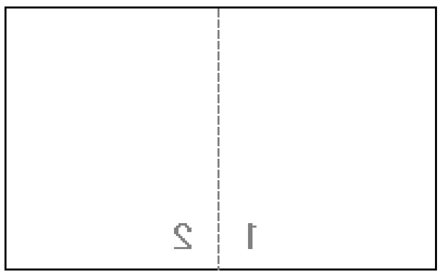
How to Print the Manual

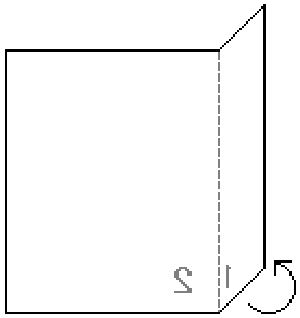
This manual is designed to be bound in a 9" x 8" 3 ring binder. You can print it on regular 8½" x 11" paper, then use the following instructions to create 4¼" x 5½" double-sided pages.

1. Print the manual to 8½" x 11" paper. Use your printer's single side setting if applicable.

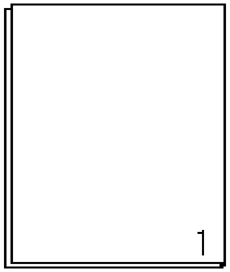
2. Place each page face down as shown below.



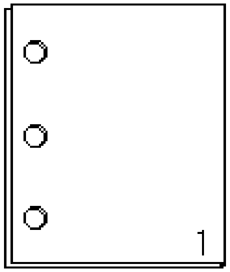
3. Fold the blank side in from right to left.



4. The first page will be facing up with the folded side to the right, and the open edges on the left.



5. Use a standard 3 hole punch to create holes for the binder rings. Most 8½" x 11" hole punchers can be set to 4¼" paper size.



MAILWARE™

Reference Guide
and Installation Manual

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

Contents

Contents

Contents

Contents

About the manuals

The **Getting Started manual** provide 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** sections 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.).

Also included are sections for special features (like the report writer), and quick reference material (e.g., Troubleshooting, Shortcuts 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.

Reference

About the Reference Section

Information in the Reference section is provided in 2 parts.

First, **Definitions** for terms and concepts used in Mailware are presented. For example, Advertisements are defined as any form of communication your company uses to sell its products - from conventional space ads to Internet banners.

The second section provides **Instructions** for performing tasks in Mailware. For example, to Add a Customer, you select the Customer table from the Company Database, click the Add to button, then start typing the customer's name, address etc.

Details about fields you will encounter are provided under Field Definitions section in the instructions for each task. Obvious fields (like Customer Name) are not listed.

The Instructions section may also contain tips and shortcuts you can use to save time, improve the quality of your data or provide greater functionality from your input.

To make looking up the task you are interested in easier, items are listed in alphabetical order in each section.

ACTIONS

Actions are automated processes that make daily functions easier. For example, if you choose **Process Open Orders** from the Actions tab in the Company Database form you will be given choices for printing labels, and invoices, shipment methods and costs, and other functions associated with order fulfillment.

ADVERTISEMENTS

Traditional ad tracking measure the number of people who contact you when they see your ad. This Response Rate is an important measurement of an ad's effectiveness, but it does not tell the whole story. Often ads that have lower response rates are more profitable than other ads because they bring you better customers who spend more and buy frequently. Even ads that start off losing money may bring these better customers, and become your true bread winners.

Mailware knows this, and uses Advertising Source Keys to effectively measure the success of your ads. Every time you place an ad you should assign it a source key. Then when customers contact you the first time, assign them an Original Source Key. Each time the same customer contacts you again you can assign additional source keys to their account. Mailware uses this information, and the cost of your ads, to determine if they are making money. Without this information you may find your company pumping valuable resources into those high response rate ads that may be less profitable or may actually be losing money.

ADVERTISING SOURCE KEYS

You are probably already using source keys. They are simply identification codes you assign to an advertisement. You use them to track where your customers found you.

Mailware makes extensive use of source keys. An Original Source Key is assigned to a customer the first time they contact you. Subsequent source keys assigned to that customer tell you which offers are pulling responses. You can assign additional keys to customers when taking an order, or in the Customer Contact Log.

Each time you place a new ad, assign a source key to it. Mailware will return the favor by telling you which ads are profitable, and which are losing money. You can also group source keys into Projects to measure the success of an entire ad campaign.

ALTERNATE CUSTOMER NUMBER

Whenever you add a customer Mailware assigns a sequential, system number (i.e., 1,2, 3 etc.). This number is visible as the System ID# on the Additional Info tab of the Customer screen. To avoid duplication, it cannot be changed.

You may, however, assign your own number by manually entering it as an Alternate Customer Number. The alternate number will replace or accompany the system assigned number on invoices, labels etc., and may be up to 12 characters long.

You may also create an Alternate Customer Number Formula to have Mailware automatically assign unique numbers based on each customer's information.

The Alternate Customer Number may be up to 12 characters long.

BACK ORDERS

When you add an order to Mailware any items you enter that have a quantity of zero in the Products table will be automatically back ordered. A dialog will pop up to confirm the back order, and will include stock level information.

To avoid back orders for items you do not stock, enter a quantity for the In Stock field (on the Stock Levels tab of the Products form). You may also wish to check the Drop Ship Item check box (on the Product tab in the Products form). The Drop Ship Item field when checked will contain a value of TRUE in your database. This is used by the report writer to create purchase orders to your drop ship vendors.

Note: Future versions of Mailware may include the ability to override the automatic back order function in Order Entry when the drop ship item check box is checked.

CATALOG

Most ads offer one or two items for sale. Catalogs typically offer many items. Mailware treats catalogs like any other advertisement, including the assignment of source keys. However, you may assign several source keys to the same

catalog to measure its effectiveness when sent to different customers, or at different times.

COMPANY INFORMATION

When you start Mailware the first time you are prompted to enter information about your company, including its name, address etc. You can change this information in Preferences at any time. Mailware uses this information in reports (e.g., Invoices, labels etc.), and to define your database.

CREDIT CARD

You can set up credit cards to select when taking orders. The card type will be selectable in the payment information portion of the order form. You can also add information about your merchant services provider for each card.

Note: Mailware supports various credit card processing software packages. Some are supported with export reports that create files which can be imported into your credit card software for batch approvals. Other packages are integrated with Mailware so you can obtain immediate approvals while Mailware is running.

Full integration means you can run your credit card software directly from within Mailware. Export utilities create a batch file of each day's orders that can be imported into your credit card software and transmitted for approval.

CUSTOMERS

Because your customers are so valuable, Mailware maintains an extensive amount of data on each one.

When you first add a customer you may specify a Customer Type, an Original Source Key, and an Alternate Customer Number.

As you update the customer's account (for example, when you take an order), Mailware updates your database to reflect the new activity. Mailware also maintains a full history of your customers' orders including payment methods, products purchased and Advertising Source Keys. You can see this information for any individual when you view a customer's history.

The Customer Contact Log gives you a tool for tracking customer service issues. It is also an invaluable resource for regularly contacting your customers using tickle dates to remind you to send catalogs, fill repeat orders and more.

In addition to managing individual accounts, you can Import and Export customer data. This makes using rented mailing lists or renting your own House List easy and profitable. Customer information can also be used by the Selects function to create targeted mailing lists, and reports.

CUSTOMER CONTACT LOG

A contact log is associated with each customer, and is visible when you view a customer's history. It can be used to document conversations, schedule mailings for individual

customers, or as a reminder to complete any task in the future thanks to its tickler function.

The Tickle Date field allows you to enter a date to complete a task. All tickler items due are shown on a tickler report which you can print daily. This is a handy tool for customer service, and for other routine tasks like mailing collection notices, filling book club type orders, sending catalogs, tracking Return Merchandise Authorization (RMA) numbers, etc. It is designed to be flexible to meet as many needs as possible, so feel free to use your imagination.

CUSTOMER TYPE

When you add a customer, or edit a customer, you may add an entry to the Customer Contact Log. Mailware will use the Inquiry type by default when you add a customer, and the Ordering type when you take an order. The type is automatically updated by Mailware each time you enter new customer information (e.g., When you enter an order for a Mailing customer the type will change to Ordering).

The Customer Types are:

Mailing: Customers whom you are contacting with a direct mailing.

Inquiry: Customers who respond to your mailing or ad, but do not place an order (e.g., They may request more information, or respond to an ad for a free sample).

Ordering: Customers who are placing an order with you

EXPORT

You can export any of Mailware's data for other programs to use. These programs typically require data to be in a certain format, and each field of a certain length and type. You can Mailware's pre-built reports or create your own with the included report writer then export the report data in any of the following formats:

Paradox Database Table (*.DB)
dBase Database Table (*.DBF)
Fixed Field ASCII File (*.TXT)
ASCII Delimited File (*.TXT) - The default Field Separator is a comma (,). The Text Delimiter is a double quote ("), and the first row of the file contains the Field Names.

The Paradox and dBase formats save the records of the report without any formatting. They are the preferred export format when you have a choice in the program you are importing to. The fixed field text file is useful for viewing records as plain text. The delimited ASCII format is useful with mail-merge programs, and is accepted by almost all programs that support importing.

Mailware includes several pre-built Export Reports for specific applications (including credit card processing software). These reports are available from the Management>System section of the Report Explorer.

HOUSE LIST

Every customer you add to Mailware becomes part of your House List. The more information you collect about these

Reference - Definitions

customers, the more valuable your House List becomes to you, and to others who wish to rent your list from you.

Customers from lists you rent are not part of your House List until they respond to one of your ads. When they do respond, you can input a source key for each customer. Mailware will automatically add those customers to your House List.

IMPORT

Mailware can import data from other programs, or other information that is sent to you. This means you can rent lists on disk and load them into Mailware, have a third party take your orders and send them to you on a daily basis, import data from software you no longer wish to use to run your business, or continue using software you like for a specific task, and then move the data into Mailware.

Import is a very powerful feature that greatly enhances the versatility of Mailware. Because of the way data inter-relates, importing can be complex. Mailware's Import Wizard makes the process easy. However, you should exercise caution when importing. It is best to test with a small file first. Then, verify all the data loaded into the proper fields (e.g., It is possible to mismatch fields and import a company name, for example, into the customer First Name field).

The most important step in ensuring a good transfer of data is proper preparation of the file you are importing. Be sure all fields are complete, and if necessary, add fields that you wish to have Mailware enter (e.g., If your customer import file does not contain an Original Source Key, add it to the import file before importing, or manually update each customer after).

OPERATOR ID

An Operator ID may be assigned to each Mailware Professional in your company. Mailware uses this numerical ID to track your employees' correspondence. and transactions with customers. When they take an order, or update the Customer Contact Log their ID is associated with the transaction.

Using the Operator ID you can track the number and amount of orders taken by each employee, see which employees corresponded with customers, and assign tasks to employees using the Customer Contact Log, and its tickler report

ORDERS

Mailware's order entry system is optimized for mail order companies. Because it is integrated with the rest of Mailware's modules it offers full tracking of Advertising Source Keys, so you know which ads are working. It remembers your customers, and their previous order information. Or, you can add new customers at the same time you take their order.

You also have easy access to your inventory including the ability to lookup products using plain English. Plus, you can add or edit products while the order is open, so you can take your customer's order now.

Cash, check and credit payments are supported including partial payments, and Mailware calculates sales tax, discounts and shipping for you. Also supported is export of your credit card transactions for batch transmittal to your merchant services provider. And, you can import or export order data so a third party can take orders for you using Mailware, their own software, or a special version of Mailware we provide to qualifying services (like 800# services).

You also have a full Zip Code database, the ability to add reminder messages to the order form and each of your products, and full edit capabilities after the sale, including returning and canceling orders, or individual items.

Plus, we have made all this easy to use and even added online tutorials just for your order entry professionals, so they don't have to learn the whole program.

ORIGINAL SOURCE KEYS

Each time a customer responds to one of your advertisements, you can track the Advertising Source Key associated with the ad. The first time a customer contacts you, and you add the customer to your database that key automatically becomes the Original Source Key. This first key is important because it is used to measure which ads bring you the type of customers you want

For example, Ad #1 may bring you many responses for a free sample, but those customers may never buy, or only buy once. Ad #2 may bring fewer customers, but those customers may make larger purchases, or buy repeatedly from you. Without an Original Source Key you would be unable to determine which ads are profitable in the long run.

In addition to the Original Source Key, subsequent source keys may be added to the customer's history each time they contact you. Subsequent keys are usually added when a customer places an order, or when you update the Customer Contact Log. These additional source keys help you determine which catalogs, direct mail pieces or other ads are profitable with your existing customer base. A source key may be an Original Source Key for one customer, and a subsequent source key for another.

As you can guess, tracking keys manually becomes a tedious, and nearly impossible job. Because Mailware calculates this information for you, source keys are much more useful than a simple tabulation of responses. All you need to do is record the source key when the customer contacts you. This may be as simple as asking them where they saw your ad, or printing actual codes on your return mail pieces. To see how your ads are doing, individually or as part of a group, use Mailware's Project module.

Original and subsequent source keys associated with a customer are visible when you view a customer's history.

PRINT VENDORS

Second only to the cost of advertising, your printing costs are a major expense for your mail order company. Mailware provides tracking of the vendors who provide these services, and detailed tracking of their costs. This is also a handy tool for comparing prices from different vendors.

PRODUCT VENDORS

Whether you make your own products, purchase them from others, or have them drop shipped, Mailware keeps your vendor database organized - even if you do a little of each. It provides contact information for each of your vendors, and associates their products with them. You can also create purchase orders when it's time to reorder, and update costs and quantities when you receive inventory.

PRODUCTS

Your inventory may be stored on site, drop shipped or made to order. Mailware provides full tracking of your products, and their suppliers. It keeps track of quantities on hand and back ordered, and reminds you when to reorder, and when to expect shipment. Plus, you can create purchase orders to send to your vendors. Mailware remembers how much you paid for each item, and calculates your average cost of goods. And, it knows how much each item weighs, its shipping costs to you, and to your customers and its retail price.

Finding products is easy, and you can associate reminder messages with each product so you don't miss opportunities when you take orders. You can even use bar codes on your products and read them directly into Mailware when you add a product, or receive inventory.

PROFIT

Mailware calculates your profitability by tracking the expenses and revenues associated with advertising source keys. You can view the profitability of ads with reports, or by grouping them into Projects.

Mailware depends on your source keys to track your profits. It is important to record any costs you wish tracked in the source key costs field when you add or edit a key. It is equally important to track source keys for all orders. This generates your revenue and expense information. In addition, Mailware includes expenses recorded elsewhere in your database (e.g., Inventory costs).

PUBLICATIONS

A publication may be a magazine, a newspaper, a card deck or even a tv station. Storing publication information in Mailware serves two primary purposes.

It enables you to store contact information related to the publication. These contacts may be the publication itself, or an advertising firm that handles your account.

When you create advertising source keys you are given the option of assigning the publication to each key. That way when a customer places an order you can use the source key to determine where your ad was seen. Mailware also uses the information to measure the effectiveness of your ads.

Reference - Definitions

PURCHASE ORDER

You can create a purchase order within Mailware to reorder products from any of your Product Supply Vendors. Mailware will track the purchase order number, and assist you with adjusting prices and quantities when you receive inventory.

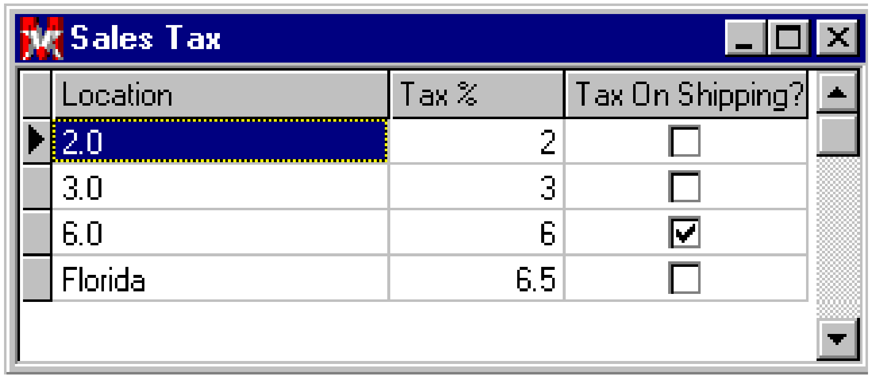
REPORTS

Mailware comes with several built in reports you can print, or edit with the included Report Writer. Reports can be selected from the Report Explorer. For more information about reports see *How to Print Reports* (p. ?.?) and *Using the Report Writer* (p. 4.1).

Reports fall into one of 3 categories:

Management Reports Informational reports about the status of your company (e.g., the Inquiry Customer Report lists only your customers who have requested free information based on the Inquiry type field entered when you add a customer).

Operation Reports Reports you use to complete a task. For example, the Pick List report lists the names and quantities of products you need to pull to fill that day's orders. Other Operation Reports include purchase orders, invoices and other reports you use to complete tasks or that prompt you to take action (e.g., The Tickler report lists all outstanding tasks in your Customer Contact Log).

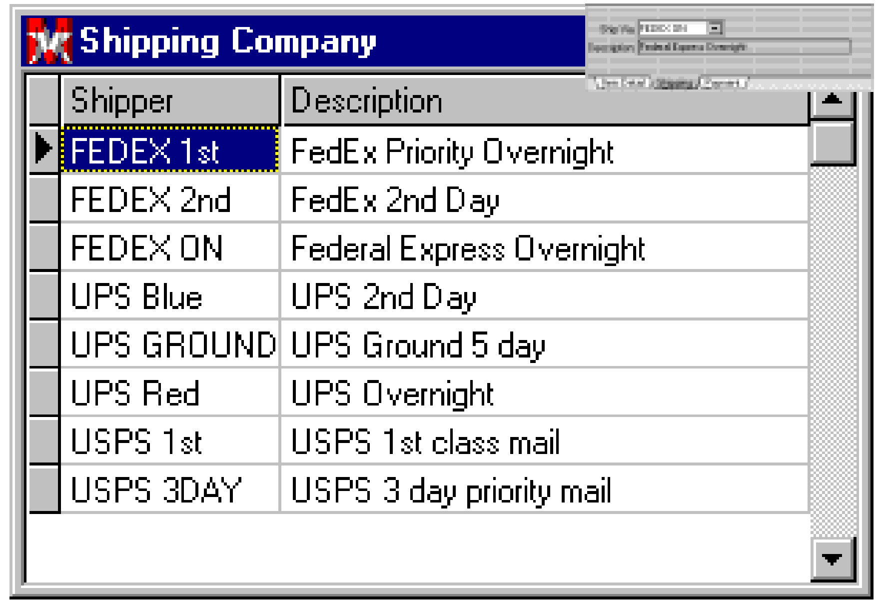


Labels Labels can be simple blank labels with your return address, or created from your database for specific recipients (e.g., Shipping labels for that day's orders).

SALES TAX TABLE

You can create a list of all agencies to whom you remit sales tax, and the tax rate. Click the ... button that appears in the Location field to open the Tax Code Creation dialog. In it you can specify a tax rate to be applied based on the customer's country, state or Zip code.. You can also specify for each district whether sales tax is collected on shipping.

When you take an order the Sales Tax Table is automatically calculated based on the Shipping Address and the Sales Tax Codes you create.



SHIPPING VENDORS

You can set up any number of shipping companies (like the Post Office, FedEx, UPS, etc.), and the services they offer (e.g., Priority Mail, Overnight, 2nd day, etc.).

SYSTEM FLAGS

Mailware provides the ability to assign flags that mark the status of an account. You can use these to mark a customer's account as inactive, for example. When a flag is checked the database contains the value TRUE to indicate the flag is on.

In this way you can include or exclude accounts of certain types when creating a report. For example, you could create a list of inactive accounts, and mail them a welcome back offer.

Following are examples of system flags:

Bad Credit: If a customer is past due in payments to you, or sent a bad check select the Bad Credit flag. This allows you to avoid extending credit, or accepting a non-cash order from this customer. You can also use it to generate a collection letter.

Don't Send Mail: If a customer does not wish to receive promotional material from you or a third party select the Don't Send Mail flag.

Inactive Account: Use this flag if you have not received an order from this customer recently (a recommended time frame is 6 months).

TABLES

Everything you enter into Mailware is stored in a database. For example, when you enter your customers they become part of the customer.db file which contains each customer's name, address and other information. This database file is also called a Table.

Mailware makes Tables easy to read by showing you your information in forms or lists. For example, each customer's name and address is displayed on the Customer form.

Tables are accessible through the Company Database. You can use them to enter, and view information. Mailware will

make all necessary associations (like which orders go with which customers) so it can track your company's performance.

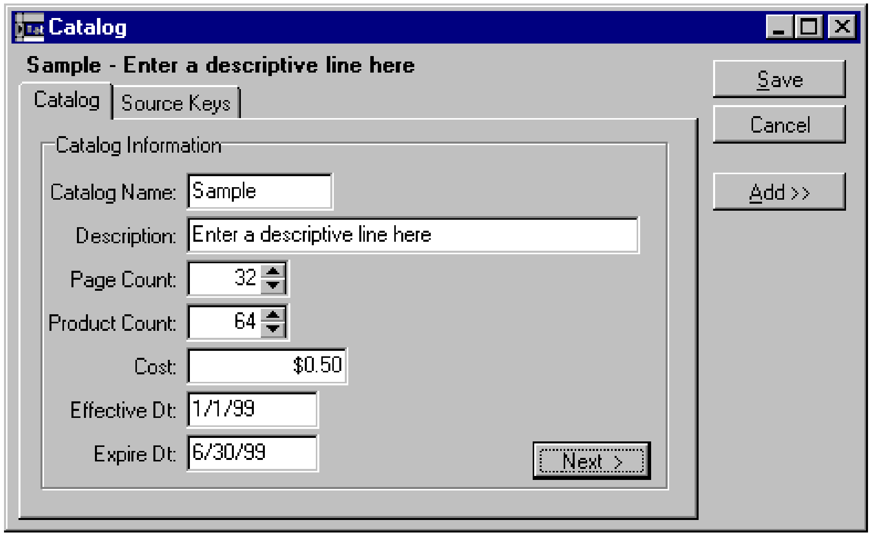
TICKLE DATE

A tickle date is used to remind you to do something. When you assign it to a task, that task appears on a tickler report on its tickle date. For example, if you want to mail a letter to a customer on January 15, 1999, you enter a tickle date of 1/15/99. You then associate the tickle date with the task - mail letter. When the tickler report is printed on January 15, 1999 it contains this particular task. And, you mail your customer a letter.

In Mailware this is done in the Customer Contact Log. The Tickle Date is a handy tool for customer service, and for other routine tasks like mailing collection notices, filling book club type orders, sending catalogs etc. It is designed to be flexible to meet as many needs as possible, so feel free to use your imagination.

ADD A CATALOG

On the Company Database form click the **Ads** button, then click the **Tables** tab. Select **Catalogs** from the list, and click the **Add To** button.



Field Definitions:

Catalog
Description: You can type anything you like here, however, you may wish to enter text that can be used to help you identify which version of the catalog this is when you add a source key for it.

Cost: Include all costs to produce the catalog. Do not include mailing costs. They can be associated with the Advertising Source Keys for this catalog.

Effective Date: This is the date the offers in the ad begin (not the mail date for the catalog).

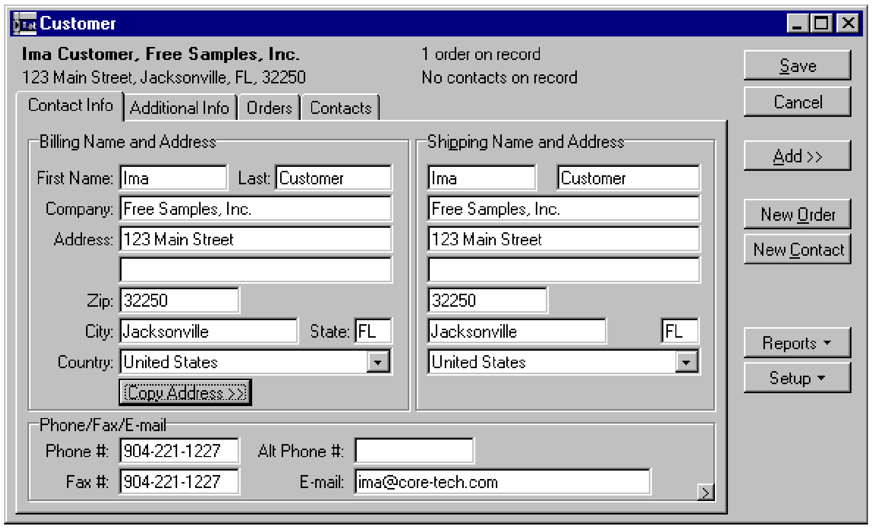
Expire Date: This is the date on which the offers in the ad are last available to your customers.

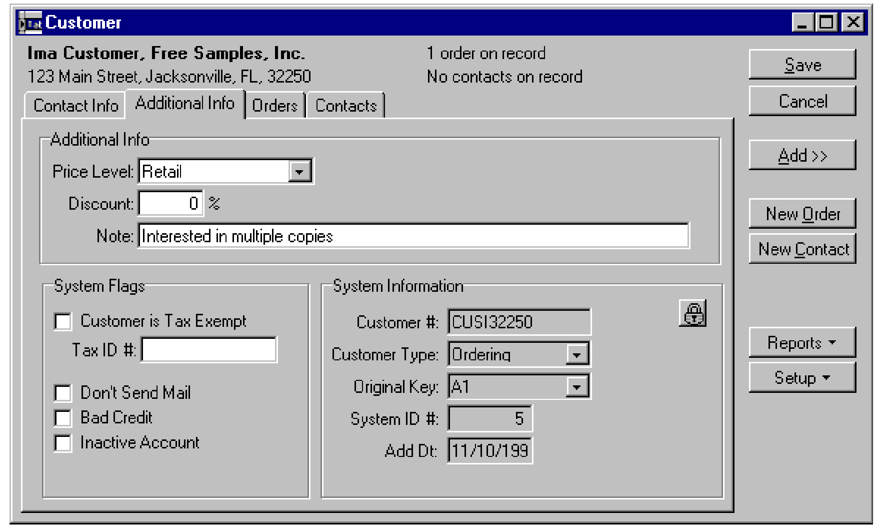
Source Keys
These are the Advertising Source Keys associated with this catalog.

Add a Customer

On the Company Database form click the Cust button, then click the Tables tab. Select Customers from the list, and click the Add To button.

Shortcut: Click the Add Customer icon on the toolbar.





Field Definitions:

Additional Info

Notes: You can type anything you like here. Mailware can query on this field when you are creating Custom Reports or Selects. Therefore, you may wish to enter information you can use to associate this customer with a specific group. For example, you could enter the customer's age as AGE=45.

Tip: The following 3 fields are automatically updated by Mailware when you add a customer or enter a contact in the Contact Log. When adding a new customer you can click the New Contact button to open the log, then enter the Source Key and Action. The first time you enter a source key for a customer, that key becomes the customer's Original Source Key.

The following 3 fields may be changed manually by clicking the lock icon to make them editable. The fields will remain open for each successive customer you add, or until you close the Customer form.

Customer #: Mailware automatically assigns an internal number to each customer you add. It is visible in the System ID# field on this screen. If you want to use an Alternate Customer Number, enter it in this field, or set up an Alternate Customer Number Formula to have Mailware enter it for you.

Customer Type: When you add a customer Mailware defaults this field to Inquiry. The Customer Type is automatically updated by Mailware whenever the customer's status changes (e.g., when you take an order the type is changed to Ordering).

Original Key: This is the Advertising Source Key associated with the first contact with this customer. You should add this key by clicking the New Contact button, and adding an entry in the Customer Contact Log. Additional source keys can be added each time a customer responds to one of your ads, mailings or catalogs. You can assign keys to customers when taking an order, or in the Customer Contact Log. (Note: You should never change the Original Source Key unless it was entered incorrectly.)

System Flags: These flags can be used by the Selects when creating lists, and when creating Custom Reports.

Tip: You can take an order for a customer you just added by pressing Alt-O or clicking the New

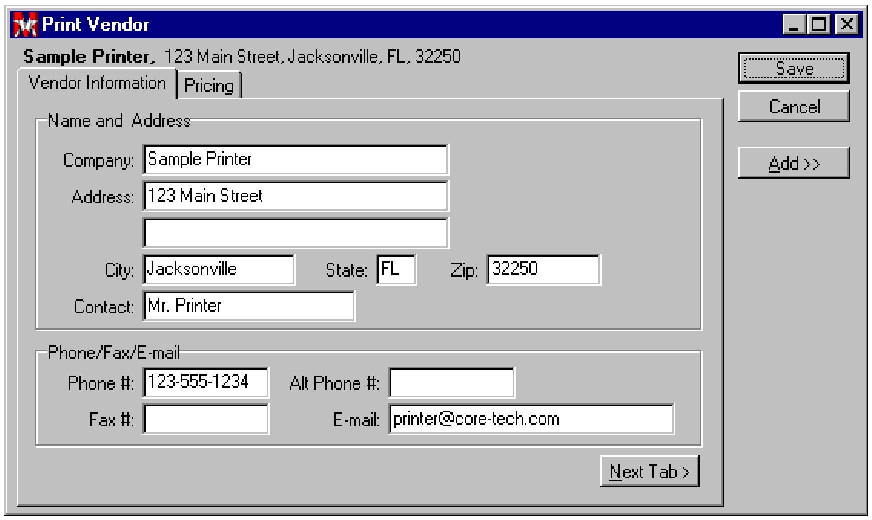
Order button.

<u>Orders</u>
You can view all the orders for each customer here. You can also add a new order, or select an existing order and edit it with the add and edit buttons on the bottom of the form.

<u>Contacts</u>
Each time you correspond with a customer you can add your contact information here. See the Customer Contact Log for more details.

Add a Print Vendor

On the Company Database form click the Ads button, then click the Tables tab. Select Print Vendors from the list, and click the Add To button.



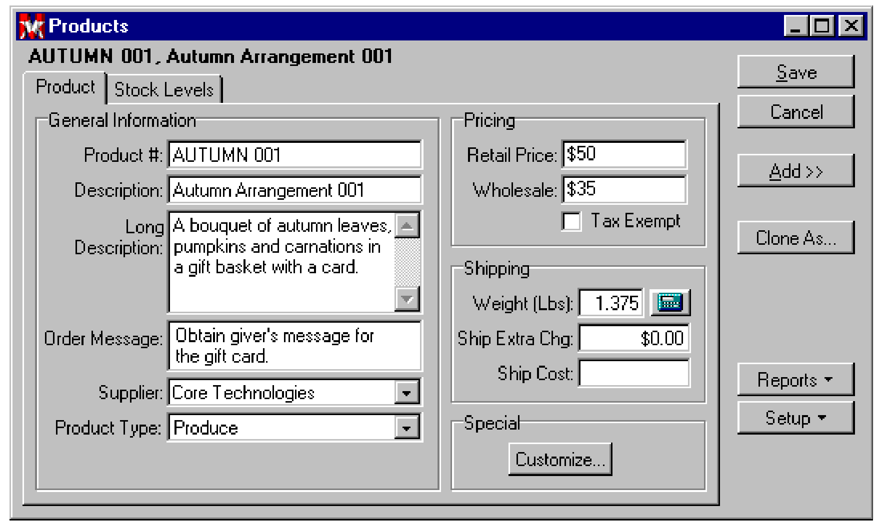
Field Definitions:

<u>Pricing</u>
Description: Type the name of the product your print vendor supplies (for example, Brochure). Then you can enter prices for various services your vendor provides. This is handy for comparing vendors, or tracking your costs.

Add a Product

On the Company Database form click the Inven button, then click the Tables tab. Select Products from the list, and click the Add To button.

Shortcut: You can open the Product form with the Inventory icon then click the Add button.



Field Definitions:

<u>Product</u>
Product #: You may enter a number, text or both here. This field is automatically capitalized so you can easily find the product later. You can also wand a bar code into this field. The Product # can accommodate up to 15 characters.

Tip: If more than one vendor supplies you with the same product, enter the product twice, but with different product numbers.

Description: Enter up to 30 characters to help you identify this product when viewing your inventory.

Supplier: You can select a Product Supply Vendor here to associate the product with its supplier. If you have not added the supplier yet, you can make the association later by editing the product.

Tip: If a vendor provides you with several products, enter the vendor first then, while in the Product Supply Vendor form, click the Products tab then the Add button. Each product you add will be associated with that vendor.

Cost: Each time you receive inventory you may pay a different amount. Mailware calculates your average cost of goods by recording how much you paid for each shipment. For example, if you paid $10 each for your first shipment of 100 items, $11 each for your second shipment of 75 items, and $12 each for a third shipment of 50 items your average cost for all your items would be $10.78 each. This cost method is most effective if you use First in First Out (FIFO) for your inventory. Or, in other words - you sell items in the order you receive them.

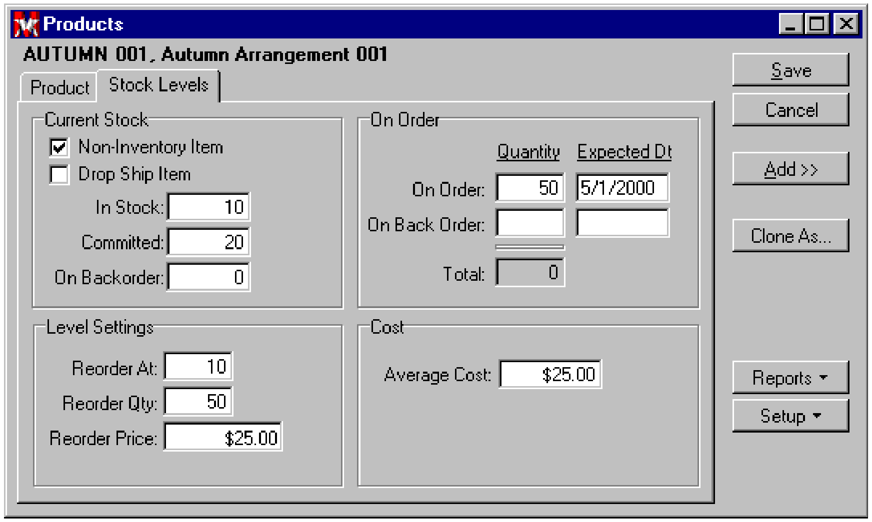
Order Message: This 50 character message will be displayed when the product is selected during an order. It is a convenient way to add reminders to products (for example: "This item requires batteries."). Note: This message may be used effectively with the Message for new order which

shows on the Order Entry screen.

Ship Cost: This is the cost to you to ship this individual item.

Ship Extra Charge: If this product requires an additional shipping charge to the customer (for example, oversized items), enter the amount here. When a customer orders this product, the extra shipping charge will be added to the total sale.

Drop Ship Item: If you do not stock this item, but have a third party ship it to your customer, check this box.



Stock Levels

Reorder at: You can specify the quantity this item may reach before Mailware reminds you to order more.

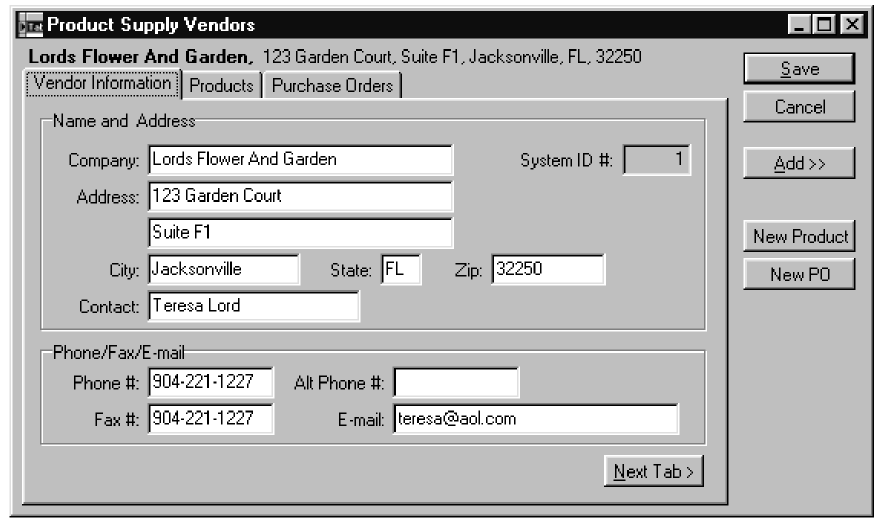
Reorder Qty: The number of items to order when the Reorder at threshold is met.

Reorder Price: The amount you expect to pay for each item. This amount is for reference only since actual costs may vary. You will have the opportunity to enter the actual price when you receive inventory.

ADD A PRODUCT SUPPLY VENDOR

On the Company Database form click the Inven button, then click the Tables tab. Select Product Supply Vendors from the list, and click the Add To button.

Shortcut: You can open the Product Supply Vendor form with the Vendors icon  then click the Add button.



Field Definitions:

Vendor Information
Enter each vendor, and contact information. If you make all your own products, enter your company information here.

Products
These are the products associated with this vendor. If you wish to add a product,, or edit a product you will be taken to

the Products form.

Tip: If more than one vendor supplies you with the same product, enter the product twice in the Products form, but with different product numbers.

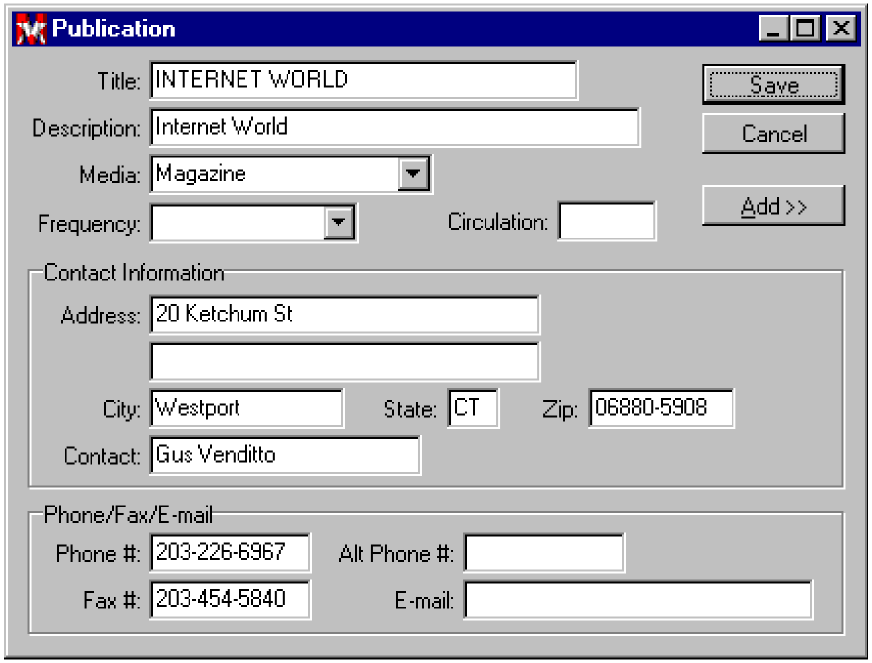
Tip: If a vendor provides you with several products, enter the vendor first then while in the Product Supply Vendor form, click the Products tab then the Add button. Each product you add will be associated with that vendor.

<u>Purchase Order</u>
This tab lists all the purchase orders you have created for this vendor. You can view or edit any purchase order by double clicking it, or clicking the Edit button. From this screen you can also create a new purchase order.

Shortcut: You can create a new purchase order from any tab on the Product Supply Vendor screen. Simply click the New PO button.

ADD A PUBLICATION

On the Company Database form click the Ads button, then click the Tables tab. Select Publications from the list, and click the Add To button.



Field Definitions:

Title: A publication may be anything from a magazine to a tv station. The title you enter will be the publication name used when you add a source key.

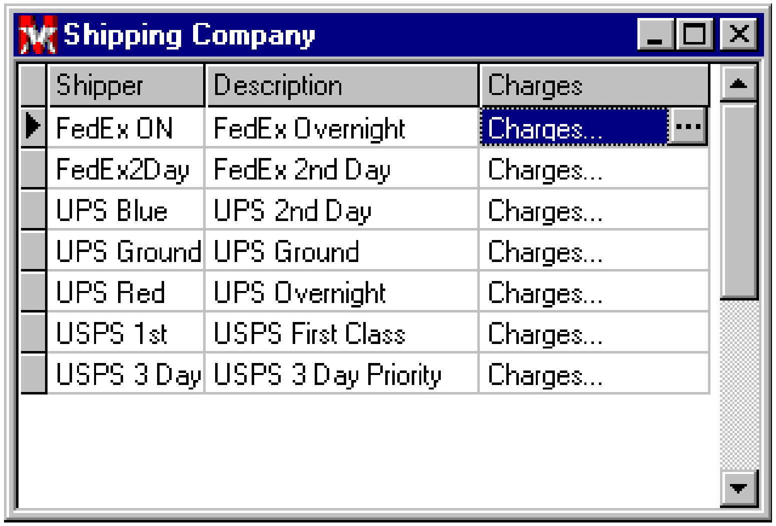
Media: Trade refers to a publication for a specific industry (e.g., Direct is a trade newspaper for the mail order industry). Card Decks are 3x5 cards mailed in packs of about 100 other cards.

Circulation: The number of items sent to subscribers or recipients.

Reference - Instructions

ADD A SHIPPING VENDOR

On the Company Database form click the Sys button, then click the Tables tab. Select Shipping Companies from the list, and click the Add to button.

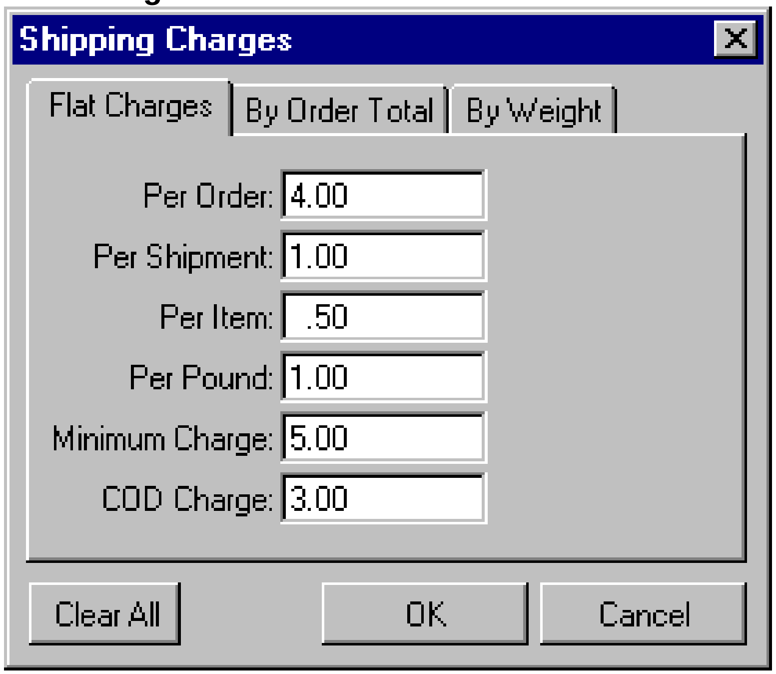


Type the name of the shipping company (up to 10 characters) in the Shipper column, and enter the type of service (up to 30 characters) in the Description column (e.g., enter USPS as the Shipper, and Post Office 3day Priority Mail as the description). Click the ... button in the Charges column to set up shipping charges as described below.

To add additional items click the Add button on the toolbar. To cancel a change click the Cancel button. All additions and changes are saved when you exit the form, or you can click the Post button on the toolbar.

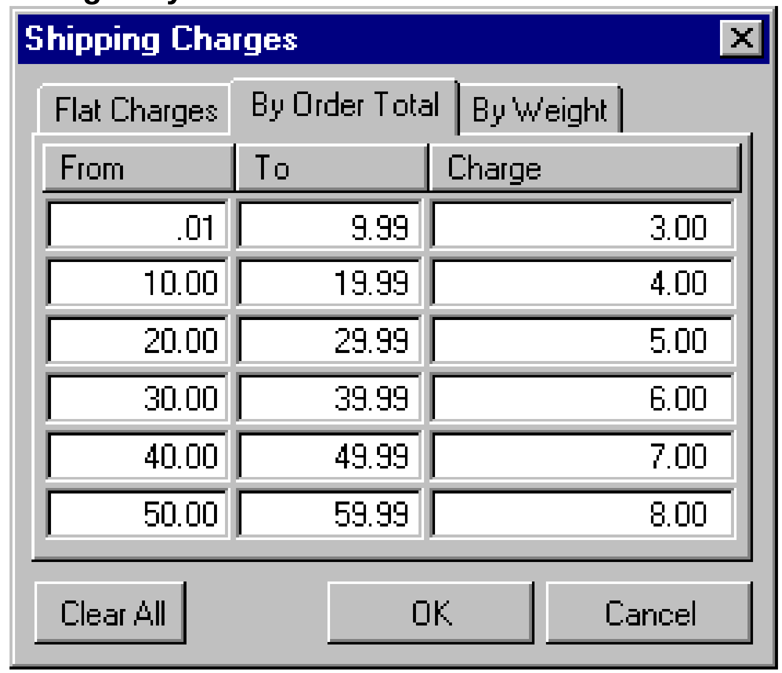
Shipping charges:

Flat Charges



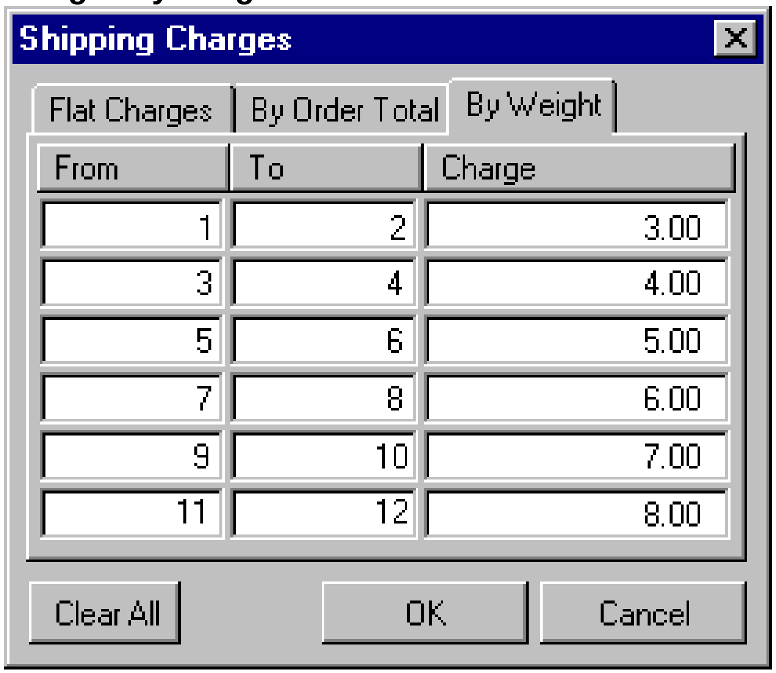
Flat charges are cumulative (i.e., they are added together on an order), and can be used in conjunction with order total and weight calculations. For example, you can enter a Per Order charge of $4.00, a Per Pound charge of $1.00 and a By Order Total calculation (as in the screen below where an order under $10 is charged $3.00). In a $9 order weighing 10 pounds the charge will be calculated as $4.00 + $10.00 + $3.00 = $17.00.

Charges by Order Total



Charges by Order Total are calculated based on the Subtotal of items (excluding Sales Tax) and are charged in addition to Flat Charges and Weight Charges you specify for each shipping method. You can also use the By Order Total to create charges above a specified order amount. For example, enter a From of $200.01 and a Charge of $50 (no To is needed) and only orders above $200 will be charged $50.

Charges by Weight

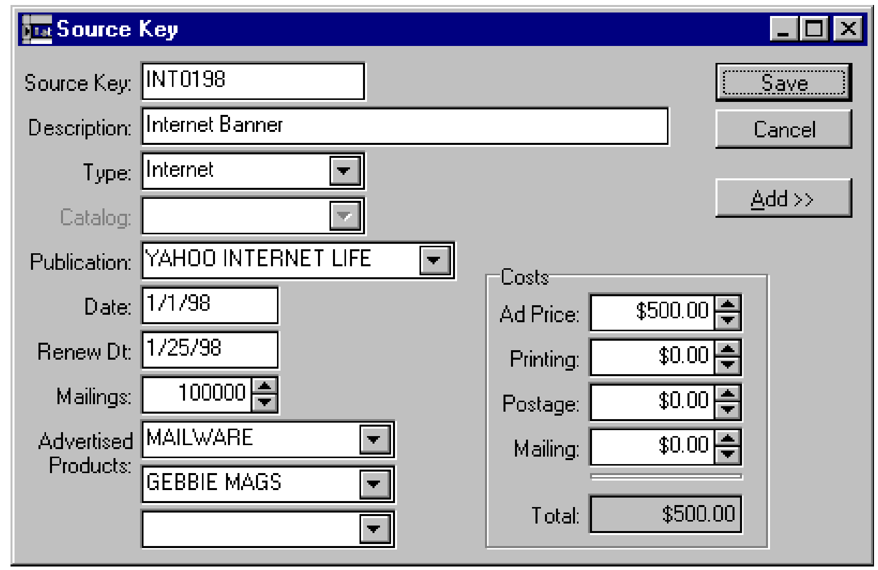


Charges by Weight are calculated based on the combined weight of items added to the order. You can enter each item's weight in the Product screen Weight field. Charges by Weight are added to Flat and Order Total charges you specify. As in the by Order Total method, you can create charges that are applied only when an order exceeds a value you specify. For example, enter a From of 100.01 pounds and a Charge of $75 (no To is needed) and only orders weighing more than 100 pounds will be charged $75.

Reference - Instructions

ADD A SOURCE KEY

On the Company Database form click the Ads button, then click the Tables tab. Select Advertising Source Keys from the list, and click the Add To button.



Field Definitions:

Source Key: Enter the code, you have assigned for a particular ad, mailing or catalog. This is your Advertising Source Key.

Description: Enter any text you wish in the next field. Starting the description with the publication date of an ad is a handy reference (e.g., 1/97).

Type: This refers to the type of ad (e.g., display or classified ad in a magazine, a direct mailing etc.)

Catalog: Use this type to activate the Catalog drop box below this field where you can associate a Catalog with this source key.

Classified: Classified ads are typically either One Shot or Two Step ads: One Shot ads ask for the order. These are effective only for very low priced items. Two Step ads offer a free or inexpensive sample or demo. The sample is mailed with sales literature that asks for the order.

Display: These are usually large ads ranging from 1/8 of a page to a multiple page spread that appear in a publication. Because display ads are expensive, and offer you room to describe your product they typically ask for the order, and offer higher priced items.

Direct: Direct Mail usually consists of several pieces mailed directly to a potential customer. The components of a direct mail package may include: a sales letter, an order form, a publisher's note and a brochure. By assigning a source key to the entire package Mailware can track the effectiveness of a direct mail campaign. You can also assign different source keys to different parts of a direct mail campaign.

For example, you could create 2 different direct mail packages, and assign each a different source code. Or, you could send the same package to 2 different lists, each with its own source code. By combining both of these methods you can create several distinct groups all within the same mailing. This is a very effective method for testing.
Internet: Use this type for Internet ads and search engines.

Reference - Instructions

Other: Use this for an ad that does not fit one of the available categories.

Publication: Select a Publication, if applicable, from the drop down list, or add a publication and return here to select it.

Catalogs: Source Keys may be assigned to a catalog once, or you may assign several to the same catalog. This allows you to measure the effectiveness of the same catalog sent to different customers, or at different times.. Enter the appropriate catalog here from the drop down list, or add a catalog, and return here to select it.

Date: Enter the date you actually placed the ad (not its publish date), or mailed a campaign.

Renew Date: If you plan to advertise in this publication again enter the deadline for submitting a new ad in the Renew Date field.

Mailings: Enter the number of pieces you mailed, or the circulation for the publication in the Mailings field.

Advertised Products: You can associate up to three different products with this ad by selecting them from the drop boxes in the Products fields. If you have multiple items you can set up a catalog, and refer to it in the catalog field above.

Ad Price: This is the actual price for a classified, display or other paid ad. Do not include printing, postage or mailing costs which are provided for below.

Printing: Enter any printing costs associated with this ad.

Postage: For mailings you can separately record the total cost of postage here.

Mailing: Any additional costs to mail can be separately recorded in the Mailing field.

Tip: Create source keys that have meanings to you. For example, DM197 for a direct mail piece you sent in January 1997.

ADD AN ORDER

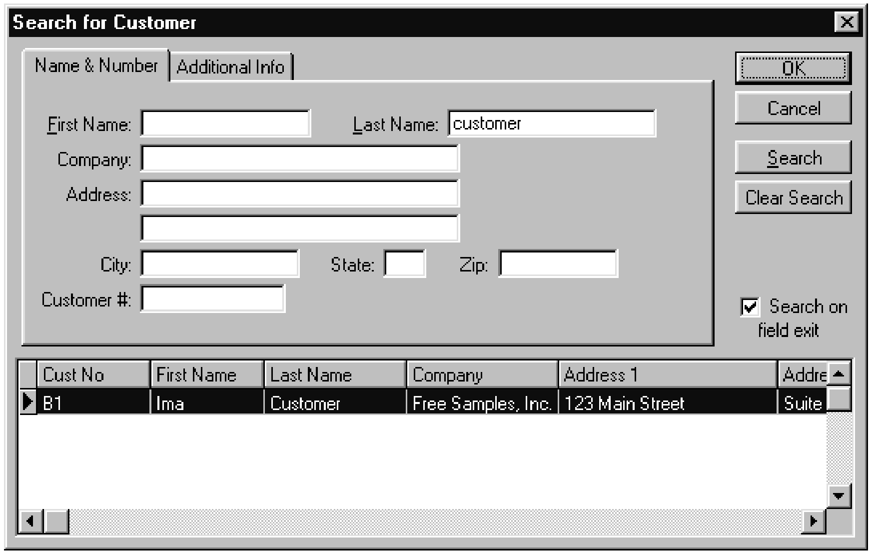
Tip: Click the Find Customer icon on the toolbar, or press the F4 key, instead of the Add Order icon. If the customer is not found you can use the Add Customer button on the search screen to enter the customer then click the New Order button.

On the Company Database form click the Order button, then click the Tables tab. Select Orders from the list, and click the Add To button.

Shortcut: Click the Add Order icon on the toolbar.

Whichever method you choose to take an order, your first step will be to find the customer. If you open an order directly, click the button in the **Cust System ID** field to start the search.

The following Customer Search screen will open so you can find the customer in your database.

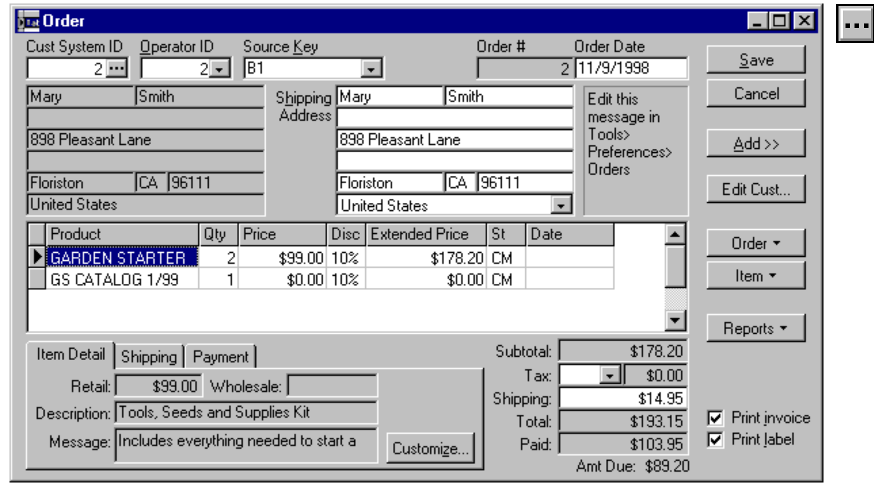


The Customer Search screen will open on top of the order screen. You can then search for the customer for whom you are taking an order. When you click the OK button the customer's information will be entered on the order form.

If the customer is not found you can click the **Add Customer** button (if available) on the form. After you enter the customer click the **New Order** button on the Customer screen to enter the order.

Note: The **Add Customer** button is not available on the Customer Search dialog when it is opened from a blank order. To add a customer when the button is unavailable, **Cancel** the search. Press the **F5** key, and select **Customers** from the Tables tab. Then click the **Add To** button. After adding the customer, click the **New Order** button on the Customer screen.

Reference - Instructions



Field Definitions:

Cust System ID: This is the number assigned to a customer when you add them to Mailware. If you click in this field a button will appear which you can click to search for the customer. If you find the customer their information will appear on the order form when you close the search dialog. If the customer is not found you can add the customer using the instructions above, then complete the order.

Operator ID: Selecting your Operator ID from the drop down list will indicate that you took this order.

Source Key: This is the ad source key for this order. The customer may be able to read it from their catalog, ad or other sales material.

Order #: This number is assigned automatically by the system, and prints out on labels and reports.

Products

Product	Qty	Disc	Price	Fill	Ship	BO	Ret	Canc	Ext. Price
COG	1	0	$50.00	1	0	0	0	0	$50.00

Order Date: This will automatically default to today's date. You may change it if you wish, but doing so will exclude the order from any reports that run based on Order Date=Today.

Shipping Address: Enter an address here if it is different than the customer's billing address.

Products:
Clicking in the Products field activates a ... button you can use to Search for Products to enter for this order. Then the following information can be added or edited for each item.

Qty This is the number of products the customer is ordering.

Disc You can input a percentage discount here (e.g., 10%) that will be calculated by Mailware, and deducted from the sale price.

Price This is the price for this product as entered on the Products form. You can enter a different price directly on the order form if desired.

Ship When you fill the order this amount may be changed to show the item has been shipped.. To update this field click the **Mark Shipped** button, and change the quantity to show the number sent. This field is automatically updated when you fill orders with the Process Open Orders action.

ST This field shows the status of the item (SH = Shipped, CM = Committed, BO = Backordered, CA = Canceled, RT = Returned).

Ext Price Mailware calculates the extended price for this product including quantity and discounts (e.g., 2 items at $10 each = $20, or if you enter a discount of 10% this amount will equal $18).

Note: To make changes to the currently selected item click the Items button.

Item Detail Tab

Description: A description of the currently selected product is displayed here. This description can be changed on the Product form.

Message: This is the Order Message you entered on the Product form when this item was added to inventory.

Customize: This button opens a form in which you can enter details about the selected product (size, color etc.). This information can be included in reports (e.g., invoices, work orders etc.).

You can specify information to collect for each product by using the Customize button on the Product table. When Customize is selected during the order the form will contain the information you entered.

Shipping Tab

Ship Via: Select a shipper and method from the drop box here. Additional shippers and their services may be added in the Shipping Vendor table.

Description: This is the description for the Ship Via field that you enter when you add a Shipping Vendor.

Tax on Shipping: Indicates whether shipping costs are included in the sales tax calculation for the order. You can specify whether tax is collected on shipping for each district in the Sales Tax Table.

Payment Tab

Method: The type you choose will determine which fields are available below it.

Action: Choose Sale or Credit to enter a charge or a return.

Number: Enter the appropriate number here for the pay method type (credit card number, PO number etc.)

Exp: Enter the expiration date of the credit card here.

Approval #: Enter the card or check approval number here. If you batch process card approvals, you can edit the order to enter this information, or do so when you process open orders.

Note: An approval # must be entered to have an amount paid entered. Use an actual approval number or anything you wish (an X, the date, the initials of the operator etc.)

Order Totals

Subtotal: Mailware calculates the subtotal of the order including any discounts.

Tax: A tax amount will be automatically entered here based on the Sales Tax Codes you create in the Sales Tax Table.

Shipping: A shipping charge will be entered automatically here based on the charges you enter in the Shipping Companies Table.

Total: Mailware calculates the total order for you here. Use this amount in the Paid field if the customer pays the full amount.

Paid: The Paid amount is entered for you when you receive or type an Approval # in the Payment tab.

Print Invoice: If you check this box you can print an invoice when you process your open orders.

Print Label: If you check this box you can print a shipping label when you process your open orders.

Tip: When you are testing you will often offer the same product at different prices. You can either show this as a discount (which will show on your customer's invoice), or you can add multiple, identical products to your inventory with different prices.

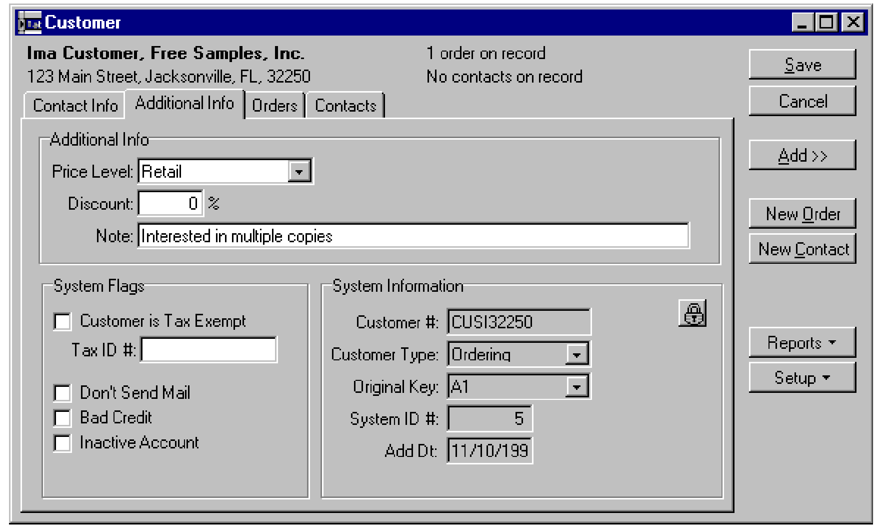
Tip: To print an invoice immediately click the Reports button and choose Print Invoice from the top of the list.

ASSIGN A CUSTOMER NUMBER

On the Company Database form click the Cust button, then click the Tables tab. Select Customers from the list, and click the Open button, then click the Additional Info tab.

Click the lock icon to make the field editable (it will turn white). You may then simply type the new customer number into the Customer # field. The number may contain alphabetical characters, and may be up to 12 characters long. Note: the System ID# assigned by Mailware cannot be changed. This ensures you always have a unique number for every customer, even if the Alternate Number is duplicated.

Tip: You do not have to assign numbers manually. You can create an Alternate Customer Number Formula instead to have Mailware enter it for you each time you add a customer. See *Create an Alternate Customer Number Formula* (p. 3.68).



Field Definitions:

<u>Additional Info</u>
Customer #: Mailware automatically assigns an internal number to each customer you add. It is visible in the System ID# field on this screen. If you want to use an Alternate Customer Number, enter it in this field,.or set up an Alternate Customer Number Formula to have Mailware enter it for you. This number may be up to 12 characters long.

System ID: This is the sequential number assigned by Mailware. To ensure your data's integrity, this number cannot be changed.

Note: This number is incremented every time you add a customer, even if you cancel or delete the record. Therefore, you may notice gaps in the sequence (for example, you may have a customer with a system number of 100, and the next customer with 103). This does not mean you have any lost or hidden records.

Assign an Operator ID

On the Company Database form click the Sys button, then click the Tables tab. Select Mailware Professionals from the list, and click the Add to button.

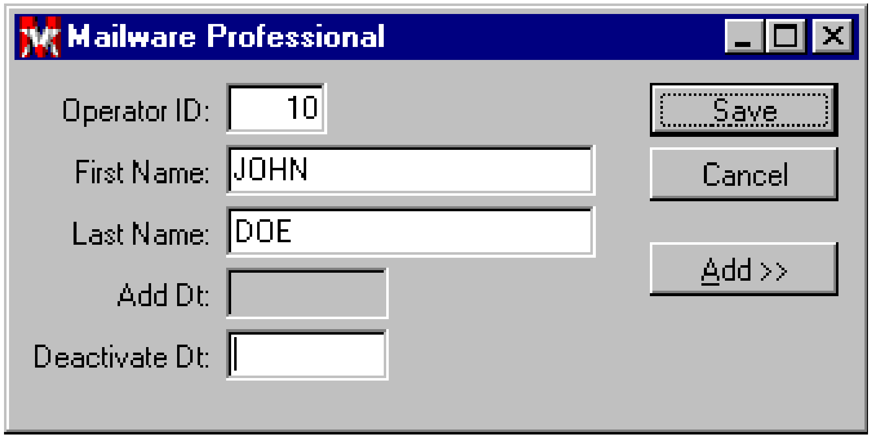
Or,

To edit an existing Operator ID click the Open button. You can then scroll through all your Operators using the navigator buttons on the toolbar, then simply type the new information, or click the Edit button on the toolbar.

Note: you should edit for corrections only. If you wish to add a new Operator you should assign a new ID to prevent confusion (i.e., changing an Operator's name for the same ID# will result in all transactions related to that ID# being associated with only the new Operator.)

To delete an Operator ID, click the Delete button on the toolbar. You will be asked for confirmation.

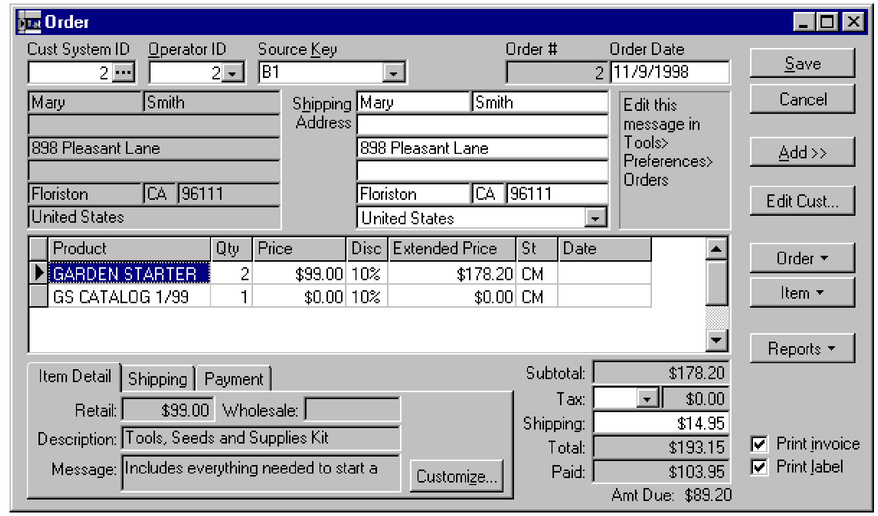
Note: deleting an Operator ID frees its number for reuse. If an employee is no longer using Mailware, or has left your company you should retire their number by entering a Deactivate Date.



Field Definitions:

Operator ID: You may type a long number here, but a maximum of 5 characters is recommended so that you will see the whole number on other screens and reports. Leading zeros will be removed (e.g., 00001 will become 1), and this is a numerical field (numbers only - no alphabetical characters).

Deactivate Date: You can specify the date an Operator ID expires. This can be used for temporary employees, and training purposes. It is especially useful, however, for retiring numbers when employees leave, or stop using Mailware.



Cancel an Order

If you are not already viewing the order you wish to cancel go to the Company Database form click the Order button, then click the Tables tab. Select Orders from the list, and click the Open button.

You can then scroll through all your orders using the navigator buttons on the toolbar, or search for a order with the Find icon

Tip: You can use the Find Order icon to quickly locate the order. Or, open the Customer screen for the appropriate customer, and double click the order you wish in the Orders tab.

Once you have located the order you may cancel all or part of it. First, select the first product you wish to cancel (by clicking on it in the grid on the Order form). Then, click the Item button and select Cancel..

In the dialog that appears type the number of items you wish to cancel. The quantity you enter will appear in the Canc field on the grid when you save the order. To update the form without closing it click the post icon on the toolbar.

Repeat this process for all items you wish to cancel, then click the Save button to close the form. Or, click the Order button to cancel all items in the order.

CHANGE A CUSTOMER NUMBER

You cannot change the System ID that Mailware assigns to a customer. This ensures the integrity of your data. However, you may assign or change an Alternate Customer Number as follows:

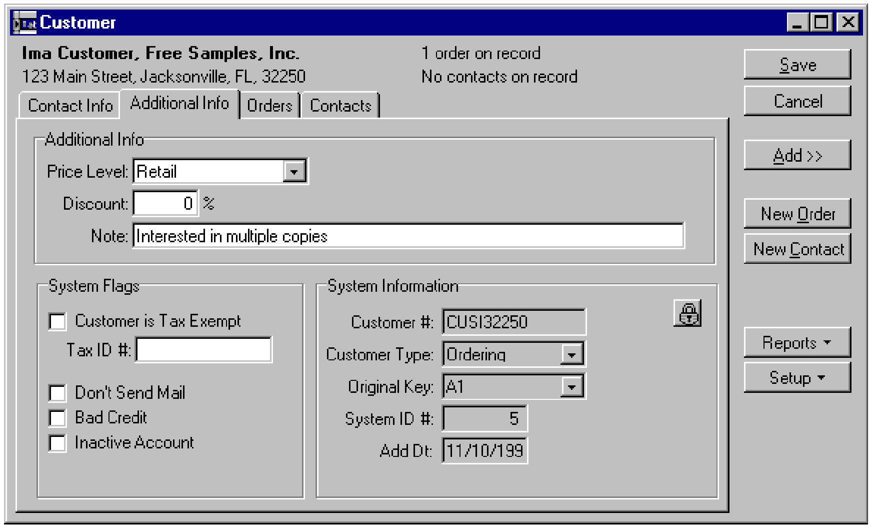
On the Company Database form click the Cust button, then click the Tables tab. Select Customers from the list, and click the Open button. You can then scroll through all your customers using the navigator buttons on the toolbar, or search for a customer with the Find icon .

Shortcut: You can use the Find Customer icon to quickly locate the customer.

When you find the customer for whom you wish to change the Customer Number, click the **Additional Info** tab. Then, click the lock icon to make the field editable (it will turn white). You may then simply type the new customer number into the Customer # field. The number may contain alphabetical characters, and may be up to 12 characters long.

Tip: You do not have to assign numbers manually. You can create an Alternate Customer Number Formula instead to have Mailware enter it for you each time you add a customer. See *Create an Alternate Customer Number Formula* (p. 3.68).

Note: the System ID# assigned by Mailware cannot be changed. This ensures you always have a unique number for every customer, even if the Alternate Number is duplicated.

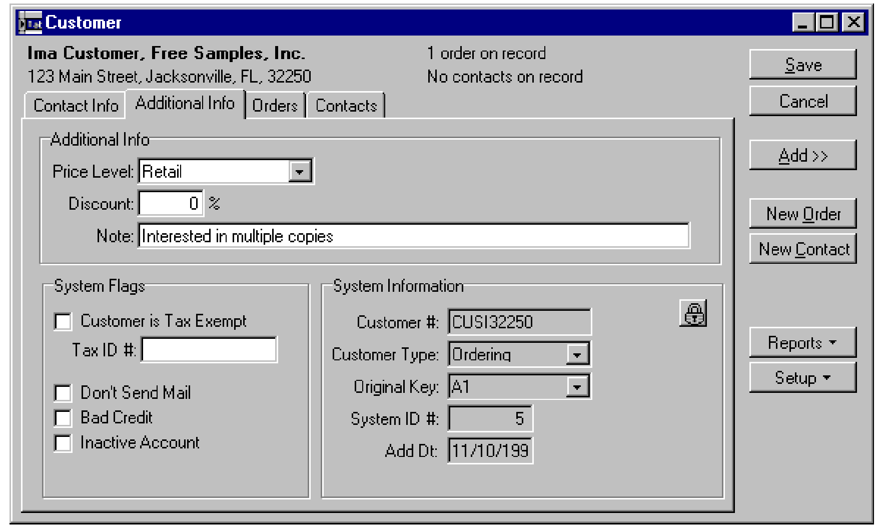


Field Definitions:

<u>Additional Info</u>

Customer #: Mailware automatically assigns an internal number to each customer you add. It is visible in the System ID# field on this screen. If you want to use an Alternate Customer Number, enter it in this field,.or set up an Alternate Customer Number Formula to have Mailware enter it for you. This number may be up to 12 characters long.

CHANGE A CUSTOMER TYPE



On the Company Database form click the Cust button, then click the Tables tab. Select Customers from the list, and click the Open button, then click the Additional Info tab.

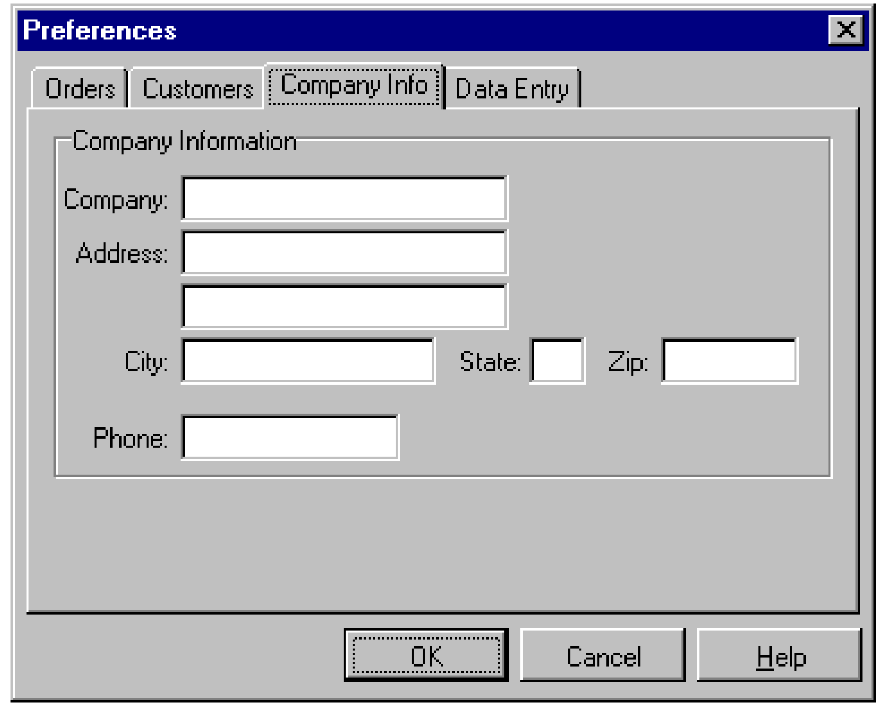
Click the lock icon  to make the field editable (it will turn white). You may then simply select the new customer type from the drop list in the Customer Type field. NOTE: You do not need to manually edit this field unless you wish to change the type that is automatically entered by Mailware. The default type when adding customers is Inquiry, and when taking orders is Ordering.

Field Definitions:

Additional Info

Customer Type: When you add a customer Mailware defaults this field to Inquiry. The Customer Type is automatically updated by Mailware whenever the customer's status changes (e.g., when you take an order the type is changed to Ordering).

CHANGE MY COMPANY INFORMATION



From the text menu at the top of the Mailware screen click on Tools then select Preferences. Click the Company Info tab.

You can then simply type your new information over the old. Your information will be saved when you click the OK button, or press the Enter key.

CREATE A PURCHASE ORDER

On the Company Database form click the Inven button, then click the Tables tab. Select Purchase Orders from the list, and click the Add To button.

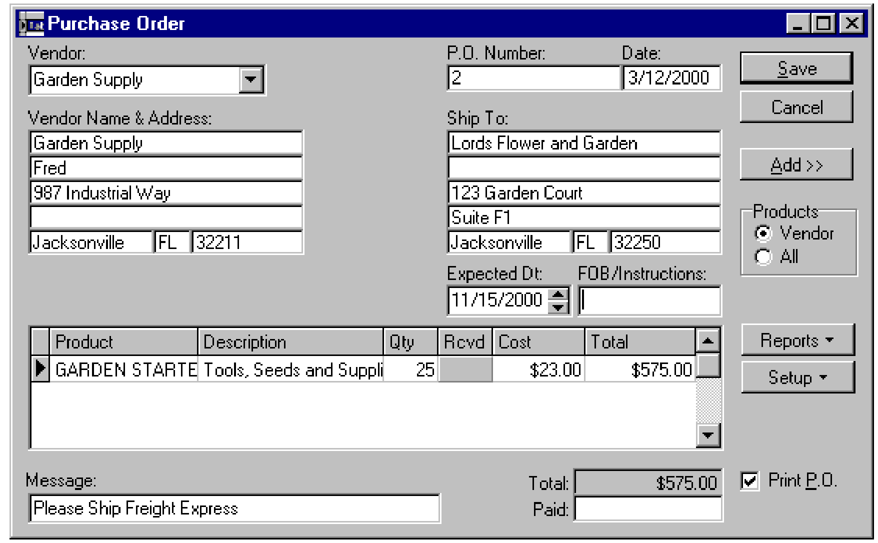
Or,

To edit an existing Purchase Order click the Open button. You can then scroll through all your Purchase Orders using the navigator buttons on the toolbar, then simply type the new information, or click the Edit button on the toolbar.

To delete a Purchase Order, click the Delete button on the toolbar. You will be asked for confirmation.

Shortcut: You can open the Purchase Order form with the Order Product icon

Reference - Instructions



Field Definitions:

Vendor: Select a Product Supply Vendor from the pull down list.

P.O. Number: You may enter up to 30 characters in this field, or use the sequential number provided by Mailware.

Rcvd: The received quantity will be completed when you receive inventory.

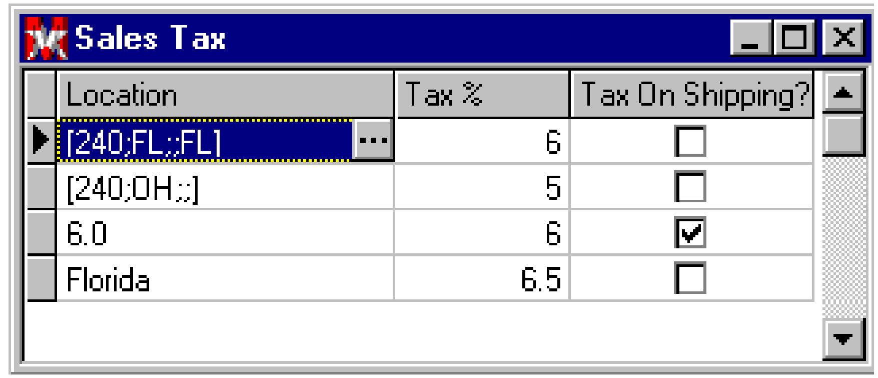
Message: The text you type here will print on the purchase order.

Paid: The paid amount will be completed when you receive inventory. You can also enter the amount manually by typing it here.

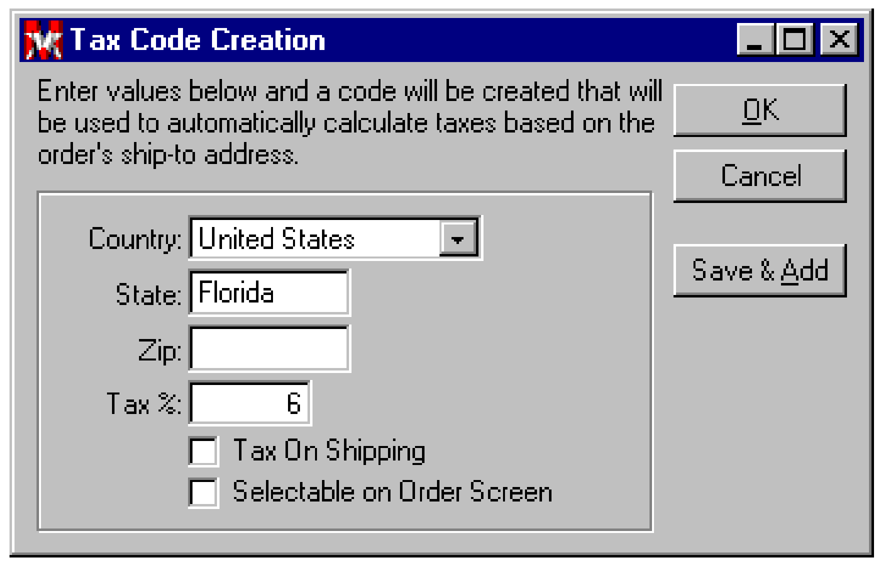
Products: Click this field to activate a drop down list of available Products. If you select Vendor, only products associated with the Product Supply Vendor you selected in the Vendor field will be shown. All allows you to see, and select all your products even though they may not be available from the selected vendor.

Print P.O. If this check box is selected you can print the Purchase Order later. Purchase Orders may also be selected for printing based on their date.

CREATE A SALES TAX TABLE



On the Company Database form click the Sys button, then click the Tables tab. Select Sales Tax Tables from the list, and click the Add to button. Type the name of the agency to whom you are remitting sales tax in the Location column then click the ... button to open the Tax Code Creation dialog.



In the Tax Code Creation dialog you can specify a rate that will be automatically applied on orders based on the Shipping Address. You need only select a Country, but can narrow the selection by select a State (or Province) and Zip Code (or Postal Code).

For example, to have orders automatically apply a 6% rate on Florida addresses select a Country of United States and a State of Florida (leave the Zip Code blank). Then enter a 6 in the Tax % field. You can also check the Tax On Shipping box to have shipping charges included in the sales tax calculation, and specify a Report Code you can use to identify this rate in reports you create.

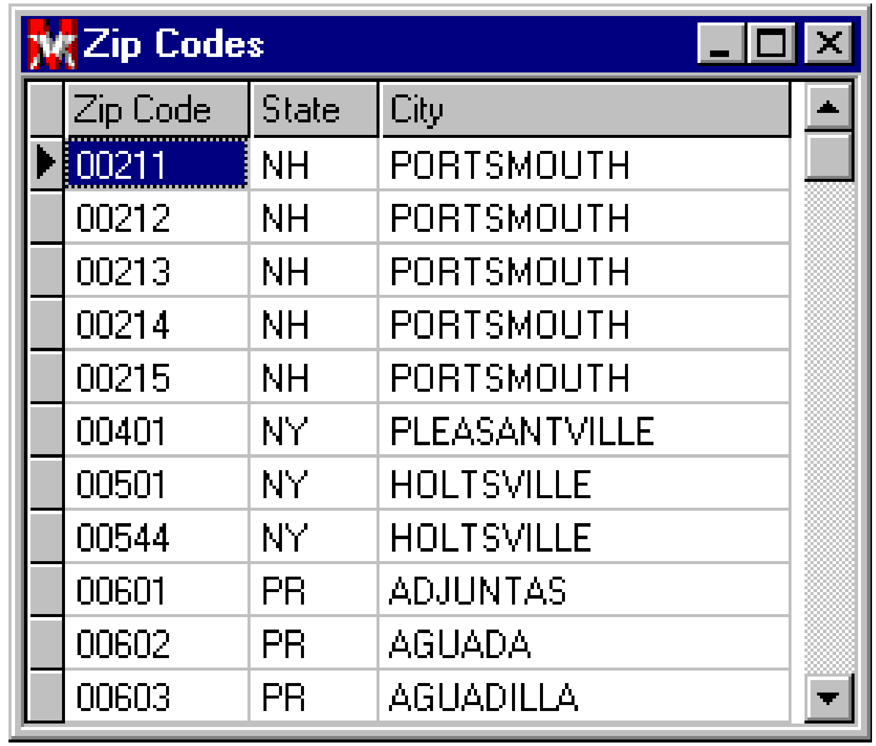
Note: When you save a Tax Code the Sales Tax table will change to reflect the new code in the format: Country Code; State Code; Zip Code; Report Code. In the example above the Location would show: 240;FL;;FL.

To add additional items click the Add button on the toolbar.

To cancel a change click the Cancel button. All additions and changes are saved when you exit the form, or you can click the Post button on the toolbar.

Reference - Instructions

Create a Zip Code Table



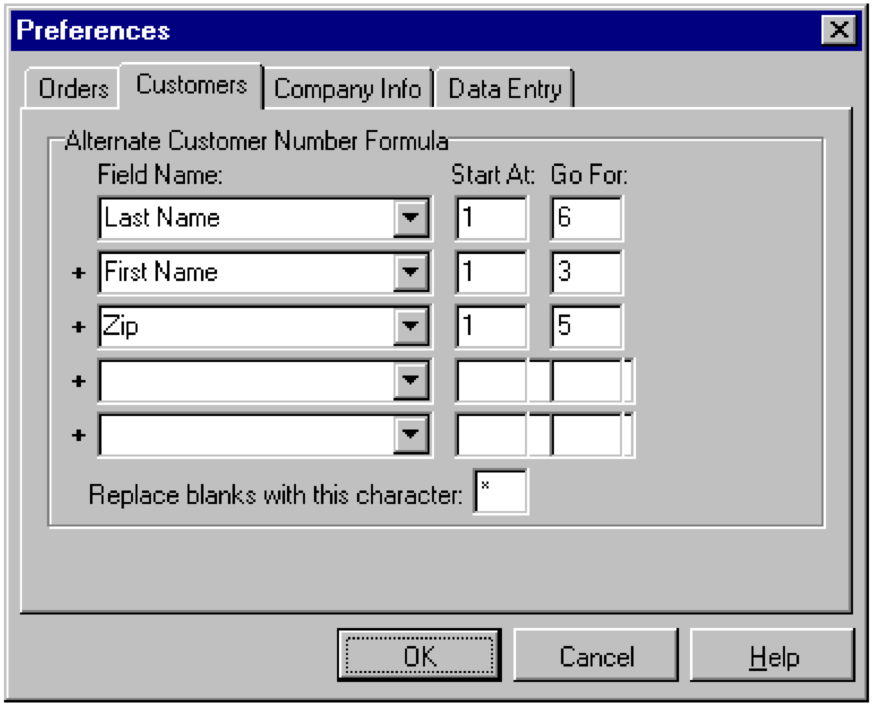
Zip Code	State	City
00211	NH	PORTSMOUTH
00212	NH	PORTSMOUTH
00213	NH	PORTSMOUTH
00214	NH	PORTSMOUTH
00215	NH	PORTSMOUTH
00401	NY	PLEASANTVILLE
00501	NY	HOLTSVILLE
00544	NY	HOLTSVILLE
00601	PR	ADJUNTAS
00602	PR	AGUADA
00603	PR	AGUADILLA

Mailware comes with a complete Zip Code database. You can access it at any time to make changes or corrections.

On the Company Database form click the Sys button, then click the Tables tab. Select Zip Code Tables from the list, and click the Open button.

To change Zip Code information simply type the new data over the old, or click the Edit button on the toolbar. To add additional items click the Add button on the toolbar. To cancel a change click the Cancel button. All additions and changes are saved when you exit the form, or you can click the Post button on the toolbar.

Create an Alternate Customer Number Formula



From the text menu at the top of the Mailware screen click on Tools then select Preferences. Choose the Customers tab.

Field Definitions:

<u>Customers</u>
You can create your own formula to have Mailware automatically assign a customer number from elements of the customer's name, address etc. (For example, a customer number could be composed of the first 3 letters of a customer's last name followed by the zip code.)

Field Name: Pick each of the fields you want to use to create the customer number. You may use just 1 field, or up to all 5. Note: the Type In Value field allows you to enter any text you wish to be part of the formula.

Start At: Tell Mailware which character to use first. The first letter is number 1, the second is 2, etc.

Go For: Then tell Mailware at which character to stop.

Replace blanks... If Mailware finds a blank, you can specify a character to use in its place (e.g., an *).

For example: If you set up the formula as follows:

Last Name	1	6
First Name	1	3
Zip	1	5

Replace blanks with this character *

And, you entered the following customer into Mailware:

John Smith
987 Elm Street
City, St. 12345

The customer number for Mr. Smith would be: SMITH*JOH123. (Note: the Alternate Customer Number is limited to 12 characters, so only the first 12 characters you define are assigned. In this case the Alternate Customer Number stopped at the third digit of the zip code. Notice too that since the last name was only 5 characters in length the sixth character was considered a blank, and was replaced with an *.)

Tip: Changes to the formula will only affect customers entered <u>after</u> the change.

DELETE A CATALOG

On the Company Database form click the Ads button, then click the Tables tab. Select Catalogs from the list, and click the Open button.

You can then scroll through all your catalogs using the navigator buttons on the toolbar, or you may search for a catalog by using the Find icon on the toolbar.

After you have located the catalog you wish to delete, simply click the Delete icon . You will be asked for confirmation.

CAUTION: Once confirmed, deletion is permanent.

DELETE A CUSTOMER

On the Company Database form click the Cust button, then click the Tables tab. Select Customers from the list, and click the Open button.

You can then scroll through all your customers using the navigator buttons on the toolbar.

Tip: You can use the Find Customer icon to quickly locate the customer.

After you have located the customer you wish to delete, simply click the Delete icon . You will be asked for confirmation.

CAUTION: Once confirmed, deletion is permanent.

Note: The System ID associated with the customer will be retired and cannot be reused. This ensures your database is always accurate.

DELETE A PRINT VENDOR

On the Company Database form click the Ads button, then click the Tables tab. Select Print Vendors from the list, and click the Open button.

You can then scroll through all your vendors using the navigator buttons on the toolbar, or you may search for a vendor by using the Find icon on the toolbar.

After you have located the vendor you wish to delete, simply click the Delete icon . You will be asked for confirmation.

CAUTION: Once confirmed, deletion is permanent.

DELETE A PRODUCT

On the Company Database form click the Inven button, then click the Tables tab. Select Products from the list, and click the Open button.

Tip: You can open the Product form with the Inventory icon

You can then scroll through all your products using the navigator buttons on the toolbar, or you may search for a product by using the Find icon on the toolbar.

After you have located the product you wish to delete, simply click the Delete icon . You will be asked for confirmation.

CAUTION: Once confirmed, deletion is permanent.

DELETE A PRODUCT SUPPLY VENDOR

On the Company Database form click the Inven button, then click the Tables tab. Select Product Supply Vendors from the list, and click the Open button.

You can then scroll through all your vendors using the navigator buttons on the toolbar, or you may search for a vendor by using the Find icon on the toolbar.

After you have located the vendor you wish to delete, simply click the Delete icon . You will be asked for confirmation.

CAUTION: Once confirmed, deletion is permanent.

DELETE A PUBLICATION

On the Company Database form click the Ads button, then click the Tables tab. Select Publications from the list, and click

the Open button.

You can then scroll through all your publications using the navigator buttons on the toolbar, or you may search for a publication by using the Find icon on the toolbar. After you have located the publication you wish to delete, simply click the Delete icon . You will be asked for confirmation.

CAUTION: Once confirmed, deletion is permanent.

DELETE A SHIPPING VENDOR

On the Company Database form click the Sys button, then click the Tables tab. Select Shipping Companies from the list, and click the Open button.

You can then scroll through all your shipping vendors using the navigator buttons on the toolbar, or you may search for a vendor by using the Find icon on the toolbar.

After you have located the vendor you wish to delete, simply click the Delete icon . You will be asked for confirmation.

CAUTION: Once confirmed, deletion is permanent.

Delete a Source Key

On the Company Database form click the Ads button, then click the Tables tab. Select Advertising Source Keys from the list, and click the Open button.

You can then scroll through all your source keys using the navigator buttons on the toolbar, or you may search for a source key by using the Find icon on the toolbar.

After you have located the source key you wish to delete, simply click the Delete icon . You will be asked for confirmation.

CAUTION: Once confirmed, deletion is permanent.

Delete an Order

Tip: Rather than delete an order you may prefer to cancel or refund part or all of the order instead. This effectively deletes the order while maintaining a record of it.

On the Company Database form click the Order button, then click the Tables tab. Select Orders from the list, and click the Open button.

You can then scroll through all your orders using the navigator buttons on the toolbar, or you may search for an order by using the Find icon on the toolbar.

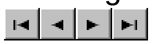
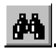
Shortcut: You can use the Find Order icon to quickly locate the order.

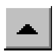
After you have located the order you wish to delete, simply click the Delete icon . You will be asked for confirmation.

CAUTION: Once confirmed, deletion is permanent.

Note: You can delete individual products from an order by selecting each one then pressing Ctrl and Del on your keyboard. It may be necessary to delete items from an order before the entire order can be deleted.

EDIT A CATALOG

On the Company Database form click the Ads button, then click the Tables tab. Select Catalogs from the list, and click the Open button.
You can then scroll through all your catalogs using the navigator buttons  on the toolbar, or search for a catalog with the Find icon .

After you have located the catalog you wish to edit, you can simply tab to or click on the fields you wish to change, and enter the new information, or you can click the edit button  on the toolbar.

Field Definitions:

<u>Catalog</u>
Description: You can type anything you like here, however, you may wish to enter text that can be used to help you identify which version of the catalog this is when you add a source key for it.

Cost: Include all costs to produce the catalog. Do not include mailing costs. They can be associated with the Advertising Source Keys for this catalog.

Effective Date: This is the date the offers in the ad begin (not the mail date for the catalog).

Expire Date: This is the date on which the offers in the ad are last available to your customers.

<u>Source Keys</u>
These are the Advertising Source Keys associated with this catalog.

EDIT A CUSTOMER

On the Company Database form click the Cust button, then click the Tables tab. Select Customers from the list, and click the Open button.

You can then scroll through all your customers using the navigator buttons on the toolbar, or search for a customer with the Find icon .

Tip: You can use the Find Customer icon to quickly locate the customer.

After you have located the customer you wish to edit, you can simply tab to or click on the fields you wish to change, and enter the new information, or you can click the edit button on the toolbar.

Field Definitions:

<u>Additional Info</u>
Notes: You can type anything you like here. Mailware can query on this field when you are creating Custom Reports or Selects. Therefore, you may wish to enter information you can use to associate this customer with a specific group. For example, you could enter the customer's age as AGE=45.

Tip: The following 3 fields are automatically updated by Mailware when you add a customer, or enter a contact in the **Contact Log**. When adding a new customer you can click the New Contact button to

Reference - Instructions

open the log, then enter the Source Key and Action. The first time you enter a source key for a customer, that key becomes the customer's Original Source Key. The following 3 fields may be changed manually by clicking the lock icon to make them editable. The fields will remain open for each successive customer you add, or until you close the Customer form.

Customer #: Mailware automatically assigns an internal number to each customer you add. It is visible in the System ID# field on this screen. If you want to use an Alternate Customer Number, enter it in this field, or set up an Alternate Customer Number Formula to have Mailware enter it for you.

Customer Type: When you add a customer Mailware defaults this field to Inquiry. The Customer Type is automatically updated by Mailware whenever the customer's status changes (e.g., when you take an order the type is changed to Ordering).

Original Key: This is the Advertising Source Key associated with the first contact with this customer. You should add this key by clicking the New Contact button, and adding an entry in the Customer Contact Log. Additional source keys can be added each time a customer responds to one of your ads, mailings or catalogs. You can assign keys to customers when taking an order, or in the Customer Contact Log. (Note: You should never change the Original Source Key unless it was entered incorrectly.)

System Flags: These flags can be used by the Selects. when creating lists, and when creating Custom Reports.

Tip: You can take an order for a customer you just edited by pressing Alt-O or clicking the New Order button.

<u>Orders</u>
You can view all the orders for each customer here. You can also add a new order, or select an existing order and edit it with the add and edit buttons on the bottom of the form.

<u>Contacts</u>
Each time you correspond with a customer you can add your contact information here. See the Customer Contact Log for more details.

EDIT A PRINT VENDOR

On the Company Database form click the Ads button, then click the Tables tab. Select Print Vendors from the list, and click the Open button. You can then scroll through all your vendors using the navigator buttons on the toolbar, or search for a vendor with the Find icon .

After you have located the vendor you wish to edit, you can simply tab to or click on the fields you wish to change, and enter the new information, or you can click the edit button on the toolbar.

Field Definitions:

<u>Pricing</u>
Description: Type the name of the product your print vendor supplies (for example, Brochure). Then you can enter prices for various services your vendor provides. This is handy for comparing vendors, or tracking your costs.

EDIT A PRODUCT

On the Company Database form click the Inven button, then click the Tables tab. Select Products from the list, and click the Open button.

Shortcut: You can open the Product form with the Inventory icon .

You can then scroll through all your products using the navigator buttons on the toolbar, or you may search for a product by using the Find icon on the toolbar.

After you have located the product you wish to edit, you can simply tab to or click on the fields you wish to change, and enter the new information, or you can click the edit button on the toolbar.

Field Definitions:

<u>Product</u>

Product #: You may enter a number, text or both here. This field is automatically capitalized so you can easily find the product later. You can also wand a bar code into this field. The Product # can accommodate up to 15 characters.

Tip: If more than one vendor supplies you with the same product, enter the product twice, but with different product numbers.

Reference - Instructions

Description: Enter up to 30 characters to help you identify this product when viewing your inventory.

Supplier: You can select a Product Supply Vendor here to associate the product with its supplier. If you have not added the supplier yet, you can make the association later by editing the product.

Tip: If a vendor provides you with several products, enter the vendor first then, while in the Product Supply Vendor form, click the Products tab then the Add button. Each product you add will be associated with that vendor.

Order Message: This 50 character message will be displayed when the product is selected during an order. It is a convenient way to add reminders to products (for example: "This item requires batteries."). Note: This message may be used effectively with the Message for new order which shows on the Order Entry screen.

Ship Cost: This is the cost to you to ship this individual item.

Ship Extra Charge: If this product requires an additional shipping charge to the customer (for example, oversized items), enter the amount here. When a customer orders this product, the extra shipping charge will be added to the total sale.

Drop Ship Item: If you do not stock this item, but have a third party ship it to your customer, check this box.

<u>Stock Levels</u>

Reorder at: You can specify the quantity this item may reach before Mailware reminds you to order more.

Reorder Qty: The number of items to order when the Reorder at threshold is met.

EDIT A PRODUCT SUPPLY VENDOR

On the Company Database form click the Inven button, then click the Tables tab. Select Product Supply Vendors from the list, and click the Open button.

Shortcut: You can open the Product Supply Vendor form with the Vendors icon . You can then scroll through all your vendors using the navigator buttons on the toolbar, or you may search for a vendor by using the Find icon on the toolbar.

After you have located the vendor you wish to edit, you can simply tab to or click on the fields you wish to change, and enter the new information, or you can click the edit button on the toolbar.

Field Definitions:

<u>Vendor Information</u>
Enter each vendor, and contact information. If you make all your own products, enter your company information here.

<u>Products</u>
These are the products associated with this vendor. If you wish to add a product,, or edit a product you will be taken to the Products form.

Tip: If more than one vendor supplies you with the same product, enter the product twice in the Products form, but with different product numbers.

Tip: If a vendor provides you with several products, enter the vendor first then while in the Product Supply Vendor form, click the Products tab then the Add button. Each product you add will be associated with that vendor.

<u>Purchase Order</u>
This tab lists all the purchase orders you have created for this vendor. You can view or edit any purchase order by double clicking it, or clicking the Edit button. From this screen you can also create a new purchase order.

Shortcut: You can create a new purchase order from any tab on the Product Supply Vendor screen. Simply click the New PO button.

EDIT A PUBLICATION

On the Company Database form click the Ads button, then click the Tables tab. Select Publications from the list, and click the Open button.

You can then scroll through all your publications using the navigator buttons on the toolbar, or you may search for a publication by using the Find icon on the toolbar. After you have located the publication you wish to edit, you can simply tab to or click on the fields you wish to change, and enter the new information, or you can click the edit button on the toolbar.

Field Definitions:

Title: A publication may be anything from a magazine to a tv station. The title you enter will be the publication name used when you add a source key.

Media: Trade refers to a publication for a specific industry (e.g., Direct is a trade newspaper for the mail order industry). Card Decks are 3x5 cards mailed in packs of about 100 other cards.

Circulation: The number of items sent to subscribers or recipients.

EDIT A SALES TAX TABLE

On the Company Database form click the Sys button, then click the Tables tab. Select Sales Tax Tables from the list, and click the Open button.

To change Sales Tax information simply type the new data over the old, or click the Edit button on the toolbar. . Type the name of the agency to whom you are remitting sales tax in the Location column, and enter the percent in the Tax% column as a decimal (e.g., enter 6% as 6, 6.5% as 6.5 etc.). When you take an order the Sales Tax Table is available as a pull down list in the Payment section of the screen.

To delete an item from the table, select it and click the Delete button on the toolbar. You will be asked for confirmation.

To cancel a change click the Cancel button . All additions and changes are saved when you exit the form, or you can click the Post button on the toolbar.

EDIT A SHIPPING VENDOR

On the Company Database form click the Sys button, then click the Tables tab. Select Shipping Companies from the list, and click the Open button.

To change Shipping Vendor information simply type the new data over the old, or click the Edit button on the toolbar. Type the name of the shipping company (up to 10 characters) in the Shipper column, and enter the type of service (up to 30 characters) in the Description column (e.g., enter USPS as the Shipper, and Post Office 3day Priority Mail as the description). When you take an order the Ship Via pull down list in the Shipping section of the order entry screen will contain all your Shipping Vendors, and each service you entered.

To delete an item from the table, select it and click the Delete button on the toolbar. You will be asked for confirmation.

To cancel a change click the Cancel button .

All additions and changes are saved when you exit the form, or you can click the Post button on the toolbar.

EDIT A SOURCE KEY

On the Company Database form click the Ads button, then click the Tables tab. Select Advertising Source Keys from the list, and click the Open button.

You can then scroll through all your source keys using the navigator buttons on the toolbar, or you may search for a source key by using the Find icon on the toolbar.

After you have located the source key you wish to edit, you can simply tab to or click on the fields you wish to change, and enter the new information, or you can click the edit button on the toolbar.

Field Definitions:

Source Key: Enter the code, you have assigned for a particular ad, mailing or catalog. This is your Advertising Source Key.

Description: Enter any text you wish in the next field. Starting the description with the publication date of an ad is a handy reference (e.g., 1/97).

Type: This refers to the type of ad (e.g., display or classified ad in a magazine, a direct mailing etc.)

Catalog: Use this type to activate the Catalog drop box

below this field where you can associate a Catalog with this source key.

Classified: Classified ads are typically either One Shot or Two Step ads: One Shot ads ask for the order. These are effective only for very low priced items. Two Step ads offer a free or inexpensive sample or demo. The sample is mailed with sales literature that asks for the order.

Display: These are usually large ads ranging from 1/8 of a page to a multiple page spread that appear in a publication. Because display ads are expensive, and offer you room to describe your product they typically ask for the order, and offer higher priced items.

Direct: Direct Mail usually consists of several pieces mailed directly to a potential customer. The components of a direct mail package may include: a sales letter, an order form, a publisher's note and a brochure. By assigning a source key to the entire package Mailware can track the effectiveness of a direct mail campaign. You can also assign different source keys to different parts of a direct mail campaign.

For example, you could create 2 different direct mail packages, and assign each a different source code. Or, you could send the same package to 2 different lists, each with its own source code. By combining both of these methods you can create several distinct groups all within the same mailing. This is a very effective method for testing.

Internet: Use this type for Internet ads and search engines.

Other: Use this for an ad that does not fit one of the available categories.

Publication: Select a Publication, if applicable, from the drop down list, or add a publication and return here to select it.

Catalogs: Source Keys may be assigned to a catalog once, or you may assign several to the same catalog. This allows you to measure the effectiveness of the same catalog sent to different customers, or at different times.. Enter the appropriate catalog here from the drop down list, or add a catalog, and return here to select it.

Date: Enter the date you actually placed the ad (not its publish date), or mailed a campaign.

Renew Date: If you plan to advertise in this publication again enter the deadline for submitting a new ad in the Renew Date field.

Mailings: Enter the number of pieces you mailed, or the circulation for the publication in the Mailings field.

Advertised Products: You can associate up to three different products with this ad by selecting them from the drop boxes in the Products fields. If you have multiple items you can set up a catalog, and refer to it in the catalog field above.

Ad Price: This is the actual price for a classified, display or other paid ad. Do not include printing, postage or mailing costs which are provided for below.

Printing: Enter any printing costs associated with this ad.

Postage: For mailings you can separately record the total cost of postage here.

Mailing: Any additional costs to mail can be separately recorded in the Mailing field.

Tip: Create source keys that have meanings to you. For example, DM197 for a direct mail piece you sent in January 1997.

EDIT AN ORDER

On the Company Database form click the Order button, then click the Tables tab. Select Orders from the list, and click the Open button.

You can then scroll through all your orders using the navigator buttons on the toolbar, or search for a order with the Find icon .

Shortcut: You can use the Find Order icon to quickly locate the order. Or, use the Find Customer icon then choose the Order tab on the customer screen.

After you have located the order you wish to edit, you can simply tab to or click on the fields you wish to change, and enter the new information, or you can click the edit button on the toolbar.

See the *Add an Order* (p. 3.42) section for information about the fields on the Order Entry screen.

EDIT THE ZIP CODE TABLE

Mailware comes with a complete Zip Code database. You can access it at any time to make changes or corrections.

On the Company Database form click the Sys button, then click the Tables tab. Select Zip Code Tables from the list, and click the Open button.

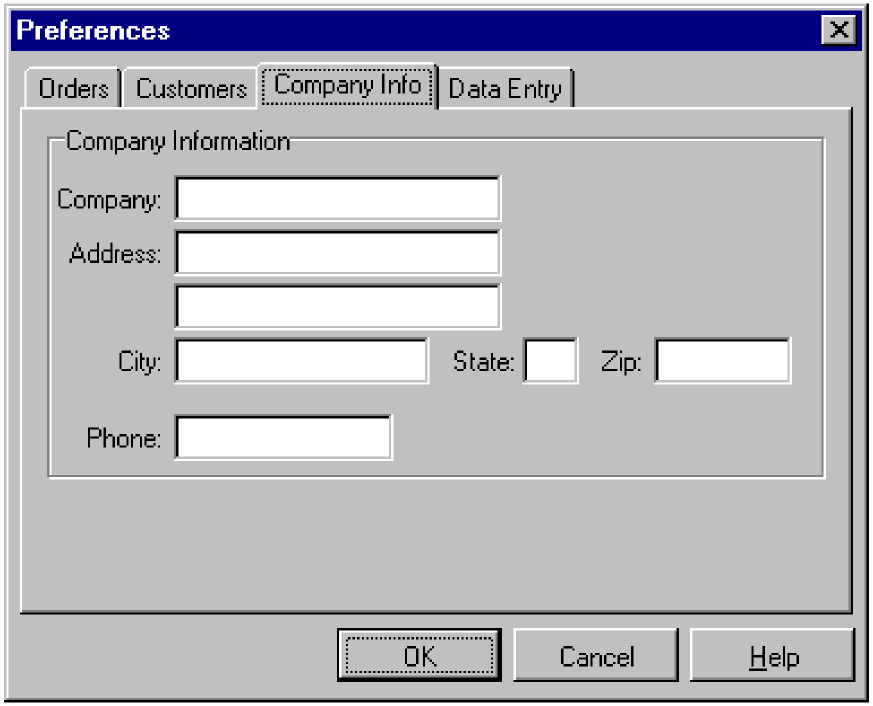
To change Zip Code information simply type the new data, or click the Edit button on the toolbar.

To delete an item from the table, select it and click the Delete button on the toolbar. You will be asked for confirmation.

To cancel a change click the Cancel button .

All additions and changes are saved when you exit the form, or you can click the Post button on the toolbar.

ENTER MY COMPANY INFORMATION



From the text menu at the top of the Mailware screen click on Tools then select Preferences. Click the Company Info tab.

To change any information, simply tab to or click on the field you wish to edit, and type the new information. Click the OK button when you are done.

EXPORT DATA

Exporting your Mailware data is accomplished with the built in report writer. Any report can be exported as an ASCII or database file. First preview a report you wish to export. Then,

1. Choose **File**, then **Export** from the report writer's text menu.

2. In the dialog that opens choose a file type:

Paradox (.DB) - Mailware's native data format

Dbase (.DBF) - A standard database format

ASCII Delimited - Text file with double quotes around fields and commas between them (e.g., “Field1".”Field2"). This is a common generic format for most programs.

ASCII Fixed - Text format with unformatted fields

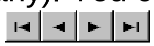
.SHZ - The report writer's compact report distribution format. .SHZ files can be read with Mailware's distributable report viewer.

3. Type a name in the **File Name** field (or use the browse button) and click **OK.** The file is saved by default to your Mailware directory (C:\Mailw15), and can be imported into any software that supports one of the above formats.

FILTER RECORDS

On the Company Database form click the All button, then click the Tables tab. Select Customers (or any table you wish to filter) from the list, and click the Open button. Then click the Filter icon  on the toolbar.

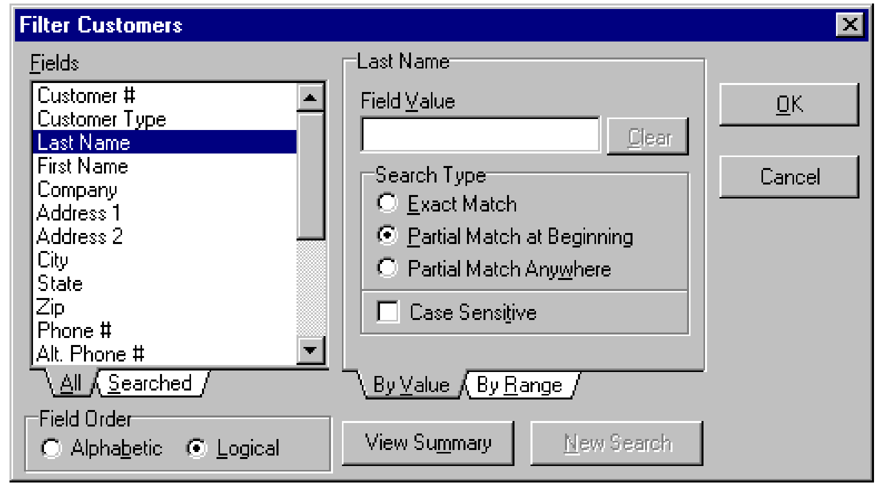
Filter is an advanced form of search that makes it easy to find exactly the records you want. When you use the Filter on the Customer screen, for example, you can tell it to display all customers with the last name Smith. Follow the steps below to try it now.

Open the filter as described at the top of this page. When the Filter screen pops up, type Smith (the cursor will be in the Field Value in which you need to type, and the default filter of last name is selected for you). Click the OK button and you will return to the Customer screen. Now, however, only customers with a last name starting with Smith will be displayed (assuming you have any). You can scroll through them with the navigator buttons  on the toolbar

Filter can work on several fields at a time so you can, for example, find all the customers whose first names start with the letter B, and who have a last name starting with Smith. You can try it now too. Open the Filter again, then click the All tab at the bottom left of the dialog. From the list of fields choose First Name, then in the Field Value type B. Click the OK button, and all customers with the last name of Smith, and a first name beginning with B are displayed.

You can use Filter with any table in Mailware to choose which records you wish to see. Use it to display specific Products, Purchase Orders for selected vendors, Inactive

Reference - Instructions



Customers and much more.

Tip: To turn off the Filter, open it with the Filter icon , and click the New Search button at the bottom of the dialog, then click OK.

Field Definitions:

Fields Select a field to Filter on by left clicking it in the Field window. Then type the Filter criteria in the Field Value to the right. You can repeat this process for as many fields as you wish, then click the OK button to view the results. The All tab displays all available fields for filtering. The Searched tab becomes active after you have completed at least one filter. It displays only the fields you have used so far. When the Searched tab is active you can click the All tab to select additional fields for filtering.

Field Order Select Alphabetic to sort the fields in the window by their names. Select Logical to sort them by their order in the database. This selection only affects the method used to sort the fields in the filter dialog. It does not affect the table you are filtering.

Field Value Type the filter criteria for the currently selected field. For example, if you have selected Last Name in the Fields section, type the customers' last name on which you wish to filter (e.g., Smith).

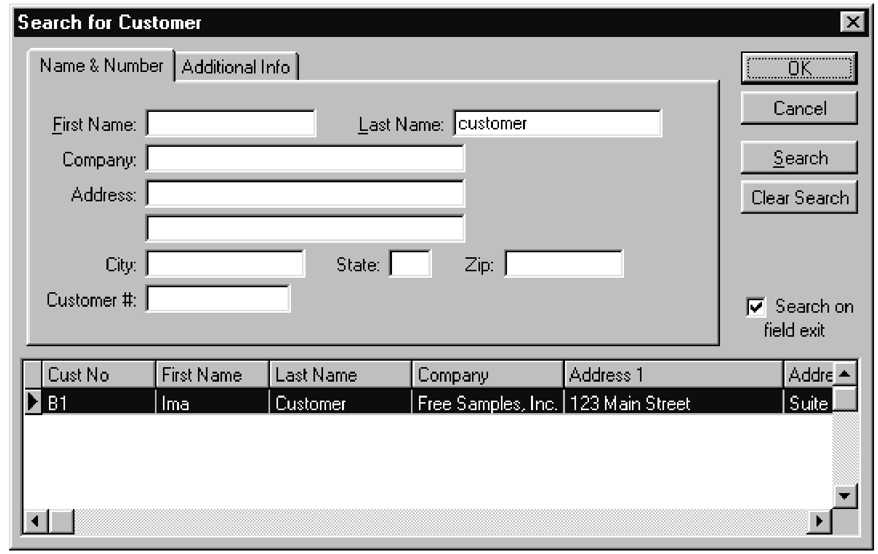
Search Type You can choose to have a field exactly match the Field Value you type, or match only part of it. For example, choosing Partial Match at Beginning and filtering on a last name of Smith would find customers with the name Smith, Smithers and Smithy. The Case Sensitive check box forces the filter to match upper and lower case letters. Select the By Value tab when you want to find records that match the Field Value. Use By Range when you want them to be part of a group (e.g., between 2 dates).

View Summary Displays a list of your filtering criteria.

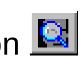
New Search Starts a new filter. Can also be used to clear all filters.

Tip: When creating Advertising Source Keys, Product Numbers and other fields keep the Filter function in mind. It can be useful later when you want to see only your Products, for example, that are stored on aisle 3, shelf B if they all have a description starting with 3B.

FIND A CUSTOMER



On the Company Database form click the Cust button, then click the Tables tab. Select Customers from the list, and click the Open button. You can scroll through all your customers using the navigator buttons  on the toolbar, or search for a customer with the Find icon  (See Also - Filter Records).

Shortcut: Click the Find Customer icon  on the toolbar.

Enter any data you wish to use for the search, and click the Search button. Mailware will display the customers it finds in the bottom of the window. Select the customer you wish, and click the OK button. You will then see that customer's information in the Customer screen.

Field Definitions:

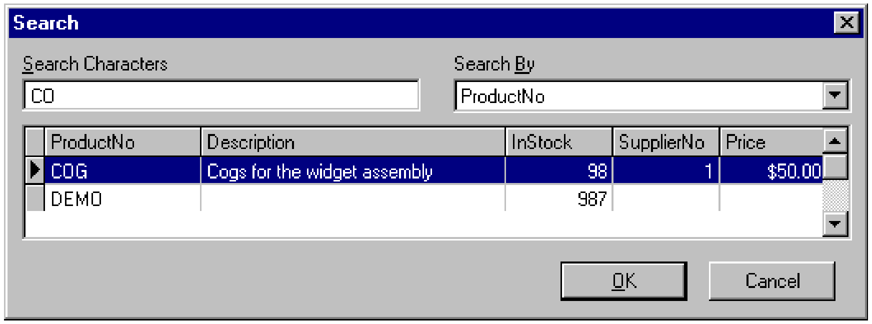
Name & Number

Search on field exit If this box is checked Mailware will begin searching immediately after you enter an item, and press the tab key (e.g., if you type the customer's first name and press tab to jump to the Last Name field Mailware will begin searching for all customers with the first name you typed).

Additional Info

This tab includes search fields that are not part of the customer's name or address (e.g., phone number).

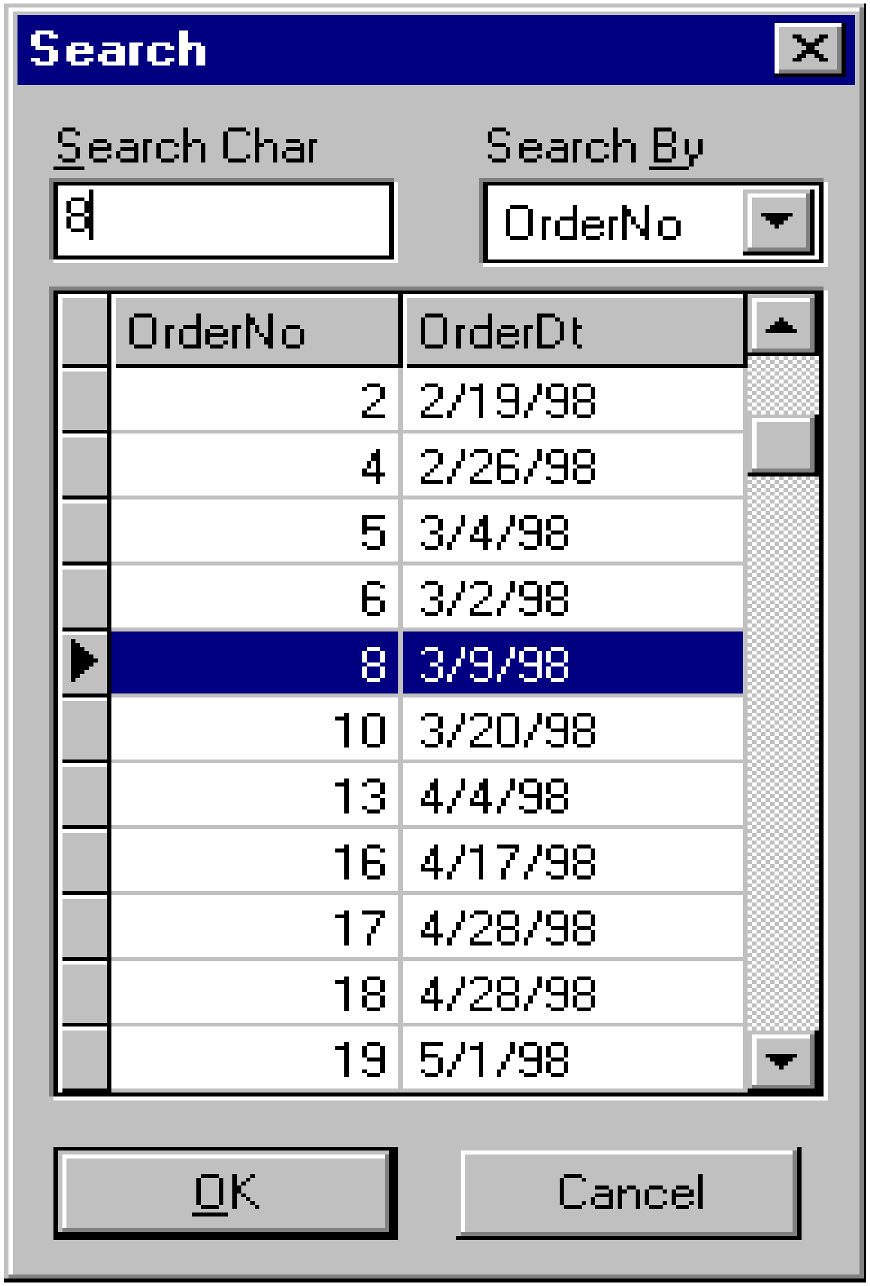
FIND A PRODUCT



On the Company Database form click the Inven button, then click the Tables tab. Select Products from the list, and click the Open button.

Shortcut: You can open the Product form with the Inventory icon .

You can then scroll through all your products using the navigator buttons on the toolbar, or you may search for a product by using the Find icon on the toolbar (See Also - Filter Records).



Reference - Instructions

Find an Order

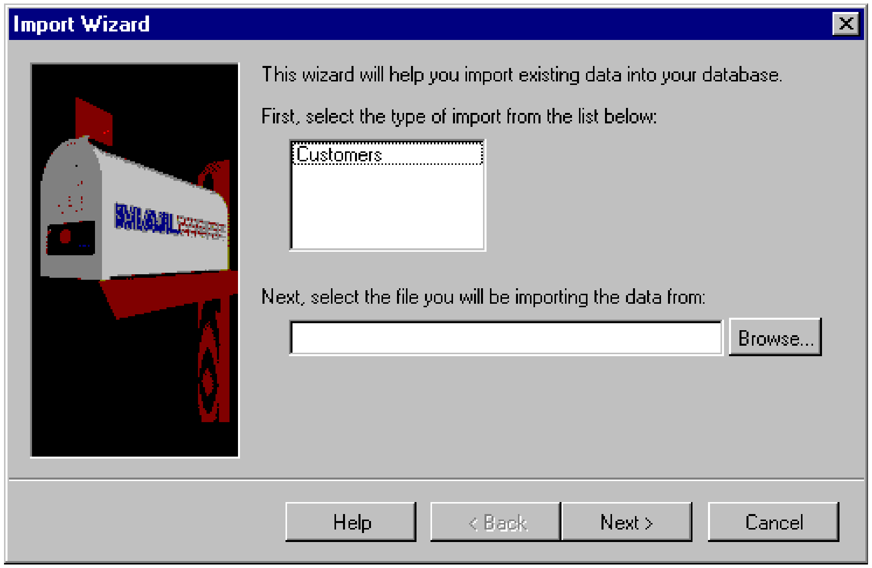
On the Company Database form click the Order button, then click the Tables tab. Select Orders from the list, and click the Open button.

You can then scroll through all your orders using the navigator buttons on the toolbar, or you may search for an order by using the Find icon on the toolbar.

Shortcut: You can use the Find Order icon on the toolbar.

Tip: You can search for a customer as described in *Find a Customer* (p. 3.102), then open any of that customer's orders from the Orders tab on the Customer screen.

IMPORT DATA



From the text menu at the top of the Mailware screen click on Tools then select Import. The Import Wizard will pop up to assist you with the process.

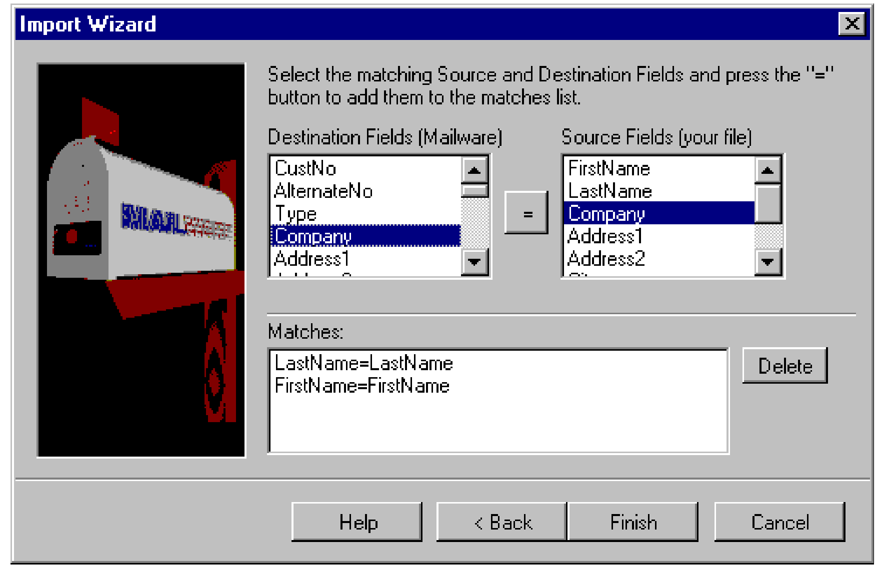
Shortcut: Click the Import icon  on the toolbar.

When the Import Wizard opens simply follow the on screen prompts. **NOTE**: Always test with a small file first.

Field Definitions:

Type of Import: Select the type of data you are importing (e.g., if you are importing a rented list, the type is customer.)

Source File: If you know the name, and path of the file you are importing type it here (e.g., a list on a 3.5" diskette may be A:\CUSTOMER.DB). Otherwise, click the Browse button,



and select the file from the dialog that pops up.

Destination Fields: These are Mailware's fields (e.g., the customer's Last Name is the field "Last Name" that is viewable in the Customer screen). Match these fields to their counterparts in the source file.

Note: To match fields click the Destination Field in the left window, then click the Source Field in the right window that contains the same data (the names of fields may vary - e.g., Last Name = LName etc.). As you match fields click the Equal Sign button to add them to the Matches window.

Source Fields: These are the fields in the file you are importing. Match them to Mailware's Destination Fields as described above.

Matches: As you match fields the groupings will appear here. If you make a mistake you can select the incorrect match and click the Delete button. You do not need to match all fields, however, unmatched source fields will not be imported.

When you click the Finish button the records will be imported. Depending on the size of the file you are importing this may take a few seconds, or a few minutes.

Tip: When importing anything you match in the import wizard will be imported (for example, you can import a first name into a phone number field). Always test with a small number of records before importing. It is also wise to back up your data directory before importing. Imported records must be deleted manually if you make a mistake, or you can restore your backed up data directory.

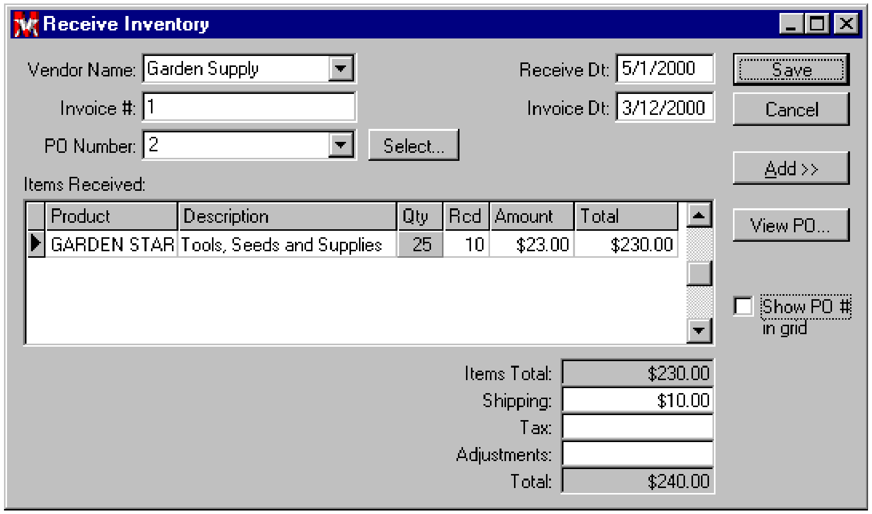
You can also add fields to your source file so the import will update the newly imported records. For example, you can add a field to each customer record you are importing that contains an ad source key. Then match that field to the Original Source Key in Mailware. Every imported customer will then contain that key in the Additional Info tab of the customer screen. Be sure to add the key to your Ad Source Key screen manually. It is not mandatory to do so (the key will import regardless), but it will keep a record of what the key means. This is a good way to keep track of

where you received the imported file.

We also recommend you run the Import Data online tutorial available from the Help menu in Mailware.

The main help file contains additional information that may be useful including data layouts for various tables. Layouts describe what the fields in each table mean (for example, the LastName field in the Customer table stores the customer’s last name, may contain alphabetical characters and can be up to 20 characters long). This information is provided to assist you with matching fields when using the import wizard, and for advanced use when importing data directly into Mailware’s tables.

Receive Inventory



On the Company Database form click the Inven button, then click the Actions tab. Select Receive Inventory from the list, and click the Open button.

Use the Receive Inventory action to record items received for open purchase orders. Mailware will automatically update stock levels for items you enter as received.

Field Definitions:

Vendor Name: Select the Product Supply Vendor for the items received.

Receive Dt: This defaults to today's date, but can be changed to reflect the date items were actually received.

Invoice #: Enter the vendor's invoice number that was sent with the order, if applicable.

Invoice Dt: Enter the date of the invoice from the vendor, if applicable.

PO Number: You can select a single purchase order from the drop down list, or click the Select... button to work on multiple purchase orders. A dialog will pop up, and you can check off the purchase orders you wish to work with.

Items Received: The products entered on the original purchase order(s) will be entered here automatically. The following fields will be filled in, and may be edited as described below.

Product This is your product number for the items ordered. If your vendor substitutes a different item you can select it here by clicking on the field, and choosing an item from the drop down list. If the item is not already in your inventory, you can add a product, then select it here.

Description This is your product description for the product number in the Product field.

Qty This is the number of items ordered as shown on the purchase order.

Rcd Enter the number of items received here. This number will be added to your inventory when you complete the action by choosing the Save or Add button. You can enter a number that is greater or less than the number ordered.

Amount This is the per item cost to you, and is entered automatically based on the cost entered in the original purchase order. This amount can be changed to reflect the actual amount charged to you.

Total This is calculated for you based on the number of items received, and the amount per item you enter. This field is not visible when the Show PO # in grid check box is checked.

PO # When you select the Show PO # in grid check box the purchase order number for each item is shown instead of the Total.

Items Total: This is the subtotal of all items from the Items Received section.

Shipping: Enter any shipping amounts you were charged.

Tax: Enter any tax amounts you were charged.

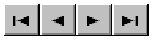
Adjustments: Any adjustments from the vendor's invoice may be entered here (e.g., allowances for lost or damaged items, discounts etc.)

Total: This is the grand total for all selected purchase orders, and is calculated for you. Each purchase order will show its own total in the paid amount field on the purchase order.

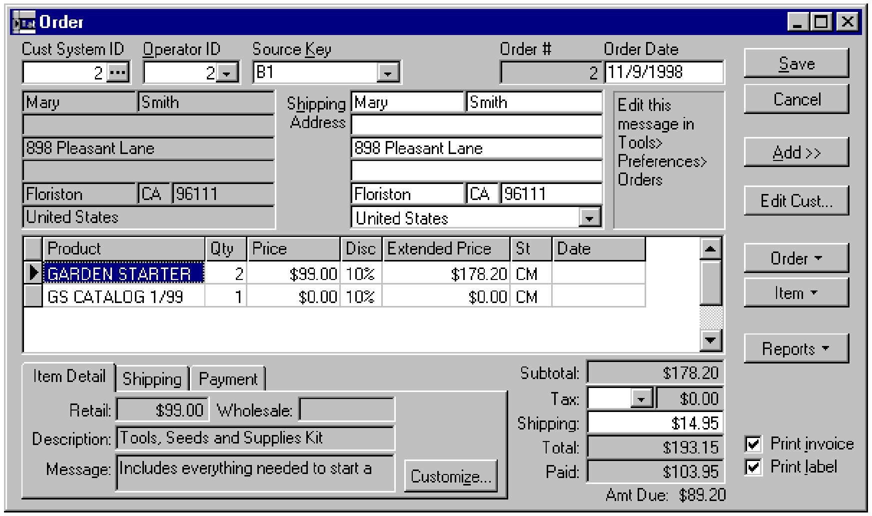
View PO...: Click this button to open the purchase order for the currently selected item.

Reference - Instructions

Show PO # in grid: When this box is checked the Items Received section will display the purchase order number for each item rather than the Total.

Note: Amounts you pay for items will be reflected in each affected purchase order's Paid field. Shipping, Tax and Adjustment amounts are associated with the vendor's invoice number, and are stored with the Action. To review these amounts later, open the Receive Inventory Action, then use the navigator buttons  on the toolbar to scroll to the appropriate invoice.

Refund an Order



If you are not already viewing the order you wish to refund go to the Company Database form click the Order button, then click the Tables tab. Select Orders from the list, and click the Open button.

You can then scroll through all your orders using the navigator buttons  on the toolbar, or search for a order with the Find icon . You can also search for a customer with the Find Customer icon  then select an order from that customer's order history (the Orders tab on the Customer screen).

Shortcut: You can use the Find Order icon  to quickly locate the order.

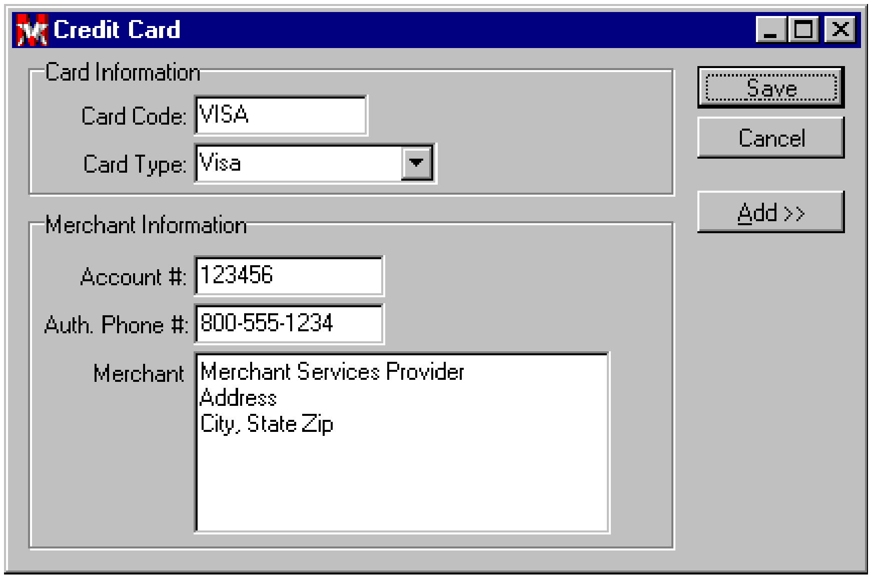
Once you have located the order you may refund all or part of it. First, select the first product you wish to refund (by clicking on it in the grid on the Order form). Then, click the **Item** button and select **Refund**.

In the dialog that appears type the number of items you wish to refund. The quantity you enter will appear in a separate line item on the grid.

Repeat this process for all items you wish to refund then click the **Save** button to close the form. Or, refund all items in an order simultaneously by clicking the **Order** button and selecting **Refund**.

Note: An item must be shipped (i.e., have a status of SH) before it can be refunded. To mark an item as shipped, select it then click the Item or Order button on the order form then select **Mark Shipped**.

SET UP CREDIT CARDS



On the Company Database form click the Sys button, then click the Tables tab. Select Credit Cards from the list. To set up a new card click the Add to button

Or,

To edit an existing Credit Card click the Open button. You can then scroll through all your Credit Cards using the navigator buttons on the toolbar, then simply type the new information, or click the Edit button on the toolbar.

To delete a Credit Card, click the Delete button on the toolbar. You will be asked for confirmation.

Field Definitions:

<u>Card Information</u>
Card Code: This is a short code to describe the card (e.g., Visa) This field appears on the Order Entry screen when you select the Credit Card in the Payment section.

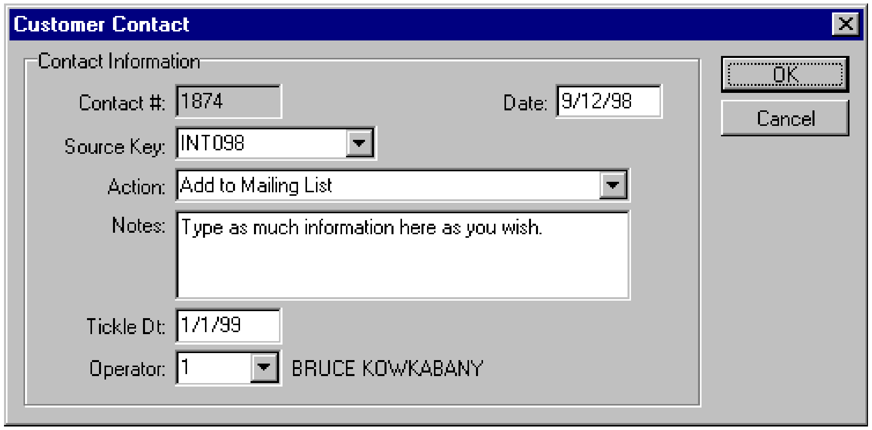
Card Type: You can use a longer name here to better describe the card code.

<u>Merchant Information</u>
Account #: This is your account number with your Merchant Services Provider.

Auth Phone #: Enter either the voice or data number you dial to authorize credit card charges.

Merchant Name and Address: You can enter the name and address of your Merchant Services Provider here.

UPDATE THE CUSTOMER CONTACT LOG



On the Company Database form click the Cust button, then click the Tables tab. Select Customers from the list, and click the Open button.

You can either add a new customer now by clicking the Add button (for help see How to Add a customer,), or you can search for an existing customer.

Shortcut: You can use the Find Customer icon  to quickly locate a customer.

Tip: Use the contact log to assign an Original Source Key when adding a customer.

After you have added or found or added your customer, click the Contacts tab. Any existing contacts will be visible, and

can be edited by selecting one, and clicking the Edit button. You can also enter new contact information with the Add button, or the New Contact button.

Field Definitions:

Source Key: Enter the Advertising Source Key associated with this contact. You may wish to create special keys just for customer contacts, by adding a source key.

Action: Select an appropriate action from the pull down list, or choose Other, and specify the action in the Notes field.

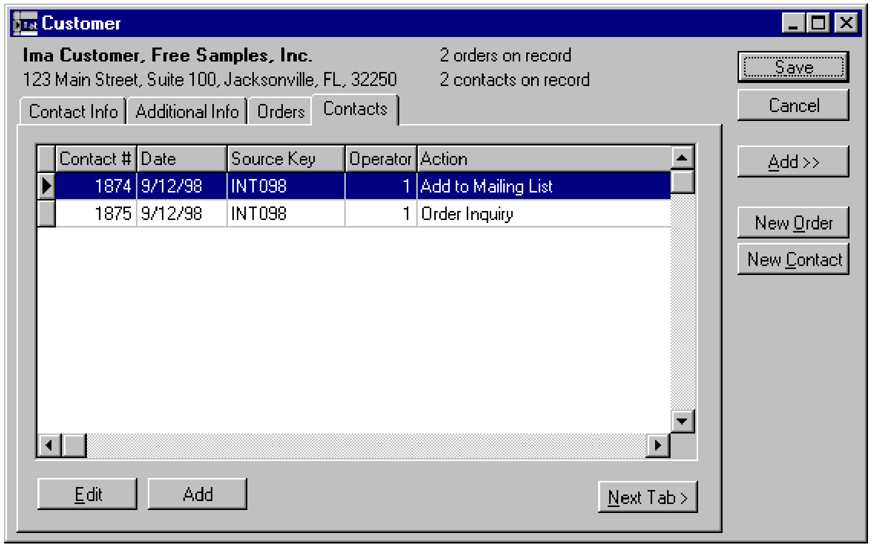
Notes: Enter any information you wish here including reminders to complete future tasks.

Tickle Date: A tickler report can be created each day that reminds you which tasks are due based on the date you enter in this field. Use this to remind you and your staff to mail letters, fill book club type orders, charge on payment plans etc.

Operator: Enter your Operator ID here, or the ID of the person who will be completing the tickler.

Reference - Instructions

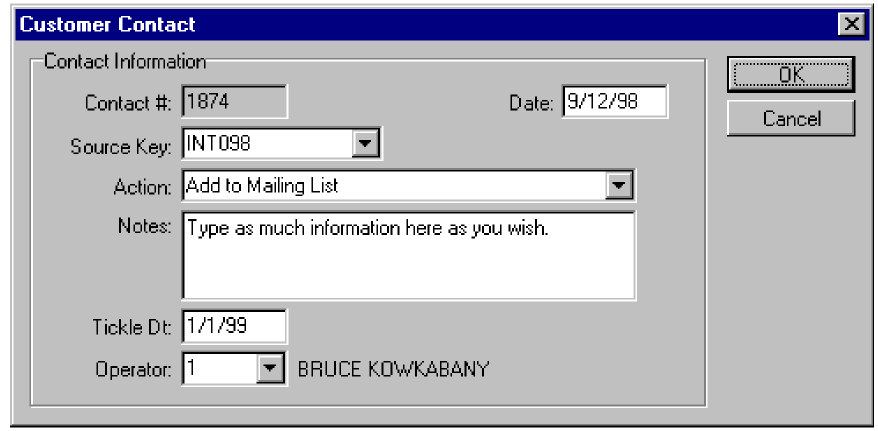
VIEW CUSTOMER HISTORY



On the Company Database form click the Cust button, then click the Tables tab. Select Customers from the list, click the Open button then click the Contacts tab.

Shortcut: You can use the Find Customer icon  to quickly locate a customer.

Double click any entry to open the Customer Contact log, and view its details.



Field Definitions:

Source Key: Enter the Advertising Source Key associated with this contact. You may wish to create special keys just for customer contacts, by adding a source key.

Action: Select an appropriate action from the pull down list, or choose Other, and specify the action in the Notes field.

Notes: Enter any information you wish here including reminders to complete future tasks.

Tickle Date: A tickler report can be created each day that reminds you which tasks are due based on the date you enter in this field. Use this to remind you and your staff to mail letters, fill book club type orders, charge on payment plans etc.

Operator: Enter your Operator ID here, or the ID of the person who will be completing the tickler.

Using the Report Writer

Mailware's report writer is one of its most useful and versatile features. You can, of course, simply print the included reports as you need them. See the section *How to Print Reports* (p. ?.?). But, you can also edit reports to include more information, to change how they look or even to add a graphic of your company logo. And, with a little practice you can create your own custom reports from scratch.

Editing Reports

Mailware includes over 100 pre-built reports. Although they are designed to meet most needs, you may wish to alter them for your particular business. You can make minor changes, like moving fields around. Or, you can use a report to make a completely new one (for example, you could turn an invoice into a payment coupon).

Let's start with a simple change to one of the existing reports.

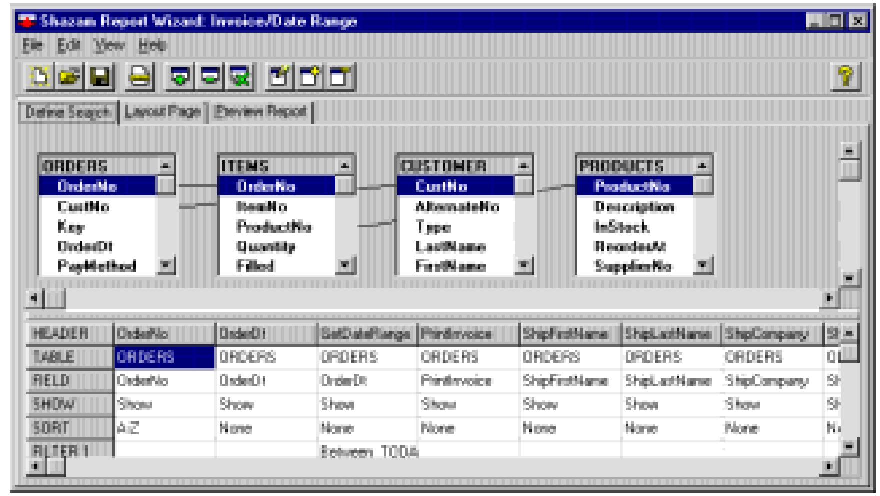
Exercise 1: Adding a Note to an Invoice

1. Open the Report Explorer. Locate the **Invoice/Date Range** report (under **Operations Reports>Orders**) and double click it.

See *Finding Reports* (p. ?.?) for instructions on locating and opening reports.

2. The Report Writer will open to the Define Search tab.

Using the Report Writer

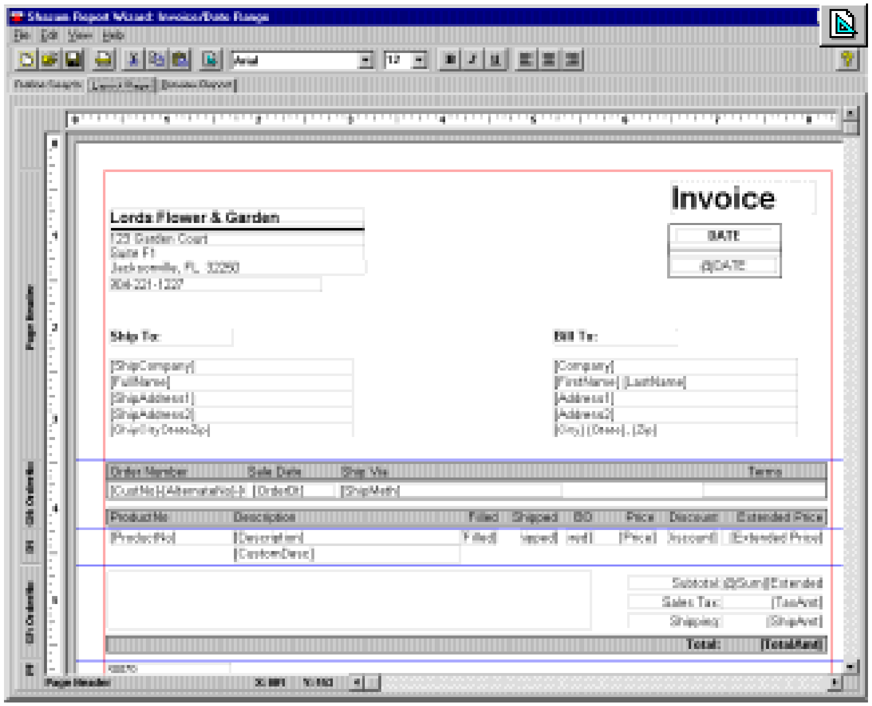


The Define Search tab in the Report Writer contains the tables and fields used in the report.

3. Click the **Preview Report** tab to see the report as it stands now. When prompted, enter a date range that includes orders (if you are using the sample database use 11/9/98 for the start and end dates).

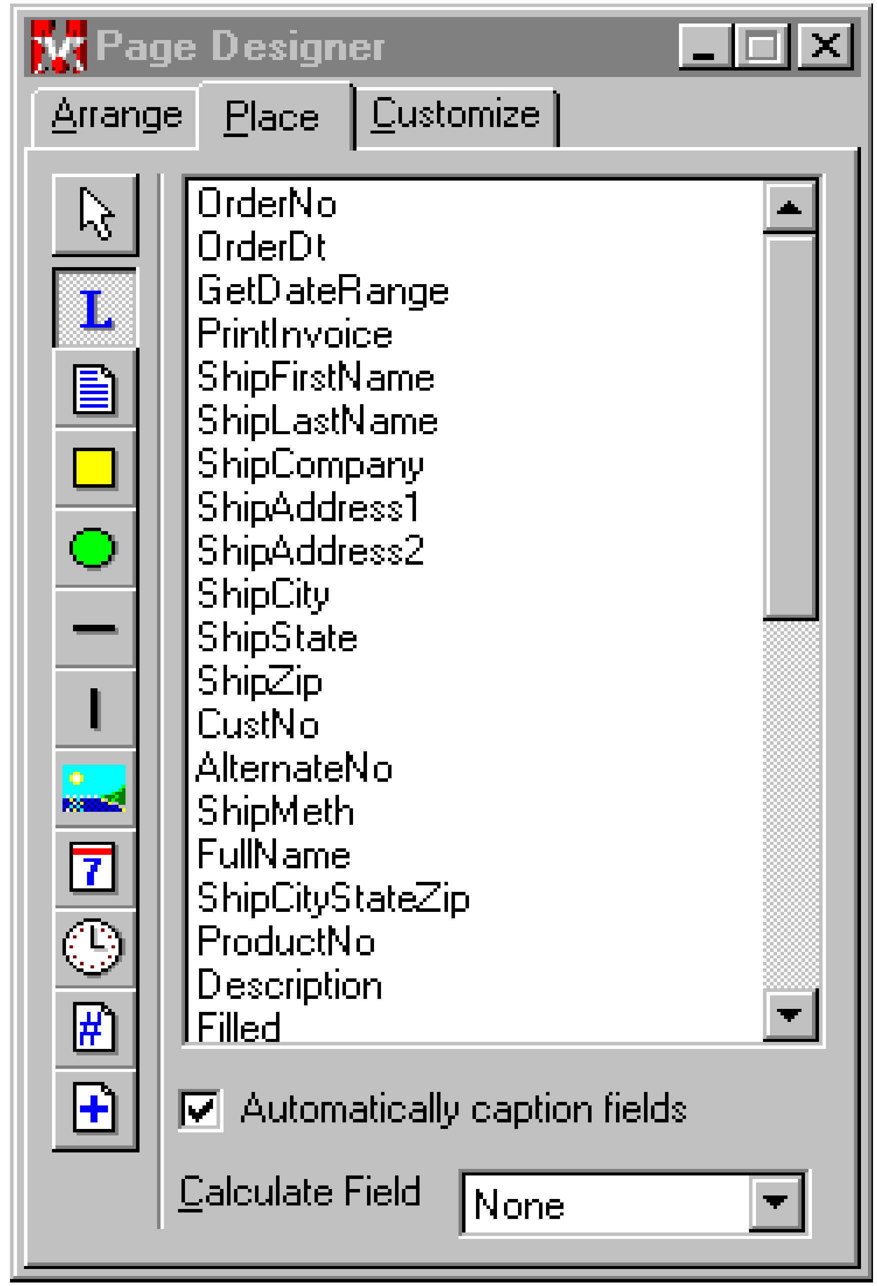
4. After you finish previewing the invoice, click the **Layout Page** tab to go to an editable preview of the report.

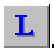
The following screen will appear (you may need to maximize the Report Writer to see the whole page).



The Layout Page displays a preview of your report you can edit by dropping fields onto it and dragging them into place.

5. Now we will add a message to the bottom of the invoice (to the left of the Subtotal). Click the Page Designer icon on the toolbar and in the dialog that opens click the **Place** tab.



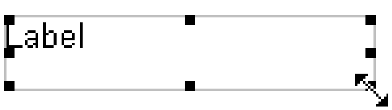
6. On the Page Designer dialog click the Label button . The button depresses to indicate that you can now place a label field on your report.

7. Click anywhere on the report to place the label field. The Label button will pop up and a field with the word **Label** in it will appear. The field has small black handles on it to show it is selected (If the Page Designer is in your way you can close it by clicking the **X** in the top right corner.).

8. We will be placing our message in the blank area to the left of the Subtotal. However, there is already a field there (a large grey outlined box), which we are not using. To delete it, click once anywhere on it. Small black handles will appear to show it is selected. Then press the **Delete** key on your keyboard, and answer **Yes** if prompted.

8. Now, click on the **Label** field we created a moment ago, and drag it to the blank area to the left of the Subtotal.

9. The field is too small for a message. To make it bigger move the cursor over a black handle. When it turns into a double-headed arrow left click and drag the field to a size that fills the blank area.



10. After you finish resizing the field click anywhere in its center and drag it into position. It should look something like the following:

11. Now it's time to add our message. Click on the **Label** field to select it (if it's not already). Then click the **Page Designer** icon .

12. On the Page Designer click the **Customize** tab. Then, at the bottom of the Page Designer click the **Caption** tab. You should see the word "Label" in an otherwise blank form.

13. Click on the word "Label" and use the **Delete** or **backspace** key on your keyboard to delete it. Then type the message:

Thank you for your order

14. Close the Page Designer (click the **X**), and you should see your message in the field you created on the invoice.

15. Click the **Preview Report** tab and enter a date range.

The previewed invoice includes your message. This same message will print on each invoice.

16. To save the modified Invoice choose **File**, then **Save As** from the text menu at the top of the Report Writer. In the dialog that pops up type:

Invoice/Message

Then click **OK** or press the **Enter** key.

Note: If you do not change the report name, or if you choose **File** then **Save**, the modified report will overwrite the Invoice/Date Range report.

17. Close the Report Writer (choose **File** then **Exit** or click the **X** in the top right corner). You will be returned to Mailware.

18. Open the Report Explorer. Click the **Orders** folder under **Operation Reports**. In the right pane find and click the report you saved - **Invoice/Message**.

19. When you click on **Invoice/Message** note that the lower pane contains a thumbnail icon and a blank space. This is used to identify the report. For example, click the **Invoice/Date Range** report. Notice the Invoice thumbnail and the text describing the report.

20. Click **Invoice/Message** again. Then right click the **Custom** thumbnail. Choose **Invoice** from the menu that pops up. Next, click in the blank space next to the thumbnail and type:

Invoice for Date Range with message: Thank you for your order

The report is now part of the Report Explorer menu, and contains a thumbnail and description to help you identify it.

Note: Reports in the Report Explorer are stored in the Reports.db file in your Mailware Data directory.

You can edit any of the reports and save them in this way. In addition to adding notes, you can “Place” a bitmap of your company logo, other fields from any linked tables (e.g., the customer’s phone number) and boxes, lines, circles, page numbers, dates and more. These additional items are available from the Page Designer’s Place tab.

Exercise 2: Adding a Changing Note to the Invoice

In the previous exercise we added a note to our invoice that prints the same message each time. Now let’s add a personalized note that we can change from the order entry screen for each customer.

1. First we need to create or edit an order to contain a message. If you are using the sample database click the Find Order icon  on the toolbar and double click Order #5 to edit it. Otherwise, choose an order of your own to edit, and make a note of its order date for previewing the report later.

2. On the order click a product (the Garden Starter on the sample company). Then click the **Customize** button on the **Item Detail** tab at the bottom of the order.

3. In the **Customize Information** window that opens type a message (e.g., "You can order additional items

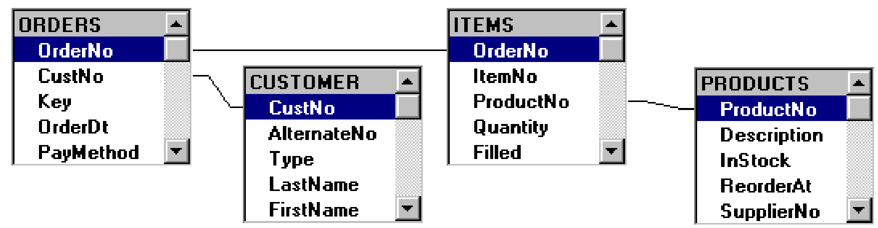
You can add a customized message to each product in an order by clicking the Customize button on the Item Detail tab when any item is selected in the Products section of the Order Entry screen.

from our enclosed catalog"), and click **OK**.

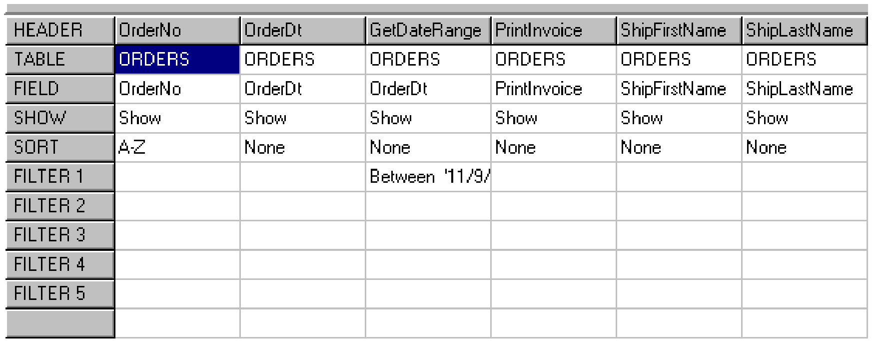
4. Click the **Save** button on the Order form.

5. Open the Report Explorer and double click the **Invoice/Date Range** report. The report will open to the **Define Search** tab in edit mode as in Exercise 1.

The Define Search section lists all the tables used in the upper half, and the fields from these tables that are used in the report in the lower half.



The Report Writer displays tables associated with the report. Lines between the tables represent links (e.g., The Orders table is linked to the Customer table by the CustNo field they both share).



HEADER	OrderNo	OrderDt	GetDateRange	PrintInvoice	ShipFirstName	ShipLastName
TABLE	ORDERS	ORDERS	ORDERS	ORDERS	ORDERS	ORDERS
FIELD	OrderNo	OrderDt	OrderDt	PrintInvoice	ShipFirstName	ShipLastName
SHOW	Show	Show	Show	Show	Show	Show
SORT	A-Z	None	None	None	None	None
FILTER 1			Between '11/9/			
FILTER 2						
FILTER 3						
FILTER 4						
FILTER 5						

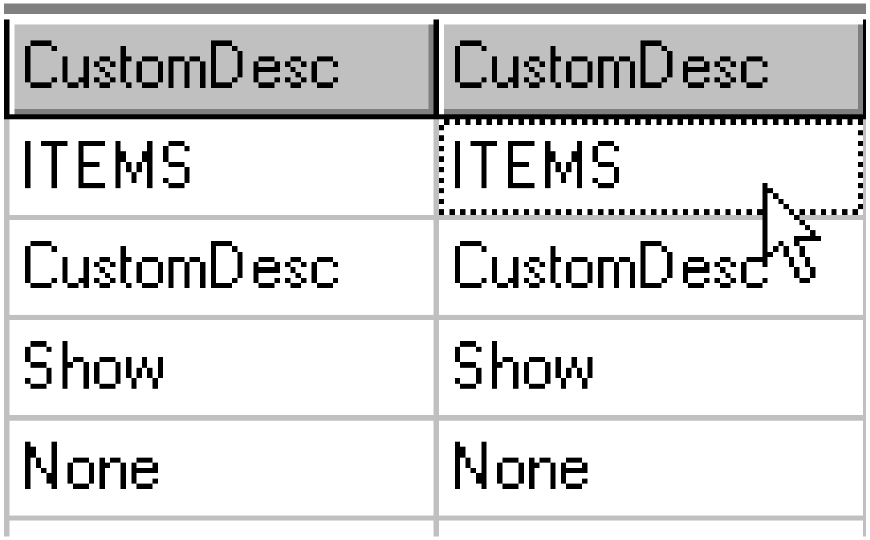
You can drag fields from tables and drop them onto columns in the Define Search tab. Only fields in columns can be "Placed" on the Layout Page tab.

6. In order to add a customized message to each invoice we will need to use a field from the **ITEMS** table (the ITEMS table contains the products each customer ordered). The field we need may be included in the columns below, but let's add it again for practice.

Use the scroll bar on the **ITEMS** table in the upper half of the screen to find the **CustomDesc** field. Then Double click it to add it to the field columns in the lower half of the screen (you can also left click and drag it to the columns).

Note: The **CustomDesc** field is associated with each product in an order. It is the message you added in the order by clicking the **Customize** button on the **Item Detail** tab

7. Use the scroll bar at the bottom of the screen to move to the far right column. You may see 2 **CustomDesc** columns (the one you added for practice, and the one



that was already part of the report). If so, click on one (in the white area - not the grey title), then press the **Delete** key on your keyboard, and answer **Yes** if prompted.

8. Because we have **CustomDesc** in our listing of available fields we can choose it in Layout to place on our report. Click the **Layout Page** tab.

9. Click the Page Designer icon, then click the **Place** tab. Use the scroll bar to scroll down to **CustomDesc** in the list of available fields.

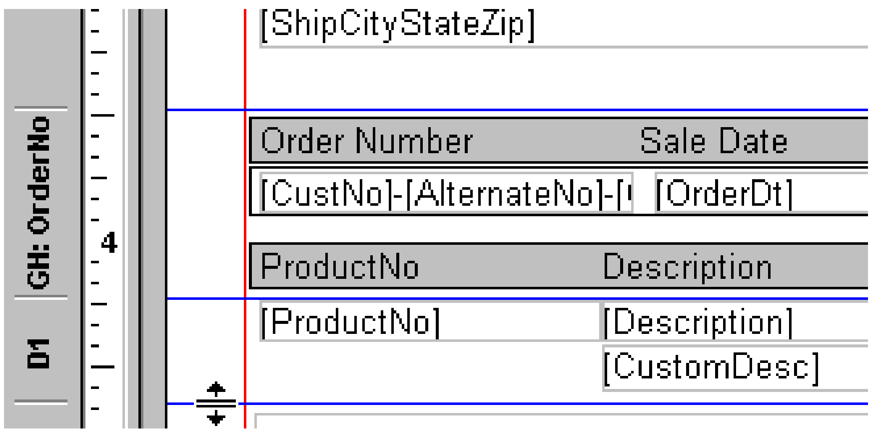
10. Before we place the field uncheck the **Automatically caption fields** check box. This prevents a title from being added to the report when we place the field.

11. Now click and drag **CustomDesc** to a blank area on

the report. When you release the mouse button the field is placed.

12. Because **CustomDesc** is associated with ordered items we want it in the section of the report that contains the items. Your report may already contain the **CustomDesc** field in the Detail (**D1**) section, directly under the Product **Description**.

You can practice moving the field into position. First, if a **CustomDesc** field is already in the detail section click it and pressing the **Delete** key on your keyboard. Next drag the **CustomDesc** field you added to the report to the same area (just below the Product No and Description), then left click and drag one of the black handles to make the field equal in size to the Description above it.



Note: In the figure above the cursor is a 2 headed arrow . You can use it to drag the blue line that defines the Detail area up or down to make room for the CustomDesc field.

Using the Report Writer

13. Click the **Preview Report** tab to see the **CustomDesc** field displayed. Notice that the field expands vertically to display longer messages.

14. The report is already saved in your Report Explorer so you can simply exit the Report Writer (**File>Exit** from the text menu or click the **X** in the top corner). Or, if you wish to save your changes choose **File>Save** or **File>Save As** from the menu.

Exercise 3: Creating a simple report from scratch

In the previous exercises we edited an existing report. This exercise will cover the basics of creating a simple report. Methods learned here can be used to create new reports, and to make more meaningful changes to the reports that come with Mailware.

1. Open the Report Explorer and locate the **Custom Reports** folder in the left pane. Left click it once to select it. Then, click **File** in the text menu and choose **New Report** from the pop down menu.

2. In the dialog that appears type: **Exercise 3** and click the OK button. This will create a new report in the Custom Reports folder.

3. In the right pane of the explorer double click the new Exercise 3 report to open it.

4. The report opens to the Define Search tab. Here we will choose which tables and fields we will include in our report. Let’s create a report that lists the orders entered in Mailware.

First, add a table by clicking the Add Table icon . on the toolbar.

5. In the dialog that appears select **Mailware** from the pull down menu in the **Database** field.

6. Several tables will appear in the lower portion of the dialog. Find **Orders.db** and double click it, or click it once then click the **Add Table** button. The Orders table will appear on the define search screen. Click **Close** to exit the Add Tables dialog.

7. The Orders table contains fields that are used in the Order Entry screen in Mailware. To include a field in the report double click it to add it to the columns in the lower half of the screen. For example, let’s create a listing of order numbers.

Find the **OrderNo** field (it is at the top of the Orders table) and double click it. OrderNo will appear in the first column.

8. Click the **Preview Report** tab to see how our report is coming along. If you have orders entered in Mailware, or are using the sample company database you will see a listing of order numbers in a grid format. (If your report is blank you can save and close it, then enter a

Using the Report Writer

couple of orders. Or, use the File>Open Company text menu item in Mailware to switch to the sample database. Then reopen the report.).

9. Click the Define Search tab, and use the scroll bar on the Orders table at the top of the screen to browse through the fields in the table. Find **TotalAmt** and double click it.

10. Preview the report (click the Preview Report tab). You should see order numbers listed with the total amount of each order listed beside it. While this is useful information a summary would be better. Click the Define Search tab.

11. Click in one of the white cells in the OrderNo column to select it. Then double click the cell to open the Edit dialog.

12. In the Edit dialog for OrderNo change the Show field to **Count** by selecting it from the drop down list. Then click the **Red Right Arrow** to move to the next field.

13. Change the Show field for TotalAmt to **Sum**. Click the **OK** button. Preview the report.

14. Your preview should show 2 fields - the number of orders entered in Mailware and their total dollar amount. You specified these results when you set the OrderNo field to Count, and the TotalAmt field to sum.

When you are ready to continue, return to the Define

Search tab.

15. Find the **OrderDt** field in the Orders table. Instead of double clicking it, left click and drag it to the first column (currently occupied by OrderNo). When you release the mouse button the OrderDt field will appear in the first column.

16. Click in the white area of the OrderDt column, then double click to open the Edit dialog. Notice that the Show field is set to the default of Show. Because the other fields in the report are calculated OrderDt must be set to a calculation or to Group. Change OrderDt's Show field to **Group**. Click **OK** and preview the report.

17. If you have more than one order on a given date the orders for that date will be grouped as in the example below on 11/9/98 which had 3 orders entered.

OrderDt	OrderNo	TotalAmt
11/1/98	1	$1,209.25
11/9/98	3	$384.15
12/2/98	1	$60.00
2/16/99	1	$50.00
3/8/99	1	

The report groups items based on the Order Date (as you specified when you set OrderDt to Group). Grouping is useful when you wish to see totals for a given day, product type, ad key etc.

NOTE: When any field is calculated (i.e., Sum, Count etc.) all other fields must also be calculated or Grouped.

18. Click the Define Search tab, then find the following fields in the Orders table and double click them:

TaxAmt
ShipAmt
PaidAmt

19. Select the TaxAmt column, then double click it to open the Edit dialog. Change its Show property to **Sum**.

Click the Red Right Arrow to move to each of the other fields and change their Show properties to **Sum**. Click **OK** to close the Edit box then preview the report.

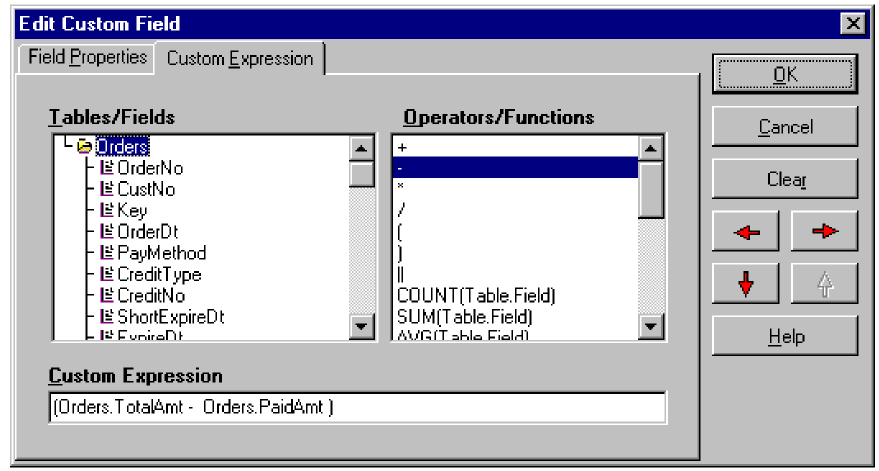
20. The report now lists total sales for each day, and itemizes Tax and Shipping charges. ThePaidAmt field shows the total amount received. The difference between it and TotalAmt is the amount still due (i.e., TotalAmt - PaidAmt = Amount Due).

The above equation is simple enough to calculate manually, but would be nice to have added to the report. Click the Define Search tab and we will create a new field.

21. Scroll through the Orders table and you will see that an Amount Due field does not exist. However, we can create one. To do so double click a blank column or click the Insert Blank Field icon on the toolbar and double click the column it creates.

The Edit dialog opens to the Custom Expression tab where you can create an equation as in this example:

22. To create an Amount Due field we need to subtract the PaidAmt from the TotalAmt. First double click the **Orders folder** (which represents the Orders table in



your report). The Orders table fields will appear in a list.

23. Find **TotalAmt** and double click it. It will appear in the Custom Expression field as Orders.TotalAmt.

24. Next find the **minus sign (-)** in the right pane and double click it so it appears in the Customer Expression field.

25. Finally find and double click the **PaidAmt** field in the left pane so the total equation in the Custom Expression field now reads as:

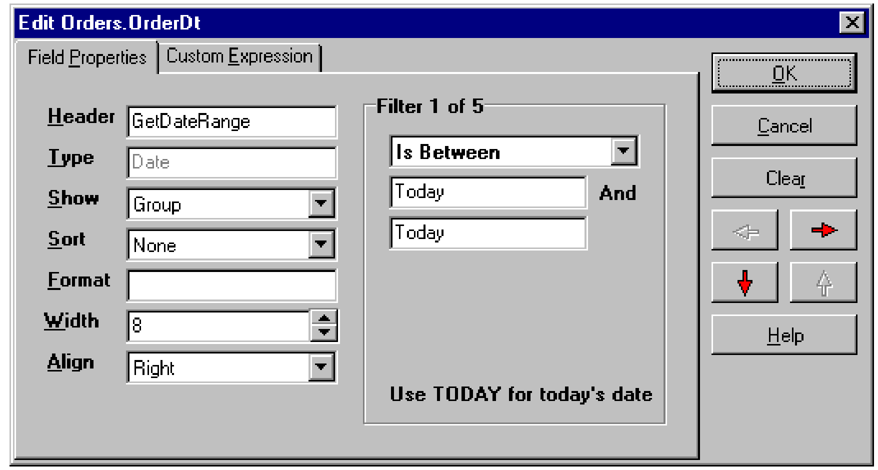
Orders.TotalAmt - Orders.PaidAmt

26. Click the Field Properties tab and change the Header from Custom to **Amount Due**. Change the Show property to **Sum** and the Align property to **Right**. Click **OK** and preview the report.

27. The report should now show the Amount Due for each day. Let’s make one more addition to the report to make it more useful. Currently all orders entered into Mailware are shown. To specify orders for a given date range we can use a special function.

Click the Define Search tab, then open the Edit dialog for the OrderDt field (click, then double click it).

28. In the Header field change OrderDt to **GetDateRange**. In the filter section of the dialog select **Is Between** from the drop down list. In each of the two fields that appear type the word **Today**. Your dialog should appear as follows:



29. Click **OK** and preview the report. You will be prompted for a beginning and ending date. Enter each date in the format **mm/dd/yy**. If you are using the sample database enter 11/1/98 and 11/30/98.

Your report will show totals for the date range you specified, and will group orders for each day.

30. If you wish you can save the report. First, return to the Define Search tab and open the Edit dialog for the GetDateRange column. Change the dates to **Today** and click **OK.** This causes the date range to default to Today if no dates are entered when prompted. Next, choose **File** then **Save As** from the text menu. You can enter a different name (e.g., Accounts Receivable) or simply click **OK** to overwrite the existing Exercise 3 report.

Note: Because the report is saved in the Reports.DB file in the data directory you are working in it will not be available if you switch databases (See Switching Databases p. ?.?). However, you can export it to an .SRW file, then switch databases, open the Report Explorer and import the .SRW file.

The report you created in this exercise used most of the basic elements of the Shazam Report Writer (with the notable exception of linking multiple tables which will be covered later). You can use these methods to create new reports and to edit the reports that come with Mailware.

Backing Up Your Data

All the data you enter, including reports in the Report Explorer, is saved by Mailware in a single directory. You can back up your Mailware data by simply copying the data directory to another media (tape, Zip disk, a separate hard drive). Use the following instructions to make a back up.

NOTE: It is recommended you back up your data daily, and before applying any upgrades or changes.

How To Back Up Your Mailware Data

1. Exit all copies of Mailware.

2. Determine the location of your data directory (or directories).

a. When you install Mailware it defaults to the sample company data (C:\Mailw15\SampData or the \SampData folder in the location you specified when installing Mailware). It is unlikely that you will use this for your company data, however, if you chose to do so this is the data directory to back up.

b. When you change to the Local Database to begin entering your company data Mailware uses the default local data directory (C:\Mailw15\Data or the \Data folder in the location you specified when installing Mailware). **This is the most commonly used data directory.**

c. **If you are running Mailware on a network** your data directory may be installed anywhere. You can check the location of a network data directory by opening

Mailware and choosing **File>Open Company** from the text menu. The network directories are listed in the lower portion of the dialog. Click each one and then click the **Edit** button to see the full path to the data directory. Back up each directory you use.

d. **If you are running multiple data directories** (e.g., multiple companies with their own data directories) your data directories are stored identically to the network directories described in item c above.

3. Choose a back up method.

a. **Manual back ups** can be performed by simply opening Windows Explorer and browsing to the Mailware data directory. Then drag the entire \Data folder(s) to another device (e.g., a physically separate hard drive, a Zip drive etc.).

b. **Automatic back ups** are created with the software that came with your back up device. For example, back up software is provided with most tape drives. Follow the instructions for using the back up software, and include the Data directory or directories you identified in step 2 above.

Mailware Technical Reference

This section outlines Mailware's directory and file structure, and provides descriptions for various items.

Mailware is a 32 bit application written in Delphi - a rapid application development package based on Pascal and distributed by Borland. Its database is Paradox 5 for Windows (.db).

FOLDERS

When installed with the default settings Mailware creates the following directory structure:

```
C:\Mailw15
  |
  |-Data
  |
  |-Mailpriv
  |
  |-Reports
  |
  |-Sampdata
```

C:\Program Files\Borland International Copyright 1996\BDE3.5

C:\Program Files\Borland\Common Files\BDE

The **Mailw15 folder** contains the Mailware application (.exe), help and support files.

The **Data folder** contains the **Local Database.** This data is blank when installed (with the exception of the Zip Code database), and is the default location for entering data on a single install of Mailware. This is the folder that is selected when “Local Database” is selected from the File>Open Company option on the text menu in Mailware. Copying this directory to another device or media effectively makes a backup of your data.

The **Mailpriv folder** is the private directory for the copy of Mailware installed on each PC. This folder is used to store temporary database files, and other miscellany. Its location can be changed in Tools>Preferences>Network in Mailware, however, accepting the default folder is recommended.

The **Reports folder** contains native .SRW files. These are text based files that can be read and saved by Mailware’s internal Shazam Report Writer. These reports are provided for backwards compatibility with versions of Mailware prior to 1.7, and are readily accessible from the Reports tab on the Company Database. Newer reports are available from the Report Explorer in Mailware. These newer reports are stored in the Reports.db file in each Data folder.

The **Sampdata folder** contains the **Sample Database** which is selected by default when Mailware is installed. It is identical to the Data folder with 2 exceptions: the Zip Code database contains only a few sample entries, and the other databases contain pre-entered sample customers, orders etc. for use with Mailware’s tutorials. To point Mailware to the Local or a Network database choose File>Open Company from the text menu and select the desired database.

Note to Mailware Home Office owners: You can delete this directory, then install a blank database to the \sampdata folder. This effectively creates a second database you can

Mailware Technical Reference

use for another company. Mailware owners may also use this method, however, the Network Databases are easier to use and you may create as many as you wish.

The Borland Database Engine (BDE) is used by Mailware to manage its database. The BDE creates directories on your C: drive, and requres the installation of version 3.5, then an upgrade to 5.0. As new BDE installations are made available they will be incorporated into the Mailware install.

You can access the BDE Administrator from the Tools menu item in Mailware or from the Windows Control Panel (Start>Settings>Control Panel>BDE Administrator). Within the administrator are settings that may need adjustment for use on your PC or network. Changes to the administrator are documented in the Mailware installation manual.

Other folders may also be created when additional utilities and updates are installed.

```
C:\Mailw15
   |
   |-MWScan
   |
   |-Report Viewer
   |
   |-nwdbv17x

C:\MailData
   |
   |-Data
```

The **MWScan folder** contains the database repair utility which can be installed from the Mailware CD. This application (dtutil.exe) can be run to rebuild Mailware's database files when they are corrupted by a system crash or unstable network.

The **ReportViewer folder** contains a view-only version of the Shazam Report Writer that is included in Mailware. The viewer can be distributed to vendors, fulfillment houses etc. then reports can be saved in compact .SHZ format for distribution. A utility on the Mailware CD can be used to create 3.5" installable copies of the viewer for distribution (choose Launch the Installer from the Welcome dialog, then click More> on the menu that appears).

The **nwdbv17x folder** is created by updates to Mailware that require an upgrade to the database. When new features require new fields and/or tables the installation of the

upgrade will save the data structure to this folder. Your current database can then be updated to the new structure by choosing the database upgrade option during the install or from its icon in the Mailware program group.

The **MailData\Data folder** is created when a Network Database is installed from the CD. This data folder can be used on a network or to create a separate database for an additional company. Use the File>Open Company text menu option in Mailware to create a Network Database for this folder. File>Open Company can then be used to switch to this database by selecting it from the list.

Note to Mailware owners: You can install as many separate data folders as you wish, and then add them into your Network Databases list (File>Open Company from the text menu). These databases can be used for separate companies, archiving data etc.

FILES

The following files and file types are stored in the folders listed.

C:\Mailw15

- Mailware.exe (the main Mailware application)
- .HLP files (various help files)

C:\Windows

- .INI files

C:\Mailw15\Data

- .DB files
- .LCK files
- .NET files
- Reports.DB, .MB etc.

C:\Mailw15\Reports

- .SRW files
- .SHZ files

C:\Mailw15\Mailpriv

- .LCK files

.INI files are text files that contain system preferences and other information specific to your installation of Mailware. The **Mailware.INI** file in each PC's Windows directory (C:\Windows) contains information from Mailware's Preferences settings (Tools>Preferences). **Mailwnet.INI** in the Windows directory contains preferences specific to each workstation on a network install of Mailware.

.DB files are Mailware's main database files. These contain your data (e.g., customers, orders etc.). They are in Paradox 5 for Windows format and may be viewed with other database management programs like Access97. You can also view .DB files with the Shazam Report Writer that is included in Mailware. In addition, the report writer can be used to export data in .db, .dbf and ASCII format (Preview any report, then choose File>Export from the report writer's text menu).

.LCK files are created by the BDE when Mailware is opened. These files track which tables and records are accessed, and exhibit warnings when two or more people attempt to access the same record (e.g., If one workstation on a network is using Mailware to update John Smith's customer file, and another workstation attempts to open the same customer's account a message will appear warning the second person that the account is being updated).

.NET files are created by the BDE when Mailware is started. Like .LCK files .NET files are used to track access to the database.

Occasionally .LCK and .NET files will prevent access to Mailware's tables. This occurs when .LCK files are not deleted by Mailware due to a system crash or network problem, or when .NET files are created in multiple locations. To correct the problem exit Mailware on every workstation then delete any .LCK and .NET files on each PC. For more information refer to *Deleting .NET and .LCK files* in the Network Troubleshooting section of this manual p. A.14.

Reports.DB, .MB etc. files contain the Report Explorer reports. You can access the Report Explorer from Mailware by clicking its icon on the toolbar. .SRW files can be imported into and exported from the Report Explorer.

.SRW files are report files which are created with Mailware's internal Shazam Report Writer. .SRW files are text based and can be read with a text editor like Notepad. .SRW files can be imported into Mailware's Report Explorer. Reports in the explorer may also be exported to .SRW format. .SRW files are useful when sharing reports with other owners of Mailware. Unlike .SHZ files they contain no data.

.SHZ files can be created with Mailware's internal Shazam Report Writer. These are compressed files that contain report results. You can send these report results to third parties who may view them with Mailware's distributable report viewer (available on the Mailware CD). Unlike .SRW files .SHZ files contain data. For example, you can save a day's invoices in .SHZ format then send the file to your fulfillment house for printing and shipping.

Troubleshooting

I have installed Mailware, but cannot find its icon in my Windows 95 Start menu.

You can set up the icon yourself, if for some reason it does not appear in your Start menu. First, click on the Start button on the task bar. Move the cursor to Settings, then click on Taskbar. Click on the Start Menu Programs tab, then click the Add button. Type C:\Mailware\Mailware.exe (if you installed Mailware in the default directory). Or, click the Browse button, then double-click on the folder where you installed Mailware. Double-click on the Mailware.exe file (it has an icon next to it of a red M with a white star).

Click the Next button, then click the New Folder button A new menu item will appear ready for you to input a name. Type Mailware, and press Enter. Type Mailware for the new shortcut name, the click the Finish button. Mailware is now available from the Start menu.

What is a Key Violation?

This error message pops up when you attempt to enter an item with the same key field as an existing item. For example, the key field for Products is the Product Number. If you enter a Product Number of “Widget” in inventory, and Widget already exists you will receive the Key Violation message. Try a different key field, or check the existing item to verify you are not entering the same item twice.

I keep getting messages that say SHARE is not active.

This can occur on peer to peer networks (like Windows 95). From Mailware's Tools menu item select BDE Configuration, and click the Help button on the message that appears.

What does this message mean? This file has been locked by C:\....PDOXUSRS.LCK

This message typically occurs when you experienced a system crash while Mailware was open. A Lock file did not get a chance to close, so it is reporting to Mailware that someone else is using a file. To fix the problem, close all running copies of Mailware (including those running on a network). Use Windows Explorer to locate the Mailware Data directory (default is C:\MAILW15\DATA), then delete all files with an extension of LCK (e.g., PDOXUSRS.LCK). See also: Deleting .NET and .LCK files in the Network Troubleshooting section of this manual p. A.14.

I entered an item (e.g., an Ad Source Key) then tried to select it in a drop down field, but it was not there.

It's there, but the field did not "refresh." You can type the entry exactly as you set it up (including upper/lower case). Or, you can close the screen you are working on, and reopen it. The field will then be visible. You can also try moving to the next record with the navigator buttons, then

returning to the record you were working on (for example, on the customer screen the Contact tab does not refresh when you enter a New Contact. Try moving to the previous customer with the navigator button on the toolbar (the left arrow), then return to the current customer.)

Where can I get updated files?

There may be last minute updates on a disk that came with your package, or patches on the CD. You can simply put the disk the disk in your floppy drive and run patch001.exe, then patch002.exe etc.. Or, follow the instructions on the CD installer for loading patches.

All updates are available on our web site too. Visit **www.Mailware.com** and choose **Upgrades** from the **Quick Find** field. While you are visiting you can also register to receive notification via email as new upgrades are made available.

NETWORK TROUBLESHOOTING TIPS

The integrity of your network is paramount when running any program, including Mailware. Two of the most common questions we receive are directly related to the stability of the network on which Mailware is running. They are:

1. When I try to open more than one copy of Mailware I receive the message: **Directory is controlled by other .NET file.** (See ***Deleting .Net and .LCK Files*** p. A.14).

2. **The data I entered is missing/corrupt,** OR I received one of the following messages:

   a. **Index is out of date: Table.db**
   b. **Corrupt or missing .VAL file**
   c. **Detail table open operation failed**

If you have entered Mailware's network settings correctly (see ***About Networking Mailware*** p. ?.?) the most likely cause of the problems you are experiencing is related to your network. This is usually the case even when other programs are not reporting errors as most programs will not present error messages even when their data is compromised.

NOTE: *Mailware's error messages to do not indicate a problem with Mailware itself. You do not need to reinstall Mailware, or upgrade it. Rather, you can correct the problem by using the following steps to optimize your network.*

Troubleshooting

OPTIMIZING YOUR NETWORK

Mailware, and other programs that share data are dependent on the stability of your network. Many variables can affect this stability including; bad network cards, low grade or overly long cables, incorrectly configured network protocols etc. Listed below are the most common causes of errors and methods for correcting them. Following these steps will help ensure the integrity of your Mailware data.

Note: Mailware will display error messages when network related errors occur. In some cases you will be unable to run more than one copy of Mailware, in others your data may be corrupted (Mailware includes a utility to fix corrupted data - See ***Using the Database Repair Utility*** p A.26).

Before attempting any of the following suggestions it is highly recommended that you back up your Mailware data first (see ***Backing Up Your Data*** p. 4.24).

Also, please see ***About Networking Mailware*** p. ?.? and follow the instructions for setting up Mailware on a network, especially the Control File directory, and BDE settings, before proceeding.

The following instructions apply primarily to Windows 95 and NT. However, they can be used with Windows 98 with a minimum amount of variation (for example, some items in Windows 98 do not need to be double clicked).

.Net and .LCK files

Before testing your network for hardware or other problems you should close all copies of Mailware and follow the instructions below to delete **.Net** and **.LCK** files that may be on any or all of your PC's. These files are used by Mailware's database to track who is accessing data. If you are experiencing network problems these files may be written to incorrect directories, or may not be deleted (as they should be) when Mailware is closed. These files may also be incorrectly written if Mailware's network settings are not correct (see ***About Networking Mailware*** p. ?.?).

NOTE: You may need to repeatedly perform the following steps after making each of the recommended corrections to your network.

Deleting .Net and .LCK Files

1. Close all copies of Mailware.

2. Locate the following files using the Windows Find tool and delete them:

   a. PDOXUSRS.NET
   b. PDOXUSRS.LCK
   c. PARADOX.LCK

   To locate the above files click the Windows **Start** button, move the cursor to **Find**, then click **Files or Folders**. In the **Named** field in the dialog that appears type: ***.LCK;*.NET** In the **Look In** field select **My Computer** from the drop down list. Then click the **Find Now** button. In the lower portion of the dialog click on each of the above named files in turn and press the **Delete** key on your keyboard. If you receive a message that a file is in use, or cannot be deleted make sure ALL copies of Mailware and any other programs are closed, then try again. Programs other

Troubleshooting

than Mailware may create similar or even identical files. You should be able to delete these files in any of Mailware's directories (including network data directories) and the root directory of your C drive (C:\).

3. Repeat step 2 for all PC's, then proceed to the following sections for help trouble shooting your network. Also, see ***Miscellaneous Network Troubleshooting Tips*** p. A.22 for help circumventing the error message: **Directory is controlled by other .NET file**.

HARDWARE PROBLEMS

In even ideal networks an errant piece of hardware can cause numerous problems. In most cases the culprit is a bad ethernet card in a pc or printer. Correcting the problem requires either sophisticated network traffic monitors ("sniffers"), or simple trial and error. You should also run Windows ScanDisk and Disk Defragmenter as well as any third party software packages that verify system integrity (i.e., Norton Utilities, First Aid etc.) on each PC.

The surest way to find a faulty device is to physically detach all workstations and printers from a network, then reattach PC's one at a time (you can do so by shutting down each PC then disconnecting the network cable). If you have no other means for detecting a faulty piece of hardware you can use Mailware to do so. ***Be sure to back up your data first***.

Starting with just one PC (the server first if you have one, or the PC where the data is installed) run Mailware. If the error or corruption problems occur on a single PC, either it is the culprit or Mailware is set up incorrectly (see ***How to Install***

Mailware p. ?.? and ***About Network Installations*** p. ?.? for instructions on installing Mailware and setting it up on a network).

If Mailware works fine with a single PC you can then add one more, and begin using Mailware with two machines at once. In this case the second PC will be accessing the data over the network.

If no errors occur you have eliminated two PC's from the problem list, AND determined that your network settings are correct.

If you receive errors with 2 PC's, and if you know your network settings are correct, the problem may lie in one of several hardware components:

1. **Check your cables** to ensure they are the correct ones for your network. Cables are either coaxial (like those used for cable TV) or 10/100 baseT (similar to thick phone cables).

   Coax cables should be terminated at either end by a small metal cap. They should also be professionally tested to meet minimum OHM standards. If in doubt, buy new cables. Coax cables should also be no longer than 50 feet - the shorter, the better.

   10/100BaseT cables should be rated Category 5, and must be connected through a hub. 10baseT cables are used for a 10mps ethernet card. 100baseT can be used for either 10 or 100mps cards. 100baseT cables must be connected to a hub that supports 100mps. These cables should not be

longer than 300 meters. A 10/100baseT crossover cable that runs directly from one PC to another is not sufficient for running a network. These cables are intended primarily for games.

2. **Check your hub** to ensure it is the right type for the network you are using. 10mps hubs cannot be used with 100mps ethernet cards. Your hub also should have a Collision light (usually marked COL). If this light is lit or flashing your network is experiencing excessive packet collisions (i.e., lost data). This is usually a result of hardware problems or the use of TCP/IP network protocols (see Network Protocols below).

3. **Check the ethernet card** in each PC. Either card, or both may be the problem at this point (the single PC may have run Mailware successfully even with a faulty ethernet card since it was being used locally). Many cards include diagnostic software you can run.

   You can also view the card's properties in Windows by clicking the **Start** button, then **Settings**, then **Control Panel**. Then double click the **System** icon. Next click the **Device Manager** tab. Click the **+** next to **Network Adapters**. Your card should be listed. If it has a red X next to it, it is not working properly.

   Click on the card once, then click the **Properties** button. The device status is listed in the center of the dialog that appears (it should read: "This device is working properly."). You can check the individual settings by clicking the **Resources** tab. Click on each **Resource Type** (i.e., Interrupt Request, Memory Range and Input/Output Range). As you select each one the Conflicting Device List should show “No conflicts.”

If your ethernet card does not meet all the above criteria you may need to reinstall it, or replace it.

Continue adding PC’s to your network one at a time, and repeat the above steps. If all your hardware checks out, the problem may be in your Network Protocols.

NETWORK PROTOCOLS

Windows networks are typically either **NT Server** or **Peer to Peer**.

NT Server networks include a PC that acts as the data server and runs a copy of Windows NT Server. Workstations on the network can run NT Workstation or Windows 95 or 98 clients.

Peer to Peer networks do not include a copy of NT. They are made up of workstations running Windows 95 or 98.

In both types of networks a Protocol is used to manage data. Frequently TCP/IP is used, however NetBEUI and IPX/SPX are also very common. It is also possible to have more than one protocol.

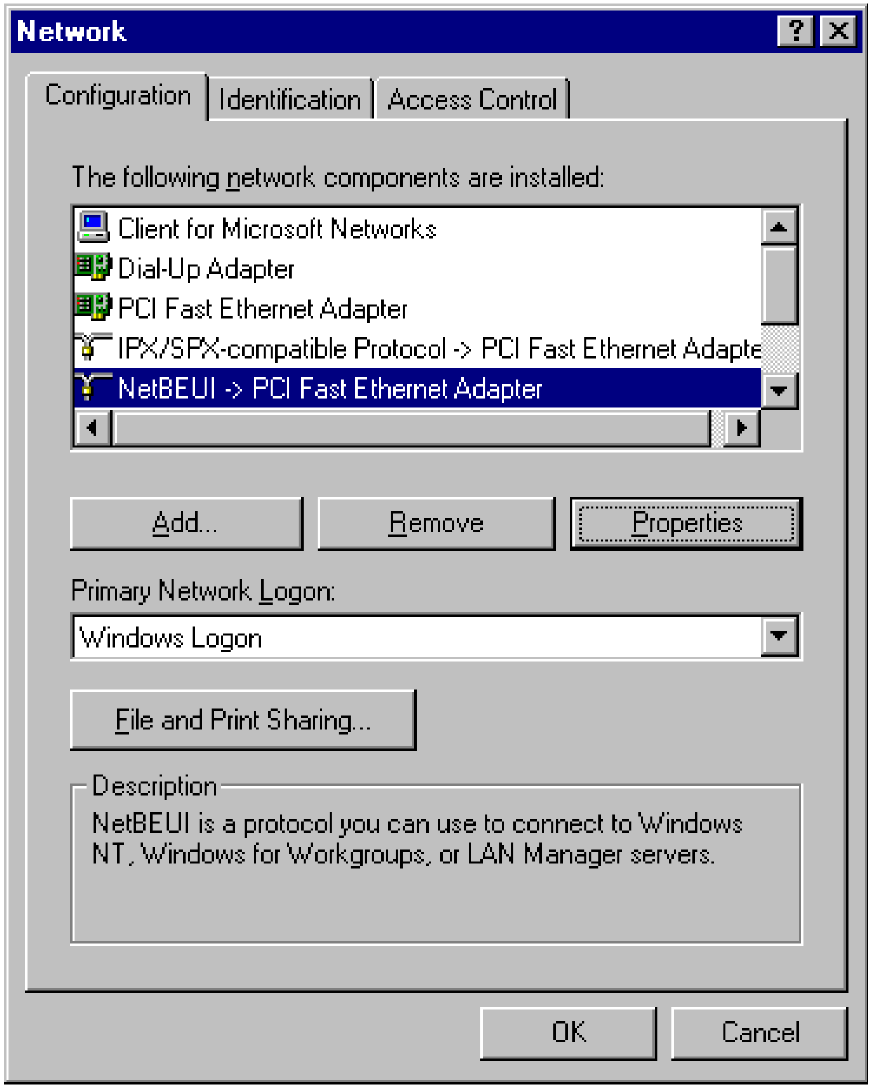
If you have a choice, NetBEUI is the preferred protocol. TCP/IP is not recommended due to its tendency to drop packets (i.e., lose data). If you are connected to the Internet, and need TCP/IP you can bind it to only your Dial Up Connector. If you must bind TCP/IP to your ethernet card

you can set NetBEUI as your primary protocol and alleviate some of TCP/IP’s packet dropping.

You can check your network settings, and make changes using the following steps.

NOTE: Making the following changes may affect your network adversely (e.g., you may lose a connection to another PC or the Internet). You should make notes of the current settings so you can restore them if necessary (double click each item in the dialog below and write down the items on each tab). It is also recommended that you back up your entire system before proceeding.

1. Click the Windows **Start** button, then move the cursor to **Settings**, and click **Control Panel**. Double click the **Network** icon in the window that appears. A dialog similar to the following will appear:



2. Double click your ethernet card in the list (e.g., **PCI Fast Ethernet Adapter** in the dialog above).

3. A dialog will appear. On it click the **Bindings** tab. Listed in the center will be the protocols bound to the card. Preferably only NetBEUI or IPX/SPX should be used. You can deselect protocols from the list by clicking the checkboxes. When you click the OK button (and after restarting Windows) the bindings will be removed. If TCP/IP is listed it is recommended you deselect it, then click the **OK** button. If you need TCP/IP you can leave it selected. Later we will make NetBEUI the primary protocol.

4. If **NetBEUI** is listed skip to the next step. If it is not listed you can add the protocol to your network. You will need your Windows CD to perform this step. Click the **Add** button on the bottom of the dialog. In the dialog that appears double click **Protocol**. Windows will build a database, then present another dialog. In the left pane click **Microsoft**. In the right pane click **NetBEUI**. Then click the **OK** button. Follow the on screen prompts which will ask for the location of the Windows CD. When the steps are completed close the original network dialog with its **OK** button, and restart Windows when prompted. You may also need to bind NetBEUI to your ethernet card after restarting. Follow the steps above to open the network dialog, then double click your ethernet card. Click the **Bindings** tab and select **NetBEUI** by clicking its check box. Click the **OK** button to save the changes. When you are done go to the next step below.

5. Double click the **NetBEUI** protocol that is bound to your ethernet card (e.g., NetBEUI -> PCI Fast Ethernet Card).

In the dialog that appears click the **Advanced** tab. At the bottom of the screen click the checkbox next to the line: "**Set this protocol to be the default protocol.**" Click the **OK** button. After Windows is restarted NetBEUI will become the default protocol.

This step can be performed for IPX/SPX instead if your network requires that protocol.

6. In the network dialog other active protocols may be listed. If you do not need them you can click each one in turn then click the **Remove** button. You may have multiple listings of protocols followed by the device to which they are bound (e.g., NetBEUI -> Dial Up Connector). These may be removed in the same manner. For most networks NetBEUI bound to your ethernet card and TCP/IP bound only to your Dial Up Connector (for using the Internet) are sufficient. Additional protocols or bindings may be causing unnecessary traffic and lost data.

7. After completing the above steps, click the **OK** button on the network dialog. Windows will restart and your network settings will take effect. Test Mailware on the new network (as well as any other commonly used programs) to ensure your network is operating correctly. If you continue to experience lost data or error messages see the steps below for more assistance.

MISCELLANEOUS NETWORK TROUBLESHOOTING TIPS

Directory is controlled by other .NET file

The PDOXUSRS.NET file is created by the Borland

Database Engine (BDE) when Mailware is started. This file should be created once, and should appear only in the Control File Directory you specified when entering Mailware's network settings (see ***About Network Installations*** p. ?.?). In some cases, especially unstable networks, the PDOXUSRS.NET file will appear on each PC in the root directory of the C drive (C:\). When this occurs the following error message appears on additional PC's attempting to open Mailware:

Directory is controlled by other .NET file

If you have optimized your network as described above, and are still having this problem you can enter an override in the BDE to circumvent this problem.

1. Click the Windows **Start** button. Move the cursor to Settings, then click Control Panel.

2. Double click the **BDE Administrator** icon.

3. In the dialog that appears click the **Configuration** tab in the left pane. Double click **Configuration** if it is not expanded. Then double click **Drivers** and below it double click **Native**. Single left click on **Paradox**.

4. In the right pane click on **C:** in the first line next to the cell labeled **NET DIR**. Click on the **browse** button (**...**) that appears.

5. Browse to the directory you selected in Mailware as the Control File Directory (usually the Network Database directory). Double click the data folder, then click the **OK** button. The NET DIR should now show the path to your

Control File Directory (e.g., C:\Maildata\Data).

6. Click another field in the right pane (e.g., 3.0 next to VERSION) to exit the NET DIR field and enter the change (Note: the tab key will not exit the field, you must click another field with the mouse).

7. Close the BDE Administrator with the **X** in the top right corner of the dialog. When prompted answer **Yes** to save the changes. If Mailware is running you must close it, then reopen it to recognize the change to the BDE.

8. Repeat the above steps for each PC on the network. Then close Mailware at each PC and delete any PDOXUSRS.NET files that exist (see ***Deleting .Net and .LCK Files*** p. A.14).

The above steps will eliminate the message: **"Directory is controlled by other .NET file**", however, you should optimize your network as described above to reduce the chance of data corruption caused by an unstable network.

About Network Data Servers

Network servers are repositories for your data. As such, and contrary to popular belief, you should generally use your *least powerful PC*. It should, however, be a Pentium class processor with sufficient memory. As a rule, data should not be stored on the C drive. Partitioning a single drive into multiple logical drives works fine, or you can use multiple hard drives.

In most cases you will store your Mailware data on the data server. The data directory can be mapped so that to your

Troubleshooting

workstations it looks like a drive letter on the server. Mailware itself does not need to reside on the server. As a matter of fact, **no programs, including Mailware, should be run on the server even in a peer to peer network**. Running programs taxes the processor, and may cause lost data.

An ideal network for Mailware consists of an NT Server that manages the Mailware data directory with workstations running Windows 95 or 98 clients. The network should be a 100mps ethernet using NetBEUI as the network protocol.

SUMMARY

Networks are tricky. A lot of data is being passed around, and like a busy highway - the more traffic, the more likely an accident. By optimizing your network as described above (thereby reducing traffic), and by following good network practices, like regularly backing up your data, you can expect far fewer problems and greater productivity.

Your network is a valuable asset to your business. Mailware and many other programs depend on it to operate properly. If your network is not stable not even the best program will perform well. And, unlike Mailware, many will not warn you until your data is already lost.

If you are not comfortable managing your network many competent consultants are available to set one up. They can also install maintenance programs (e.g., Norton Utilities) and scheduled tape back ups to help ensure a smooth operating environment, and to provide emergency recovery tools.

USING THE DATABASE REPAIR UTILITY

This utility can be used to repair Mailware's databases if they become corrupt (corruption usually occurs when a computer is turned off or rebooted while tables are open, or when Mailware is used on an unstable network).

Mailware will display an error message when a table is corrupted. The most common error messages follow:

1. detail table open...operation failed: Table.db
2. Index is out of date: Table.db
3. Corrupt or missing .VAL file
4. Detail table open operation failed

Some will be followed by the name of the affected table (for example, orders.db) You can run the repair utility and select each reported database table for repair.

IMPORTANT NOTE: Before using the following procedures you should back up your data. You can use a backup device (e.g, a tape drive or Zip disk drive), or simply copy the Mailware Data directory (default is C:\MAILW15\DATA) to another hard drive (see ***Backing Up Your Data*** p. 4.24)

QUICK START INSTRUCTIONS FOR RUNNING THE DATABASE REPAIR UTILITY

1. Run the setup.exe file in the Database Repair Utility directory on the CD, or choose the Database Repair Utility option from the Installer.

2. To use the Repair Utility, run it from its icon in the Mailware Program group. Click the **By Directory** button

Troubleshooting

to select individual tables in your Mailware Data directory (e.g., Ads.db is a table). Then click the **Verify** button.

3. If the utility does not report that the table "has no errors" click the **Rebuild** button to fix it. Repeat the process for all suspect tables (usually those listed in the error message as described above).

FULL INSTRUCTIONS FOR RUNNING THE DATABASE REPAIR UTILITY

1. Exit Mailware, and any other open programs. If the repair utility is already installed skip to step 5 below. Otherwise, insert the Mailware CD. If autostart is active on your system, the Welcome screen will appear after several seconds. Click **Launch the Installer.**

2. Choose the **Database Repair Utility** option from the menu that appears (you may need to click the **More >** button to see it).

3. Follow the on screen instructions to install the utility.

4. Close the Installer and Mailware if it is running.

5. Run the **Database Repair Utility** from its icon in the Mailware program group (Click the Windows **Start** button, move the cursor to **Programs**, then to **Mailware**. Click the **Database Repair Utility** item.).

6. On the dialog that appears click the **By Directory** button. A browse window will pop up. Browse to the Mailware data directory (the default directory is

Troubleshooting

C:\MAILW15\DATA), and find the file name that appeared in the error message you received (e.g., orders.db), or any file with an extension of ".db" and double click it.

NOTE: If you are running Mailware on a network be sure to browse to the network directory (default is C:\MAILDATA\DATA). You can check which database you are using by opening Mailware and choosing **File** then **Open Company** from the text menu.

7. Click the **Verify** button on the utility. After a moment it will report in the message line that the Verification was Successful (the table is good), or that it could not verify the table (the table is corrupt).

8. If the table is corrupt, or if you are not sure, you can click the **Rebuild** button to repair it.

9. Close the utility and run Mailware to check for any additional errors. You can repeat the above for any files with an extension of .db

Visit our web page for updated support tips at:
www.Mailware.com

Shortcuts

Help Shortcuts

Ctrl-F1	Opens the help Search window. This works both in help and in Mailware.
I	Opens the topics Index window
S	Opens the Search window (Windows 3.x owners use Alt-S)
X	Exits Help
Z	Opens the Shazam Report Writer Help window

Mailware Keyboard Shortcuts

Ctrl-F1	Opens the help Topic Search window. This works both in help and in Mailware.
F1	Opens Help Contents or context sensitive help for the current topic.
F2	Lookup a field in a drop down box
F5	Shows the Company Database window
Alt	Accesses the text menu (then press the underlined letter of the item you wish to use e.g. F for File.)
Ctrl-F	Opens the Find dialog
Ctrl-P	Print the current form
Ctrl-X	Cut the currently selected text to the clipboard
Ctrl-C	Copy the currently selected text to the clipboard
Ctrl-V	Paste text from the clipboard into the currently selected field

Shortcuts

Mailware Toolbar Shortcuts

Add a Customer - Opens a blank customer form.
Find a Customer - Opens the search form.

Add a New Order
Find an Order

Opens the Product form
Opens the Product Supply Vendors form
Opens the Purchase Order form

Begins Processing of Open Orders
Begins Processing of Credit Card transactions

Opens the Import Wizard

Opens the Shazam Report Writer so you can create a report
Opens the Shazam Report Explorer

Brings the Company Database window to the front
Opens Help Contents

Shortcuts

The following buttons appear when needed for the form you are currently using (the active form). For example, you will see these buttons when you are using the Customer form.

Adds an item to the active form (e.g., add a customer while in the customer form)
Edits the selected item in the active form (e.g., edit a product while in the product form)
Immediately saves your changes to the current record without closing the form.

Jumps to the first item in the active form
Moves back one item in the active form
Moves forward one item in the active form
Jumps to the last item in the active form

Opens the Search dialog for the active form (use to find a specific item)
Opens the Filter dialog for the active form (use to view only records that match criteria you specify)
Lookup a field in a drop down box

Cancels changes made to the currently selected record without closing the form
Deletes the currently selected record (you will be asked for confirmation - Caution: after confirmation the deletion is permanent)

Index

Index

Mailware Reference Guide

Index

Index

Mailware Reference Guide