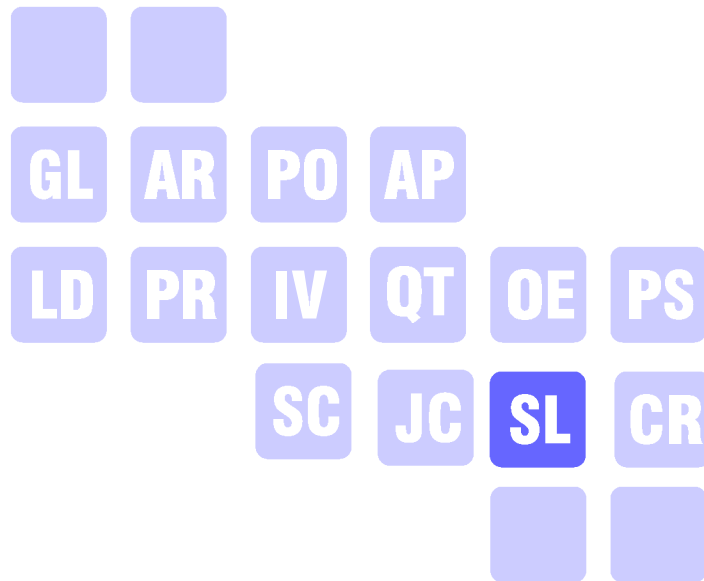




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Section 13

# SALES LEADS



*"Quality Business Software Since 1976"*

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# TABLE OF CONTENTS

## PREFACE

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### **CHAPTER ONE** **INTRODUCTION** **1-1**

<b>WHAT CAN IT DO FOR ME</b>	ERROR! BOOKMARK NOT DEFINED.
<b>FEATURES OF THE SYSTEM</b>	ERROR! BOOKMARK NOT DEFINED.
<b>HOW THE SYSTEM IS DESIGNED</b>	ERROR! BOOKMARK NOT DEFINED.
<b>BRIEF DESCRIPTIONS OF THE MAIN PROGRAMS</b>	ERROR! BOOKMARK NOT DEFINED.

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### **CHAPTER TWO** **PROCEDURES** **2-1**

<b>SPECIAL PROCEDURES</b>	<b>2-1</b>
<b>LOADING INITIAL DATA</b>	<b>2-1</b>
<b>DAILY PROCEDURES</b>	<b>2-1</b>
<b>MONTH END PROCEDURES</b>	<b>2-2</b>
<b>YEAR END PROCEDURES</b>	<b>2-2</b>

---

### **CHAPTER THREE** **PROGRAMS** **3-1**

<b>CONTROL FILE MAINTENANCE</b>	<b>3-1</b>
RECORD FIELDS	3-1
<b>MASTER FILE MAINTENANCE</b>	<b>3-2</b>
RECORD FIELDS	3-2
<b>NOTES FILE MAINTENANCE</b>	<b>3-6</b>
RECORD FIELDS	3-6
<b>MASTER/NOTES INQUIRY DISPLAY</b>	<b>3-6</b>
MASTER RECORD FIELDS	3-7
NOTES RECORD FIELDS	3-8
<b>SELECT RECORDS</b>	<b>3-8</b>
OPERATING STEPS	3-8
<b>UPDATE CODES &amp; ACTION DATE</b>	<b>3-9</b>
OPERATING STEPS	3-10
REPORT FIELDS	3-10
<b>CREATE MAIL MERGE FILE</b>	<b>3-11</b>
OPERATING STEPS	3-11
<b>CREATE INTERCHANGE FILE</b>	<b>3-12</b>
OPERATING STEPS	3-12
RECORD FIELDS	3-12
<b>UPDATE S/L FROM A/R CUSTOMER FILE</b>	<b>3-15</b>

OPERATING STEPS	3-15
<b>DELETE S/L IF A/R CUSTOMER</b>	<b>3-16</b>
OPERATING STEPS	3-16
REPORT FIELDS	3-17
<b>UPDATE ZIP DATA</b>	<b>3-17</b>
OPERATING STEPS	3-17
REPORT FIELDS	3-18
<b>PRINT MASTER/NOTES</b>	<b>3-18</b>
OPERATING STEPS	3-19
MASTER REPORT FIELDS	3-19
NOTES REPORT FIELDS	3-20
<b>PRINT NOTES</b>	<b>3-21</b>
OPERATING STEPS	3-21
MASTER REPORT FIELDS	3-21
NOTES REPORT FIELDS	3-22
<b>PRINT LABELS</b>	<b>3-22</b>
OPERATING STEPS	3-22
REPORT FIELDS	3-24
<b>PURGE MASTER/NOTES</b>	<b>3-24</b>
OPERATING STEPS	3-24
REPORT FIELDS	3-25
<b>PURGE NOTES</b>	<b>3-25</b>
OPERATING STEPS	3-25
REPORT FIELDS	3-26

**CHAPTER FOUR****SAMPLE REPORTS****4-1****INDEX**

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# PREFACE

This manual is designed to assist you in the use of the Starr Computer Systems Inc. Sales Leads module. In addition to describing and explaining the module, this manual will guide you step-by-step through the operation of each program. For information regarding starting the system, how to operate the screens, how to operate the menus, function keys, file names, how to allocate/expand files, and how records are accessed, please refer to the "Introduction to Starr Accounting", which is Section One at the beginning of this set of documentation.

## **STARR DOCUMENTATION ON THE WEB**








The latest versions of our documentation are available free from our Web site at "<http://www.starrcs.com/>". The documents are in Adobe PDF format. These files can be viewed and printed using the free Adobe Acrobat reader. The reader is available from our Web site.

## **READER'S COMMENTS FORM**

Please note the Reader's Comments form at the back of this manual. Your suggestions are important to us, and we will use them to improve later versions of this manual.

## GRAPHICS CONVENTIONS

This manual conforms to other Alpha Micro publications in its use of a standard set of graphics conventions. We hope these conventions simplify our examples and make them easier for you to use. Unless stated otherwise, all sample commands are assumed to be entered at AMOS command level.

SYMBOL	MEANING
filespec	<p>An AMOS file specification that identifies a specific file within an account. A complete filespec for the local computer is made up of the device name, the file name, the file extension, and the account number. For example: DSK0:SYSTEM.INI[1,4]</p> <p>A file specification may also consist of an ersatz name, which specifies a particular disk account, and a file name, like this: SCSLIB:COMPNY.DAT.</p>
<b>TEXT</b>	This <b>bold</b> typeface represents characters you type. Variable parts of the entry are in italics, as noted below.
<i>Text</i>	We use this <b><i>bold italic</i></b> type for variable parts of command examples. Replace the text shown with the appropriate entry.
	The key symbol indicates a reference to a key on your keyboard. The name of the key appears inside the key symbol.
	This indicates a control sequence you press on the keyboard. Press  and hold it down while you press the indicated key.
^	When displayed in front of a capital letter, this means the letter is a control character. For example, when you press  , it appears on your screen as ^C (^C is the control character that cancels most programs and returns you to AMOS command level).
	This Halt! symbol indicates an important note you should read carefully before going further in the documentation. Usually, text next to this symbol contains instructions for something you <i>must</i> or <i>must not</i> do, so read it carefully.
	This Hint symbol indicates a helpful bit of information, or a “short cut” that could save you time or trouble.
	This Remember symbol indicates something you should keep in mind while following a set of instructions.

---

# CHAPTER ONE INTRODUCTION

## WHAT CAN IT DO FOR ME

Have you ever lost a sale because your sales staff failed to follow up on a lead in a timely manner? Our Sales Leads system is designed to help you avoid this very costly problem.

When you have your salesmen using this system, it makes them accountable for their actions. It tracks salesmen's activity and gives you the ability to monitor their progress.

Using the Sales Leads database will save you time. You can quickly generate mailing labels, mail merge data, or import data for another application or computer. You also save time when the lead becomes a customer; you do not have to re-key the customer information.

## FEATURES OF THE SYSTEM

The Starr Computer Systems Inc. Sales Leads System is a powerful; multi-company leads tracking system. The Sales Leads system is designed to:

- Maintain a comprehensive database of clients and/or potential clients
- Provide full telemarketing ability
- Provide ability to load existing customers into the Sales Leads database, to create customer mailings
- Provide automatic creation of Customer Master records from Sales Leads records, when the lead becomes a customer
- Provide record selection ability from the Sales Leads database
- Generate reports, labels, and mail merge letters based on selected records

Particular features of the Starr Computer Systems Sales Leads System include:

- Interactive, menu-driven programs

- Self-instructing user documentation
- Can have a unlimited number of notes associated with a master record
- Record selection ability
- Online order query at any time
- Full telemarketing ability with automatic dialing
- Comprehensive management reporting
- Automatic interface with A/R Customer Master
- Mail merge Output
- Data interchange between other computer systems
- Sample data for training

## HOW THE SYSTEM IS DESIGNED

The Sales Leads (S/L) system operates with two ISAM based master files. The Master file includes full name and address information, contact names, salutation, and company name. Also includes class, type, action, and status codes; these codes are used to identify and process groups within the database. Also includes file, update, last action, and next action dates.

The Notes file is used to store notes, which are associated with a Master record. There is no limit to how many note records are associated to a given master record; the total pool of notes is "shared" between all master records. The note key is composed of the S/L customer key and the current date; duplicate keys are allowed to permit multiple notes on the same date.

Master and associates note data can be displayed the CRT screen via the "Master/notes inquiry" program. Options then exist to automatically update the master or add new notes. These features are particularly useful in a telemarketing environment.

Records are selected for processing/printing by a "Select records" program, which marks records either in groups or individually, based upon the codes, date ranges, and zip code ranges.

The Sales Leads system prints a master/notes report, a notes report, and one to four up labels. Reports are optionally printed for records which have been marked for printing by the "Select records" program.

A program exists to update the Master file with existing Customer records, so that the selection and reporting features of the Sales Leads system can be used to generate new sales for existing customers.

A mail merge output file can be created for selected records, which can then be used with the AlphaWrite word processing software to create mail merge letters.

A program exists to create an interchange file of the Master data in a format that can be processed by any other type of computer, so you can sell yours leads to other businesses.

## BRIEF DESCRIPTIONS OF THE MAIN PROGRAMS

The Sales Leads system contains nineteen programs that collectively perform the creating, maintaining, updating, and report generating functions of the system. Each main program is briefly described below.

- **Control file maintenance**

This program maintains the S/L Control file parameters.

- **Master file maintenance**

This programs maintains Master records.

- **Notes file maintenance**

This programs maintains Note records (notes associated with a Master record).

- **Master/notes inquiry display**

This program displays master information and associated notes on the terminal screen in a condensed format.

- **Select records**

This program marks master records for processing; either groups or individually, based on codes, dates, zip codes, and other selection criteria.

- **Update codes & action dates**

This program updates the S/L Master codes and next action date for selected records. It also produces an audit trail of updated records.

- **Create mail merge file**

This program creates a sequential mail merge output file from selected records. These sequential records can then be used by word processing software to create mail merge letters.

- **Create interchange file**

This program creates a sequential interchange output file from selected records. This file is used for data interchange between Alpha Micro and non-Alpha Micro systems. Provided so you can sell your leads data for any type of system.

- **Update S/L from A/R customer file**

This program creates new or updates existing S/L master records using the A/R Customer Master file data. Provided so that customer data can be process via Sales Leads.

- **Delete S/L if A/R customer**

This program deletes S/L Masters and their corresponding notes when an A/R Customer record has the same key as the S/L Master. Used to delete leads after they become customers. Produces an audit trail of deleted records.

- **Update Zip data**

This program updates the S/L Master city, state, and area code using the zip code database.

- **Print master/notes**

This program produces a complete listing of the Master file and associated notes. This program has sorting and record selection options.

- **Print notes**

This program prints notes for a specified note date range.

- **Print labels**

Prints one to four up labels for selected records. This program has sort and record selection options.

- **Purge master/notes**

Purges master and associated notes for selected masters, and optionally print an audit trail of purged masters/notes.

- **Purge notes**

Purges notes for a specified date range, and optionally print an audit trail of purged notes.



---

# CHAPTER TWO PROCEDURES

## SPECIAL PROCEDURES

There are several special cases that may arise in running the Sales Leads system. The handling of each of these special cases is described in the following section:

1. Delete master and notes

Delete the master. The corresponding notes will be automatically deleted.

2. Delete all the notes corresponding to a master

Use the "S/L master file maintenance" program "Delete corresponding notes" option.

## LOADING INITIAL DATA

The following procedure is used to load your initial leads when you started using the Starr Sales Leads system.

The initial data load procedure follows:

1. Load your customers (if desired) using the "Update from A/R customer file" program.
2. Manually key your existing leads.

## DAILY PROCEDURES

There are currently no Sales Leads daily procedures.

## **MONTH END PROCEDURES**

There are currently no Sales Leads month end procedures.

## **YEAR END PROCEDURES**

There are currently no Sales Leads year end procedures.

---

# CHAPTER THREE PROGRAMS

## CONTROL FILE MAINTENANCE

This program is run during system creation and is used to define control information.

Maintain the data using the normal ESP screen features, using the EXECUTE key to update changed records, or the MENU key to ignore changes and return to the previous menu.

Use the ESP print key to print the data to the default printer.

### Record Fields

The record fields are:

1. Record number  
The control file record number.
2. Select record count  
The current number of selected records. A display-only field.
3. Custom option  
Used to control custom Sales Leads features. No custom options are currently defined.  
Enter the sum of the features to turn on multiple features.
4. Access A/R master  
Enter "Yes" to access the A/R Customer Master file when adding S/L master records; else enter "No". Accounts Receivable must be implemented before you can access A/R.

5. Access S/L master

Enter "Yes" to access the S/L Master file when adding S/L master records. Sales Leads must be implemented before you can access S/L.

6. Customer code load option

It is possible to create Sales Leads masters from A/R Customer masters. Customer masters have a "customer code" field, which can be loaded into either the Sales Leads category or class field; this option specifies which one of those Sales Leads fields is loaded. A pop-up field.

7. Auto chain notes

Enter "Yes" to automatically chain to "Notes file maintenance" after adding a master.

## MASTER FILE MAINTENANCE

This program is used to maintain S/L Master records. The master record contains name, address, date, and selection code information.

Maintain the data using the normal ESP screen features, using the EXECUTE key to update changed records, or the MENU key to ignore changes and return to the previous menu. The change/delete password is required to change/delete records, unless the password is blank.

Each record contains a field called the record flag. This flag is used by the system to identify the status of that record. The value of the flag will be the SUM of the status conditions. The various conditions follow:

Status condition exists when the S/L record has been selected for printing.

### Record Fields

The record fields are:

1. S/L key

A unique key that identifies this lead.

If A/R is implemented and you indicated in the S/L Control file that you want to access A/R, the system reads the associated customer record (if found), and automatically fills in all associated customer fields in the record.

---

2. Company name

The company name as "Last name; First name".

3. Address line one

The first line of address.

4. Address line two

The second line of address.

5. City

6. State

7. Zip code

In add mode will fill in the city and state by entering the zip code (if city and state are blank and this feature is implemented).

8. Email address

9. Salutation

The salutation name for mail merge letters (e.g. "Mr. Smith").

10. Phone#1

Phone#1 in xxx-xxxx or xxx-xxx-xxxx format, optionally followed by extension.

11. Contact#1

The contact name associated with phone#1 (in "lastname;firstname" format).

12. Phone#2

Phone#2 in xxx-xxxx or xxx-xxx-xxxx format, optionally followed by extension.

13. Contact#2

The contact name associated with phone#1 (in "lastname;firstname" format).

## 14. Phone#3

Phone#3 in xxx-xxxx or xxx-xxx-xxxx format, optionally followed by extension.

## 15. Contact#3

The contact name associated with phone#3 (in "lastname;firstname" format).

## 16.

## 17. Contact#1

Phone number and extension.

## 18. Company name

The company or person's name as "Last name; First name".

## 19. Address line one

The first line of address.

## 20. Address line two

The second line of address.

## 21. City

In add mode the city can be defaulted from the Zip Code field (based on the System Control File Settings).

## 22. State

In add mode the state can be defaulted from the Zip Code field (based on the System Control File settings).

## 23. Zip code

Zip or international postal code. In add mode, now uses the new get city/state from zip code subprogram to default the city and state fields from the zip code field. Based on the new System Control file "zip convert" option, this feature can be turned off, or set to default the city/state as either upper/lower case or upper case.

24. Category number

See the help file for the valid numbers.

25. Salesman number

See the help file for the valid numbers.

26. Promotion number

27. Class code

See the help file for the valid numbers.

28. Type code

See the help file for the valid numbers.

29. Action code

See the help file for the valid numbers.

See the help file for the valid numbers.

30. Status code

See the help file for the valid numbers.

31. File date

When this record was originally entered.

32. Update date

When this record was last changed.

33. Last action date

The last time a label was printed for this lead.

34. Next action date

The next contact date for this lead.

## NOTES FILE MAINTENANCE

This program is used to maintain Sales Leads note records. Notes are associated with an existing Sales Leads Master record with the same customer key. There is no limit to how many note records are associated to a given master record; the total pool of notes is "shared" between all master records.

The note key is composed of the Sales Leads customer key and the current date. Duplicate keys are allowed, to permit multiple notes for a customer on the same date.

Maintain the data using the normal ESP screen features, using the EXECUTE key to update changed records, or the MENU key to ignore changes and return to the previous menu. The change/delete password is required to change/delete records, unless the password is blank.

### Record Fields

1. Customer key

The Sales Leads master key associated with this note.

2. Date

The note date in MMDDYY or MMDDYYYY format.

3. Sequence number

In add mode, automatically assigned by the system.

4. Note

The note or comment.

## MASTER/NOTES INQUIRY DISPLAY

This program is used to display Sales Leads master information at the top of the terminal screen, as well as all notes that are associated with this master.

Notes are displayed in date order.

The lower right hand corner of the display contains three numbers in the format "beginning-line/ending-line total lines". The "total lines" number represents the total set of notes that can be

displayed. The "beginning-line" and "ending-line" numbers represent the subset of notes that are currently displayed (e.g. if you were displaying the last twelve notes in a set of one hundred notes the display would be "0089/0100 0100").

Twelve transactions at a time are displayed, and the user can "browse" through the transactions in both the forward and the backward direction; either a line at a time or twelve lines at a time. Use the F1 key to go to the next line. Use the F2 key to go to the previous line. Use the F3 key to go to the next page (ahead twelve lines). Use the F4 key to go to the previous page (back twelve lines). Use function key F5 to set the beginning transaction display at a specified line number.

Function key F8 will automatically dial S/L Master phone number. If you want to abort the dialing, press F8 again. For this feature to work, you will need a modem connected to the auxiliary printer port of your terminal. The software uses "transparent print" to control the modem.

## Master Record Fields

The Master fields are displayed at the top of the screen. The master fields are:

1. Leads customer key
2. Lead name, address, and phone
3. Category code
4. Salesman number
5. Class code
6. Type code
7. Action code
8. Flag
9. File date
10. Update date
11. Last action date
12. Next action date
13. Salutation

14. Contact name

## Notes Record Fields

The Notes are displayed on the bottom of the screen. The note fields are:

1. Note date
2. Note

## SELECT RECORDS

The "Select records" program is the key to using the Sales Leads system. It has been designed to handle almost any function the user may desire in selecting which records to print.

Records may be marked for processing in two ways; a manual selection or an automatic selection. The automatic selection marks all records within the specified criteria. The manual selection allows the user to view records within the specified criteria range on the CRT, and individually mark them.

The "Select records" program automatically de-selects any records that do not match the specified criteria. The print programs will either print all transactions, or only marked transactions.

Each code is a two byte binary number, comprised of sixteen bits. Working right to left through the eight bits, the value of each bit is 1, 2, 4, 8, 16, 32, 64, 128, 256, 512, 1024, 2048, 4096, 8192, 16384, and 32768. When more than one bit is set, the total value of the number will be the sum of the numbers represented by the bits. To get the most out of your coding scheme, you should assign each of the sixteen bits in a code to stand for a "condition". Then the select program can select on any combination of sixteen "conditions" for each code, by entering a code mask that is the number representing the requested "conditions".

You can select master records that do not have any corresponding notes.

The records are processed in S/L key order.

## Operating Steps

The operating steps are:

1. Enter the category number to be marked, or "All" for all categories. This number must be an exact match (not a mask).
2. Enter the salesman number to be marked, or "All" for all salesmen. This number must be an exact match (not a mask).
3. Enter the promotion number to be marked, or "All" for all promotions. This number must be an exact match (not a mask).
4. Enter the class code mask to be marked, or "All" for all class codes.
5. Enter the type code mask to be marked, or "All" for all type codes.
6. Enter the action code mask to be marked, or "All" for all action codes.
7. Enter the status code mask to be marked, or "All" for all status codes.
8. Enter the file date range to be marked.
9. Enter the update date range to be marked.
10. Enter the action date range to be marked.
11. Enter the state code mask to be marked, or "All" for all state codes.
12. Enter the zip code range to be marked, or "All" for all zip codes.
13. Enter the "No notes" option. If "Yes", masters with no corresponding notes will be marked.
14. Enter the mark option. Enter "All" to automatically mark all records that match the selection criteria. Enter "Individual" to manually select individual records within the selection criteria.

The records will now be processed. The total number of records marked will then be displayed.

## UPDATE CODES & ACTION DATE

This program updates the S/L Master codes and next action date for selected records. It only processes selected records; you must select records to process before running this program. An audit trail of updated records will be printed.

For a code to be updated, you must define both the old value and the new value for the code. Codes that are not to be updated should be given the value of "Skip".

The records are processed in S/L key order.

## Operating Steps

The operating steps are:

1. Select the printer number for this report. One of sixteen different printers may be selected. The printer name will appear to the right of the printer number. The printer number will default to the operator printer number.

The report can be displayed on the screen by selecting the "CRT Screen" printer. In this case, a screen at a time will be displayed, and you will be asked to press the MENU key to abort the report, or any other key to display the next screen.

2. Prepare the printer by loading it with 132-column paper. Set the paper in the printer to the first line of a new page.
3. Enter the number of copies of the report desired. Default is 1.
4. Enter the run date in MMDDYY format. Default is the system date.
5. Enter the old code values.

Enter the old code values for category, salesman, promotion, class, type, action, and status. Enter "Skip" to not update the code.

6. Enter the new code values.

Enter the new code values for category, salesman, promotion, class, type, action, and status. Enter "Skip" to not update the code.

7. Enter the new next action date

Enter the new next action date. If you enter a blank new next action date, the S/L Master next action date will be cleared.

## Report Fields

1. S/L Master key

2. Company name
3. Address line one
4. Address line two
5. City
6. State

The first twelve characters.

## CREATE MAIL MERGE FILE

This program creates a mail merge (sequential) output file, from selected Sales Leads Master File records. The mail merge file name will be displayed on your terminal screen; the file will be located in the company PPN. The program outputs selected fields in a user specified order.

The program uses a display format identical to the "Master file maintenance" program. Place a non-zero digit in each field to be output. The number will determine the order in which the fields will be printed; it's OK to increment the numbers by other than one.

The records are processed in S/L key order.

## Operating Steps

The operating steps are:

1. Enter the "Marked only" option.  
  
Enter "Yes" to only process records marked by the "Select records" program. Enter "No" to process all records.
2. Enter the field prefix character used by the mail merge program (a character immediately preceding each data element).
3. Enter the field suffix character used by the mail merge program (a character immediately following each data element).

4. Enter the field delimiter string used by the mail merge program (a character between each data element). Control characters are identified by a preceding "\*" (e.g. tab, which is a control-I is denoted as "\*I").
5. Enter the record delimiter string used by the mail merge program (a character following each data record). Control characters are identified by a preceding "\*" (e.g. carriage return, which is a control-M is denoted as "\*M").
6. Enter a number in the range 1-99 to identify the fields and the order of the fields to be output; skip by 5 numbers for each field so that you can insert without renumbering.

The records will now be processed. The number of records created will be displayed after processing.

## CREATE INTERCHANGE FILE

This program creates a mail merge (sequential) output file, from selected Sales Leads Master File records. This file is used for data interchange between the Alpha Micro and any other computer system. The mail merge file name will be displayed on your terminal screen; the file will be located in the company PPN.

The records are processed in S/L key order.

## Operating Steps

1. Enter the "Marked only" option.
2. Enter "Yes" to only process records marked by the "Select records" program. Enter "No" to process all records.

The records will now be processed. The number of records created will be displayed after processing.

## Record Fields

The output record is 256 bytes in length; 254 data bytes followed by a carriage return and line feed. All fields are ASCII display format. Numbers are zero filled to the left of the most significant digit. Strings are padded to the right with spaces. Dates are in YYMMDD format (year month day).

The record fields, and their lengths are listed below:

1. Contact Name

Thirty alphanumeric characters. Names can be entered as "last name; first name" optionally with one or more spaces after the semicolon. (e.g. "Dr. Bill Smith" could be entered as "Smith; Dr. Bill").

2. Salutation

Twenty-four alphanumeric characters. Some examples are "Dr. Smith", and "Bill".

3. Company Name

Thirty alphanumeric characters.

Company names can be entered as "last name; first name" optionally with one or more spaces after the semicolon. (e.g. "Dr. Bill Smith" could be entered as "Smith; Dr. Bill").

4. Address Line 1

Thirty alphanumeric characters.

5. Address Line 2

Thirty alphanumeric characters.

6. City

Fifteen alphanumeric characters.

7. State/country

Fourteen alphanumeric characters.

8. Postal Code

Ten alphanumeric characters.

9. Phone

Seventeen alphanumeric characters in free format. Although this field is free format, Starr Accounting users normally use xxx-xxxx or xxx-xxx-xxxx format for phone numbers, since the "Update zip data" program can update area codes if phone numbers are entered using these formats.

10. Category Number  
Five numeric digits.
11. Salesman Number  
Five numeric digits.
12. Class Code  
Five numeric digits.
13. Type Code  
Five numeric digits.
14. Action Code  
Five numeric digits.
15. Status Code  
Five numeric digits.
16. File Date
17. YYYYMMDD format, or eight spaces if no date.
18. Update Date
19. YYYYMMDD format, or eight spaces if no date.
20. Last Action Date
21. YYYYMMDD format, or eight spaces if no date.
22. Next Action Date
23. YYYYMMDD format, or eight spaces if no date.
24. Filler  
Twelve spaces.

- 25. Carriage Return
- 26. Line Feed

## UPDATE S/L FROM A/R CUSTOMER FILE

This program creates or updates Sales Lead Master records using the A/R Customer Master file. If the A/R Customer key does not exist on the S/L Master file, the S/L record is added. If the A/R Customer key already exists on the S/L Master file, the S/L record can be optionally updated.

The records are processed in S/L key order.

### Operating Steps

The operating steps are:

1. Enter the "Update existing S/L" option. Enter "Yes" to update existing S/L master records with the current A/R Customer data. The following S/L Master fields will be updated:
  - a) Company name
  - b) Contact name
  - c) Address line one
  - d) Address line two
  - e) City
  - f) State
  - g) Zip or postal code
  - h) Phone
  - i) Category or class  

An option exists to load the customer class code into either S/L category or class.
  - j) Salesman number
  - k) Update date

2. Enter the customer code to process, or "All" for all customer code. This number must be an exact match (not a mask).
3. Enter the A/R customer code load option. Enter "1" to load the customer code into S/L category. Enter "2" to load the customer code into S/L class.
4. Enter the salesman number to process, or "All" for all salesmen. This number must be an exact match (not a mask).
5. Enter the customer last sale date range to match.

The records will now be processed. Adds, duplicate, and update counts will be displayed after processing.

## **DELETE S/L IF A/R CUSTOMER**

This program to deletes S/L Masters and the corresponding notes when an A/R Customer record has the same key as the S/L Master. Used to delete leads after they become customers. Produces an audit trail of deleted records.

The records are processed in S/L key order.

## **Operating Steps**

The operating steps are:

8. Select the printer number for this report. One of sixteen different printers may be selected. The printer name will appear to the right of the printer number. The printer number will default to the operator printer number.

The report can be displayed on the screen by selecting the "CRT Screen" printer. In this case, a screen at a time will be displayed, and you will be asked to press the MENU key to abort the report, or any other key to display the next screen.

9. Prepare the printer by loading it with 132-column paper. Set the paper in the printer to the first line of a new page.
10. Enter the number of copies of the report desired. Default is 1.
11. Enter the run date in MMDDYY format. Default is the system date.

12. Enter the "Marked only" option.

Enter "Yes" to only process records marked by the "Select Records" program; else processes all records.

## Report Fields

1. S/L Master key
2. Company name
3. Address line one
4. Address line two
5. City
6. State

The first twelve characters.

## UPDATE ZIP DATA

This program updates the S/L Master city, state, and area code using the zip code database. For phone area codes to be updated, they must have been entered into the customer master record in the format xxx-xxx-xxxx.

## Operating Steps

The operating steps are:

1. Select the printer number for this report. One of sixteen different printers may be selected. The printer name will appear to the right of the printer number. The printer number will default to the operator printer number.

The report can be displayed on the screen by selecting the "CRT Screen" printer. In this case, a screen at a time will be displayed, and you will be asked to press the MENU key to abort the report, or any other key to display the next screen.

2. Prepare the printer by loading it with 132 column paper. Set the paper in the printer to the first line of a new page.

3. Enter the number of copies of the report desired. Default is 1.
4. Enter the run date in MMDDYY format. Default is system date.
5. Enter the "Update S/L masters" option. Enter "Yes" to update the S/L Master file.
6. Enter the "Print detail" option. Enter "Yes" to print an audit trail of changes.

## Report Fields

The report fields are:

1. S/L Master key
2. Customer name
3. Zip code
4. Old city
5. Old state
6. Old phone numbers
7. New city
8. New state
9. New phone numbers

## PRINT MASTER/NOTES

This program prints selected Sales Leads master information, and all associated notes.

The report can be produced in the following orders:

1. S/L key order
2. Zip, company name order
3. State, company name order

## Operating Steps

The operating steps are:

1. Select the printer number for this report. One of sixteen different printers may be selected. The printer name will appear to the right of the printer number. The printer number will default to the operator printer number.

The report can be displayed on the screen by selecting the "CRT Screen" printer. In this case, a screen at a time will be displayed, and you will be asked to press the MENU key to abort the report, or any other key to display the next screen.

2. Prepare the printer by loading it with 132-column paper. Set the paper in the printer to the first line of a new page.
3. Enter the number of copies of the report desired. Default is 1.
4. Enter the run date in MMDDYY format. Default is the system date.
5. Enter the "Marked only" option. Enter "Yes" to only process records marked by the "Select records" program. Enter "No" to process all records.
6. Enter the report heading.
7. Enter the beginning zip code to be marked, or "All" for all zip codes.
8. Enter the ending zip code to be marked, or "All" for all zip codes.
9. Enter the S/L customer key group to process, or "All" for all customers.

## Master Report Fields

The report has four lines for each master. The report fields are:

### Line one:

1. Company name
2. S/L customer master key
3. File date

**Line two:**

1. Address line one
2. Contact name
3. Update date

**Line three:**

1. Address line two
2. Salutation
3. Category code
4. Salesman number
5. Class code
6. Type code
7. Action code
8. Status code
9. Flag
10. Last action date

**Line four:**

1. City, state, zip
2. Phone number and extension
3. Next action date

**Notes Report Fields**

The report fields are:

1. Date

2. Note

## PRINT NOTES

This program prints abbreviated Sales Leads master information, and all associated notes that fall within a specified note date range.

The report is produced in S/L key, note date order.

## Operating Steps

The operating steps are:

1. Select the printer number for this report. One of sixteen different printers may be selected. The printer name will appear to the right of the printer number. The printer number will default to the operator printer number.

The report can be displayed on the screen by selecting the "CRT Screen" printer. In this case, a screen at a time will be displayed, and you will be asked to press the MENU key to abort the report, or any other key to display the next screen.

2. Prepare the printer by loading it with 132-column paper. Set the paper in the printer to the first line of a new page.
3. Enter the number of copies of the report desired. Default is 1.
4. Enter the run date in MMDDYY format. Default is the system date.
5. Enter the note date range to process.
6. Enter the S/L customer key group to process, or "All" for all customers.

## Master Report Fields

The report fields are:

1. S/L customer master key
2. Company name

3. Address line one
4. City
5. State
6. Zip code
7. Phone number

### **Notes Report Fields**

The report fields are:

1. Date
2. Note

### **PRINT LABELS**

This program produces 3.2 x 15/16 x 1 to 4-up labels. Labels can be printed by various selection criteria. A lineup option is also provided.

The labels may be printed in the following orders:

1. S/L customer key order
2. Zip, company name order
3. State, company name order

### **Operating Steps**

The operating steps are:

1. Select the printer number for this report. One of sixteen different printers may be selected. The printer name will appear to the right of the printer number. The printer number will default to the operator printer number.

The report can be displayed on the screen by selecting the "CRT Screen" printer. In this case, a screen at a time will be displayed, and you will be asked to press the MENU key to abort the report, or any other key to display the next screen.

2. Prepare the printer by loading it with labels. Set the paper in the printer to the first line of a new page.
3. Enter the number of copies of the report desired. Default is 1.
4. Enter the run date in MMDDYY format. Default is the system date.
5. Line up the labels in the printer via the "Lineup labels" option.
6. Enter how many labels across the page.
7. Enter how many copies of each set of labels to print. For example, if two were entered, the program would print two labels for the first vendor, then two labels for the second vendor, etc.
8. Enter the "Marked only" option. Enter "Yes" to only process records marked by the "Select records" program. Enter "No" to process all records.
9. Enter the attention line, or "None" for no attention line. Default is "None". If an attention line is entered, the attention line will replace the contact name. If you want a blank attention line, enter the DELETE LINE key in the attention line.
10. Enter the beginning zip code to process, or "All" for all zip codes. Default is "All".
11. Enter the ending zip code to process, or "All" for all zip codes. Default is "All".
12. Enter the S/L key group to process, or "All" for all S/L keys. Default is "All".
13. Enter how many labels across the page.
14. Enter how many copies of each set of labels to print. For example, if two were entered, the program would print two labels for the first record, then two labels for the second record, etc.
15. Enter how many lines per label, measuring from the top of one label to the top of the next label. There are six lines per inch.
16. Enter "Yes" to have your printer do a form feed when exiting this program (you want to put regular paper/forms in this printer); else enter "No" (you want to leave labels in this printer).

## Report Fields

The report has six lines for each master. The report fields are:

1. Contact name

This field will be "flipped" if a semi-colon is found; e.g. "Smith; Joe" will be printed as "Joe Smith".

2. Company name

This field will be "flipped" if a semi-colon is found; e.g. "Smith; Joe" will be printed as "Joe Smith".

3. Address line one

4. Address line two

5. City, state, zip code (if room)

Will either be blank, or will contain the zip code

## PURGE MASTER/NOTES

This program purges marked S/L masters and their corresponding notes, and optionally prints an audit trail of purged records.

Orders can be printed in either S/L key or S/L name order.

## Operating Steps

The operating steps are:

1. Select the printer number for this report. One of sixteen different printers may be selected. The printer name will appear to the right of the printer number. The printer number will default to the operator printer number.

The report can be displayed on the screen by selecting the "CRT Screen" printer. In this case, a screen at a time will be displayed, and you will be asked to press the MENU key to abort the report, or any other key to display the next screen.

2. Prepare the printer by loading it with 132-column paper. Set the paper in the printer to the first line of a new page.
3. Enter the number of copies of the report desired. Default is 1.
4. Enter the run date in MMDDYY format. Default is the system date.
5. Enter the print detail option.

Enter "Yes" to print the record detail. Enter "No" to not print the record detail.

## Report Fields

All of the master and note fields are printed. See the "Print master/notes" report documentation for a listing of the fields.

## PURGE NOTES

This program purges S/L notes for a specified date range, and optionally prints an audit trail of purged records.

Orders are printed in S/L key, date order.

## Operating Steps

The operating steps are:

1. Select the printer number for this report. One of sixteen different printers may be selected. The printer name will appear to the right of the printer number. The printer number will default to the operator printer number.

The report can be displayed on the screen by selecting the "CRT Screen" printer. In this case, a screen at a time will be displayed, and you will be asked to press the MENU key to abort the report, or any other key to display the next screen.

2. Prepare the printer by loading it with 132-column paper. Set the paper in the printer to the first line of a new page.
3. Enter the number of copies of the report desired. Default is 1.
4. Enter the run date in MMDDYY format. Default is the system date.

5. Enter the note date range to process.
6. Enter the S/L key group to process.
7. Enter the print detail option.
8. Enter "Yes" to print the record detail. Enter "No" to not print the record detail.

## **Report Fields**

Selected master fields and all note fields are printed. See the "Print notes" report documentation for a listing of the fields.

---

# CHAPTER FOUR SAMPLE REPORTS

This section contains some selected sample reports (edited for brevity).  
See Chapter One for a complete listing of all the standard reports available.  
Control file reports are not included in this section; see the control file documentation.

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MASTER/NOTES FILE REPORT : ALL : S/L KEY ORDER

COMPANY NAME & ADDRESS

KEY, CONTACT, SALUTATION,PHONE CODES, DATES

Allen & Company  
4436 Roswell Road  
Suite 123  
Omaha NE. 68125

ALLEN	CATEG	SLSMN	CLASS	TYPE	ACTN	STATS	FLAG	FILE	DTE=01/31/91
Allen;Jose								UPDT	DTE=
Mr. Allen	1	1	1	1	1	1	0	LAST	ACT=
402-255-9999								NEXT	ACT=02/15/91

--DATE-- --NOTE--  
01/31/91 Interested, but too busy now. Wants a call back in two weeks.

Cox Properties, Inc.  
1334 Perimeter Parkway  
Lincoln NE. 68235

COX	CATEG	SLSMN	CLASS	TYPE	ACTN	STATS	FLAG	FILE	DTE=01/31/91
Shannon;Gary								UPDT	DTE=01/31/91
Mr. Shannon	1	1	1	1	1	1	0	LAST	ACT=
402-394-6666								NEXT	ACT=03/01/91

--DATE-- --NOTE--  
01/31/91 Any of note records can be attached to a master record.  
01/31/91 Each note record can be up to seventy-six characters in length.  
01/31/91 20:04 The current time can be automatically placed at the front of a

2 records printed.

07/15/96 06:43:20

XYZ (SAMPLE) COMPANY  
SALES LEADS

PAGE 1

NOTES FILE : S/L KEY, DATE ORDER : DATES - 07/15/96 : GROUP All

S/L KEY	COMPANY NAME	ADDRESS LINE 1	CITY	ST ZIP	PHONE
ALLEN	Allen & Company	4436 Roswell Road	Omaha	NE 68125	402-255-9999
	-----NOTE-----				
	01/31/91 Interested, but too busy now. Wants a call back in two weeks.				
S/L KEY	COMPANY NAME	ADDRESS LINE 1	CITY	ST ZIP	PHONE
COX	Cox Properties, Inc.	1334 Perimeter Parkway	Lincoln	NE 68235	402-394-6666
	-----NOTE-----				
	01/31/91 Any of note records can be attached to a master record.				
	01/31/91 Each note record can be up to seventy-six characters in length.				
	01/31/91 20:04 The current time can be automatically placed at the front of a				

4 note records printed.



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# DOCUMENT HISTORY

## SALES LEADS USER'S GUIDE

REVISION	RELEASE	DATE	DESCRIPTION
00	4.06	04/01/97	New PDF document; adapted from old format.
01	4.07	07/14/97	September 1, 1997 release
02	4.08	09/01/98	September 1, 1998 release
03	4.09	09/01/99	September 1, 1999 release (no changes in this release)



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# INDEX

- control file
  - maintenance, 3-1
- Conventions used in this book, iv
- daily
  - procedures, 2-1
- delete
  - S/L Master if A/R customer, 3-16
- Filespec, iv
- Graphics conventions, iv
- interchange file, 3-12
- labels, 3-22
- loading initial data, 2-1
- mailmerge file, 3-11
- master file
  - maintenance, 3-2
- master/notes
  - inquiry, 3-6
  - purge, 3-24
  - report, 3-18
- month end
  - procedures, 2-2
- notes
  - purge, 3-25
- notes
  - report, 3-21
- notes file
  - maintenance, 3-6
- reader's comment form, iii
- record flag, 3-2
- select records, 3-8
- special procedures, 2-1
- system
  - design, 1-2
  - features, 1-1
  - main programs, 1-3
- update
  - codes & action date, 3-9
  - update from customer file, 3-15
  - update zip data, 3-17
- Web
  - documentation, iii
- year end
  - procedures, 2-2



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# READER'S COMMENTS

We appreciate your help in evaluating our documentation efforts. Please feel free to attach any additional comments.

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Organization: \_\_\_\_\_

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City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

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