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www.Mailware.com

MAILWARE™

Installation and Getting Started Manual

**The Direct Marketer's Software Solution
for Windows™ 95, 98, NT and 2000**

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About this manual

This manual is intended as a primer for using Mailware. It provides detailed instructions for installing and using Mailware:

How to Install Mailware - Step by step instructions for installing Mailware on a single PC or a network.

Getting Started - A guide to the tutorials, and a quick start section for experienced users.

Using Mailware - An introduction to the basic features in Mailware, and how to use them.

The reference manual is provided separately and contains 2 **Reference** sections that provide specific information about the various features in Mailware:

Definitions - A glossary of terms used in Mailware.

Instructions - How to complete tasks in Mailware (e.g., add a customer, take an order etc.).

In addition to the manual, Mailware contains extensive help files which you can access at anytime with the **F1** key. Online tutorials are also available by choosing **Tutorials** from the **Help** text menu item.

How to Install Mailware

Quick Start Instructions

1. Insert the CD and the Installer will autostart. Or, double click *StartHere.exe* on the CD.
2. Click the **Quick Install** button.
3. To install Mailware to the recommended default directory (C:\Mailw15) simply click the **Next>** button on each screen.
4. When all steps are complete close the Installer and run Mailware from its program group.

Note: For network installations see the **About Network Installations** section (p. 1.7)

Full Installation Instructions

1. Insert the CD and the installer will start automatically after several seconds. If it does not autostart, right click the **Start** button and choose **Explore** to open Windows Explorer. Left click your CD drive in the left window pane. Then find **StartHere.exe** in the right pane and double click it.
2. Click the **Quick Install** button on the Welcome screen that appears. During the install you can specify an install directory, or simply click **Next>** at each prompt to install Mailware to the default location (C:\Mailw15).

About the BDE: For all versions a copy of the

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Borland Database Engine (BDE) will be installed. Mailware uses the BDE to manage its database. If when starting Mailware you receive the error: **Exception EBDEngine Error** simply reinstall the BDE from your CD.

3. Patches and updates may be available on the CD.

To install patches click the **Quick Patch** button.

A small Explorer window (sample below). To install available patches double-click them.



To install a patch, double click it in the Explorer window that appears.

4. Close the Installer by clicking the **Exit** button.

How to Install Mailware

5. To open Mailware, click the **Start** button. Move your cursor to **Programs** then to the **Mailware** Program group in the list. Click  **Mailware**.

When you start Mailware the first time a welcome dialog will appear and includes a button that opens the tutorials. We recommend you complete the first set of tutorials that use the database for the sample company - **Lords Flower and Garden**.

Important Note:

When you first run Mailware it defaults to the sample database. When you are ready to begin entering your company's data you can switch to an empty database. For instructions please see the section:

Switching Between the Sample Database and Your Database (p. 1.5).

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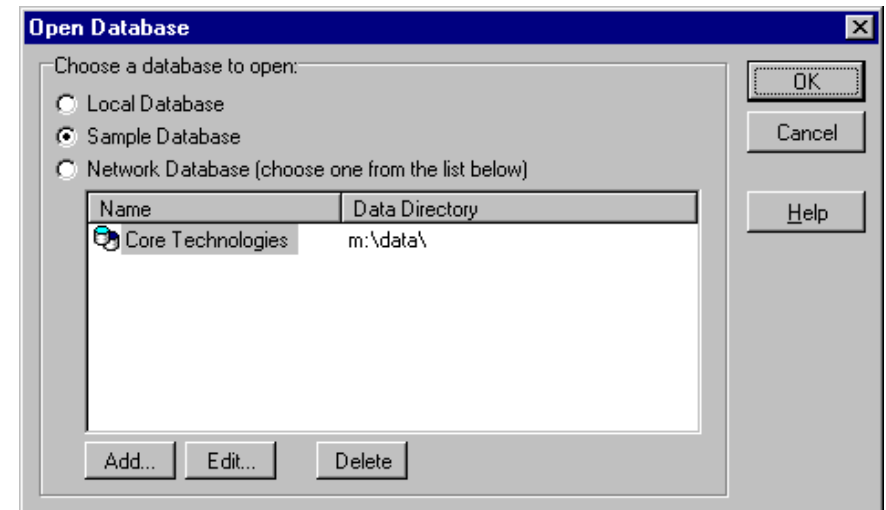
Switching Between the Sample Database and Your Database

The first time you open Mailware it uses the included sample company database. The sample company is provided to help you familiarize yourself with Mailware's features. A set of tutorials are included to guide you, and can be opened at any time by selecting **Help** from the text menu, then clicking the **Tutorials** item from the list.

When you are ready to set up your own company, you can switch to the blank database that installed with the program, or a network database created by your system administrator (see the section - *About Network Installations* on p. 1.7).

To switch databases:

1. Close any open windows (e.g., customers). Choose **File** then **Open Company** from the text menu.



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If you are not using Mailware on a network:

Click the button next to the **Local Database** option. This uses the \Data directory where Mailware is installed. Click the **OK** button to complete the switch.

Note: If you have not set up your company yet, choose **Help>Tutorials** from the text menu, and run the Getting Started tutorial for assistance.

Tip: Even if you are not using a network, you can set up multiple network databases to run multiple companies.

If you are using Mailware on a network:

Select a database from the list and click the **OK** button. If no databases are listed you can create one. See the *About Network Installations* section (p. 1.7) of this manual.

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About Network Installations

Mailware will work on any network that supports Windows 95, 98, NT or their successors. To install Mailware on a network, follow the *Full Installation instructions* (p. 1.2) for each workstation. You will also need to install a shared data directory on your server or a workstation you select. The Network License Installation includes an **Install Data Directory** option for this purpose.

Note: You can install additional copies of Mailware on any PC's in your network (even if you purchased only one). Mailware will allow you to run as many simultaneously as you have purchased. For example, if you buy 5 licenses and install Mailware on 10 machines, any 5 can be run at the same time.

After installing the data directory and a least one copy of Mailware, you can create a **Network Database** which will be available to all stations under **File>Open Company**.

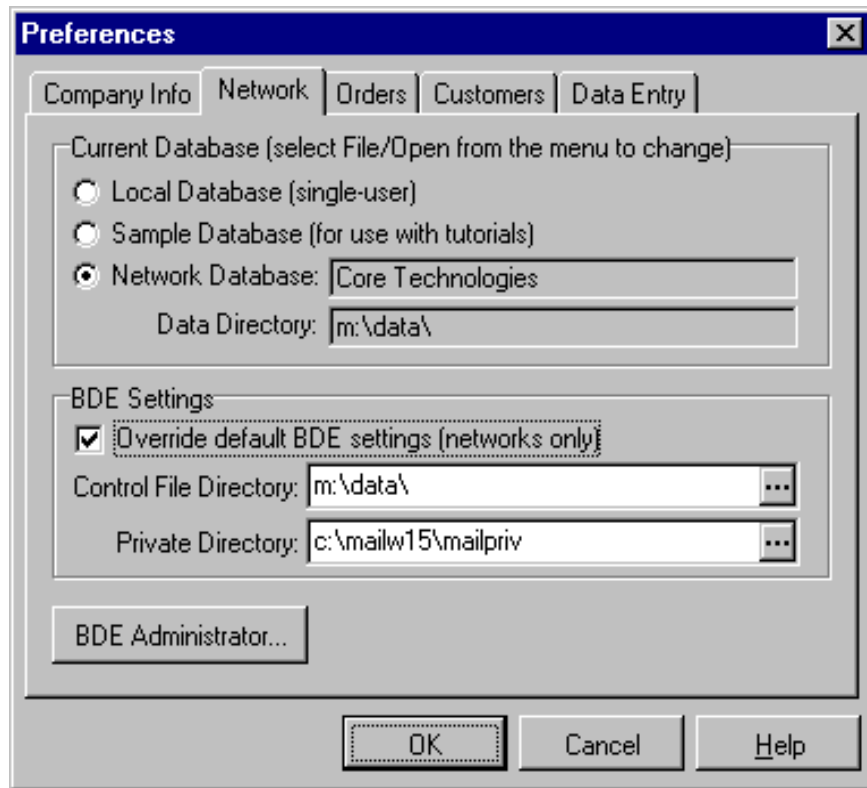
To create a network database

Note: Repeat these steps for each copy of Mailware and each Workstation you install.

2. Start Mailware and choose **Tools** from the text menu, Then select **Preferences**. On the dialog that opens click the **Network** tab.

Tip: Press the **F1** key for more help on setting up a Network Database.

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The **Current Database** portion of the dialog indicates which database is active. This can be changed with the **File>Open Company** text menu option, and is displayed on this dialog for information purposes only.

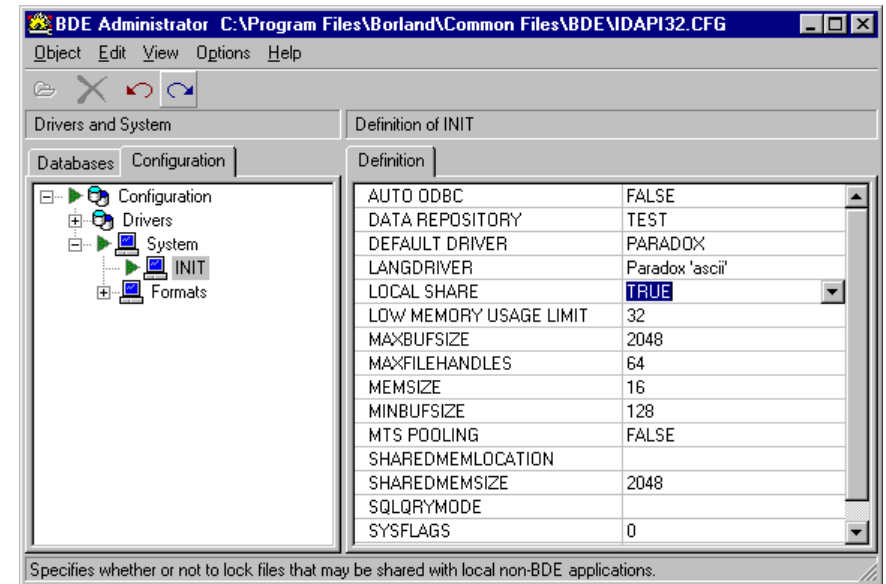
3. Check the **Override default BDE settings** check box and change the **Control File Directory** on each workstation to point to the same directory, preferably the data directory they all share. You can specify an absolute path (e.g., \\SERVER\C\Data) or map a drive letter for each station (e.g., M:\Data). You can also simply browse to the data directory by clicking the ... button that appears in the field.

Note: The **Private Directory** defaults to \mailpriv in

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the Mailware installed directory, and does not need to be changed.

4. Click the **BDE Administrator** button, and answer **OK** to the warning message that appears. The following screen will appear.



5. On the BDE Administrator screen:
 - a. Click the **Configuration** tab.
 - b. Expand the **Configuration** item in the list (click the +)
 - c. Expand the **System** item.
 - d. Click **INIT** then in the right pane change the **Local Share** option to **True**.
 - e. (**Recommended Step**) You can also change the Net Directory (Net Dir) default to avoid the

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possible error: Directory is Controlled by Other .NET File. To do so expand the **Drivers** folder, then expand the Native folder. Click **Paradox** in the list. In the right panel change the **Net Dir** from C:\ to your Control File Directory (you can type it, or browse to it). Press the down arrow key to move to the next line (to ensure the Net Dir entry is saved).

- f. Click the **X** button in the top right corner to exit the Administrator, answer **Yes** to the prompt to save changes, and **OK** to the message about restarting applications.
6. Click **OK** on the Mailware Preferences panel to save the changes. Then proceed to the next step to create a Network Database.
7. Click **File** on the text menu, then select **New Company** from the menu that appears to open the **Network Database** dialog (see image below).
8. In the Network Database dialog enter a **Name** to describe the database you are creating (e.g., Your Company Name).
9. In the next field enter the location of the **Data Directory**. It may be an absolute address (i.e., the name of a computer and its drive name - e.g., \\SERVER\C\Data) or a mapped drive (e.g., M:\Data).

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The screenshot shows a 'Network Database' dialog box with the following fields and values:

- Name: Core Technologies
- Data Directory: m:\data\
- Company: Core Technologies
- Address: 14286 Beach Blvd.
- #19374
- City: Jacksonville
- State: FL
- Zip: 32250
- Phone: 904-221-1227

10. Repeat all steps for each copy of Mailware and each Workstation on your network
11. Restart Mailware then select **File>Open Company** from the text menu to switch to the Network Database you created. See *Switching Between the Sample Database and Your Database* (p. 1.5).

Data Directory Note: It is recommended you use the same directory you specified as the **Control File Directory** in the previous steps. You can browse to the directory by clicking the ... button that appears in the field. When you find the data directory double click it, then click the **Save** button on the browse dialog (You do not have to select a file first). If you receive the error message **Directory Controlled by Other .NET file** see the Help file Error Messages topic for instructions (Press the **F1** key to open Help, then click the Index button, and select **Error Messages** from the list).

Getting Started

INTRODUCTION TO MAILWARE

Mailware is a comprehensive mail order system, designed to automate nearly every facet of your direct marketing operation. You can use it all, or just the parts you need.

Because Mailware has so many features, and because some rely on each other, the best approach to fulfilling your goals is to learn the basics:

We recommend the online tutorials. They introduce Mailware's features and even assist you with setting up your own data.

The following section - *Using the Tutorials* (p. 2.2) explains how the tutorials work, and helps you get started.

If you are in a hurry you may want to skip the tutorials, and start setting up your company.

The section - *Getting Started without the Tutorials* (p. 2.3) contains a quick exercise to get you going, and tips for setting up Mailware. You can take advantage of the tutorials too. They may be used in any order once you have some basic data set up (customers, products etc.)

Everyone can benefit from the information in this manual and the online help files. **TIP:** Help is always a keystroke away. Just press the **F1** key anywhere in Mailware.

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USING THE TUTORIALS

The first time you run Mailware a screen prompts you to run the tutorials. Any time thereafter, simply select **Tutorials** from the **Help** text menu in Mailware.

The first set of tutorials uses the sample company database, and guides you through various screens to familiarize you with the program. After you have completed them you can switch to your company's database, and begin setting up your information. Instructions for switching databases are in the tutorial, and in this manual in the section *Switching between the Sample Database and Your Database* (p.1.5).

Tutorials for use with your database are divided into 3 categories:

Getting Started - these tutorials guide you through setup and use of Mailware, and can be used to enter your company's actual data.

Training - each one stands alone, or you can run all of them to get in-depth training on Mailware's modules. These are designed to train your employees who perform only specific tasks, like order entry.

Advanced - Use these tutorials to make the most of Mailware. These tutorials cover advanced features like import/export and creating reports.

For more information see the section *Using Mailware* (p. 3.1).

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GETTING STARTED WITHOUT THE TUTORIALS

If you prefer to begin using Mailware without running the online tutorials the following exercise and tips will help you get started.

Note: Mailware defaults to the sample company database when it is installed. You will want to switch to your company's database before using the tips and exercise below.

Instructions for switching databases are in the tutorial, and in this manual in the section - *Switching between the Sample Database and Your Database (p. 1.5)*.

A Quick Exercise Setting up an Operator ID



1. Open Mailware. Or, if it is already open, press the **F5** key to make the Company Database the active window.
2. If it is not already selected, click the **Tables** tab on the Company Database.
3. Click the **System** filter button (the last one above the tabs with the tools graphic). This filters out any items that do not belong to the System group, and makes the list shorter and easier to read.
4. Click the **Mailware Professionals** item in the Table

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list to select it.

5. Click the **Add To** button at the bottom of the Company Database.
6. In the dialog that opens type an Operator ID of **999**.
7. Type your First and Last Name by tabbing to each of the next fields.
8. Click the **Save** button. This adds your Name and ID to Mailware. You can select it when you take an order or enter a customer contact.

Deleting an Operator ID

1. Now let's delete the ID we added. Select **Mailware Professionals** in the Tables list again, and click the **Open** button.
2. The dialog box will open and display the first Mailware Professional. If your name is not displayed click the Navigator buttons  on the toolbar to find it.
3. When your name is displayed, click the Delete icon  on the toolbar. Answer **OK** to the message that pops up.
4. Click the **Save** button to close the Mailware Professionals dialog.

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All of Mailware's tables work similarly to this one. You can edit and add Customers, Products and Ad Source Keys using the same basic steps.

Quick Start Tips

- 1 Set up the easy items first: Company Information, Mailware Professionals, Product Vendors and Shipping Companies. Company Information is in Preferences in the Tools text menu. All other items are all accessible in the Tables tab of the Company Database.
2. Next input your inventory items. Use the Product form (again accessible in the Tables tab on the Company Database).
4. Set up your ads in the Advertising Source Keys form. If you do not use ad source keys, make some up now. Future ads should always have source keys (for example, a classified ad in the Mailware News April issue might have a key like MM040199).
5. Add a customer, and take an order. You can add the customer first (using the Customers table), then click the **New Order** button on the Customer form (instead of clicking the Save button) to take an order for that customer. The products, ad source keys and other information you entered in the previous steps will be available on the order form.

If you forgot to add something, leave the order open, press the **F5** key and open the appropriate table from

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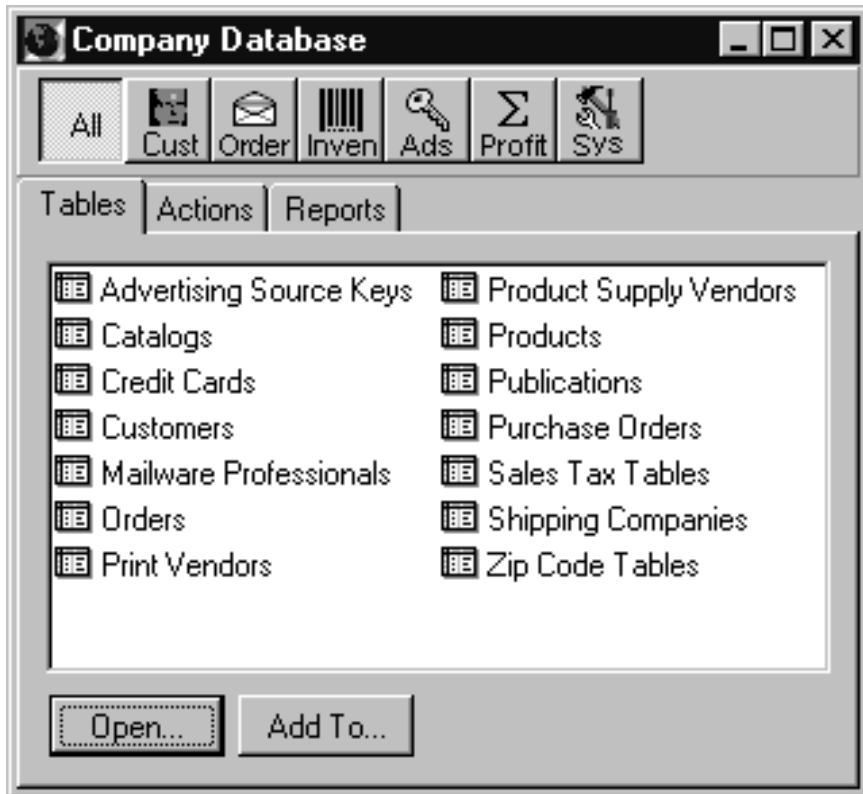
the Company Database. When you are done you can go back to the order, and finish it (if you can't find the order look in the Windows text menu item).

6. Experiment with items on the other tabs. Actions will usually prompt you, and reports are accessible from the Reports Button on each screen, and the Reports tab on the Company Database.

Note: Custom reports can be created with the Shazam Report Writer. You can learn more about creating reports in the section - *Using the Report Writer* in the Reference manual, the help files (press the F1 key to open help any time), and the Advanced Tutorials.
7. Refer to the online help, and the reference manual for descriptions of many of the items you will run across. Also, don't forget the **F1** key brings up context sensitive help.

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THE COMPANY DATABASE



When you start Mailware you will see the text menu and toolbar at the top of the screen. In the dark grey work area is a window (shown above) called the **Company Database**. This is Mailware's main menu. Almost everything you do with Mailware can be launched from here.

Tip: You can access the Company Database at anytime by pressing the **F5** key.

Inside the Company Database are 3 tabs. These represent

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various functions as follows:

Tables - These access your data either as a list of items, or individually within a form (e.g., the Customer screen)

Actions - These are prerecorded functions that work automatically, or step you through processes.

Reports - This lists reports which you can print or preview with the buttons below the list.

Across the tops of these tabs are Filter buttons. These are used to filter the contents of the tabbed pages. For example, when the **Customers** button is depressed only items related to your customers are listed. This makes it easy to find the items you need without scrolling through long lists.

Use the Company Database to access almost everything you need in the program (a few functions are accessible only through the text menu, for example, Preferences). For example, to add a new customer you would:

1. Click the **Customer** filter button, then the **Tables** tab.
2. Click the **Customer** table in the list.
3. Click the **Add To...** button at the bottom of the Company Database.


This is a very intuitive process that should only take a few moments to get comfortable with. It is also covered in detail in the Getting Started Tutorials, and in the section of this manual entitled - *How to Add a Record* (p. 3.3).


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HOW TO ADD A RECORD (USING TABLES)


Mailware stores your information in a database. Each piece of data you enter is called a record. Within records are fields. For example, each customer is a record, and the individual pieces of information about that customer (name, address, etc) are fields.

You can add records using the Tables tab in the Company Database. Mailware uses forms to make entering your records easy. For example, to enter a customer simply select **Customers** from the Tables list, and click the **Add To** button. A form will pop up, and you can begin entering the customer's information. All the tables work the same way. Only the data you enter is different.

Viewing and editing records works the same way, but use the **Open** button on the Company Database (instead of Add To). Then you can scroll through your records with the navigator buttons  on the toolbar.

Occasionally a different type of table is used. Instead of a form showing a single record, a list of all your records will pop up (for example the Zip Code table). You can edit records in these lists by simply typing over them, or you can add a record with the Add button  on the toolbar.

The other buttons on the toolbar perform similar tasks, and can be used on both the form and list style of tables. They are:

 **Add** - As mentioned above this button adds a record to your database. Use it when viewing a list of records

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(e.g., the Zip Code list). It will also open a new form when viewing your records individually (e.g., the Customer form).



Edit - Use this button to change the contents of the currently selected record. **Note:** On most screens you can simply enter or change information without first clicking this icon.



Save - This Save button saves the current record without closing the form (the Save button found directly on a form closes the form when it saves the record).



Cancel - When adding or editing a record this button cancels any changes, and leaves the form open (the Cancel button on a form cancels changes, and closes the form).



Delete - This deletes the currently selected record. You will be asked for confirmation. If you answer OK the entire record is permanently deleted (e.g., If you delete a customer, all information about that customer is deleted).

Note: To delete just a field within a record simply select it and press the **Delete** key on your keyboard (e.g., highlight the customer's name, then press the **Delete** key on your keyboard). Some items require you hold the **Ctrl** key when you press the **Delete** key (e.g., items in an order).

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HOW TO RUN AN ACTION

Actions are automated processes that automatically run, or step you through a procedure. Each one is different, but self-explanatory.

To run an Action, simply select it from the **Company Database** then click the **Open** button. The Action will start.

If you need help with any action open it then press the **F1** button, and the Help file will open to the appropriate topic.

Some of the Included Actions Are:

PROCESS OPEN ORDERS

Use this action to print invoices, shipping labels etc. and close open orders.

RECEIVE INVENTORY

Use this action to log the receipt of products shipped to you by your vendors. The action closes open purchase orders, and updates your inventory..

ADJUST INVENTORY

Use this action to adjust the in stock quantities of your inventory. This also works with a bar code wand.

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HOW TO PREVIEW AND PRINT REPORTS

Mailware includes a report writer you can use to print and edit existing reports, or to create your own. Below are instructions for previewing and printing reports. For help with editing and creating reports see the help file, run the *Advanced Tutorials* (**Help>Tutorials** from Mailware's text menu), and see the section in the Reference manual - *Using the Report Writer*.

Previewing and Printing Reports


Reports are accessed through the **Reports tab** on the Company Database, and **Report Buttons** on various screens.

To Print a report from the Company Database

1. Click the **All Filter Button**, then click the **Reports tab**. All available reports will be displayed in the Reports tab. To make finding reports easier you can view them by type. To do so click one of the **Filter Buttons** on the Company Database (e.g., to see order related reports like invoices and shipping labels click the Order filter button).
2. Select any report you wish from the list, and click the **Preview** button at the bottom of the Company Database.
3. The Shazam Report Writer will open, and display a preview of your report. You may be prompted for a date range. If so, enter the beginning and ending dates you wish to view in the format **mm/dd/yyyy**.

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Tip: When prompted for dates click the Cancel button or press Enter twice to use the report's default date range. Most reports default to Today's date.

4. To print the report click the Print icon  on the reports toolbar. A standard Windows print dialog will open. To print the report click the **OK** button

To print a report from the Reports Button on any screen.




1. On any screen where it is available click the Reports Button (e.g., the Reports button on the Order screen includes invoices, shipping labels etc.).
2. All reports relevant to the current screen will be displayed in a pop up menu. Select any report from the list.
3. The Shazam Report Writer will open, and display a preview of your report. You may be prompted for a date range. If so, enter the beginning and ending dates you wish to view in the format **mm/dd/yyyy**.

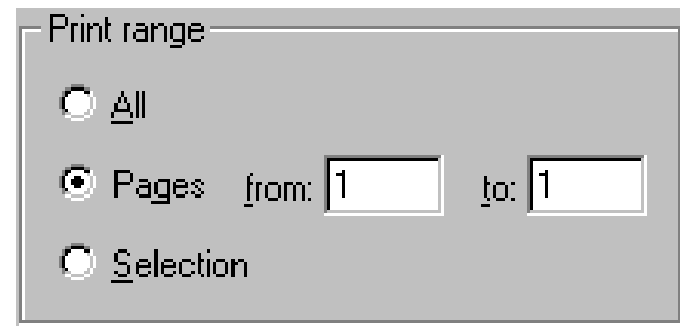
Tip: When prompted for dates click the Cancel button or press Enter twice to use the report's default date range. Most reports default to Today's date.

4. To print the report click the Print icon  on the reports toolbar. A standard Windows print dialog will open. To print the report click the **OK** button

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Printing Selected Pages of a Report

1. **Preview the report** as described in the *Print and Preview a Report* section.
2. **Locate the pages you wish to print** by scrolling through the preview using the Navigator buttons   on the toolbar. Make a note of the page number(s) you wish to print.
3. **Click the print icon**  and in the dialog that appears **enter the page range you wish to print**. The Print range is selectable from the dialog in the section that appears as follows.



You can enter a range of pages (e.g., 1 to 5), or a single page (e.g., 1 to 1).

Note: Reports that do not have a layout defined (as described in the Help file) can only be printed in full.

REMEMBER: PRESS THE F1 KEY ANYWHERE IN MAILWARE TO OPEN CONTEXT SENSITIVE HELP.