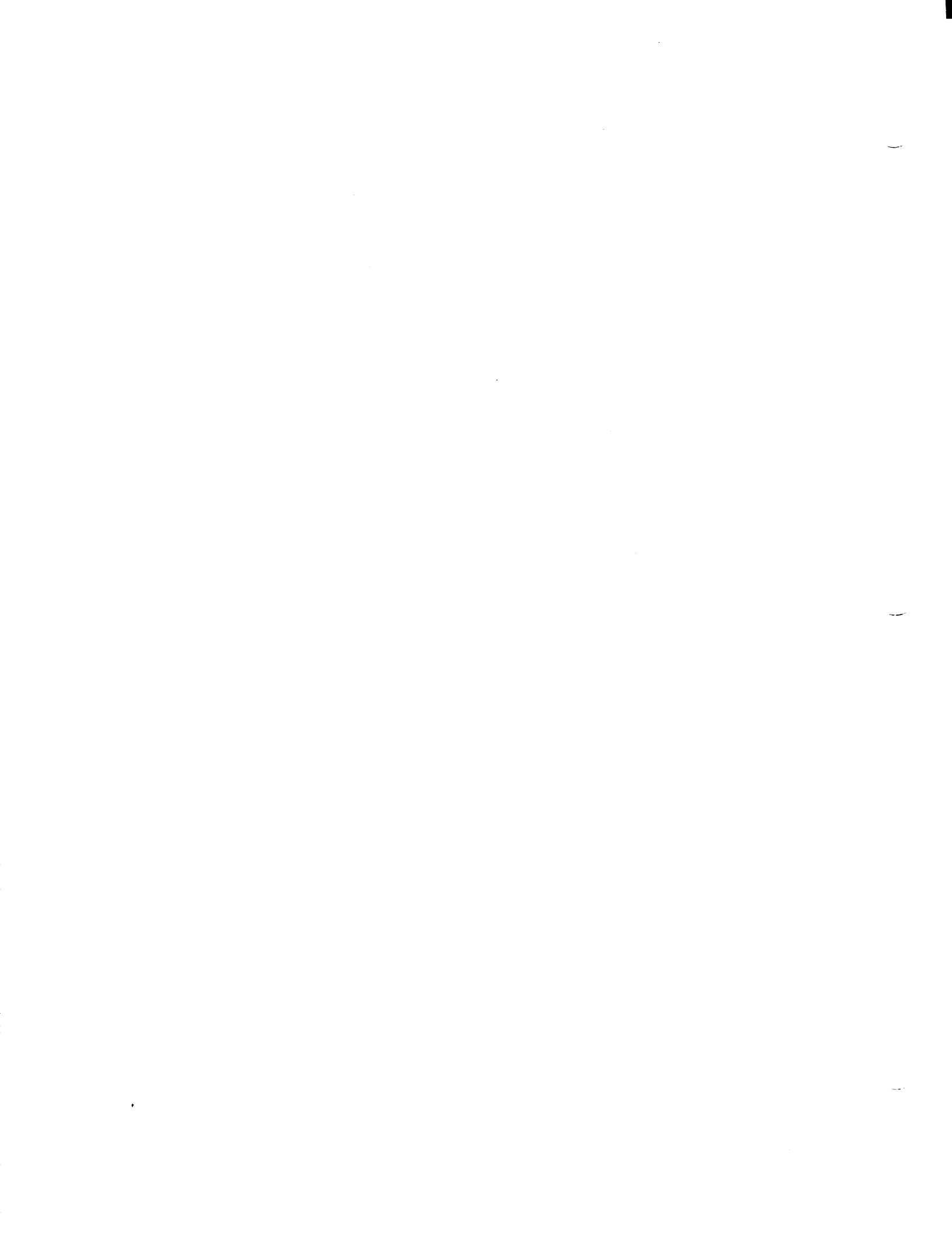
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This manual was prepared on a Vector VIP system using Memorite III. It was printed on a Sprint 3 printer using a 10PT proportionally spaced printwheel called "TITLE".

TABLE OF CONTENTS

<u>Section</u>	<u>Page</u>
Table of Contents	
1. Description	1
2. Components of a Mailing List	2
3. Procedure: Getting Started	4
4. Create or Delete a Mailing List	7
5. Edit or Display Members of a Mailing List	9
6. Print a Mailing List or Labels	11
7. Select Members From or Sort a Mailing List	15



MAILING LIST USER'S MANUAL

1 - DESCRIPTION OF THE MAILING LIST PROGRAM

This manual is concerned with a special part of MEMORITE III called the Mailing List Program which is used to create and maintain lists of names, addresses, or other associated data and to print mailing labels or lists. The information can be sorted alphanumerically (by name, zip code, date, etc.) and, in addition, the operator can select a certain subgroup of the total list. The program is menu driven which means that when you load the program a list of choices will appear on the screen as in a restaurant menu. You will have to enter the number of your choice which will load another program. This program will have a menu from which you will select the feature you want to use.

As explained in MEMORITE III, the "HA M" Reference Screen, the system can access a list in order to merge (insert) the information at specified points in letters and on corresponding envelopes if desired. This feature is used for mass mailings.

The mailing list program was designed specifically to create, maintain, and use standard mailing lists. However, additional versatility is also incorporated into the program, which enables the user to set up "mailing lists" for other purposes as well, including custom-designed reports. The program allows as many as fifteen fields for data plus the qualifier field. The default prompts are as shown below. The program allows you to build your own special prompts corresponding to the information you wish to record for the members of a particular list.

2 - COMPONENTS OF A MAILING LIST

Member Information A mailing list consists of a number of members, each member having certain types of information recorded on disk. The information items (called "fields") for standard mailing lists are as follows:

FIELD LENGTH		PROMPT
1	(FIRST LINE OF NAME)	(60)
2	(2ND LINE OF NAME)	(60)
3	(STREET ADDRESS)	(60)
4	(CITY)	(60)
5	(STATE)	(20)
6	(ZIP CODE)	(9)
7	(TELEPHONE NUMBER)	(13)
8	(SALUTATION)	(60)
	QUALIFIER FIELD LENGTH (40 MAX)	(40)

Note: 9 spaces are allocated for zip codes because of the upcoming change.

All the members of any particular list have the same prompts and field lengths.

Field size and content Each of the fifteen data fields can be up to 60 characters long. The qualifier field can contain up to 40 capital letters. The total number of characters used in all the fields for one member must be greater than or equal to 128 and less than or equal to 512. (There is no need to count exactly, because the system will indicate when too many or too few characters have been entered, and will allow you an opportunity to correct it.)

The qualifier field is composed of up to 40 "qualifiers." A qualifier is an upper case letter used to classify a member. (For instance, if you were maintaining a mailing list of vendors, you might use the letter "M" to indicate manufacturer, "W" to indicate wholesaler, and "R" to indicate retailer.)

For each of the 40 possible positions in the qualifier field, any of the 26 characters of the alphabet can be used. Thus, in the example above, the "vendor type" could be recorded in the first position. Some members would have an "R" in the first position, others would have a "W", etc. The use of qualifiers provides a means of selecting a subgroup of a list. In order to do a select based on the qualifier field, the qualifier field must be at least one character long.

Another way of using the qualifier field is to type a code word in the qualifier field. While creating your list of vendors you may want to note which wholesalers are in which state. After typing a

"W" in the first space you could type the two letter code for the states in space 2 and 3. Then you could generate a list of all wholesalers by selecting all member with a "W" in space one or a list of all California wholesalers by selecting all members with a "W" in space 1, a "C" in space 2 and an "A" in space 3.

After each list is selected out it becomes a separate file on your disk and can then be sorted any way you want to create new files to print new lists or can be used itself to select out an even more defined list that becomes a new file on the disk. An endless number of lists may be created with the single data base by using the qualifiers and the sort/select portion of the program.

"Record Numbers " for member information. The system automatically assigns a record number to each member as you enter it onto a list. In order to access a particular member's information, the user must enter the record number corresponding to that member. (For example, if you wanted to change the address of a certain person on a list, the system would ask you for the record number of that person.)

To find out what the record numbers are for the members of a list, use the option in the Mailing List Program to print a list. When the list is printed, the record number will appear in the upper left corner of each member's data.

Number of members per mailing list Lists may have a maximum of 32,764 members. However, the program only has the ability to sort 3700 members at a time, so for many lists it isn't practical to have them larger than 3700 members.

Number of lists that can be kept There is no restriction on the number of separate lists which can be maintained on diskette as far as the mailing list program is concerned. However, you will have problems if you don't have enough disk space for a new list.

3 - PROCEDURE: GETTING STARTED

The Mailing List Program works separately from MEMORITE so your system and printer should be reset before running it. To load the Mailing list program, while in MEMORITE III, you must get back to CPM. Do this by pressing the reset button and rebooting or by typing "QC" while in the auxillary mode to return to the operating system.

1) To begin type MBASIC5 MENU /S:512 in answer to the CPM prompt. This will display the main menu of the Mailing List Program. To have the main menu appear automatically when you boot the disk use the CONFIG utility program and type the above phrase as the auto command. The /S:512 allows a record size of up to 512 characters. The default is 128 characters.

2) Getting around on the screen is fairly straightforward for the first three Options of the main menu and is described as follows:

ESC KEY - When you are within one of the programs hitting [ESC] will get you back to that program's menu. Hitting [ESC] again will get you back to the main menu. If you press [ESC] while in the main menu it will return you to the operating system.

UP ARROW - This will move you to the previous question on the screen or if you are already at the top of a screen it will move you to the previous screen. Note that if you are at the top of a screen in the print routine (option 3 of the main menu) it will take you to the menu for the print routine and you will have to enter new values for all questions.

DOWN ARROW - This will move you to the next question on the screen or if you are at the bottom of a screen it will move you to the next screen.

LEFT ARROW - Use this to move left in a field.

RIGHT ARROW - It can be used to move right in a field. If blanks are not allowed in a field, the right arrow will not allow you to move farther right than one space past the last character entered.

BACKSPACE - Will delete the character to the left of the cursor. If the cursor is all the way to the right in a field, [BACKSPACE] once to delete the character the cursor is on and then hit it again to delete characters to the left of the cursor. If the cursor is in the middle of a field where spaces aren't allowed, [BACKSPACE] will work like a LEFT ARROW.

DEL KEY This will delete the character the the cursor is on and all characters to the right of the cursor.

RETURN and **TAB** - These are similar to the **DOWN ARROW**. If there is more than one question on a line [RETURN] and [TAB] will take you to the next question on that line. A **DOWN ARROW** will take you to the next question on the next line.

3) Option 4, "Select Members from or Sort a Mailing List", is slightly different. [ESC], **LEFT ARROW** and **RIGHT ARROW** work as mentioned above. [BACKSPACE] works the same except that it will not work like a left arrow if it is in the middle of a field where spaces are not allowed. The **UP ARROW**, when at the top of the screen will not take you to the previous screen. You must continue with the information already entered or use the [ESC] to abort. [DEL] works exactly like [BACKSPACE]. [TAB] will work like a down arrow.

IMPORTANT: When using option 4 of the main menu, **SORT/SELECT**, do not use the [RETURN] UNTIL you have entered all the information in answer to the questions. Use the arrows to move around on the screen. When all of the questions are completed, then hit [RETURN]. The arrows modify the information on the screen; the [RETURN] executes the changes.

If you enter a small letter where a capital letter should be, it will be automatically capitalized.

The Mailing List Program is divided into four separate divisions with its own program. Selections 1,2 and 3 can be entered from the Mailing List Program, but Selection 4 has to be entered from CPM. How to load selection 4 will be described later.

MAIN MENU

VECTOR GRAPHIC, INC.
MAILING LIST PROGRAM

- 1 - Create or Delete a Mailing List
 - 2 - Edit or Display Members of a Mailing List
 - 3 - Print a Mailing List or Mailing Labels
 - 4 - Select Members from or Sort a Mailing List
- *** Hit ESC Key to Exit to CP/M ***

ENTER YOUR SELECTION

Selections 1-4 are described in the following sections of this manual.

4 - SELECTION 1: CREATE OR DELETE A MAILING LIST

This selection is used for creating a file on the disk to which members can be added or erasing a file from a disk. Members cannot be added in the Edit/Display selection unless the file has been created.

Upon selecting the Create or Delete option, the following menu is displayed:

CREATE/DELETE MAILING LIST

1 - Create a Mailing List

2 - Delete a Mailing List

*** Hit ESC Key to Return to Main Menu ***

ENTER YOUR SELECTION

1) Create a Mailing List

The "Create" option allows you to select the drive on which you wish to create your list and the name of the mailing list (up to 8 numbers or letters). The program will automatically add ".ML " to the name and this will show up whenever you display your mailing list files. However, do not include the ".ML " whenever the program asks you for a mailing list name. You have the option of giving the list a title (up to 38 characters in length) which will print out on a list.

At this point you are asked whether or not you wish to create your own prompts. If not, the Mailing List Program will use the same prompts as shown in Section 2. If you do want to create your own prompts, a display will appear instructing you to "fill in the blanks". A prompt may be up to 18 characters long including spaces. After you have entered all your prompts and their lengths, the program will instruct you to hit any key to continue or ESC to exit. Hitting any key will create the file on the disk. ESC will abort the program; you will have to start over to create the file.

If a list already exists with the name you chose, you will be so notified and given the opportunity to change the name or overwrite the currently existing list with your new list, thereby destroying whatever is in the current list.

There are a maximum of 15 data fields and the qualifier field. Once you have completed entering your prompts, and the designated the length of the qualifier field followed by [RETURN], you will be prompted to hit any key to continue or [ESC] to exit.

Once you have successfully created the list and the name has been displayed, you have the option to immediately go into that list and add members to it or return to the Create or Delete Mailing List Menu. If you choose to add members to your list, you will automatically be taken to the Add Members option of the Edit or Display Members selection of the main menu. See section 5.

2) Delete a Mailing List

When this option is selected, you are asked if you wish to see the names of your mailing lists and on which drive those lists are located. If you choose to see them they will display. Deleting a list will erase the file from the disk. For this reason, the program asks you which list to delete and then asks you to confirm the name. If you answer no to the confirmation the cursor will return to the original question. The correct name can be entered or [ESC] can be hit to exit.

The program will indicate if it can not find the selected list. Upon successfully deleting a list, a message will indicate that the file has been erased from the disk. It will continue to prompt for a list to be deleted until you [ESC] to exit.

5 - SELECTION 2: EDIT OR DISPLAY MEMBERS OF A MAILING LIST

Upon selecting option 2 in the main menu , Edit or Display Members of a Mailing List, the following menu will display:

EDIT/DISPLAY MEMBERS

- 1 - Add Members
- 2 - Delete Members
- 3 - Reactivate Members
- 4 - Change Information for a Member
- 5 - Display Members

*** Hit ESC Key to Return to Main Menu ***

ENTER YOUR SELECTION

All five options will initially ask if you'd like to see the names of your mailing lists. They also ask on which drive your mailing lists are. Then, it asks you to select the mailing list to be used. If adding members, it will display the prompts with blanks for all of the fields and allow you to enter in the information for each of those fields. Before adding members to a list, read about the use of the backslash in Section 7.

For options 2 and 3, Deleting and Reactivating Members, it will ask for the record number to be either deleted or reactivated. For options 4 and 5, Changing or Displaying a Member's Information, it will allow you to either go directly to a member or [RETURN] to display the next member in sequence in the list. When a member has been selected, the prompts are displayed as well as the corresponding information for each of the fields. When displaying, option 5, no changes can be made. Changes can be made only in option 4. As in the case of the Create or Delete option, [ESC] will return you to the previous menu.

Once a member has been added to a list, his record number will always be there. In order to delete the member, use the Delete option and enter his record number. This will set a status field for that member indicating that he has been "deleted," and if a list of members is printed, it will indicate next to the record number that this member has been deleted.

At any time, a member who has been deleted can be reinstated. Whenever a list is sorted or selected into another list, the

resulting list will not contain any of the deleted members. Therefore, doing a select on a list without specifying any qualifiers is a good way to "clean up" a list and eliminate all deleted records.

6 - SELECTION 3: PRINT A MAILING LIST OR LABELS

When option 3 is selected from the main menu the following menu will be displayed.

PRINT MAILING LIST/MAILING LABELS

- 1 - Print Mailing Labels
 - 2 - Print a Mailing List
 - 3 - Print Non-Continuous Labels
 - 4 - Print a Mailing List Using a Sheet Feeder
- *** Hit ESC Key to Return to Main Menu ***

ENTER YOUR SELECTION

All four printing options in this menu ask if you would like to see the names of your mailing lists, and on which drive your mailing lists are located. Then they also ask for the name of the mailing list to be used, how many sets of labels or lists you'd like, and whether or not you'd like to change the standard format.

The standard format consists of the following:

- 1. 5 lines of information per member
- 2. 2 members across a page (can be up to four members)
- 3. 40 columns or characters for each line per member
- 4. 4 columns between members
- 5. 66 lines per page
- 6. Title printed on the first page only
- 7. 43 columns from the left edge of the page to the beginning of the printing of non-continuous labels
- 8. 10 columns from the left edge of the page on all continuous feed printing

Any of these values may be changed; however, care should be taken to not assign values such that impractical conditions arise. The possible combinations of these values are so vast that it becomes impractical for the program to check them all. The option of changing values is an important feature to give you flexibility, but you must remember to check the feasibility of your format.

Once your format has been selected, the next display will allow you to choose which fields you want and where you want them on your label or list. The screen is divided into 2 parts. The left half of the screen displays your prompts and the lengths of the fields. The right half will sequentially display each line that will be printed on your label or list. If you have selected a format of 5 lines to be printed on your label or list, this screen will sequentially take you through each of the 5 lines, asking which field and how much of that field you want to appear on the line. There are a maximum of 5 fields that may appear within one line. For example, line 1 could be entirely devoted to Field 1 and to its full length of 30 characters; line 2 could be Field 2, 30 characters, and Field 5 up to 9 characters. This is because between each field that is selected to go on a line, 1 character, a space, will be inserted. There are a total of 40 characters allowed per line on the standard format, 30 and 9 plus 1 equaling 40, therefore this is all that will be allowed on line 2. If you exceed the length allowed for the line, the program will so indicate and prompt you to make a correction.

Any field may appear on any line, but remember to plan your format before you begin to answer your questions. As you begin, the fourth column of the screen will display the word "line" and underneath it a "1". The fifth column will say "field" and display five zeros vertically for the five fields that may appear on line 1. The sixth column will say "length" and also have five vertical zeros for the five fields lengths that may appear on line 1. The cursor will be placed on the first zero beneath the word "field". Answer the questions by replacing the zeros with your answers. Each zero may be replaced by up to two characters. Type in your answer to the first field and hit return. The cursor will move to the zero under the word "length". Answer this question and hit return. The cursor will move to the second zero underneath the word "field". If you want no more fields on line 1, hit return again. Hitting return twice in a row will cause the program to read the data you have entered for line 1 and change the screen to accommodate data for line 2. The number under the word "Line" will now change to a 2. Enter all the fields you want on each line before hitting return twice.

If you change your mind and want to change a previous line use the UP ARROW to move the cursor to the previous screen. You will now be at the beginning of the screen. If you want your response to stay the same type return. If you want to change the data type the new answer over the old one. If you type the same answer the screen will display "ILLEGAL INPUT". You will then have to type return to go to the next response or type a different response and then return. After changing the items you wanted to change hit return until the cursor returns to the place it was when you decided to go back. After entering all data for all lines, a message will appear that tells you to hit any key to

continue or ESC to exit the program. If you decide to change something and you have entered all data for all lines, you will have to hit ESC, reload the program and start over. After you hit any key other than ESC, a message will appear on the screen instructing you to align the paper and hit return. If your printer is turned on and the disk is configured for your printer, printing will begin.

When using Option 2, Print a Mailing List, the list may be formatted any way you choose. When the program asks you if you would like to change the standard program, answer yes. A series of questions will appear on the screen with default values in parentheses. Change only the answers that will affect your list. One example of this change is to create a report where all information on one member prints on one line. To create this report use the following answers:

1. 1 line of information per member instead of 5
2. 1 member across a page instead of 2
3. 80 or 132 (as many characters your printer will print for each line per member
4. 0 columns between members
- 5 and 6. Can be changed or stay the same
7. Does not affect the list
8. Can be changed or stay the same

After these questions are answered, you must answer the questions to format the fields for printing. You must now decide how to arrange the data and how much of it you want to print. The fields may print out in any order, for example, you may want to have field 3 on the line first.

Options 1 and 3 from the Print Mailing List/Mailing Labels Menu will allow a set of practice labels to be printed. To align the printer properly for continuous feed labels, using a Sprint 3 printer, place the red horizontal line on the horizontal perforation of the paper and the vertical red line on the left perforation. Option 3, the printing of non-continuous labels, will automatically come out 1 member across only. To print non-continuous labels set the printer on the line of the label where the first line of printing should appear, but to the far left edge. The printer will move over as many spaces from the left edge of the label as you specified or 43 spaces, which is the default value. The printer will feed out the label when it is done and wait for another label until it has printed the number of labels requested. When the number of labels requested has been done, it will return to the Printing menu.

Option 4, Print a Mailing List Using the Sheet Feeder will automatically print two members across per page.

All four options allow an adjustment of the paper or labels before printing takes place by changing the standard format. When the paper is in position, hitting any character will initiate printing.

7 - SELECTION 4: SELECT MEMBERS FROM OR SORT A MAILING LIST

When option 4 is selected from the main menu, a display will instruct you how to enter CP/M. An A>, the CPM prompt, will then appear on the screen. At that point you type in SORT and [RETURN]. The Sort/Select menu will then be displayed.

SORT/SELECT

1 - Sort

2 - Select by Qualifier

*** Hit ESC Key to Return to Main Menu ***

ENTER YOUR SELECTION

IMPORTANT: When in the Sort/Select option of the Mailing List Program, do not use [RETURN] until all information has been entered for that page. Use the down arrow to go to the next question. In the Sort program, [RETURN] can only be used for sending data to the computer not altering it on the screen.

When sorting or selecting by qualifiers, a new list will be created from the old list and the old list will be left on the disk. If you don't want the old list after the new one is created, use the DELETE program of option 1 in the main menu, but make sure your new list is correct first. You must always use two different names for the list to be sorted or selected from (source) and the new list you are creating (output).

Members in the list being sorted or selected from with a "DELETED" status, will automatically not be put in the new list.

When asked for input, [ESC] will abort the program and return you to CP/M. A message, "PROGRAM INTERRUPTED AND THE NEW LIST WAS NOT CREATED," will display.

When sorting or selecting from a list, the Mailing List Program will indicate the number of members it transferred to the Output List.

1) Sort

Sorting will be done on the first ten characters of the field, or if a backslash (type control key and the bracket key) is used in the field, the program will begin counting the ten characters immediately following the backslash. For example, in the name field, the backslash could be placed just preceding the person's last name. Sorting on the name field, then, would result in having each member sorted by the first ten characters of the last name. The backslash is replaced by a space in the print routines.

Remember that only ten characters will be used in sorting; therefore, if the first ten characters of several members are the same, their relationship to one another may not be fully sorted.

The Sort option will ask on which drive your mailing list is located, what is the name of your mailing list, on which drive you want your new list, and what you want to call it. When that information has been entered, then [RETURN]. If the output list already exists, it will allow you to either change the name of the list or the drive you're going to put it on, or to overwrite that list with your new output list. If there are any other errors, the program will terminate and return to CP/M. For example, if your original list does not exist or has no members in it, the program will terminate and return to CP/M. If there were no errors, the program will ask for the name of the new list. It will begin by displaying the name of your original list which you can then edit. Finally, and most importantly, you're asked which field you would like to use for sorting. It will display all of your fields and your prompts for those fields. Upon exiting the sort, the program will tell you how many members are on the new list. If there happen to be too many members to sort on a list, it will so indicate and return to CP/M.

In order to sort by a date, the date must be in year-month-day format, with no symbols between the parts, and with numbers less than ten filled out with a zero so that they have two digits. For example, January 4, 1981 would be 810104. The total must be six digits.

2) Select by Qualifier

When this option is selected, the initial questions are the same as for the sort. After you give the name of the drive you're using, the mailing list you're going to select from, the drive you want the selected list to go to and its name, then enter the title of the new list. The following will display:

"For each column enter a capital letter for the qualifier you want each member to have, and a small letter for each qualifier you

don't want. Enter an asterisk if you want members with a space in that column. You can enter 27 characters per each column.

If it doesn't matter what a member has in a particular column, then leave it blank on the screen.

The conditions in all columns must be met in order for a member to be selected. For example, if your qualifier field was 3 columns long and you had entered the following--

<u>COLUMN</u>	<u>QUALIFIERS</u>
1	RI*
2	
3	c
4	H

--it would mean "create a new mailing list with all members that have R OR I OR space in column 1 and anything except C in column 3 and an H in column 4."

Note: You should only have one small letter per column on the screen. This is because when the program checks for a match, a member either has that letter, in which case that member won't be selected, or it doesn't have it, in which case the program will go to the next column or it will select that member if it is already on the last column.

Remember when entering information about the qualifiers in each of the columns to use the down and up arrows to move the cursor around on the screen. Do not [RETURN] until all of the columns and their information are correct. As with the Sort option, when exiting the Select option it will display the number of members that have been selected for the new list. If there were no qualifier fields on the original list, the error message "MAILING LIST HAS NO QUALIFIERS" will display and the program will return to CP/M.

