Apple III

Mail List Manager

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10260 Bandley Drive
Cupertino, California 95014
(408) 996-1010

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Apple Product #A3D0003

Apple III

Mail List Manager

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Introduction

This manual explains how to use the Apple III Mail List Manager. Before you begin reading it, you should read the sections of the Apple III Owner's Guide on setting up your Apple III and using the Apple III Utilities diskette to format and make backup copies of diskettes.

How to Use This Manual

You need no computer experience to use the Mail List Manager. Consequently, this manual was written with the inexperienced user in mind.

Chapter 1 introduces you to the capabilities of the Mail List Manager and describes the equipment you need to use it. It also describes the way one hypothetical user uses the Mail List Manager in her business.

Chapter 2 is a brief tutorial that takes you step-by-step through starting up the Mail List Manager and creating, modifying, sorting, and printing a mailing list.

Chapter 3 through Chapter 9 contain in-depth descriptions of Mail List Manager features. Each of these chapters, with the exception of Chapter 4, concludes with a brief exercise that lets you try out the feature described in that chapter.

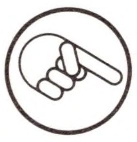
Appendix A describes Soundexing, the method used by the Mail List Manager to find similar-sounding names.

Appendix B is a list of some of the error messages that may appear on your screen and what causes them.

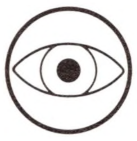
This manual concludes with a glossary and an in-depth index. A tear-out reference card containing a list of the keys used in entering and editing mailing record information is located on the last page of this book.

Special Symbols

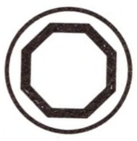
Three special symbols appear in this manual to alert you to helpful information.



This symbol precedes "helping hand" information, which includes hints and extra details about the procedure discussed.



This symbol precedes a description of a special or unusual feature of the Mail List Manager.



This symbol precedes a warning that you are about to destroy data or harm hardware.

Pay careful attention to the information below these symbols. It can help make your sessions with the Mail List Manager even more productive and useful.

1

Getting Started

4 A Case Study
6 Equipment You Will Need
7 The Mail List Menu

1

Getting Started

The Apple III Mail List Manager is a powerful, easy-to-use system that lets you create, update, and print lists of mailing labels. You can enter and save mailing label information on diskette. You then can find, modify, or delete labels on your list, and rearrange the labels into a different order. You also can print or display selected records on your mailing list as well as merge labels from different mailing lists to create new mailing lists.

The Mail List Manager gives you complete flexibility in choosing the kind of information you put on your mailing labels and where that information is placed. Some people want mailing labels to be brief: name on the first line; street address on the second; city, state, and zip code on the third. Others need to include additional information, such as the addressee's title, company name, and mail stop.

In addition to letting you record the information that routinely appears on a mailing label, the Mail List Manager also lets you record additional background information about each addressee on your list. In the world of the Mail List Manager, all of the information that you record about an addressee is called a record. All of the information that appears on a label when it is printed is called, as you might expect, a label. Thus, a mailing label is part of a mailing record. An addressee's phone number, for example, is usually included in a mailing record but rarely in a mailing label.

The kind of information you choose to place on your mailing records will depend upon how your mailing list is used. An insurance agent might record the kind of policies each client has purchased, policy numbers, expiration dates, and premium amounts. A fund-raiser might want to keep track of donor's contributions over the past several years while a newsletter editor would need to know the date each subscriber's subscription comes due.

This additional record information is often used to create subsets of a mailing list. The insurance agent, for example, might want to print a mailing list that contains records of clients who have purchased homeowner's insurance or whose premiums exceed a specified amount.

People who use mailing lists also differ when it comes to the order in which they want their labels printed. Some people want labels printed by zip code; others need them arranged alphabetically by company name or by the addressee's last name. Here again, the Mail List Manager lets you choose what's best for you.

Even though, at this point, your knowledge of the Mail List Manager is limited, it should be apparent that the Mail List Manager is filled with features that let you customize your mailing list to suit your own needs. But rather than starting out with a detailed explanation of each of these features, it seems more sensible to describe how one hypothetical Apple III user has chosen to use the Mail List Manager.

The next section of this chapter is such a description. This description does not provide you with the specific steps our user has taken to create and use her mailing list. Rather, its purpose is to show you that the Mail List Manager is a highly versatile tool that lets you do far more than simply print lists of mailing labels. The exercises at the end of Chapters 3, 5, 6, 7, 8 and 9 use mailing lists similar to the list described in the following section.

The description is followed by a discussion of the equipment you need to use the Mail List Manager and a brief overview of the Mail List Manager's capabilities.

A Case Study

Francine Barnett, manager of a six-building apartment complex, has just purchased the Apple III Mail List Manager to help her with the numerous mailings she routinely sends to tenants.

After buying the Mail List Manager, Francine's first task was to create a mailing record for each of the 900 tenants who live in her apartment complex. Each record included not only the tenant's name, apartment number, street address, city, state, and zip code, but also the tenant's phone number, the date he or she moved in, and a special building code that designates what building in the complex the tenant lives in.

When a tenant moves out, Francine simply deletes the tenant's mailing record. Similarly, when a tenant moves in, she adds a record. If a tenant changes apartments, she modifies the appropriate record.

One Mail List Manager feature Francine finds especially useful is the ability to look through a mailing list and print those labels that fit a particular criterion. Francine uses this feature to notify tenants whose rents are overdue. Her method works like this: When a tenant sends in a rent payment, Francine uses the Mail List Manager's searching capability to locate the tenant's record and then record that the rent has been paid. Then, on the 10th of each month, she uses the Mail List Manager to search through her list and print the records of those tenants who have not sent in their checks.

Francine uses a feature of the Mail List Manager called label codes to record additional information about each tenant. This information includes the number of rooms in the tenant's apartment, the month the lease expires and whether the apartment has a view. Francine uses these label codes to print subsets of her mailing list.

Suppose, for example, that Francine decides that during 1981 the rents of all tenants living in 1-bedroom apartments with views and 2-bedroom apartments without views will increase by $60 a month. At the beginning of each month, Francine uses label codes to print the labels of tenants whose leases expire in 60 days and whose apartments fit one of these classifications and sends them notice of the pending rise in rent.

Equipment You Will Need

The Mail List Manager requires an Apple III computer with a minimum of 128K bytes of memory, a monitor and at least one external disk drive in addition to the Apple III's built-in disk drive.

A diskette can hold a maximum of 960 records. If you want to merge records stored on different diskettes to create new mailing lists, you need at least two external disk drives. Complete information about merging mailing lists is included in Chapter 9.

The Mail List Manager is a program stored on a standard Apple III diskette. The diskette that contains the Mail List Manager program is called the system diskette. Your Mail List Manager package includes one system diskette and one blank diskette. Place a write-protect sticker over the notch on the system diskette so you cannot inadvertently change or remove the information written on it. Then make a copy of the system diskette using the Apple III Utilities diskette and keep the original in a cool, safe place.

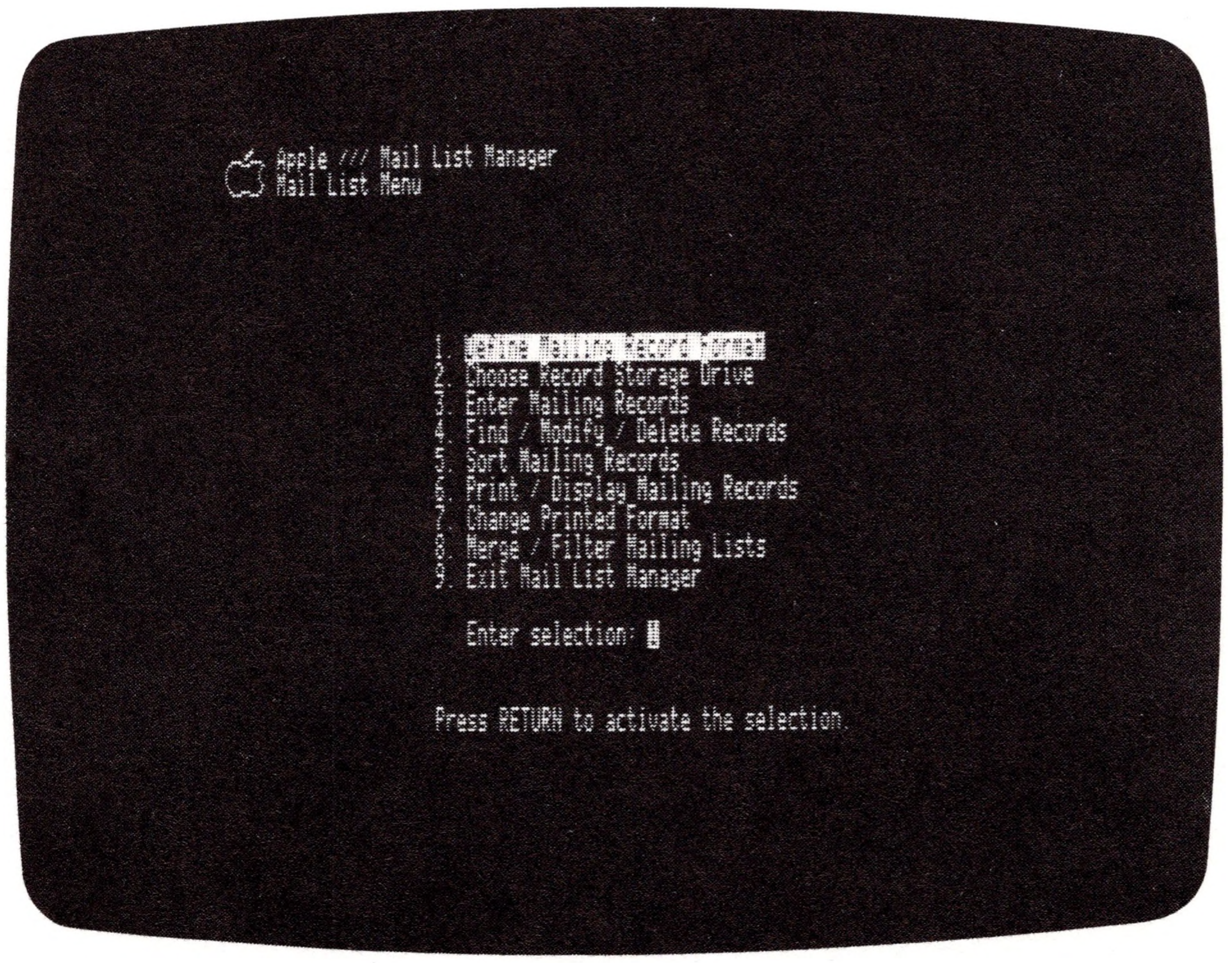
To use the Mail List Manager you also need several formatted diskettes. These diskettes are used for storing mailing records and are called mailing records diskettes.

Although you do not need to attach a printer to your Apple III when creating or modifying mailing records, you do need to attach a printer when you are ready to print mailing labels. Refer to the Apple III Owner's Guide for information about using a printer with the Apple III.

The Mail List Manager comes equipped to print labels using a Qume Sprint 5 printer or a Silentype III. If you plan to use a different printer, your system diskette must be modified. Your local dealer can help you do this, or you can do it yourself using the System Configuration Program. Instructions on using the System Configuration Program are included in the Apple III Standard Device Drivers manual.

The Mail List Menu

The Mail List Manager is a "menu driven" program. This means that when using the Mail List Manager the screen frequently displays a list of options from which you can choose. The menu that you see most often is called the Mail List Menu. Here is what it looks like:



```
Apple /// Mail List Manager
Mail List Menu



                    1. Define Mailing Record Format
                    2. Choose Record Storage Drive
                    3. Enter Mailing Records
                    4. Find / Modify / Delete Records
                    5. Sort Mailing Records
                    6. Print / Display Mailing Records
                    7. Change Printed Format
                    8. Merge / Filter Mailing Lists
                    9. Exit Mail List Manager

                       Enter selection: █

                    Press RETURN to activate the selection.
```

Figure 1-1. Mail List Menu

The following is a brief description of each of the options on the Mail List Menu. Once you have completed this manual, you will fully understand the capabilities of each one.

1. DEFINE MAILING RECORD FORMAT - This option lets you specify the kind of information that your mailing records will contain. The Mail List Manager provides a standard format that is predefined for you. When you use the standard format, your mailing labels include the addressee's name, company, address, city, state, and zip code. You can use the standard format, modify the standard format, define your own format or use or modify a previous format. This option also lets you specify the number of lines on each mailing label, the maximum number of characters per line, and the method the Mail List Manager will use to find and sort records in your mailing list. Chapter 3 describes how to define a mailing record format.

2. CHOOSE RECORD STORAGE DRIVE - Option 2 lets you indicate to the Mail List Manager the number of the disk drive that contains your mailing records diskette. You use this option each time you change mailing records diskettes. Choosing this option also causes the diskette directory, which includes the mailing list name and the number of records on the diskette, to be displayed. Chapter 4 describes choosing a storage drive.

3. ENTER MAILING RECORDS - Option 3 lets you enter mailing records into your mailing list. After you enter a mailing record, the Mail List Manager stores that record on your mailing records diskette. Before you can begin entering mailing records, you must define a mailing record format. Chapter 5 describes how to enter mailing records.

4. FIND / MODIFY / DELETE RECORDS - Option 4 lets you find a record on a mailing records diskette and then, if you wish, modify the record or delete it from your the diskette. Chapter 6 explains the procedures for finding, modifying, and deleting records.

5. SORT MAILING RECORDS - Option 5 lets you change the order of the records on your mailing records diskette. You may, for example, want to sort your records in alphabetical order by the addressee's last name or in numerical order by zip code. Chapter 7 describes how to sort records.

6. PRINT / DISPLAY MAILING RECORDS - Option 6 lets you print or display a list of mailing records, mailing labels or names and phone numbers. Using this option, you also can print or display selected records on your mailing list such as the records of all individuals who work for a particular company or are members of a particular committee. This option is also used to tell the Mail List Manager the physical dimensions of your mailing labels so that printed mailing information is properly positioned. Chapter 8 describes this option.

7. CHANGE PRINTED FORMAT - This option is used to tell the Mail List Manager the dimensions of the labels you will be using. The Mail List Manager "remembers" from session to session, the dimensions you set using this option. Chapter 8 describes this option.

8. MERGE / FILTER MAILING LISTS - Option 8 lets you combine records from two or more mailing lists to create a new mailing list, sort a mailing list that occupies more than one diskette,

and choose selected records from a mailing list to create a smaller mailing list. Chapter 9 explains merging and filtering mailing lists.

9. EXIT MAIL LIST MANAGER - Option 9 lets you exit from the Mail List Manager and start another program. Chapter 2 describes exiting from the Mail List Manager.

2

Trying It Out

13 Starting Up
16 Choosing a Mail List Menu Option
17 Choosing Your Mailing Record Format
20 Entering Mailing Record Information
25 Correcting Errors
26 Entering More Records
27 Modifying a Record
31 Sorting Mailing Records
32 Looking at Your Labels

2

Trying It Out

This chapter gives you step-by-step instructions for creating, modifying, sorting, and displaying a sample mailing list. Figure 2-1 shows the options on the Mail List Menu that you will use in this chapter and the order in which you will use them.

Before you begin this chapter, make sure that you have a formatted diskette on which to store your sample mailing list. You either can use a blank formatted diskette or a diskette that contains information you no longer need.

Starting Up

Place the Mail List Manager system diskette into the built-in drive and close the drive door. First turn on the monitor. Next, turn the power switch located on the back left side of the Apple III to the "on" position, or, if your Apple III is already turned on, restart it by holding down the CONTROL key

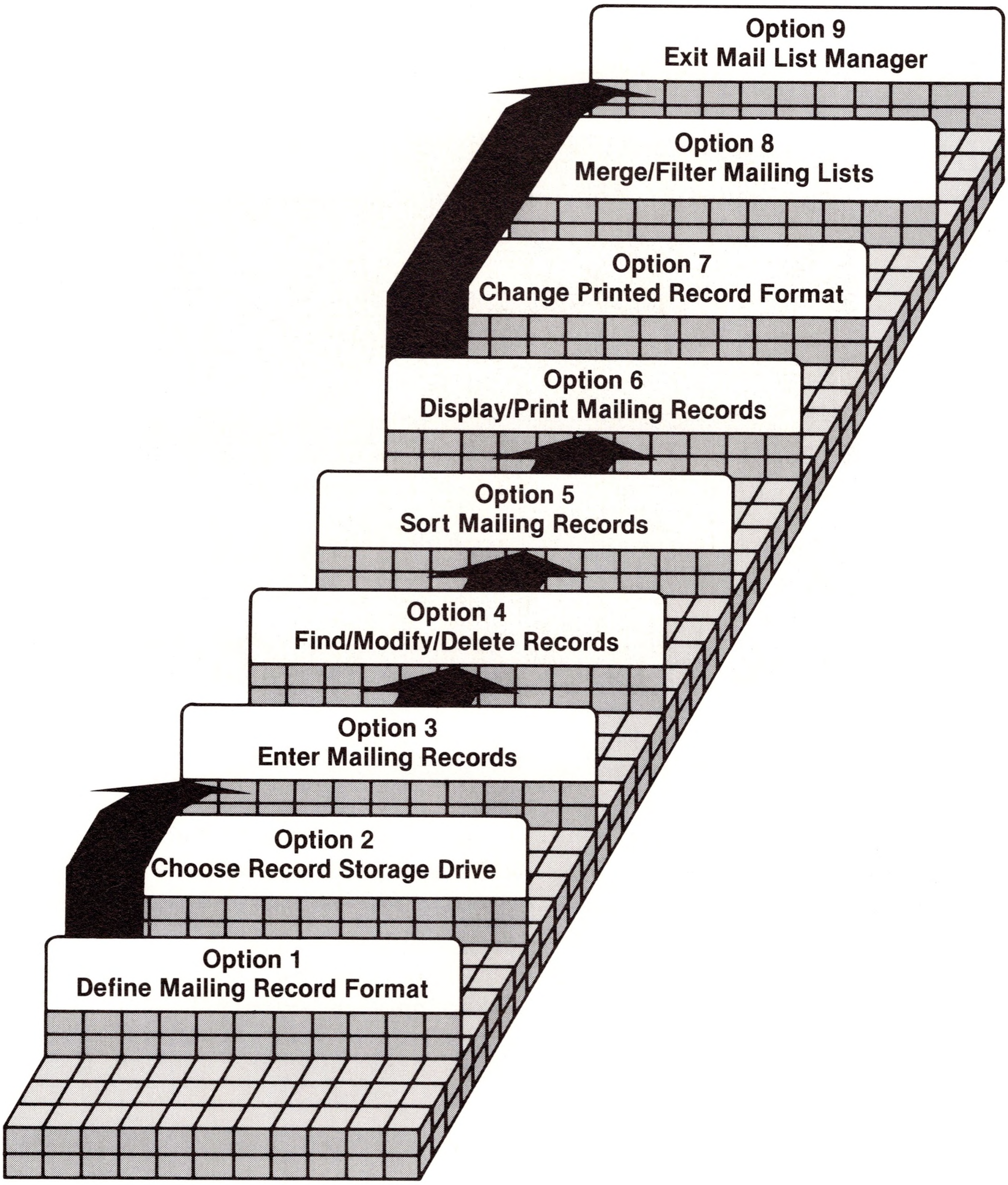
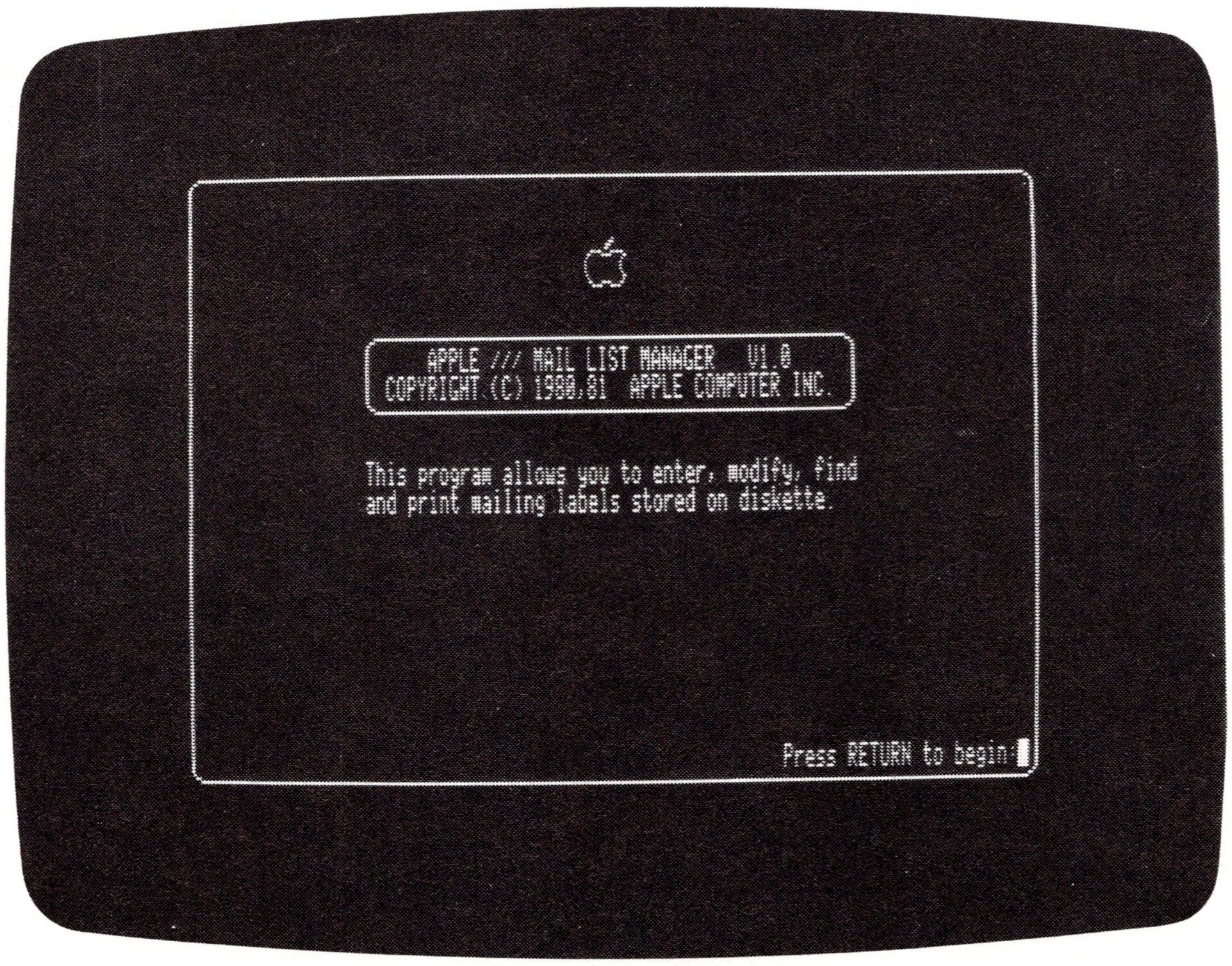

Option 9
Exit Mail List Manager
Option 8
Merge/Filter Mailing Lists
Option 7
Change Printed Record Format
Option 6
Display/Print Mailing Records
Option 5
Sort Mailing Records
Option 4
Find/Modify/Delete Records
Option 3
Enter Mailing Records
Option 2
Choose Record Storage Drive
Option 1
Define Mailing Record Format

Figure 2-1. Overview of Menu Options Used in Chapter 2

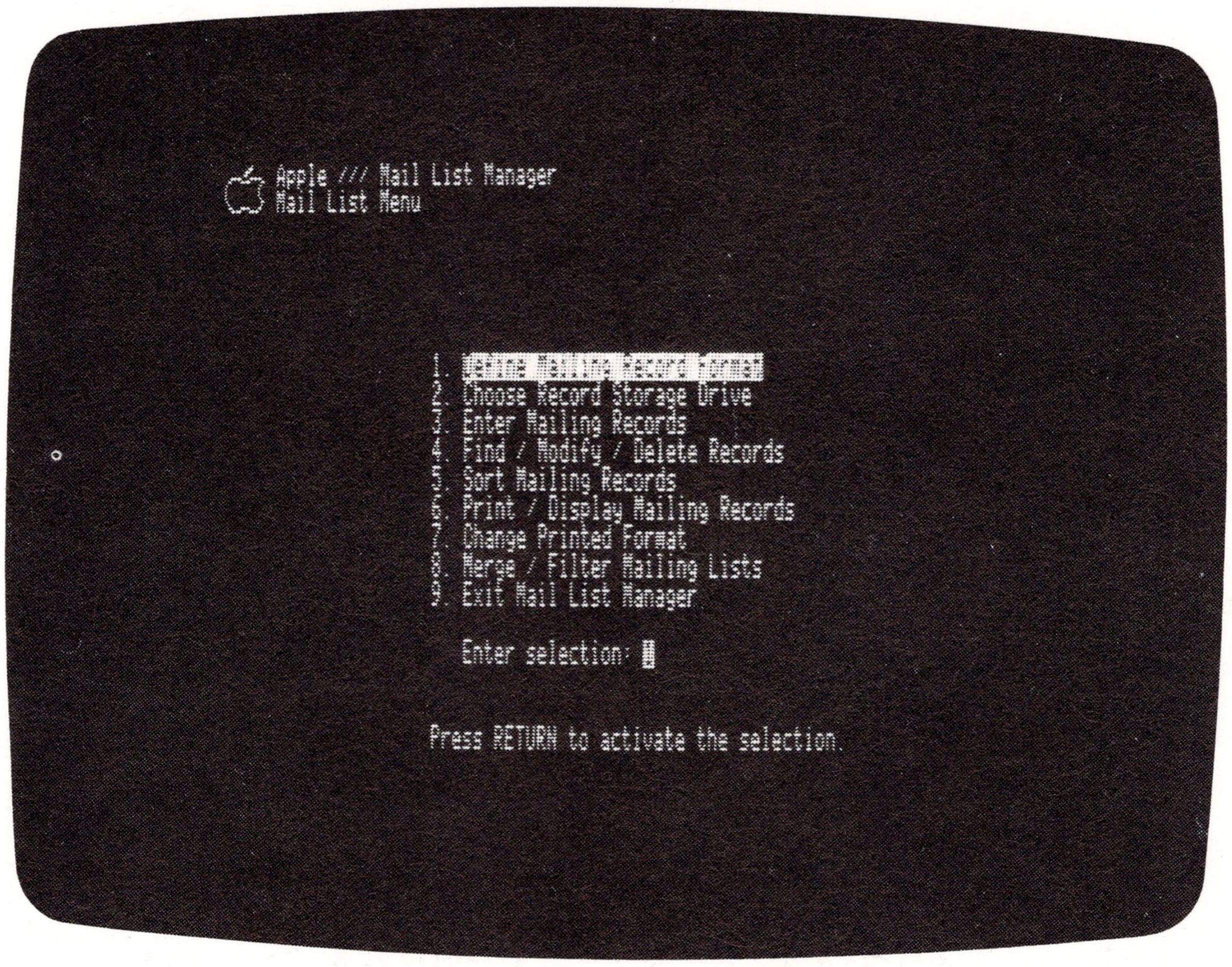
and pressing the RESET button on the back right side of the keyboard. The Apple III takes several moments to load the Mail List Manager program. Then the introductory screen appears:



```
     APPLE /// MAIL LIST MANAGER   V1.0
 COPYRIGHT (C) 1980,81  APPLE COMPUTER INC.

This program allows you to enter, modify, find
and print mailing labels stored on diskette.

                                Press RETURN to begin:
```

Figure 2-2. Introductory Screen

To begin using the Mail List Manager, press the RETURN key, as you are prompted to do. The Mail List Menu appears on the screen.



```
Apple /// Mail List Manager
Mail List Menu

1. Define Mailing Record Format
2. Choose Record Storage Drive
3. Enter Mailing Records
4. Find / Modify / Delete Records
5. Sort Mailing Records
6. Print / Display Mailing Records
7. Change Printed Format
8. Merge / Filter Mailing Lists
9. Exit Mail List Manager

   Enter selection: █

Press RETURN to activate the selection.
```

Figure 2-3. Mail List Menu

Choosing a Mail List Menu Option

Notice the two cursors, or white boxes, on the screen. The large rectangular cursor identifies the currently selected option. The small square cursor tells you the number of that option. Notice that option 1, Define Mailing Record Format, is currently selected.

You can change the currently selected option either by typing the number of the option you want to select or by using the UP-ARROW and DOWN-ARROW keys to move the cursor to the option you want to select.

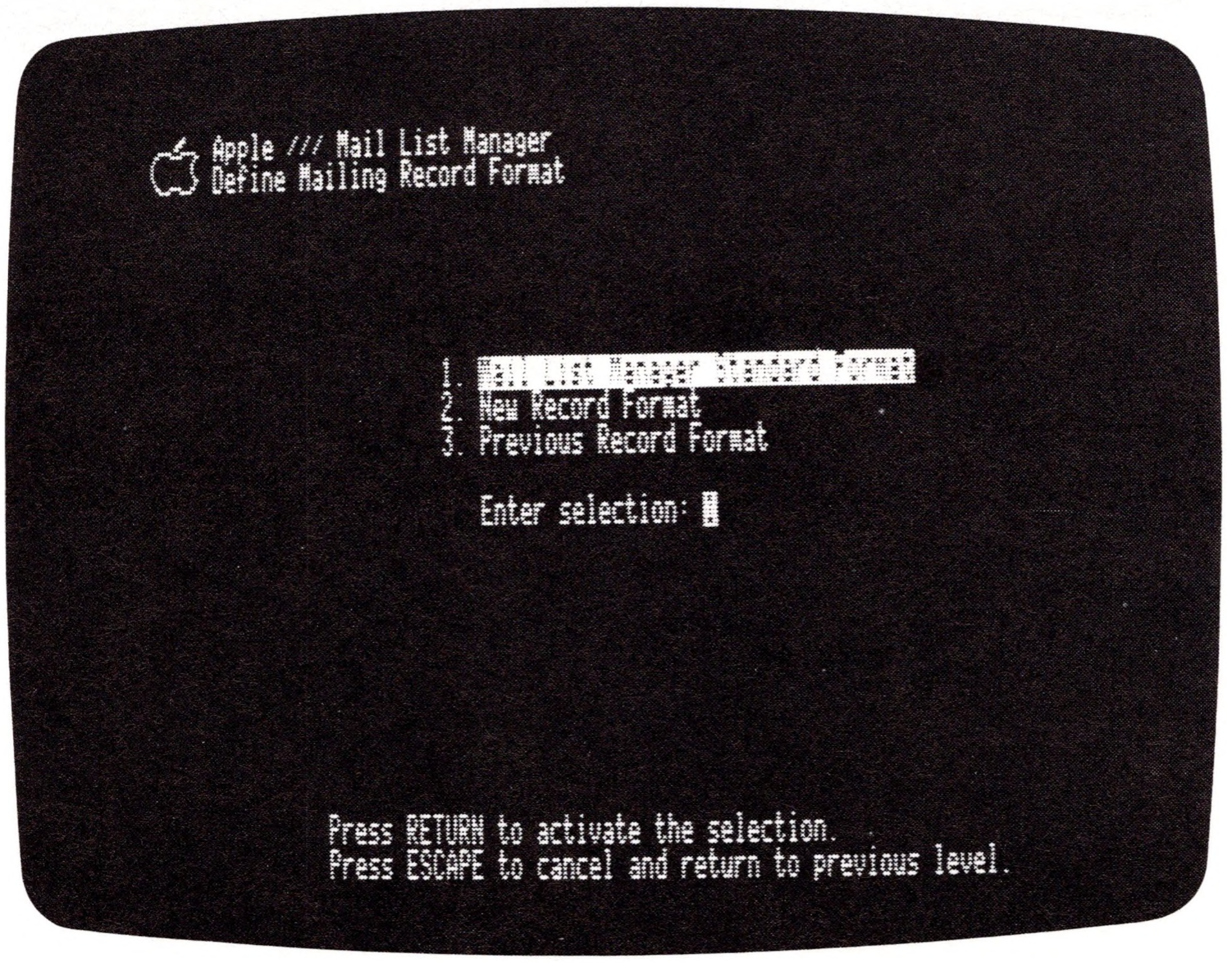
If you type the number of an option and then decide that you want to choose a different option, simply type the new number of the option that you want to select.

Take a minute or two now to practice moving the cursor on the Mail List Menu screen.

Choosing Your Mailing Record Format

Before you can begin typing or entering mailing records, you must define a record format. The record format lets you specify the kind of information your mailing records can contain. Chapter 3 gives you a detailed explanation of defining a record format. Make sure you read that chapter before you use the Mail List Manager to create your own mailing list.

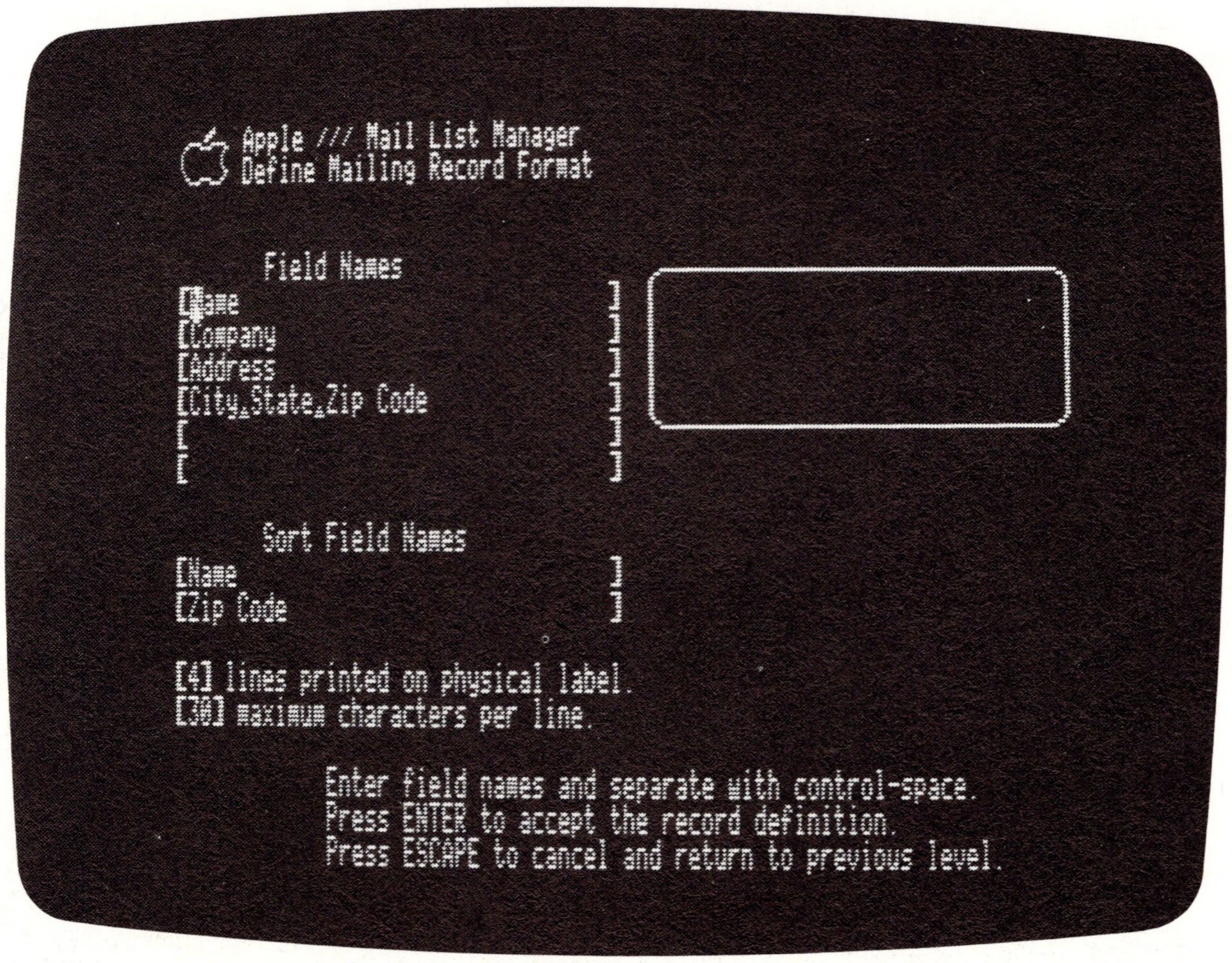
To define a format, select option 1, DEFINE MAILING RECORD FORMAT, from the Mail List Menu by typing 1 and pressing the RETURN key. The screen displays:



```
Apple /// Mail List Manager
Define Mailing Record Format



                    1. Mail List Manager Standard Format
                    2. New Record Format
                    3. Previous Record Format

                       Enter selection: █




               Press RETURN to activate the selection.
               Press ESCAPE to cancel and return to previous level.
```

Figure 2-4. Choose Record Format

In this example, we do not want to create a new format, but instead we'll use the standard format. Since the cursor is already placed at option 1, Mail List Manager Standard Format, you don't need to type 1; simply press the RETURN key. The screen displays the standard format:



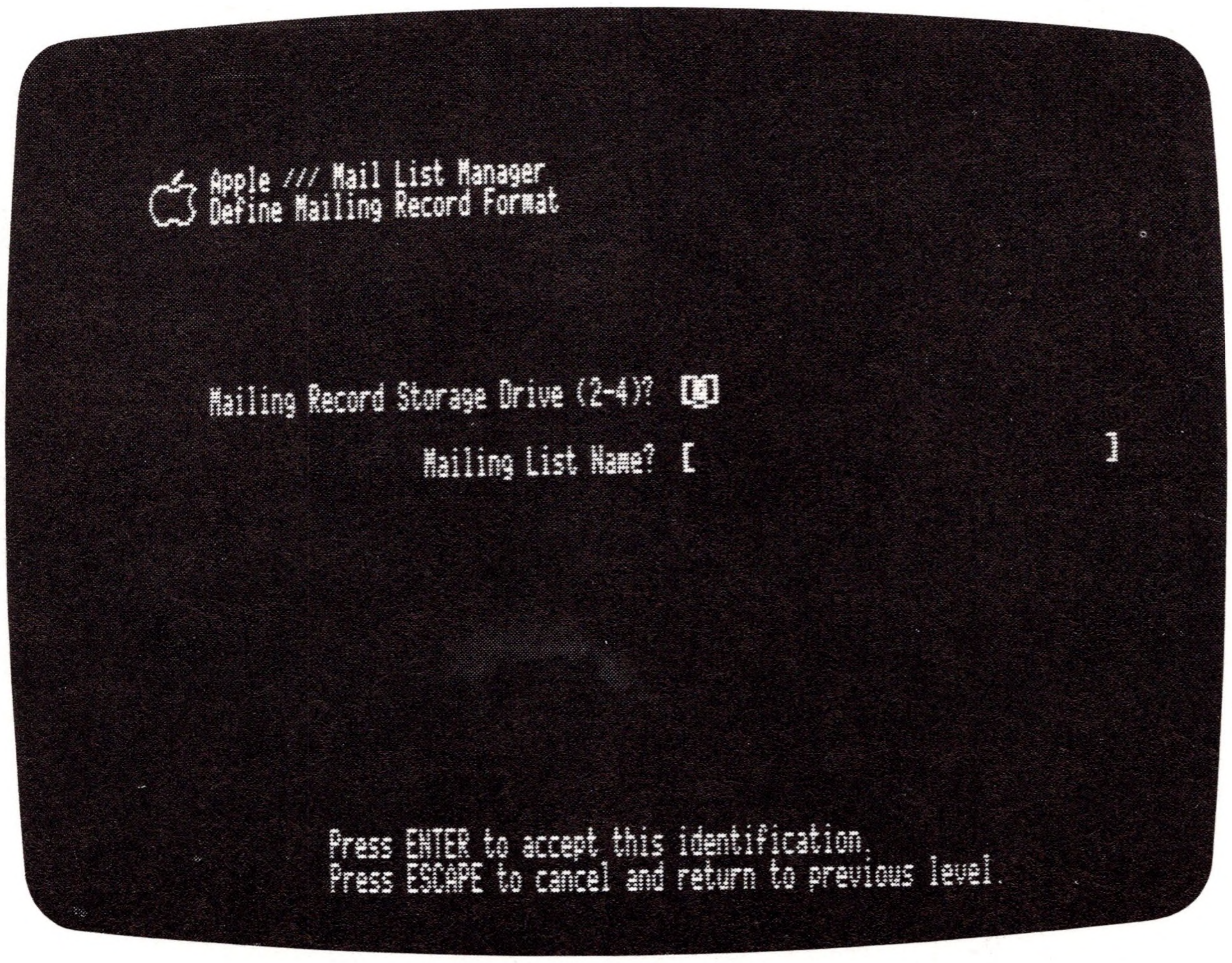
```
   Apple /// Mail List Manager
   Define Mailing Record Format


        Field Names
[Name                                  ]
[Company                               ]
[Address                               ]
[City▴State▴Zip Code                   ]
[                                      ]
[                                      ]

        Sort Field Names
[Name                                  ]
[Zip Code                              ]

[4] lines printed on physical label.
[30] maximum characters per line.

              Enter field names and separate with control-space.
              Press ENTER to accept the record definition.
              Press ESCAPE to cancel and return to previous level.
```

Figure 2-5. Mail List Manager Standard Format

The standard format specifies that each record on a mailing list will include the addressee's name, company, address, city, state, and zip code, that records can be sorted based on the addressee's name or zip code, that each printed label will contain four lines, and that each line can contain a maximum of 30 characters.

Note that the only purpose of the screen in Figure 2-5 is to show you the format the records in your mailing list will have. You cannot enter information into a record at this time.

Now press the ENTER key to verify this format. Next the screen displays:



```
Apple /// Mail List Manager
Define Mailing Record Format

    Mailing Record Storage Drive (2-4)? [2]
                 Mailing List Name? [                         ]

        Press ENTER to accept this identification.
        Press ESCAPE to cancel and return to previous level.
```

Figure 2-6. Choose Storage Drive

You are prompted for the number of the mailing records storage drive (the drive that contains your mailing records diskette) and for the name of your mailing list.

Place a formatted diskette into Drive 2 (the external drive that is directly connected to the Apple III). Note that the cursor is inside the first set of brackets.

Press RETURN to indicate that your diskette is in drive 2. The cursor now moves to the second set of brackets.

Let´s name your mailing list SUBSCRIBERS. Notice that as you type this name, it appears inside the brackets.

Next press ENTER to accept the information you´ve provided.

Each time the Mail List Manager tells you to press ENTER, you can, if you wish, press the CONTROL key while holding down the RETURN key. This instruction is frequently referred to as "pressing CONTROL-RETURN". Some people find it easier to type CONTROL-RETURN than to press ENTER.

You see this message:

```
***WARNING: About to overwrite current content of diskette in Drive #2.
Press RETURN to go on, ESCAPE to return to previous level.
```

Note that you receive this message even when you are using a newly-formatted diskette.

When you receive this message, it is a good idea to look on your diskette label to confirm that you don't need the information stored on that diskette.

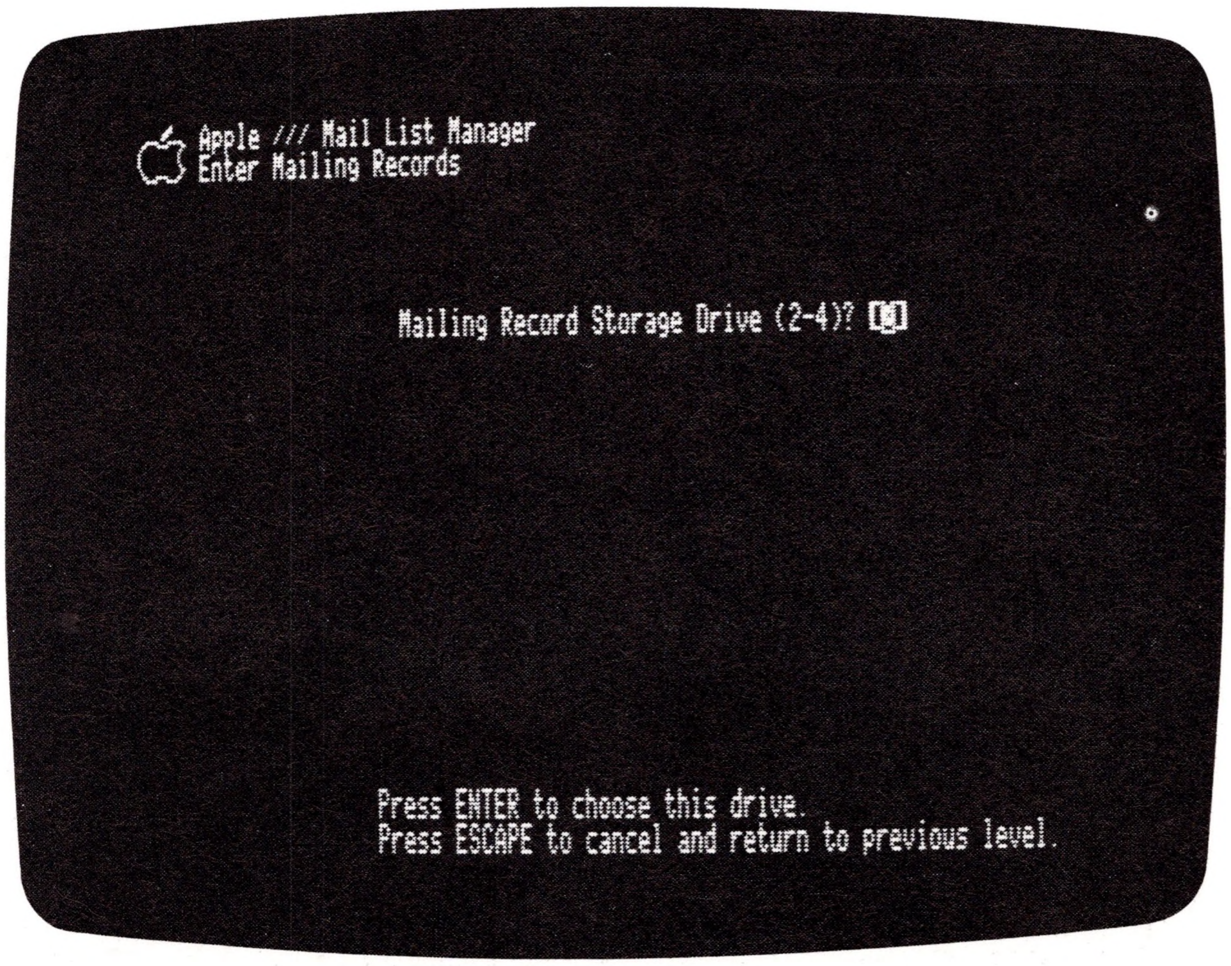
If you do not want to write over the contents of the diskette, replace the diskette that you want to keep with another diskette whose contents you don't care about and press RETURN.

If the diskette you are using is blank or if it contains information that can be written over, press the RETURN key. Your diskette has been transformed into a mailing records diskette that can be used to store mailing records. The Mail List Menu is again displayed with the cursor positioned at option 1.

You may have noticed that to move from one screen to the next, you sometimes press ENTER and sometimes press RETURN. In general, you press ENTER after you've entered information inside brackets and RETURN at all other times. You don't need to remember this distinction; messages on the bottom of the Mail List Manager screen always tell you what key to press to continue.

Entering Mailing Record Information

Now that you have defined your record format, you are ready to enter mailing records into your mailing list. Select option 3, ENTER MAILING RECORDS, from the Mail List Menu and press RETURN. The screen displays:



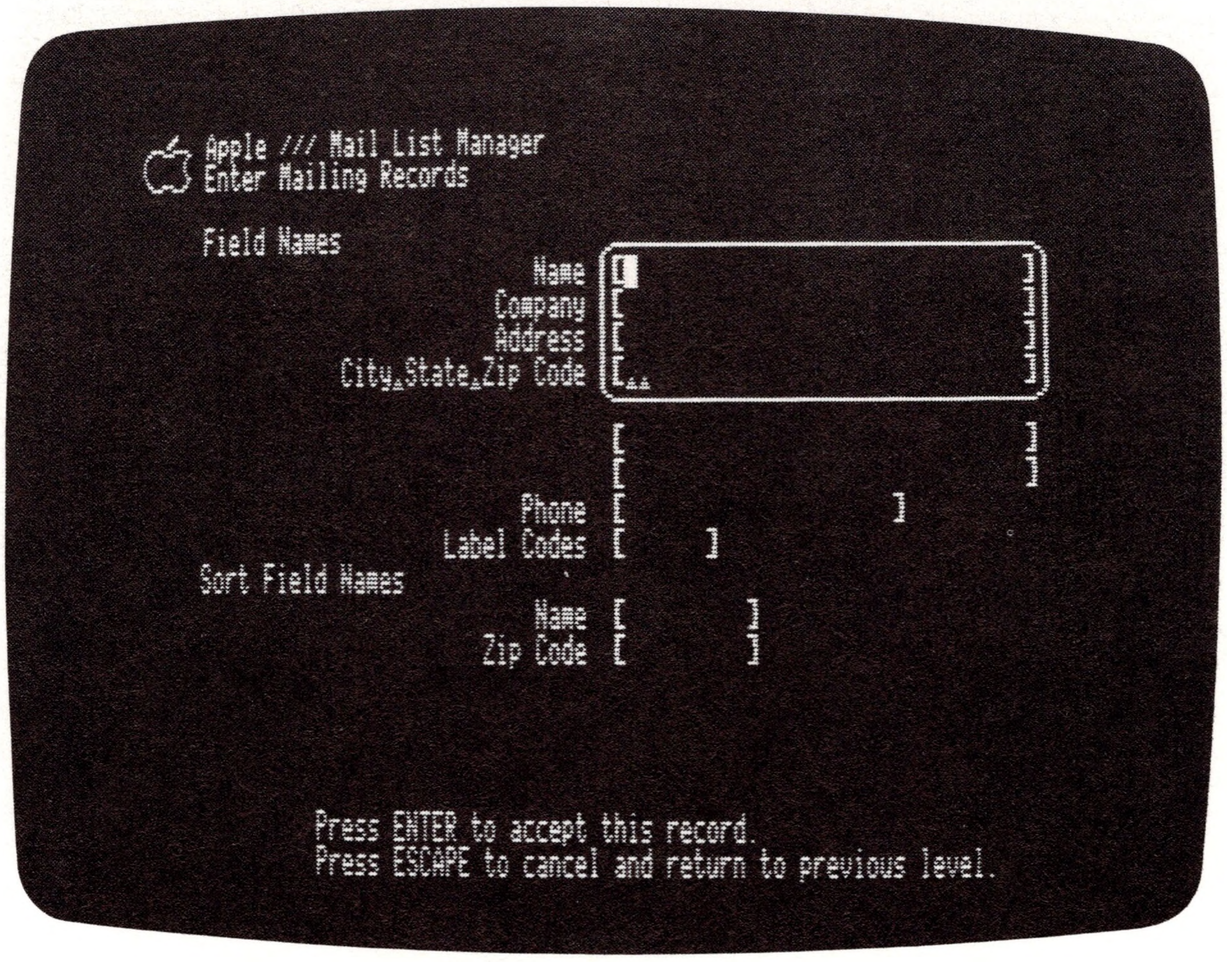
```
Apple /// Mail List Manager
Enter Mailing Records

                  Mailing Record Storage Drive (2-4)? [2]




                  Press ENTER to choose this drive.
                  Press ESCAPE to cancel and return to previous level.
```

Figure 2-7. Choose Storage Drive

Note that the Mail List Manager has placed a "2" inside the brackets. The option automatically chosen by the Mail List Manager is called the <u>default</u>. To choose the default, press ENTER, indicating that your mailing records diskette is in Drive 2. This message appears below the prompt on the screen:

```
Diskette "SUBSCRIBERS"
has 0 records on it
and 960 empty records remaining.
```

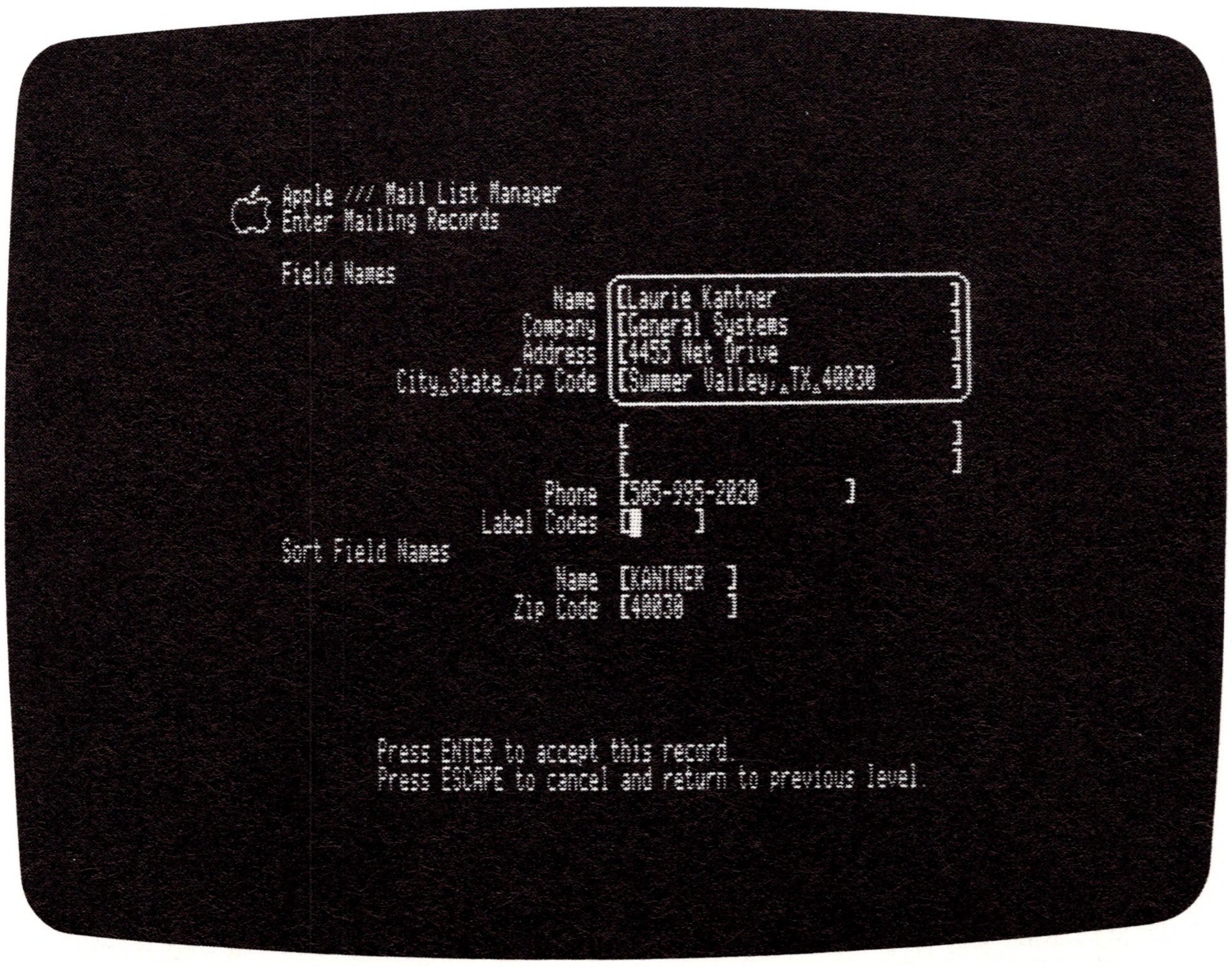
Now, as you are prompted to do, press the RETURN key to go on. A blank record is displayed on the screen:



```
Apple /// Mail List Manager
Enter Mailing Records

Field Names
                      Name [                               ]
                   Company [                               ]
                   Address [                               ]
       City▵State▵Zip Code [▵▵                             ]

                           [                               ]
                           [                               ]
                     Phone [                    ]
               Label Codes [      ]
Sort Field Names
                      Name [         ]
                  Zip Code [         ]



         Press ENTER to accept this record.
         Press ESCAPE to cancel and return to previous level.
```

Figure 2-8. Enter Mailing Records Screen

But before explaining how to enter records, a bit of background information is in order. The easiest way to present this information is to show you a record that already contains addressee information. Here is such a record:



```
Apple /// Mail List Manager
Enter Mailing Records

Field Names
                     Name [Laurie Kantner                    ]
                  Company [General Systems                   ]
                  Address [4455 Net Drive                    ]
      City▲State▲Zip Code [Summer Valley,▲TX▲40030           ]

                          [                                  ]
                          [                                  ]
                    Phone [505-995-2020        ]
              Label Codes [█   ]
Sort Field Names
                     Name [KANTNER  ]
                 Zip Code [40030    ]



         Press ENTER to accept this record.
         Press ESCAPE to cancel and return to previous level.
```

Figure 2-9. Completed Record Entry

The information enclosed in the box is referred to as a label. A label contains the information that appears on an actual mailing label when it is printed. To the Mail List Manager, a field is an area on a record in which you enter a specific kind of information. Thus, on the previous screen, the addressee's name, Laurie Kantner, appears in the NAME field and the addressee's company, General Systems, appears in the COMPANY field.

A line can contain several fields. Again looking at the previous screen, we see that the fourth line on the screen contains three fields: CITY, STATE, and ZIP CODE. Note that each field is separated by the ▲ symbol. This symbol is called a delimiter. A delimiter is used to separate fields on a line.

If you look at your screen, you will see that the cursor is in the NAME field on the first line. You are now ready to enter information into the first record in your mailing list.

To enter the name in the first mailing record, type:

Laurie Kantner

in the NAME field and press the RETURN key.

If you make a typing error, ignore it. You soon will be shown how to correct typing errors.

Notice that the NAME sort field at the bottom of the screen has been filled in with Laurie Kantner's last name. The Mail List Manager uses the content of a sort field when you sort a mailing records diskette and when you want to search for records in a mailing list.

Now the cursor is at the beginning of the COMPANY field. In this field, type

General Systems

and press the RETURN key. The cursor moves to the beginning of the ADDRESS field. Type:

4455 Net Drive

and press the RETURN key. The cursor is now at the beginning of the CITY field, and the two small triangles (delimiters between fields on this line) that were at the beginning of the line have moved to the far right.

In the CITY field, type

Summer Valley,

After you type the comma, hold down the CONTROL key while pressing the SPACE BAR. A triangle moves from the right side of the line to the cursor position to create a delimiter. Now type the STATE field:

TX

and then enter another delimiter at the end of the STATE field by again holding down CONTROL while pressing the SPACE BAR.

Next type:

40030

in the ZIP CODE field and press RETURN. Note that the ZIP CODE sort field is now filled in. The next two lines will be left blank. Thus, press the RETURN key two more times to move the cursor to the PHONE field. Type:

505-995-2020

and press the RETURN key. The cursor moves to the beginning of the next field, LABEL CODES. Since we do not want to enter any information here, leave it blank.

Correcting Errors

Unless you are an expert typist, chances are good that you will make an occasional typing error when you enter record information. The following paragraphs explain how to move the cursor and replace, add, and delete characters. A summary of this information is included in the reference card at the end of this book.

MOVING THE CURSOR: Use the UP-ARROW, DOWN-ARROW, RIGHT-ARROW, and LEFT-ARROW keys on the bottom right side of the Apple III keyboard to move the cursor back and forth along a line or up and down to go to the beginning of the appropriate line.

MOVING TO THE NEXT OR PREVIOUS LINE: To move the cursor to the next line on a record, press the RETURN, TAB, or DOWN-ARROW key. When the cursor is on the last line of a record, pressing the RETURN, TAB, or DOWN-ARROW key causes the cursor to jump to the first line of the record. To move the cursor to the previous line of the record, press CONTROL-TAB, or use the UP-ARROW key.

REPLACING CHARACTERS: If you type a wrong character, correct the error by using the ARROW keys to move the cursor to the incorrect character. Type over it with the correct character.

DELETING CHARACTERS: If you want to delete a character without replacing it, move the cursor to that character. Hold down the CONTROL key while typing D. The character beneath the cursor disappears, and the text to the right of the cursor closes up by moving one space to the left. You can either use a capital or small "D" to delete characters.

INSERTING CHARACTERS: To insert characters into a line of text, position the cursor on the character to the right of where you want to insert text. Hold down the CONTROL key while typing I. All characters from the cursor on, move to the end of the line. (If at this point, you decide you don't want to insert anything, just press the UP or DOWN-ARROW key, RETURN or CONTROL-I.) You can add characters until the available space is used up. If you try to add more characters than the line can hold, your Apple III beeps. When you finish inserting text, press the UP-ARROW or DOWN-ARROW key, RETURN or CONTROL-I to complete the insertion. You can use a capital or small "I" to insert characters.

DELIMITERS: To position a delimiter between fields, hold down the CONTROL key while pressing the SPACE BAR. A delimiter appears on the screen as a small triangle. When you print a label or a record, the delimiter appears as a space. Thus, if you want a comma, for example, between city and state, you must type it after you type the name of the city and before you enter the delimiter.

To delete a delimiter, use the arrow keys to position the cursor over the delimiter. Then type CONTROL-D.

To insert a delimiter, use the arrow keys to position the cursor to the immediate right of where you want the delimiter placed. Then type CONTROL-I followed by CONTROL-SPACE BAR, followed by a final CONTROL-I.

Entering More Records

Try experimenting with the editing keys. When you are satisfied with your record, press ENTER to store the completed record on the diskette in Drive 2. It doesn't matter where the cursor is positioned when you press ENTER to accept the record.

After you press ENTER, another screen appears showing a blank record. Follow the same procedure you used when entering Laurie Kantner's record to add the following four records to your list:

Beth Mills
Ramco
300 Pine Lane
Alley,▲MI▲45560
313-778-1000

Alan Shiplett, Jr.
Frostgate Enterprises
22 Stadium Blvd.
Detroit,▲MI▲48100
313-998-1000

Karen K. Neylon
E and T Co.
999 Grover Road
Blue Skies,▲MI▲48137
313-498-3789

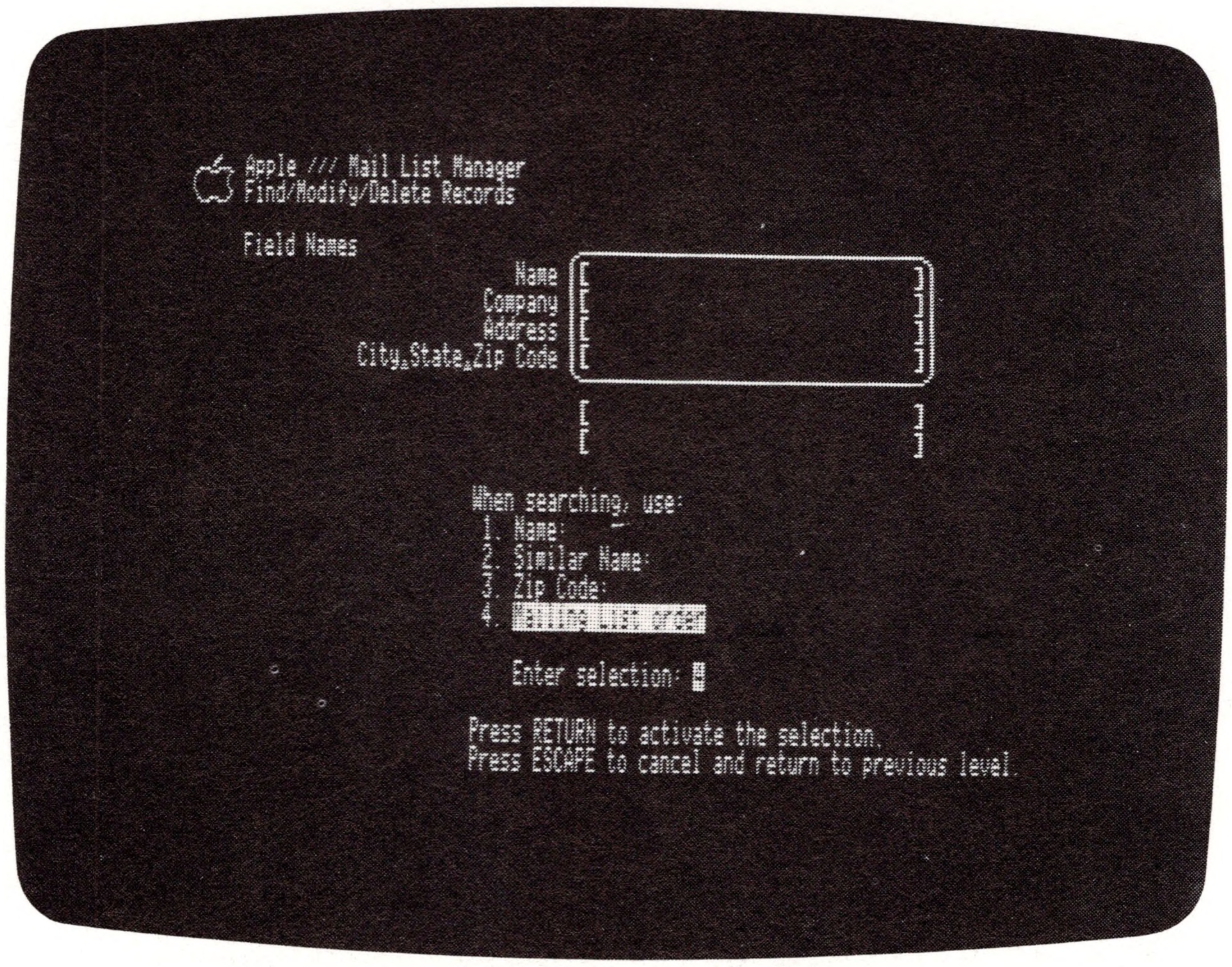
Josephine Stein
Plum Co.
500 8th Ave.
Palo Alto,▲CA▲94301
415-851-9900

After you have entered the last record and a blank record is displayed, press the ESCAPE key. The Mail List Menu is displayed. You have now entered five mailing records which are stored on the diskette in Drive 2.

Modifying a Record

Suppose you want to change some information on one of the records that you entered. Select option 4, FIND / MODIFY / DELETE RECORDS, from the Mail List Menu and press RETURN.

A screen displaying a blank record and four search options appears:

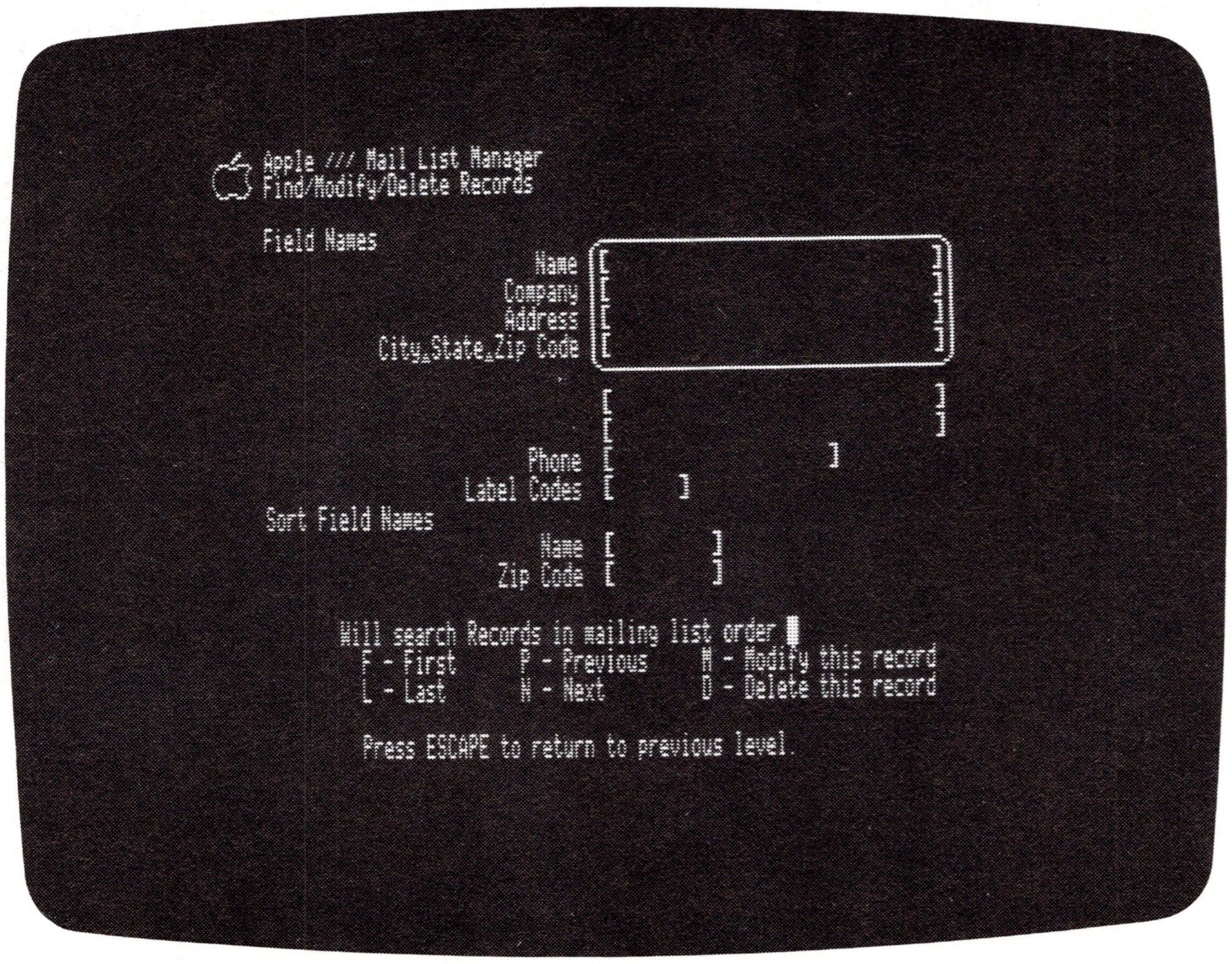


```
Apple /// Mail List Manager
Find/Modify/Delete Records

Field Names
                     Name [                              ]
                  Company [                              ]
                  Address [                              ]
     City,State,Zip Code [                              ]

                           [                              ]
                           [                              ]

              When searching, use:
               1. Name:
               2. Similar Name:
               3. Zip Code:
               4. Mailing List Order

                 Enter selection: 

              Press RETURN to activate the selection.
              Press ESCAPE to cancel and return to previous level.
```

Figure 2-10. Search Options

Let's assume that you want to change the address on Beth Mills' record. But before you can modify the record, the Mail List Manager needs to find it. As you can see from the screen, four different methods can be used to find a record. You will use Option 4, Mailing List Order. When you select this option, you can ask the Mail List Manager to display, one at a time, each record on your mailing list.

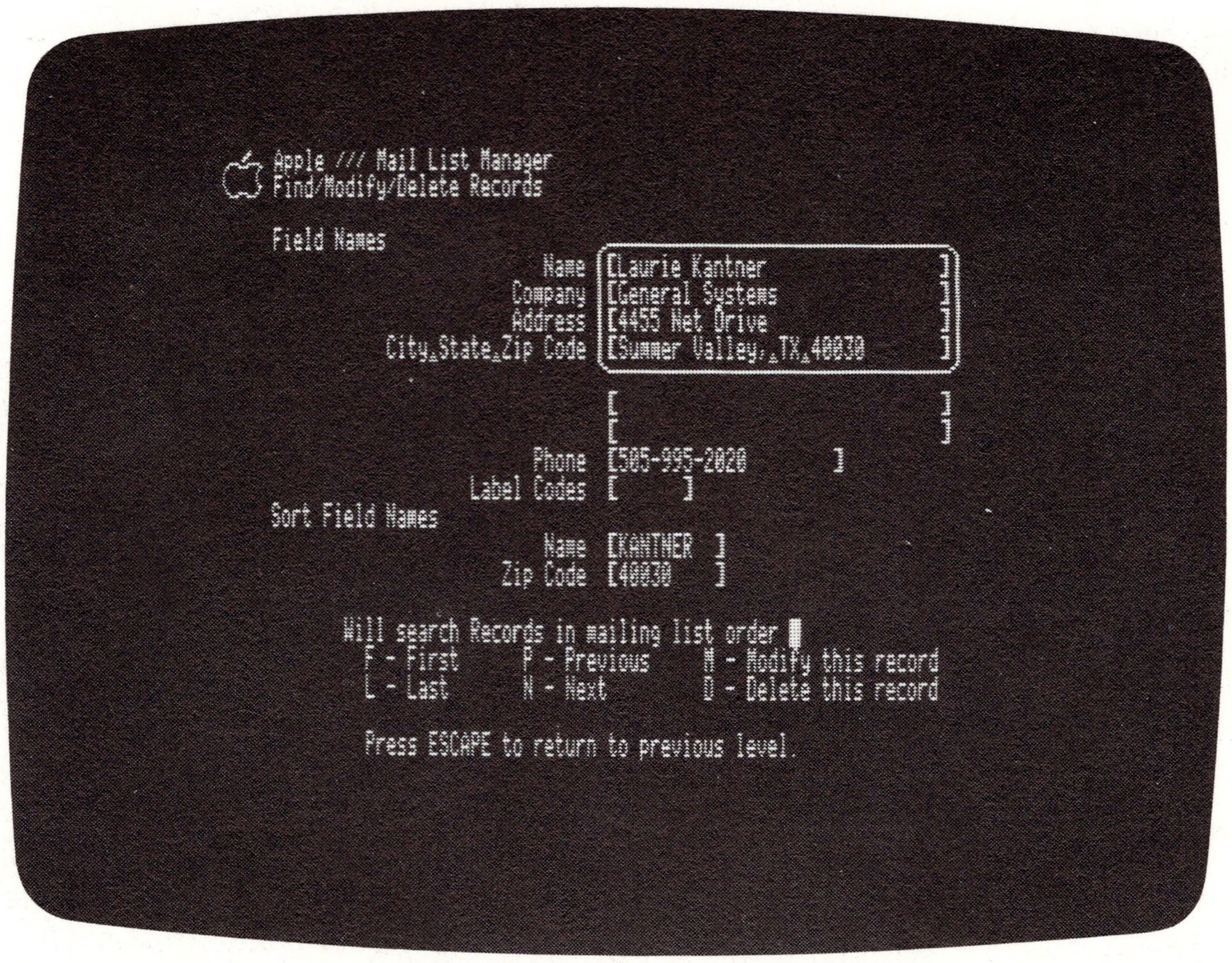
To select option 4, press RETURN. The screen displays a blank record:



```
Apple /// Mail List Manager
Find/Modify/Delete Records

Field Names
                   Name [                         ]
                Company [                         ]
                Address [                         ]
    City,State,Zip Code [                         ]

                        [                         ]
                        [                         ]
                  Phone [                  ]
            Label Codes [     ]
Sort Field Names
                   Name [      ]
               Zip Code [      ]

       Will search Records in mailing list order
         F - First     P - Previous     M - Modify this record
         L - Last      N - Next         D - Delete this record

         Press ESCAPE to return to previous level.
```

Figure 2-11. Search in Mailing List Order

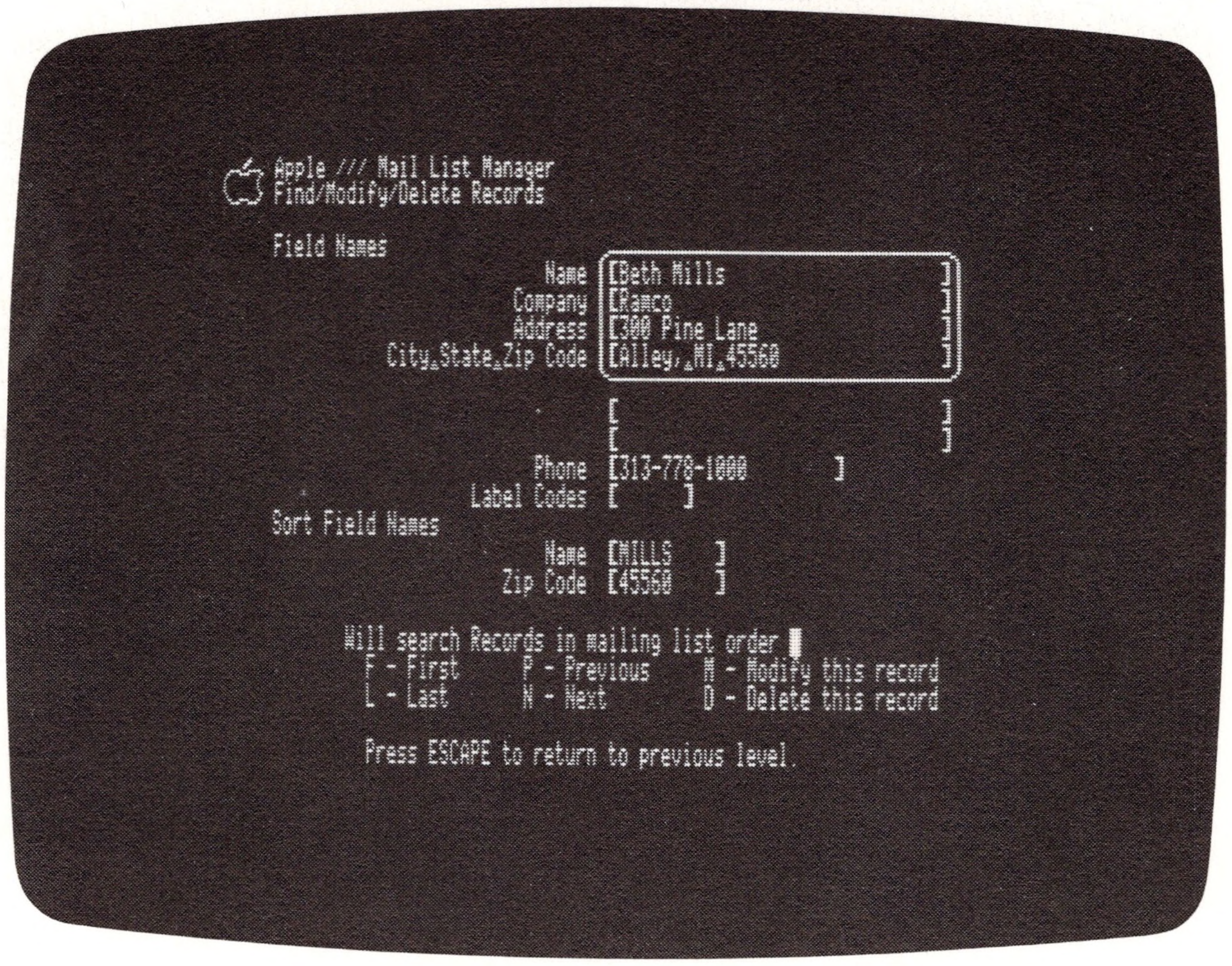
Type F for First to tell the Mail List Manager that you want it to display the first record on your mailing records diskette. Laurie Kantner's record is displayed.



```
Apple /// Mail List Manager
Find/Modify/Delete Records

Field Names
                Name [Laurie Kantner             ]
             Company [General Systems            ]
             Address [4455 Net Drive             ]
  City▵State▵Zip Code [Summer Valley,▵TX▵40030     ]

                     [                           ]
                     [                           ]
               Phone [505-995-2020        ]
         Label Codes [     ]
Sort Field Names
                Name [KANTNER  ]
            Zip Code [40030    ]

      Will search Records in mailing list order █
        F - First     P - Previous     M - Modify this record
        L - Last      N - Next         D - Delete this record

        Press ESCAPE to return to previous level.
```

Figure 2-12. Find First Record

This clearly is not the record you are looking for. Now type N for Next record. Eureka! Beth Mills' record is displayed.



```
Apple /// Mail List Manager
Find/Modify/Delete Records

Field Names
                Name [Beth Mills                 ]
             Company [Ramco                      ]
             Address [300 Pine Lane              ]
  City▵State▵Zip Code [Alley,▵MI▵45560             ]

                     [                           ]
                     [                           ]
               Phone [313-778-1000        ]
         Label Codes [     ]
Sort Field Names
                Name [MILLS    ]
            Zip Code [45560    ]

      Will search Records in mailing list order █
        F - First     P - Previous     M - Modify this record
        L - Last      N - Next         D - Delete this record

        Press ESCAPE to return to previous level.
```

Figure 2-13. Find Next Record

Next type M for Modify. The cursor is in the NAME field. Use the DOWN-ARROW key to move the cursor to the ADDRESS field. Then type:

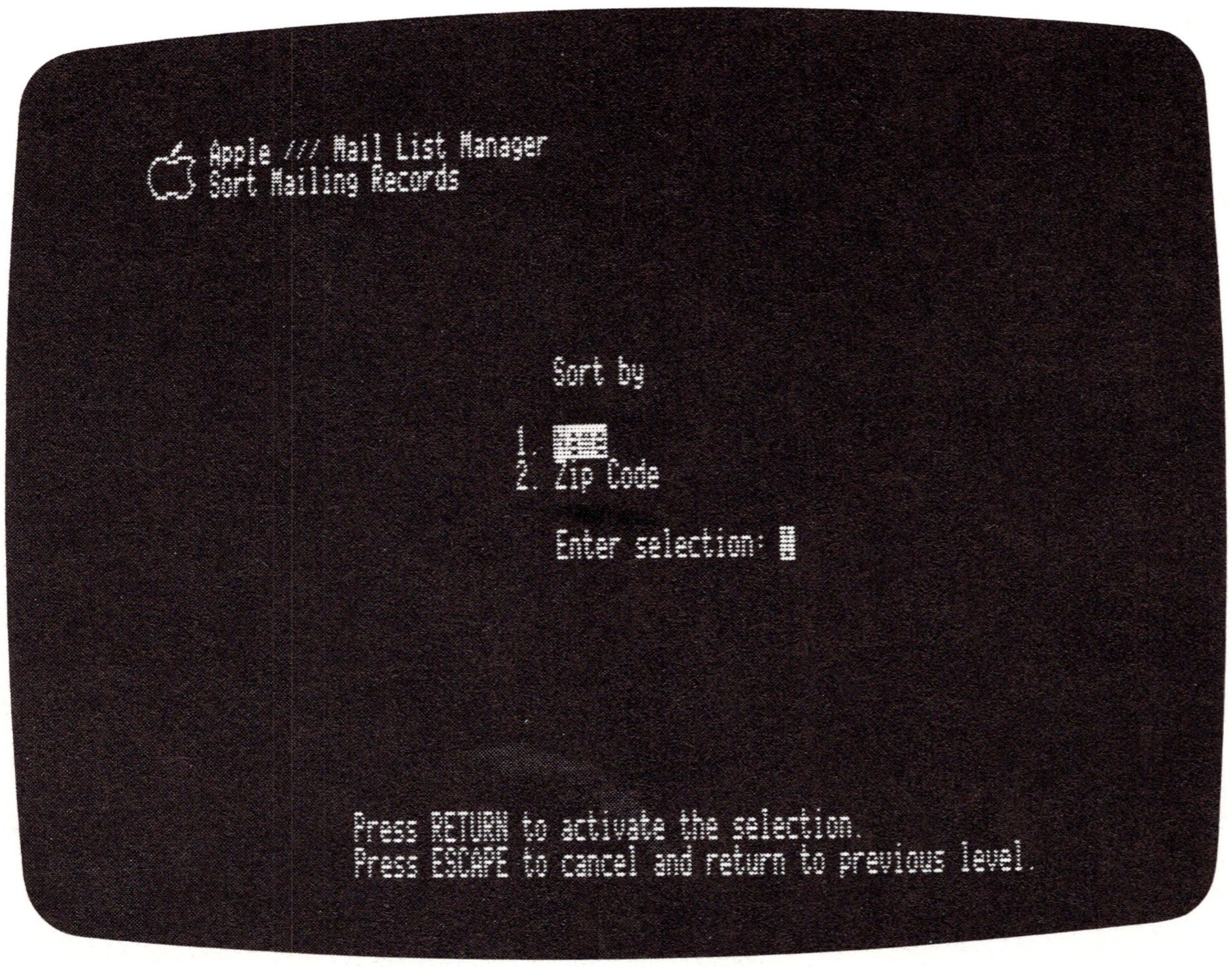
299 East End Ave.

and press the RETURN key. As you enter the new address in the field, the old address disappears from the screen.

Press the ENTER key once to accept the modified record, and then press the ESCAPE key twice to return to the Mail List Menu.

Sorting Mailing Records

Your next task is to sort or change the order of the records on your mailing records diskette so they appear in alphabetical order by last name. To sort the records, select option 5, SORT MAILING RECORDS, from the Mail List Menu and press RETURN. The Sort Mailing Records prompt appears:



```
Apple /// Mail List Manager
Sort Mailing Records

          Sort by

        1. [illegible]
        2. Zip Code

          Enter selection: █

Press RETURN to activate the selection.
Press ESCAPE to cancel and return to previous level.
```

Figure 2-14. Sort Mailing Records

To sort the records on your mailing records diskette by the contents of the NAME field, press RETURN.

The Mail List Manager begins sorting the records in alphabetical order by last name and displays:

```
Sorting (on Name) . . . . . . . .
```

When the Mail List Manager finishes sorting, the screen displays:

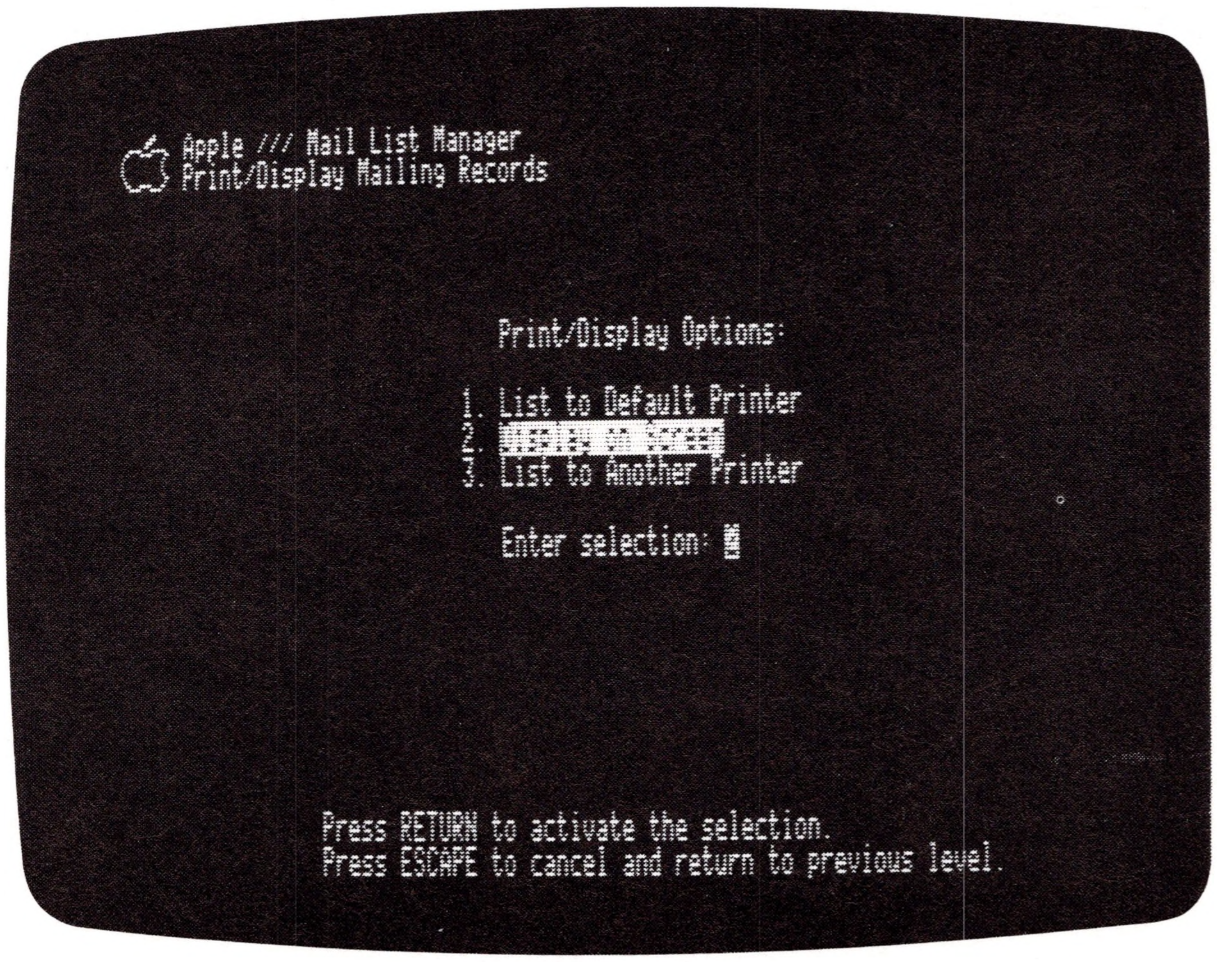
```
Diskette in Drive #2 sorted by Name
```

Press the RETURN key to return to the Mail List Menu.

Looking at Your Labels

The Mail List Manager lets you print or display on the screen mailing records, mailing labels, or a phone list of addressees' names. Suppose that you want to display your mailing labels so you can check their contents and make sure that they have been sorted correctly.

To display mailing labels, select option 6, PRINT / DISPLAY MAILING RECORDS, from the Mail List Menu and press RETURN. The screen displays:

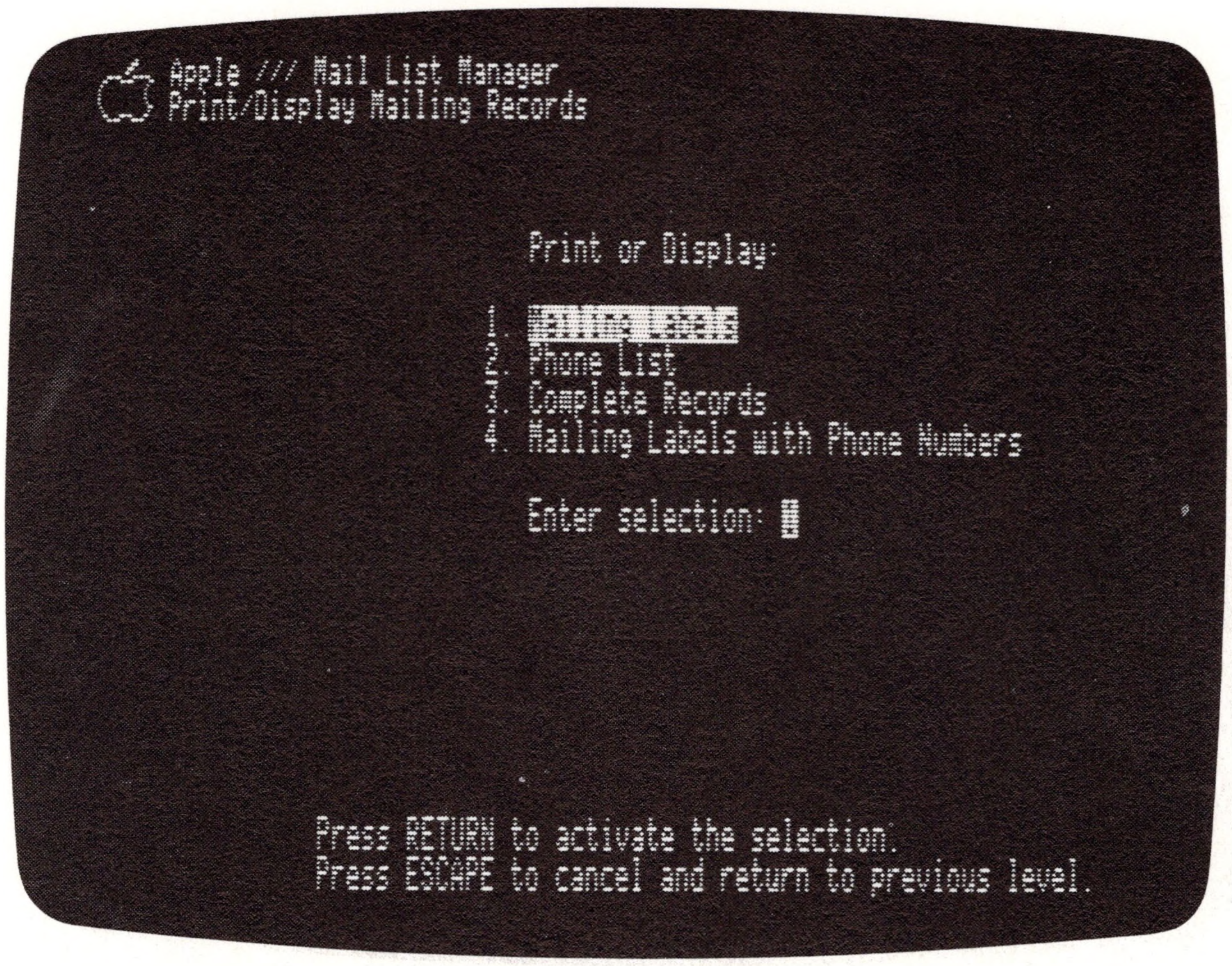


```
Apple /// Mail List Manager
Print/Display Mailing Records

                Print/Display Options:

              1. List to Default Printer
              2. Display on Screen
              3. List to Another Printer

                Enter selection: 

Press RETURN to activate the selection.
Press ESCAPE to cancel and return to previous level.
```

Figure 2-15. Print/Display Options

Press RETURN to indicate that you want to display your labels on the screen.

The screen changes and displays the message:

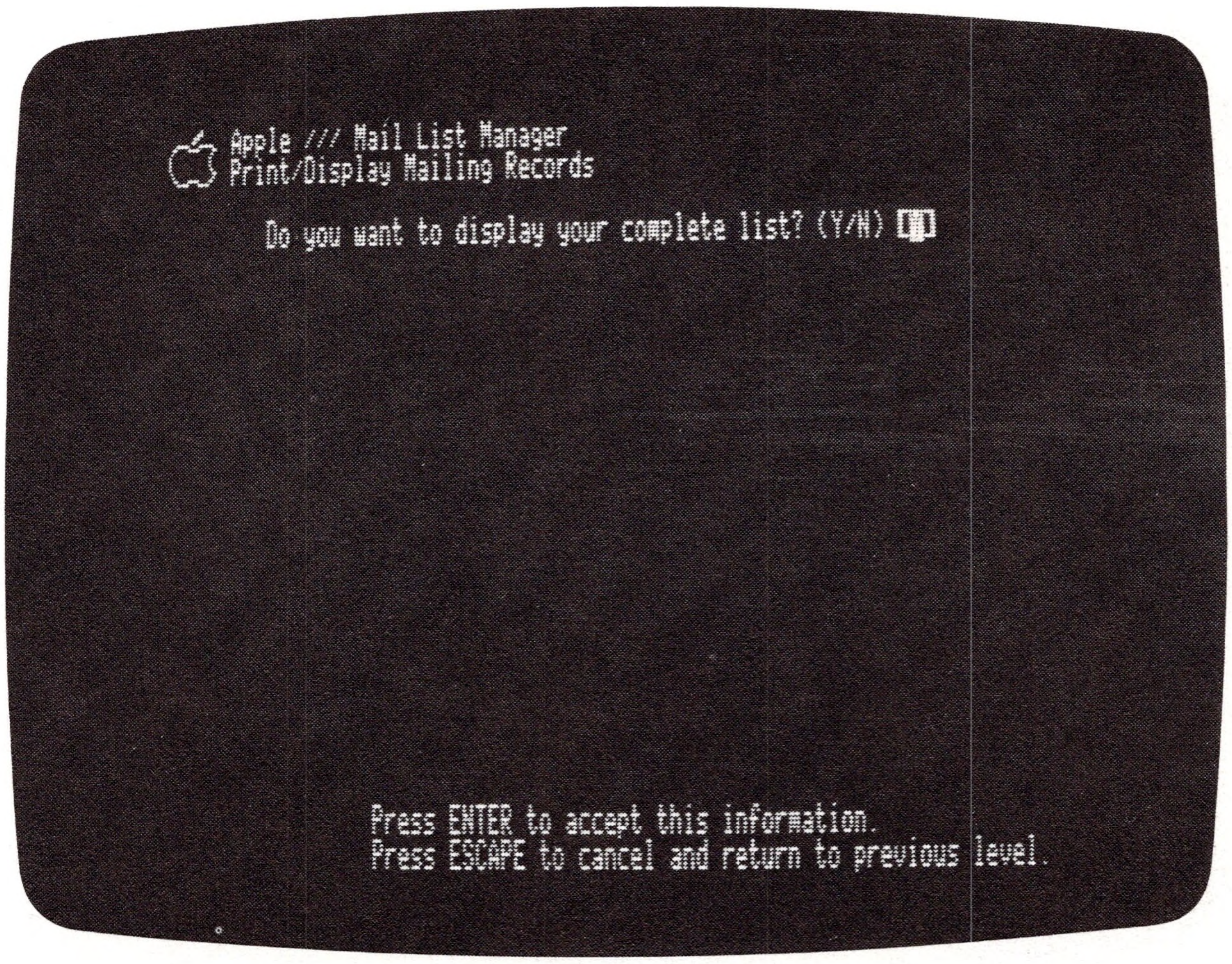


```
Apple /// Mail List Manager
Print/Display Mailing Records

                    Print or Display:

                  1. Mailing Labels
                  2. Phone List
                  3. Complete Records
                  4. Mailing Labels with Phone Numbers

                    Enter selection:

          Press RETURN to activate the selection.
          Press ESCAPE to cancel and return to previous level.
```

Figure 2-16. Display Options

Press RETURN to indicate that you want to display mailing labels.

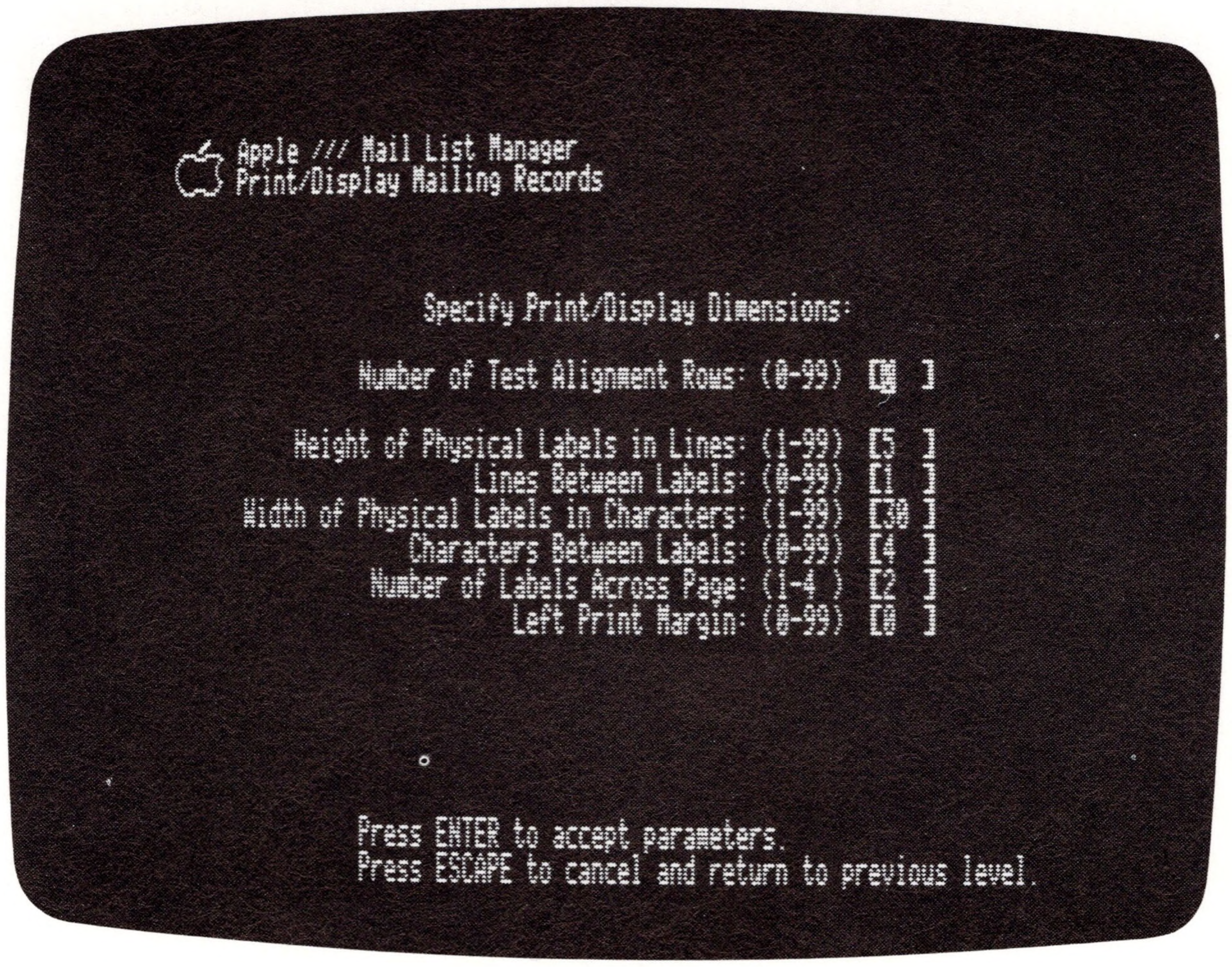
Next the screen displays:



```
Apple /// Mail List Manager
Print/Display Mailing Records

        Do you want to display your complete list? (Y/N)






                Press ENTER to accept this information.
                Press ESCAPE to cancel and return to previous level.
```

Figure 2-17. Filter Question

To indicate that you want to display your complete list, simply press ENTER. The Change Label Format screen then appears:



```
Apple /// Mail List Manager
Print/Display Mailing Records


                   Specify Print/Display Dimensions:

              Number of Test Alignment Rows: (0-99)  [0 ]

         Height of Physical Labels in Lines: (1-99)  [5 ]
                       Lines Between Labels: (0-99)  [1 ]
   Width of Physical Labels in Characters: (1-99)  [30 ]
                  Characters Between Labels: (0-99)  [4 ]
               Number of Labels Across Page: (1-4 )  [2 ]
                          Left Print Margin: (0-99)  [0 ]



              Press ENTER to accept parameters.
              Press ESCAPE to cancel and return to previous level.
```

Figure 2-18. Change Label Format

By changing the values on this screen, you can align the label information correctly on your printed labels.

To give you additional practice changing screen information, we'll change the number of spaces between labels. To do this, use the DOWN-ARROW key to move the cursor to the line that shows:

```
Characters Between Labels: (0-99) [4 ]
```

Type 5 and press ENTER.

The Mail List Manager displays all of the complete rows of records on your diskette. Next you are asked:

```
Is there another diskette?
```

Type N to respond NO.

The last label in your list is displayed.

Press RETURN to return to the Mail List Menu. From the menu, choose option 9, EXIT MAIL LIST MANAGER, and press RETURN.

The screen displays:

```
Insert boot diskette and press CONTROL-RESET,
or press ESCAPE to return to main menu.
```

Remove the diskette from Drive 2. We won't be using this mailing list again. Thus, you can reuse this diskette in later exercises.

3

Defining the Record Format

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3

Defining the Record Format

Before you can enter mailing records into a mailing list, you must define a mailing record format. The record format tells the Mail List Manager the kind of information each of the records on your mailing list will contain and the order in which the information will appear. The record format also specifies the number of lines on each mailing label, the maximum number of characters per line, and the method the Mail List Manager will use to find and sort records in your mailing list.

This chapter explains how to define a mailing record format. The chapter ends with an exercise in which you define your own mailing record format.

Background Information

Before discussing the specifics of defining a mailing record format, here are a few facts to keep in mind:

> You must define the mailing record format before you can enter records onto a mailing records diskette.
>
> All records on a mailing list must use the same record format. This is true even when the mailing list occupies several diskettes. If you define a record format, enter some records, and then decide that you want to change your record format, you must reenter all the records on your list. By reading the following sections carefully, you will minimize the chances of this happening.

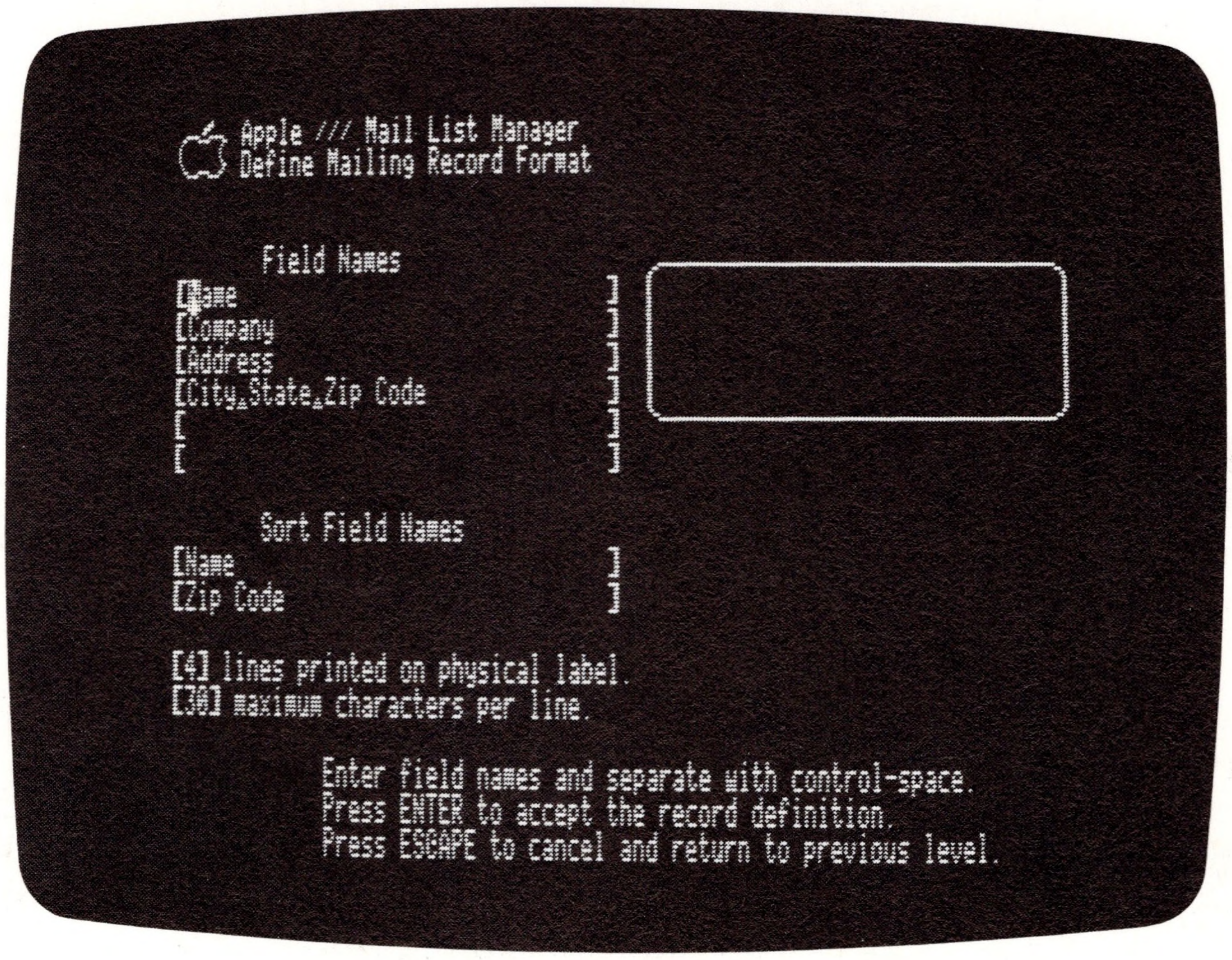
A mailing records diskette can store one mailing list or a maximum of 960 records.

Mailing lists that are going to be merged to create a new mailing list must have the same mailing record format.

Considerations When Defining a Format

When defining a mailing record format, you can use the standard format, as you did in Chapter 2, modify the standard format, define a new record format, or use or modify a format that you previously defined. The following sections tell you how to decide which format to use. They do not tell you how to actually define or modify a format. Specific information about the mechanics of defining and modifying a format is included in the section of this chapter called Mailing Record Format Options.

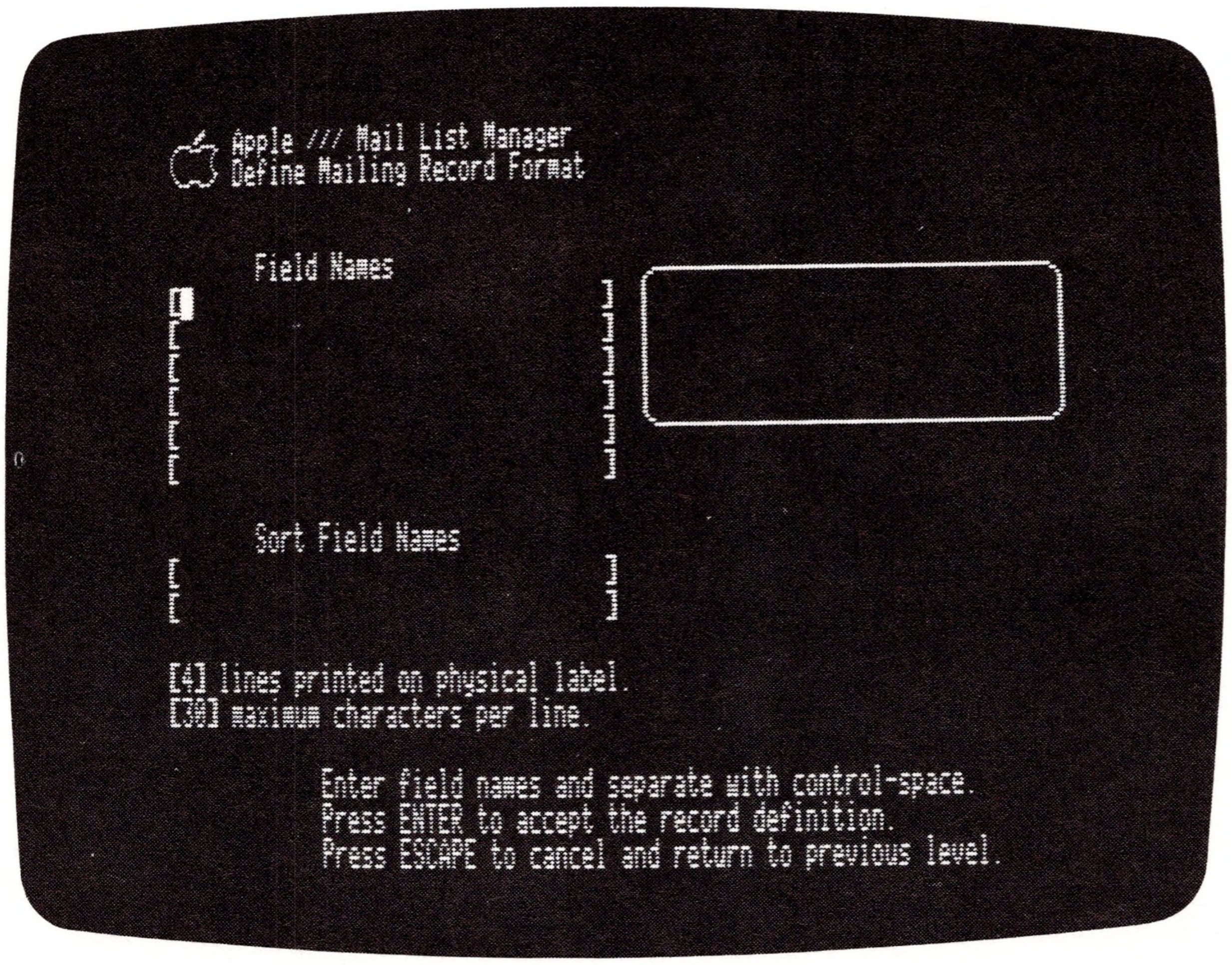
Here is what the screen looks like when you tell the Mail List Manager that you want to use the standard format:



```
Apple /// Mail List Manager
Define Mailing Record Format

     Field Names
[Name                              ]
[Company                           ]
[Address                           ]
[City_State_Zip Code               ]
[                                  ]
[                                  ]

     Sort Field Names
[Name                              ]
[Zip Code                          ]

[4] lines printed on physical label.
[30] maximum characters per line.

          Enter field names and separate with control-space.
          Press ENTER to accept the record definition.
          Press ESCAPE to cancel and return to previous level.
```

Figure 3-1. Mail List Manager Standard Format

Here is what the screen looks like when you tell the Mail List Manager that you want to define a new format:



```
Apple /// Mail List Manager
Define Mailing Record Format

     Field Names
[                             ]
[                             ]
[                             ]
[                             ]
[                             ]
[                             ]

     Sort Field Names
[                             ]
[                             ]

[4] lines printed on physical label.
[30] maximum characters per line.

          Enter field names and separate with control-space.
          Press ENTER to accept the record definition.
          Press ESCAPE to cancel and return to previous level.
```

Figure 3-2. New Record Format

Note that when you use the standard format, field names are provided for you. You either can use these pre-defined field names or define your own. When you define a new record format, no field names are provided. You define the fields you want included in your records.

The First Six Lines

Notice that on both the "Standard Format" screen and the "New Record Format" screen, four lines are reserved for the mailing label. A mailing label, as we have said, contains the information on a record that you want to appear on a printed mailing label. When you define the mailing record format, you can change the number of label lines to a number between one and six. You may, for example, want to define a record format in which the label is composed of only three lines: name on the first line, address on the second, and city, state, and zip code on the third.

Look again at Figures 3-1 and 3-2. The two lines below the label lines are called comment lines. Comment lines are used to store additional information that you want to include on your record but that you don't want to appear on your label.

The number of label lines and comment lines on a record always adds up to six. Thus, if a record has six label lines, it has no comment lines; if it has five label lines, it has one comment line, etc.

When you define a mailing record format, you tell the Mail List Manager what label and comment fields you want your mailing records to contain by giving each field a field name. Both comment lines and label lines can contain multiple field names. Each of these field names must be separated by a delimiter. For example, the fourth line of the standard format contains three field names: CITY, STATE, and ZIP CODE. Similarly, a comment line might contain the field names ORDER NUM, SOC SEC NUM (social security number), and BIRTH PLACE.

A record can contain a maximum of 12 label and comment field names, not counting the PHONE and LABEL CODES fields. A line containing field names can contain a maximum of 33 characters, including delimiters. A field name can have a maximum of 11 characters. Field names may not be duplicated in a record format.

Formats: Fixed and Free

Mailing record formats come in two varieties: fixed formats and free formats. A fixed format contains fields that designate the location and kind of information that is to appear on every record in a mailing list. The standard format, for example, designates that, for every record on a mailing list, the addressee's name appears on the first label line, company on the second, street address on the third, and city, state, and zip code on the fourth.

A free format, on the other hand, contains no fields. Thus, when you enter a mailing record that uses a free format and contains, say, four label lines, you simply put the mailing record information anywhere you want on the record's first four lines. One record on a mailing list using a free format might contain the addressee's name on the first line, title on the second, street address on the third, and city, state, and zip code on the fourth. Another record on the same mailing list might contain the addressee's name on the first line, street address on the second, city and state on the third, and zip code on the fourth.

One of the Mail List Manager's most valuable features is that it can print, display, and merge subsets of a mailing list based on the content of specific label and comment fields. Thus, if you are using the standard format, you can tell the Mail List Manager to print (or display or merge) all of the records of addressees who work for a particular company or live in a particular city or state. If you are using a free format this feature is unavailable since your mailing record contains no label or comment field names; the Mail List Manager can only locate information when that information is associated with a field name.

When you use a free format, the Mail List Manager is able to locate records in your mailing list based on the content of records' sort fields and label code fields. Both of these fields are described later in this manual.

If you know that most of your records contain the same kinds of information, use a fixed format. Doing so lets you utilize the full capabilities of the Mail List Manager. If, on the other hand, you know that the kind of information included in your records varies dramatically from addressee to addressee, it may be more convenient to use a free format. Remember, once set, a format may not be changed.

Finally, it is important to note that a mailing record can have a combination fixed and free format. The standard format shown in Figure 3-1 is an example of such a format. The four label lines contain field names, thereby indicating that they are reserved for specific kinds of information. The two comment lines contain no field names, indicating that they can be used to store information that does not fit into any one category.

Phone and Label Codes Fields

The seventh and eighth lines in a record are the PHONE field and the LABEL CODES field.

The PHONE and LABEL CODES fields are not shown on the Define Mailing Record Format screen because they are always present, no matter what format you use. These fields are shown on the Enter Mailing Records screen, as you saw in Chapter 2 when you entered records into a mailing list. Theoretically, PHONE and LABEL CODES fields are also comment fields because they contain information that does not appear on a label.

The PHONE field contains the addressee's phone number; the LABEL CODES field contains special codes for printing and displaying subsets of your mailing list. Information about these fields is included in Chapter 5.

Sort Field Names

The next two lines on the Define Mailing Record Format screen are for the primary and secondary sort field respectively. Sort fields give the Mail List Manager the ability to change the order of records on your list and to search for records that you want to modify, delete, or examine.

When choosing sort field names, consider these two questions:

> In what way do you want your list printed or displayed? (in alphabetical order by last name or state, in numerical order by zip code, etc.)
>
> What field do you want to use to locate a particular record in the mailing list? (addressee's name, city, etc.)

If, for example, you want your mailing list printed alphabetically by the addressee's city, you would identify CITY as a sort field name. If your records include a comment field named ORDER NUM (for order number) and you want the labels in your list to be placed in numerical order based on this number, you would make ORDER NUM a sort field.

The sort field is also used by the FIND / MODIFY / DELETE option to locate records on a mailing records diskette. If, for example, you know that when you want to locate a record, the easiest means of identification would be to give the Mail List Manager the addressee's name, you would use NAME as a sort field name.

In most instances, you will give a sort field the same name as one of the label or comment fields on your record. When you do this, the Mail List Manager automatically fills in the sort field with up to the first nine characters of the appropriate label or comment field after you have entered information into that field. For example, if you define a mailing record format that includes a label field and primary sort field named STATE and then enter an addressee's state onto a record, the Mail List Manager places up to the first nine letters of the addressee's state in the record's primary sort field.

A primary sort field that is called NAME works differently than other sort fields. When a primary sort field is called NAME, the Mail List Manager determines the addressee's last name and places it in the NAME sort field. Suppose, for example, that you select NAME as both a label field name and a sort field name and then enter the name Henry Minks in the NAME label field. The Mail List Manager then places MINKS in the NAME sort field. If, on the other hand, you select PERSON as both a label field name and a sort field name and then enter the name Henry Minks in the PERSON label field, the Mail List Manager places HENRY MIN in the PERSON sort field.

Sorting by Last Name

If you want to sort the records in your mailing list alphabetically by last name or want to find a record by specifying the addressee's last name, you have two options. Your first option is to use NAME as a sort field. When you do this, the Mail List Manager places the addressee's last name in the NAME sort field.

When NAME is used as a sort field name, the Mail List Manager is unable to distinguish between two records with the same last name but different first names. When the Mail List Manager sorts two such records, it sorts them based on their secondary sort fields.

Your second option is to name the label field containing the addressee's name something other than NAME, such as PERSON or SURNAME, and to give one of the sort fields this same name. Then, when you are ready to enter mailing record information, enter the addressee's name, last name first, into the appropriate sort field. The first nine characters of the name will appear in the comparable sort field. Note that when you use this option, the Mail List Manager is able to distinguish between two records containing the same last names but different first names if the last name contains seven or fewer characters.

Suppose that you have a label field named PERSON and that you enter Henry Minks' name as Minks, Henry into this field. The name that appears in the PERSON sort field would be MINKS HE (Note that the Mail List Manager converts the comma to a space).

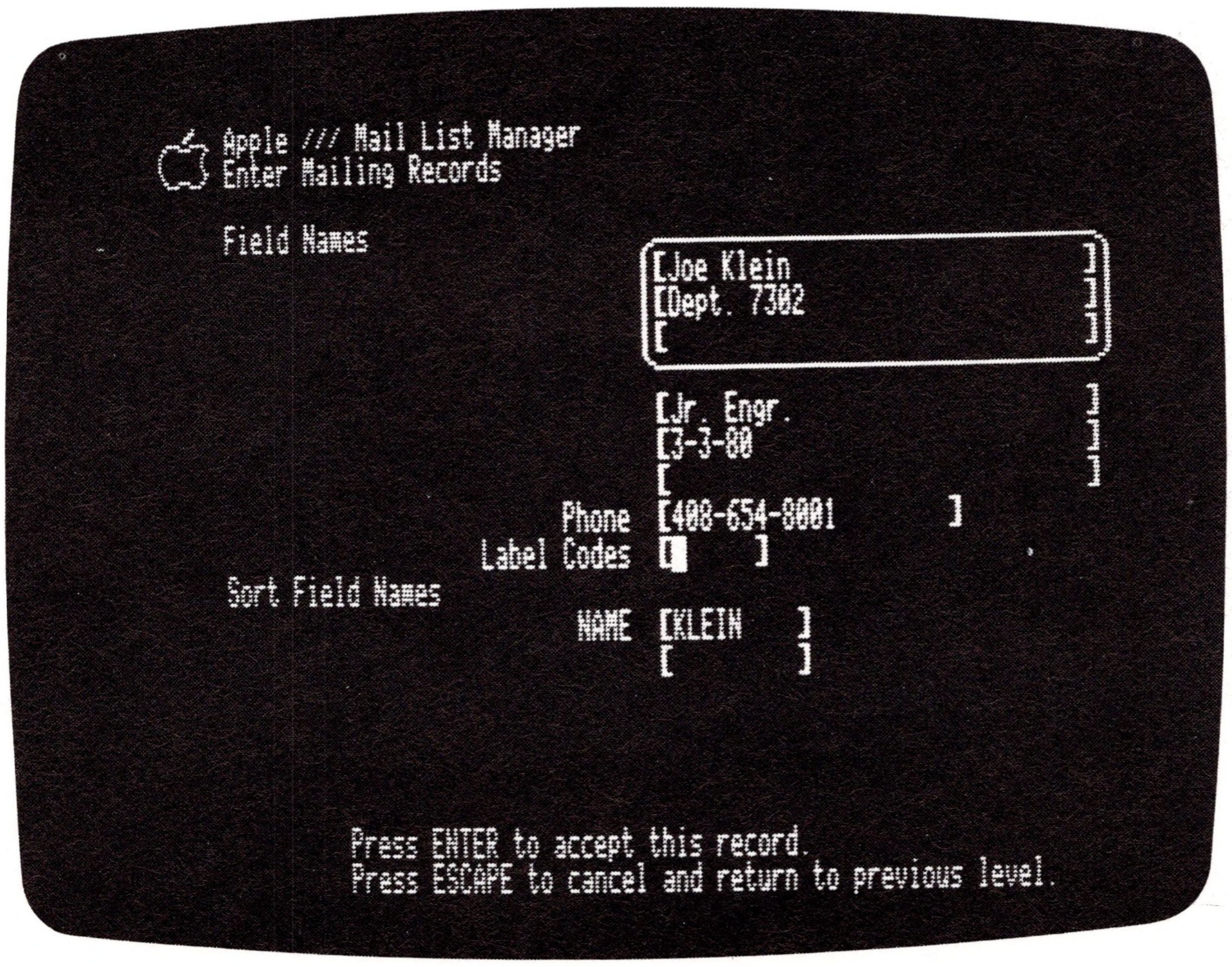
Sort Fields and Free Format Records

Based on our discussion so far, you probably have concluded that a sort field name must match a label or comment field name. But what happens when a free format is used? If a record format contains no label or comment fields, your record obviously cannot contain a sort field name that matches a label or comment field name.

To remedy this situation, the Mail List Manager lets you call your primary sort field NAME and the secondary sort field ZIP CODE even when your record has no fields with these names. Then, when you enter a mailing record, the Mail List Manager looks for information on the record that looks like the addressee's NAME and ZIP CODE.

In the case of NAME, the Mail List Manager assumes that the first line of the record contains the addressee's name and places this name in the NAME sort field. In the case of ZIP CODE, the Mail List Manager looks for a number in the label that looks like a zip code and enters that number into the ZIP CODE sort field. The number that the Mail List Manager chooses as a zip code is always the last number on a label line. If more than one label line contains a number that could be the zip code, the Mail List Manager chooses the number on the last such line in the label as the zip code. The Mail List Manager is also able to recognize zip codes from Canada and Great Britain.

Here is what a record that uses a free format might look like after all record information has been entered into it. Note that the NAME sort field has no matching label or comment field name.



```
Apple /// Mail List Manager
Enter Mailing Records

Field Names
                                [Joe Klein                     ]
                                [Dept. 7302                    ]
                                [                              ]

                                [Jr. Engr.                     ]
                                [3-3-80                        ]
                                [                              ]
                          Phone [408-654-8001        ]
                    Label Codes [     ]
Sort Field Names
                           NAME [KLEIN    ]
                                [         ]

               Press ENTER to accept this record.
               Press ESCAPE to cancel and return to previous level.
```

Figure 3-3. Free Format Record

Record Dimensions

The last two lines on the mailing record pertain to record dimensions. We have already discussed the first line; it specifies the number of lines on the printed mailing label. The second line specifies the maximum number of characters per label or comment line. Here you can enter a number between 1 and 40. The default value, or the number automatically assigned by the Mail List Manager, is 30.

A record can hold a maximum of 105 characters. Thus, if all record information is going to appear on, say, three lines, you may want to change the maximum number of characters per line to 35.

Summing Up

Here is a summary of things you should know before you define your record format.

The names of your label fields, if any.

The names of your comment fields, if any.

Primary and secondary sort field names (Remember, a sort field name must either match a label or comment field name or must be called NAME or ZIP CODE).

The number of lines in your label.

The maximum number of characters per line in your record.

Mailing Record Format Options

Figure 3-4 summarizes the steps you take to define a mailing record format. Each of these steps is explained in the remaining sections of this chapter.

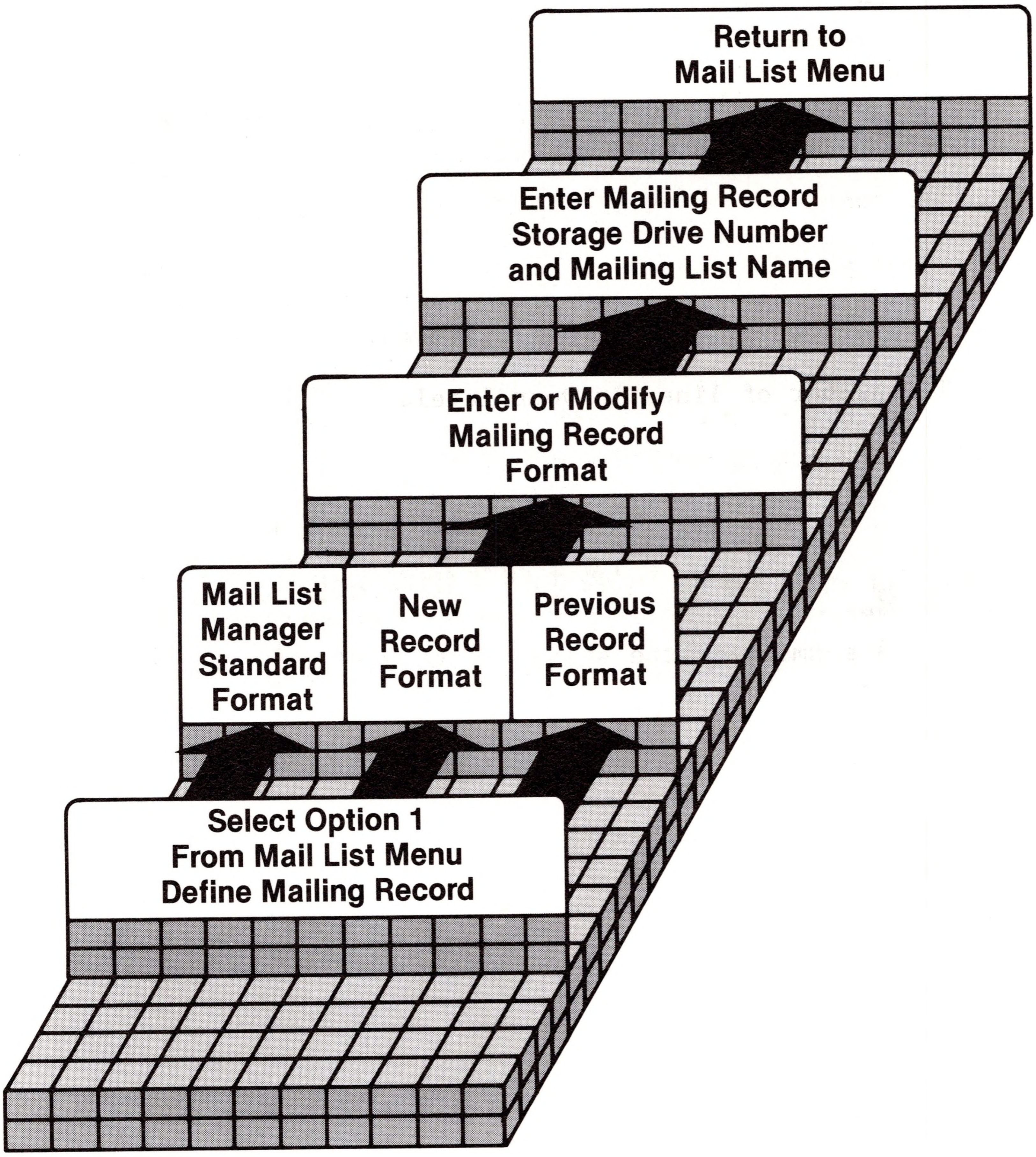
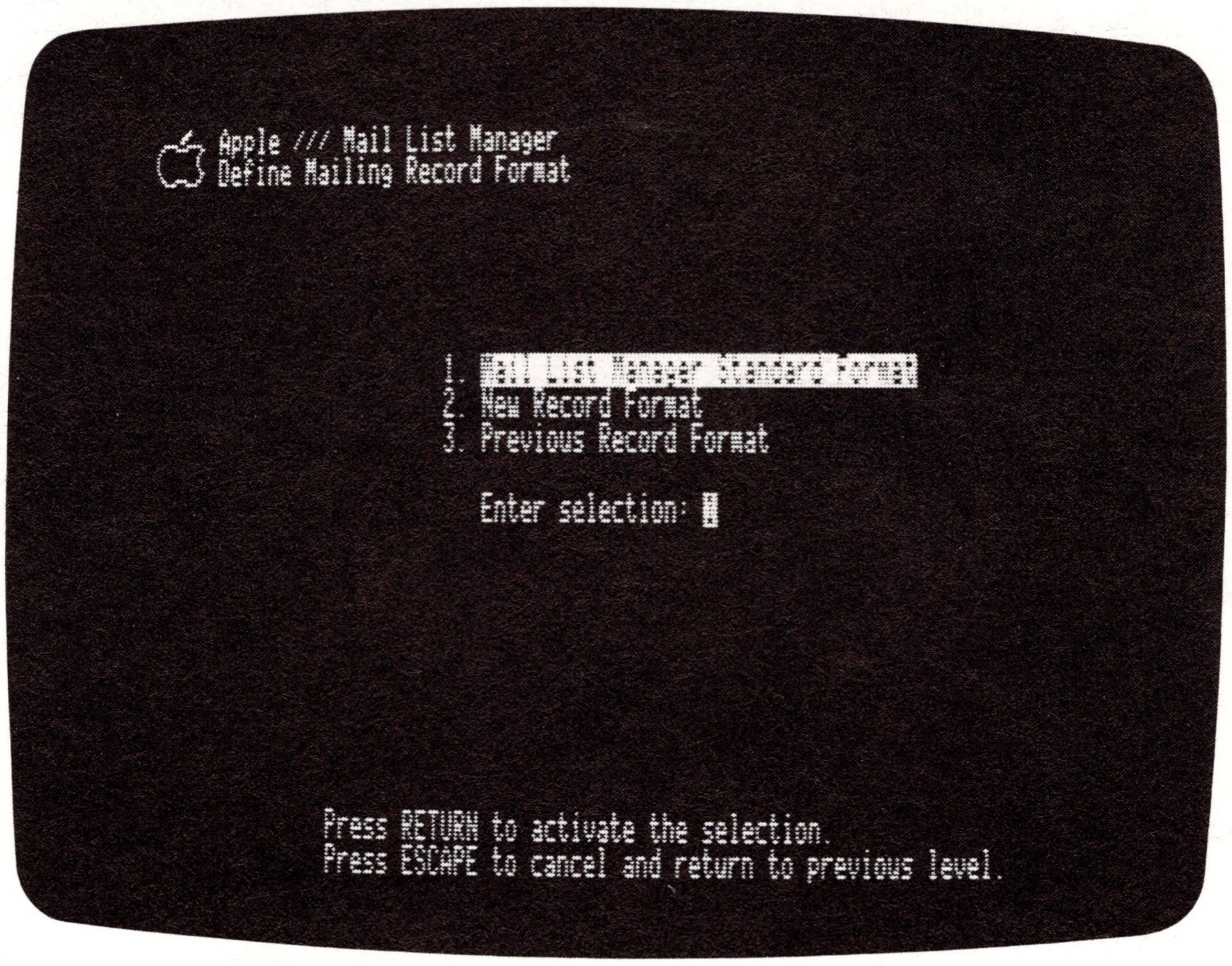

Return to
Mail List Menu
Enter Mailing Record
Storage Drive Number
and Mailing List Name
Enter or Modify
Mailing Record
Format
Mail List
Manager
Standard
Format
New
Record
Format
Previous
Record
Format
Select Option 1
From Mail List Menu
Define Mailing Record

Figure 3-4. Steps in Defining a Record Format

To specify a record format, select option 1, DEFINE MAILING RECORD FORMAT, from the Mail List Menu. The Define Mailing Record Format screen displays the following options:



```
Apple /// Mail List Manager
Define Mailing Record Format



          1. Mail List Manager Standard Format
          2. New Record Format
          3. Previous Record Format

             Enter selection: █



      Press RETURN to activate the selection.
      Press ESCAPE to cancel and return to previous level.
```

Figure 3-5. Define Mailing Record Format

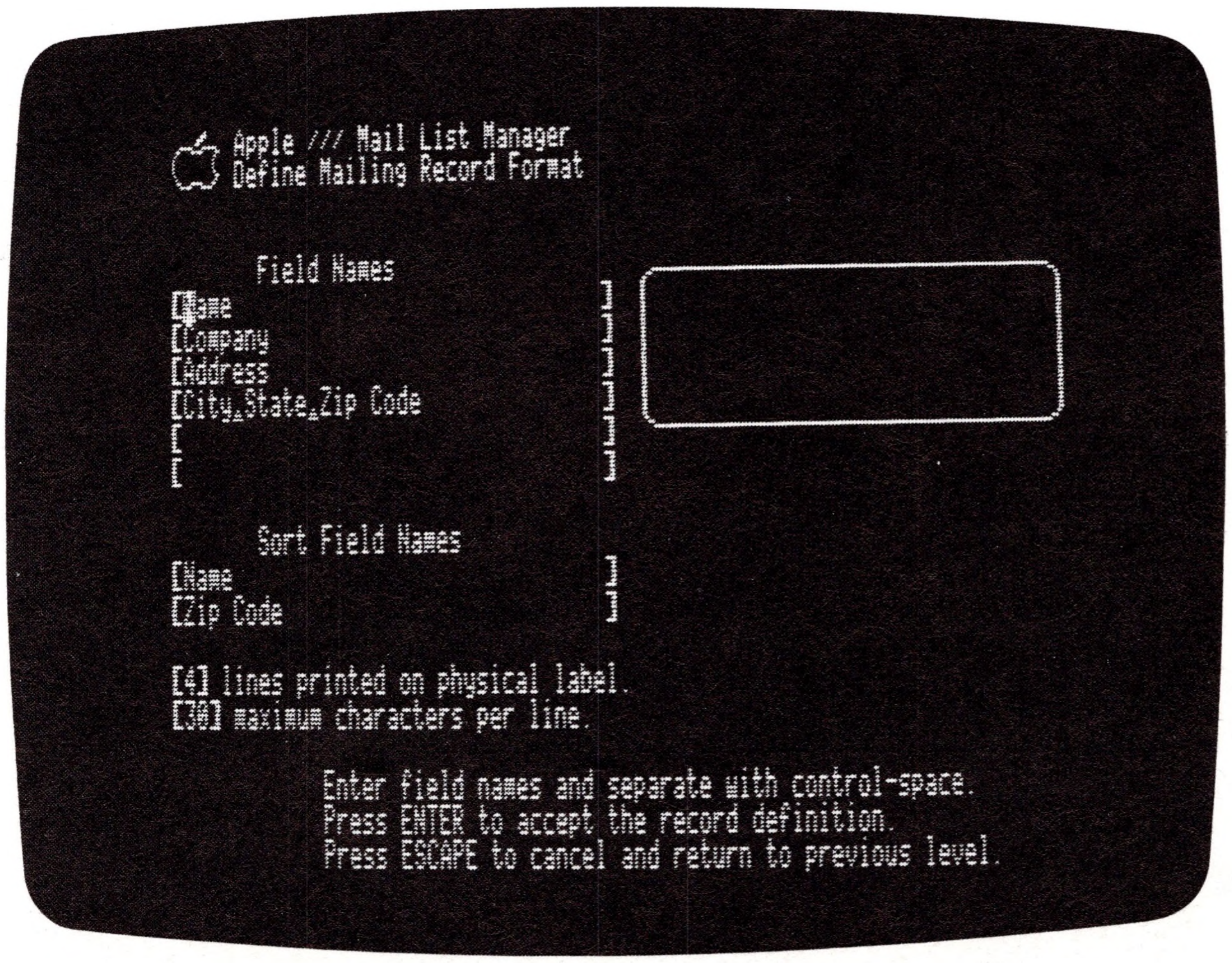
Option 1, Mail List Manager Standard Format, lets you either use the Mail List Manager's standard format as is or modify that format by altering field names and/or record dimensions.

Option 2, New Record Format, lets you define your own format by assigning your own field names and record dimensions.

Option 3, Previous Record Format, lets you use or modify a record format that you defined for a previous mailing list. This feature frees you from having to recreate record formats that already exist if you want to continue a mailing list on another diskette or create two mailing lists with the same or similar format.

Using the Standard Format

To create a new mailing list using the standard format, select option 1, Mail List Manager Standard Format, on the Define Mailing Record Format screen. The screen shows:



```
Apple /// Mail List Manager
Define Mailing Record Format

      Field Names
[Name                          ]
[Company                       ]
[Address                       ]
[City_State_Zip Code           ]
[                              ]
[                              ]

      Sort Field Names
[Name                          ]
[Zip Code                      ]

[4] lines printed on physical label.
[30] maximum characters per line.

           Enter field names and separate with control-space.
           Press ENTER to accept the record definition.
           Press ESCAPE to cancel and return to previous level.
```

Figure 3-6. Mail List Manager Standard Format

This screen displays the field names for the standard format. It also specifies that each printed label will contain four lines and that each of the first six lines of the record can contain a maximum of 30 characters.

You can modify the standard format by changing field names (including sort field names), the number of lines per label or the maximum number of characters per line.

To change field names on the standard format, move the cursor to the field you want to change. Then alter the text using the procedure for modifying screen information described in Chapter 2.

Remember that a sort field name must either match a label or comment field name or must be called "Name" or "Zip Code". If you enter another name, the screen displays:

```
***ERROR: Unrecognized or unmatched sort field name.
Press RETURN to go on.
```

Press the RETURN key and reenter a field name that matches a field name from the record, or enter "Name" or "Zip Code".

The line of text below the sort field name indicates the number of lines that you want printed on each label. The default number of lines is four. If you want to change this number, type the desired number (between one and six) and press the RETURN key. Note that the label frame changes accordingly.

The next prompt requests the maximum number of characters per line on a record. The default is 30. You can enter any number between 1 and 40.

Once you have a record format that suits you, press the ENTER key. You will be prompted for the number of the storage drive and the name of the mailing records diskette, as you were in the example in Chapter 2. Insert a formatted diskette into Drive 2, 3 or 4. Then respond to the prompts and press ENTER. The screen displays:

```
***WARNING: About to overwrite current content of diskette in drive #_
Press RETURN to go on, ESCAPE to return to previous level.
```

This message appears as a reminder that if there is information on the mailing records diskette, the mailing record format will be stored over it and the current information erased. To continue using the diskette, press the RETURN key.

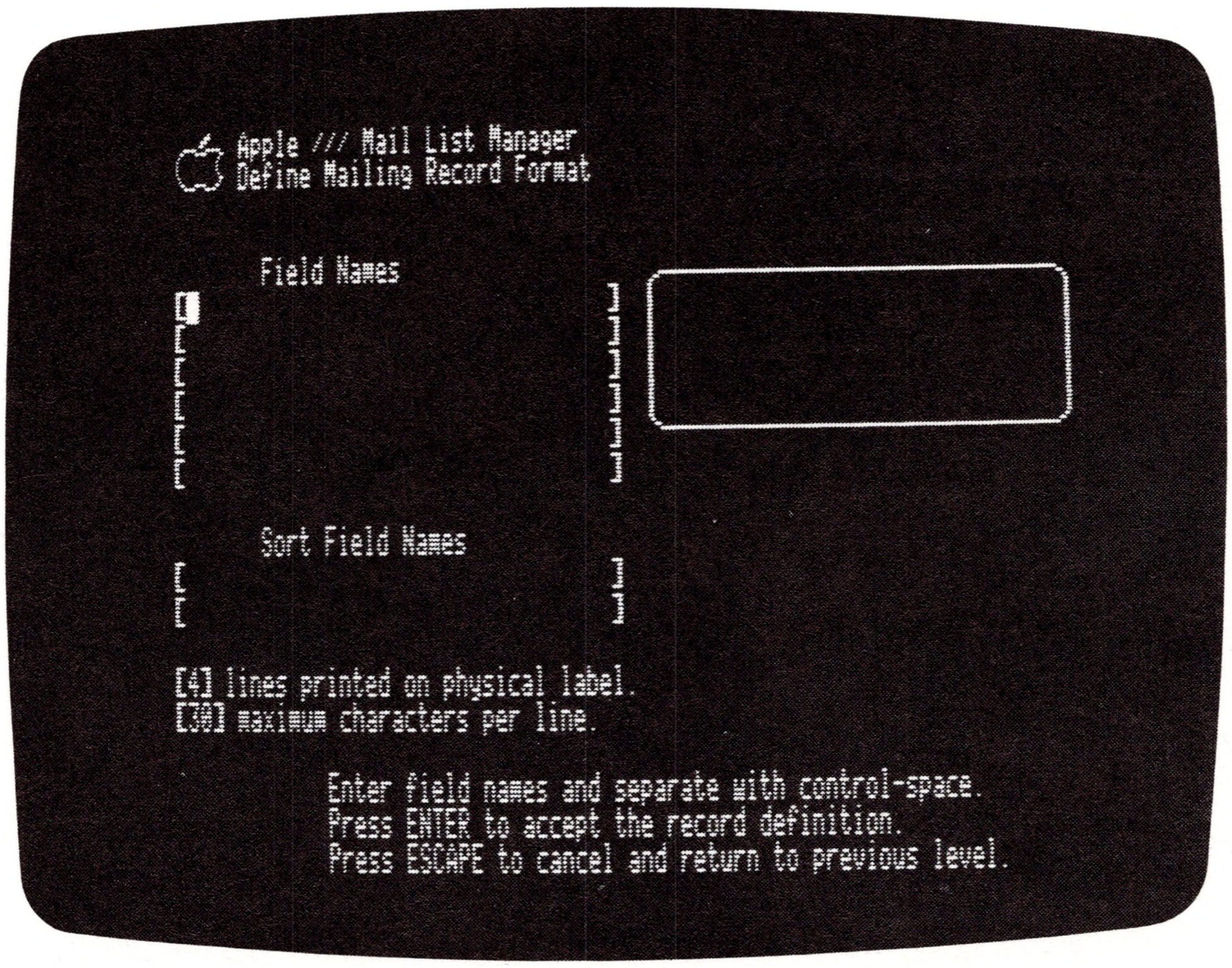
If the diskette contains information you do not want to erase, remove the diskette from the drive, replace it with another diskette, and press RETURN. The system stores the standard format on the new diskette and then displays the Mail List Menu on the screen.

If you define a record format, store it on your mailing records diskette, and then realize that you've made an error, you can modify the format by choosing Option 1, DEFINE MAILING RECORD FORMAT, from the Mail List Menu and then choosing selection 3, Previous Record Format, from the Define Mailing Record Format screen. The format you have just defined will be displayed.

After you define the format for your mailing records, you are ready to enter mailing records onto your mailing records diskette.

Defining a New Record Format

To define a new record format, select option 2, New Record Format, from the Define Mailing Record Format screen. The screen displays:



```
Apple /// Mail List Manager
Define Mailing Record Format

      Field Names
[                               ]
[                               ]
[                               ]
[                               ]
[                               ]
[                               ]

      Sort Field Names
[                               ]
[                               ]

[4] lines printed on physical label.
[30] maximum characters per line.

          Enter field names and separate with control-space.
          Press ENTER to accept the record definition.
          Press ESCAPE to cancel and return to previous level.
```

Figure 3-7. New Record Format

Note that the cursor is in the brackets on the first line. Enter a field name of up to 11 characters.

You can enter more than one field on each line of a record by separating the fields with a delimiter. To create a delimiter, hold down the CONTROL key and press the SPACE BAR.

After you complete each line of the record, press the RETURN key. The cursor moves to the next line. Continue entering names for all the fields in your record, including sort fields.

If you are using a free format, you do not need to enter any label and comment field names. When using a free format, you can either use NAME as the primary sort field and ZIP CODE as the secondary sort field, or you can leave the sort fields blank.

Next enter the number of lines that you want to be printed on each label and the maximum number of characters per line.

Once you have a satisfactory record format, press the ENTER key. You will receive the same prompts as described in the previous section on using a standard format.

Using a Previous Record Format

The Mail List Manager lets you create a new mailing list using a record format that you have already defined by making a copy of the record format from the original mailing records diskette and storing it on a new diskette.

To use a previous record format, select option 3, Previous Record Format. When the Choose Storage Drive screen is displayed, enter the number of the drive that contains the mailing records diskette with the record format you want to copy onto your new diskette. Next, press the ENTER key. After the diskette directory is displayed, press RETURN. The Mail List Manager displays the record format stored on the diskette.

If you are defining a record format so that you can continue a mailing list on a subsequent diskette, simply press the ENTER key. If you want to use the existing format as a starting point for creating a new format, modify the format in the same way that you modified the standard format and then press ENTER. In either case the screen displays:

```
Mailing Records Storage Drive (2-4)? [2]
Mailing List Name? [                              ]
```

If you have one external drive, remove your original mailing records diskette and insert the new diskette. Otherwise, place your new mailing records diskette in an empty external drive. Now enter the number of the drive that contains the new mailing records diskette and press the RETURN key. Type a name for the new mailing list and press the ENTER key.

The screen displays the usual warning message about overwriting the contents of the diskette.

To store the new record format onto the diskette, press the RETURN key.

Exercise 1: Defining a New Record Format

The case study in Chapter 1 describes how the manager of a high-rise apartment complex uses the Mail List Manager. This exercise shows you how to define a mailing record format for a mailing list similar to the mailing list described in that case study. Before you begin this exercise, insert the Mail List Manager diskette into the built-in drive and turn on the Apple III. Then, when the introductory screen appears, press RETURN so that the Mail List Menu is displayed. If your Apple III is already turned on, reboot by pressing CONTROL-RESET. Now place a formatted blank diskette into Drive 2.

1. Select option 1, DEFINE MAILING RECORD FORMAT, from the Mail List Menu and press RETURN. Then select the New Record Format option by typing 2 and pressing RETURN. The empty Mailing Record Format screen is displayed.

2. The records will include the following information: the addressee's name, apartment number, street address, city, state, and zip code. In addition, they will contain the date the tenant moved in, the code number of the building he lives in, and the last month for which the tenant has paid his rent. Thus, type the following field names:

Line	Field Name
1	Name
2	Apart. No.
3	Address
4	City▲State
5	Zip Code
6	move date▲bldg. code▲rent status

Remember, that you will need to use one delimiter in line 4 and two delimiters in line 6. A delimiter is created by holding down the CONTROL key and pressing the SPACE BAR.

Then type the following sort field names:

Line	Sort Field
7	Name
8	bldg. code

Now change the number of lines per label to 5 and press RETURN. Notice that the outline of the label changes after you press RETURN.

Press ENTER. The system prompts for a mailing record storage drive and mailing list name.

3. Press RETURN to indicate that your diskette is stored in Drive #2. Name the mailing list LAKEVIEW APARTMENTS and press ENTER. The Mail List Manager warns about overwriting the contents of the diskette. Because you used a blank diskette, press RETURN to store your record format on the diskette. The Mail List Menu is displayed.

4. Remove the diskette from the drive and label it LAKEVIEW APARTMENTS. Store the diskette in a safe place. You will enter record information onto this diskette in the exercise at the end of Chapter 5.

4

Choosing the Storage Drive

61 Choosing a Drive at the Beginning of a Session
64 Choosing a Drive Mid-Session

4

Choosing the Storage Drive

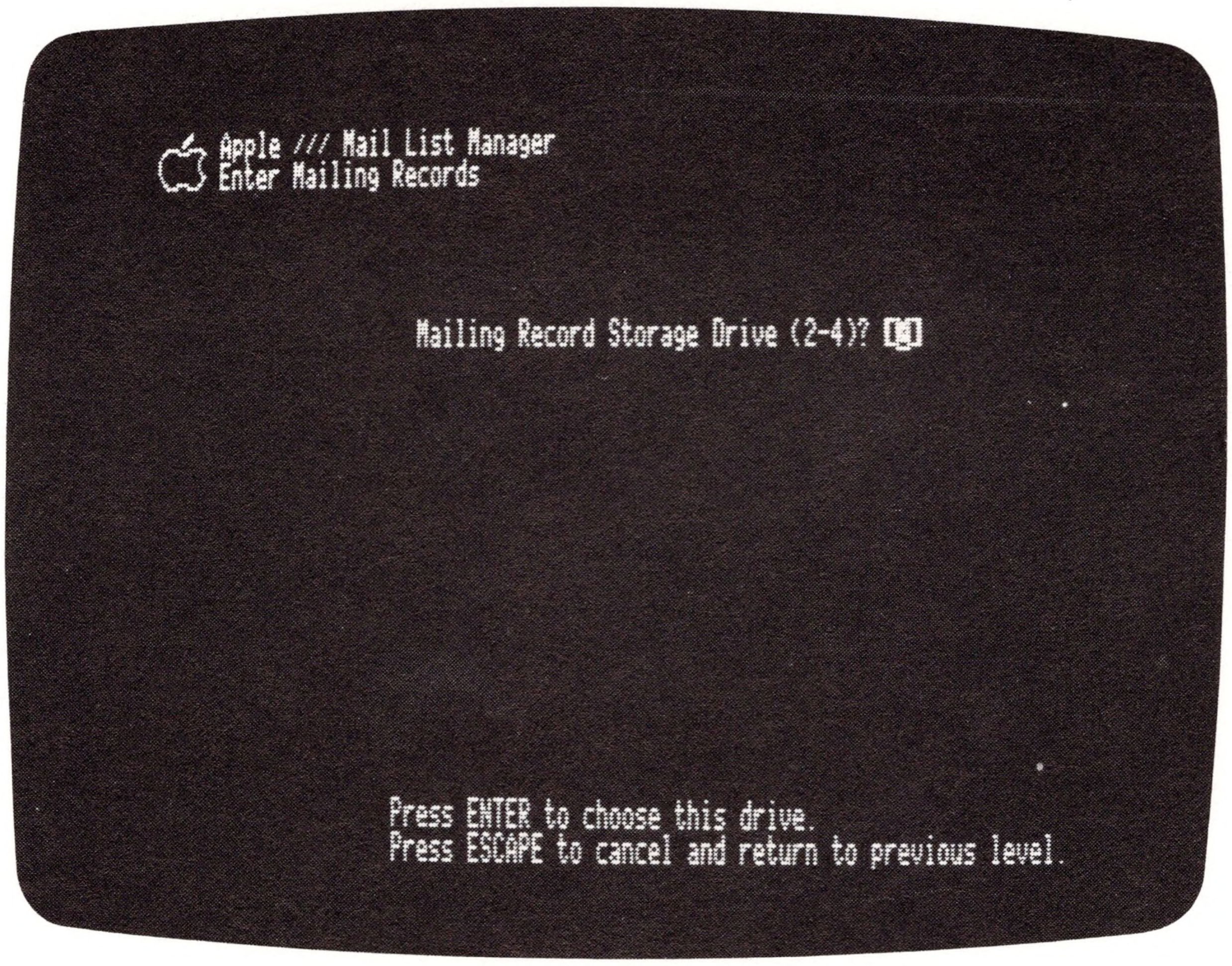
The Mail List Manager must always know the number of the disk drive that holds your mailing records diskette. Once the Mail List Manager knows the drive number, it looks on the diskette for certain crucial information such as the name of the mailing list stored on the diskette. This chapter tells you what you need to do to keep the Mail List Manager informed of where your mailing records diskette is placed.

Choosing a Drive at the Beginning of a Session

You already have seen that after you specify a mailing record format, the Mail List Manager prompts you for the number of the drive that contains your mailing records diskette and the name of your mailing list.

But suppose that you define a mailing record format, enter a few records, select option 9 to exit the Mail List Manager, and then turn off the Apple III. When you turn the Apple III back on, the Mail List Manager needs to know the number of the disk drive in which your mailing records diskette is placed.

Each time you start up the Mail List Manager and select an option on the Mail List Menu other than option 1 (DEFINE MAILING RECORD FORMAT), option 8 (MERGE / FILTER MAILING LISTS) and option 9 (EXIT MAIL LIST MANAGER), you immediately are prompted for the number of the drive that contains your mailing records diskette. The screen looks like this:



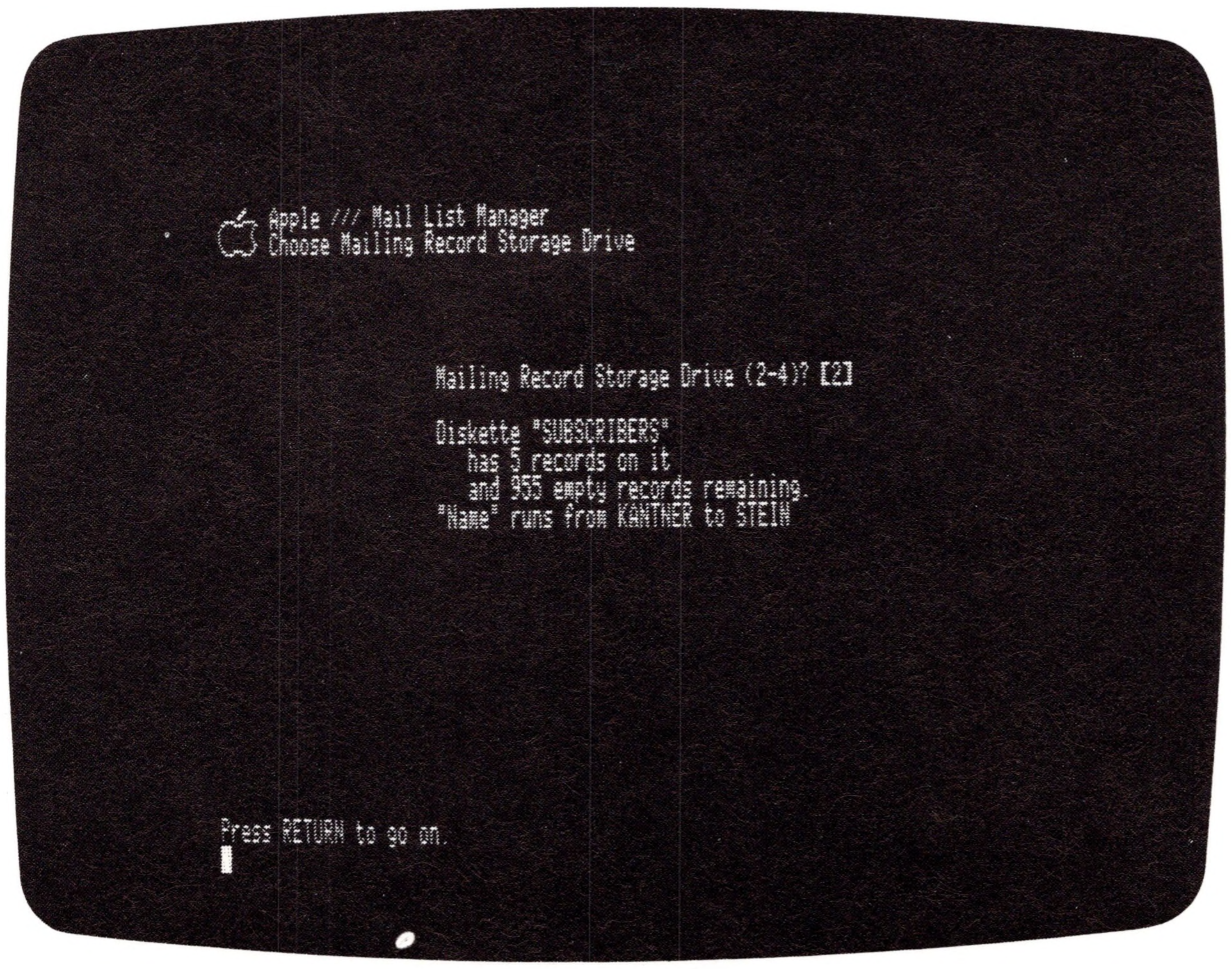
```
Apple /// Mail List Manager
Enter Mailing Records

                 Mailing Record Storage Drive (2-4)? [2]

               Press ENTER to choose this drive.
               Press ESCAPE to cancel and return to previous level.
```

Figure 4-1. Specify Drive Number

Notice that the number 2 appears inside the brackets. Thus, drive 2 is considered the default drive. To indicate that your storage drive is drive 2, press ENTER. To select another drive, type the appropriate drive number and then press ENTER.

Each time you begin using the Mail List Manager, the system assumes that your storage drive is drive 2. If, during the course of a session, you choose a different storage drive, the drive you choose becomes the default drive during that session.

After you type the appropriate drive number, press ENTER. The Mail List Manager then displays a diskette directory similar to this:



```
Apple /// Mail List Manager
Choose Mailing Record Storage Drive

          Mailing Record Storage Drive (2-4)? [2]

          Diskette "SUBSCRIBERS"
             has 5 records on it
             and 955 empty records remaining.
          "Name" runs from KANTNER to STEIN

Press RETURN to go on.
█
```

Figure 4-2. Diskette Directory

Mailing lists often occupy several diskettes. If you have used the MERGE / FILTER option to create a mailing list, the directory displays the sequence number of the diskette next to the diskette name.

If, when prompted for a drive number, you type the number of a drive that your Apple III is not connected to, you get this message:

```
I-O Error #9 on drive #_
Press RETURN to try again, or ESCAPE to return to previous level.
```

If you press RETURN, the operation is attempted again. If you press ESCAPE, the Mail List Menu is displayed.

If, when prompted for a drive number, you type the number of a drive that contains no diskette or whose door is open, you get this message:

```
I-O Error #64 on drive #____
Press RETURN to try again, or ESCAPE to return to previous level
```

If, when prompted for a drive number, you type the number of a drive that contains a diskette that is bent or scratched, you get the same message.

If, when prompted for a drive number, you type the number of a drive that does not contain a properly formatted diskette or a diskette that does not contain a mailing record format, you get this message:

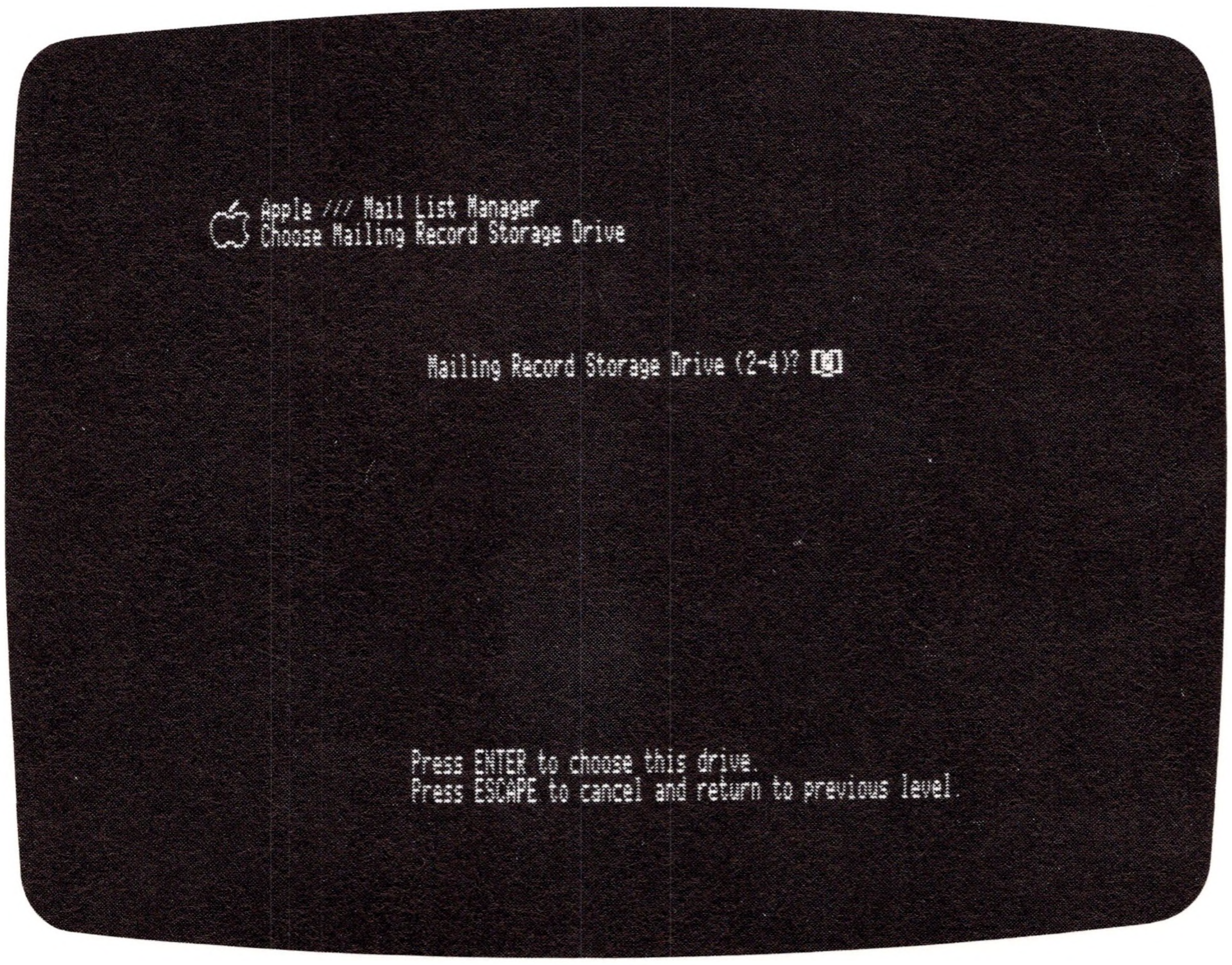
```
***ERROR: A good mailing records diskette is not seated properly in that drive.
Press RETURN to go on.
```

When you type RETURN, the Mail List Menu is displayed.

Choosing a Drive Mid-Session

During a session with the Mail List Manager, you frequently may be working with several different mailing records diskettes. You may, for example, fill one diskette with records and need to continue your mailing list on another diskette. Or you may want to stop working on one mailing list and begin working on another. (Remember, you can store only one mailing list on a diskette.)

You need to tell the Mail List Manager each time you begin working on a different mailing records diskette. To do this, select option 2, CHOOSE RECORD STORAGE DRIVE, from the Mail List Menu, and press RETURN. The screen displays:



```
Apple /// Mail List Manager
Choose Mailing Record Storage Drive

          Mailing Record Storage Drive (2-4)? 4

         Press ENTER to choose this drive.
         Press ESCAPE to cancel and return to previous level.
```

Figure 4-3. Specify Drive Number

You need to select option 2 regardless of whether you place your new mailing records diskette in the same drive as the mailing records diskette previously used or in a different external drive. The only time you can place a mailing records diskette in the internal drive is during a merge.

Type the number of the drive that contains the mailing records diskette you want to use and press ENTER. The Mail List Menu is then displayed.

If you change mailing records diskettes and then select an option from the Mail List Menu without selecting option 2 first, the screen displays this message:

```
It seems a different diskette is now in drive _; press ESCAPE
to return to main menu, or insert proper diskette and press RETURN
```

Press ESCAPE. Then select option 2 from the Mail List Menu to inform the Mail List Manager of the new mailing records diskette.

5

Entering Record Information

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5

Entering Record Information

This chapter explains how to enter mailing records onto a mailing records diskette. Exercise 2 at the end of this chapter shows you how to create a mailing list using the record format you defined in Exercise 1. Exercise 3 uses the same record format to create a second mailing list. Both of these lists are used in exercises later in the manual.

Figure 5-1 is an overview of the steps you take when you enter mailing record information.

Strategy

A mailing records diskette can hold a maximum of 960 mailing records. If you fill one diskette with mailing records, you can continue your mailing list on a second mailing records diskette as long as the same mailing record format is used. If, however, you want to sort a mailing list that is stored on more than one diskette, you need at least two external drives.

If you only have one external drive and know that your mailing list is going to occupy more than one diskette, try to think ahead about how your mailing records could be most strategically stored on diskette. You might, for example, restrict one mailing records diskette to addressees whose last names begin with the letters A through H, a second to addressee last names beginning with I through P and a third to addressee last names beginning with Q through Z. Then, you could sort each of these mailing records diskettes individually and end up with a mailing list that is properly sorted by last name.

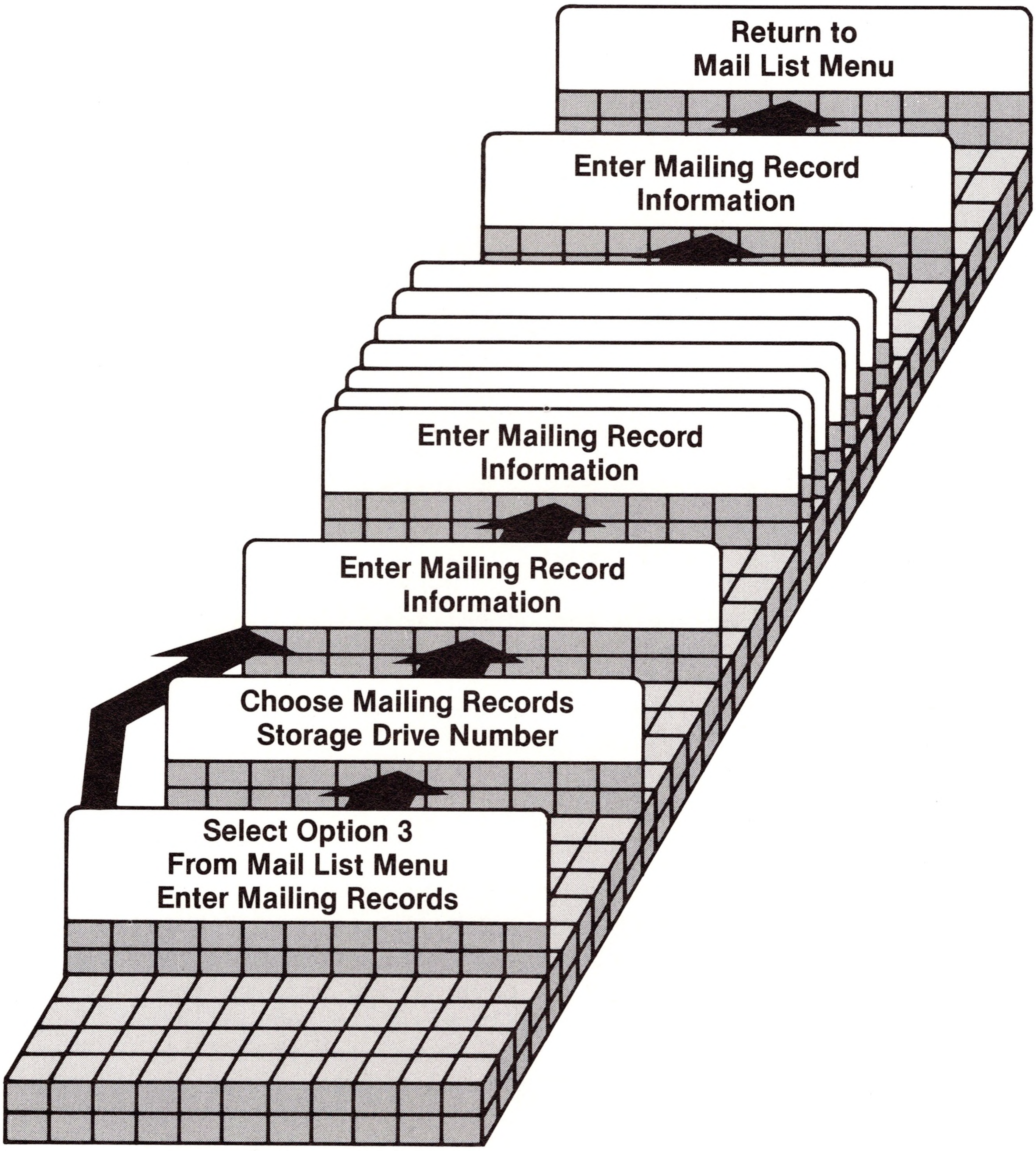
Return to
Mail List Menu
Enter Mailing Record
Information
Enter Mailing Record
Information
Enter Mailing Record
Information
Choose Mailing Records
Storage Drive Number
Select Option 3
From Mail List Menu
Enter Mailing Records

Figure 5-1. Steps in Entering Record Information

Another way of obtaining a properly sorted list when you have only one external drive is to use the Filter option described in Chapter 9.

Creating Mailing Records

To enter records into your mailing list, select option 3, ENTER MAILING RECORDS, from the Mail List Menu and press RETURN.

If you have not already identified your mailing records storage drive, the Mail List Manager prompts you for that drive number. After you type the appropriate number and press ENTER, the diskette directory is displayed. Press RETURN to continue.

The screen displays a blank record with the field names you chose when you defined the mailing record format.

If you fail to define a mailing record format before you choose option 3, ENTER MAILING RECORDS, you'll get this message:

```
***ERROR: A good mailing record diskette is not seated properly in that drive.
Press RETURN to go on.
```

Press RETURN to return to the Mail List Menu.

The following sections describe how to enter information into a mailing record.

Label and Comment Fields

You have already seen that the first six lines on a mailing record contain label and comment fields. You can enter record information into these fields using the same procedures that you used when you created a sample mailing list in Chapter 2. A summary of how to move the cursor and insert and delete characters is included in the reference card in the back of this book.

Remember that to enter a delimiter to separate fields, hold down the CONTROL key and press the SPACE BAR. A delimiter appears on the screen as a small triangle (▲). When you print a label or record, the delimiter appears as a space.

Note that delimiters appear on the left hand margin of lines whose corresponding mailing record format lines contain delimiters. If you try to enter a delimiter on a line whose corresponding format line does not contain a delimiter, the Apple III beeps.

Whenever you want any line in your record to contain the same information as the same line of the previous record in your list, just move the cursor to the appropriate line in the record you are creating. Type P (for Previous) while holding down the CONTROL key and then press RETURN. This "repeat" feature is particularly helpful when your mailing list includes several people in the same company, city, state, or zip code area.

The maximum number of characters that can be entered on the first six lines of a record is 105. The Mail List Manager informs you when you are reaching the maximum character allowance by moving the right bracket to the left on the remaining lines of the record.

The Phone Field

The PHONE field, line 7, lets you enter an area code, a phone number, and an extension; for example:

(213) 323-8111 x2933

Acceptable characters in this field are:

1234567890Xx-() and space

You can enter a maximum of 20 characters in this field.

The Label Codes Field

The LABEL CODES field lets you print or display numerous subsets of your mailing list. Label codes can consist of a maximum of six characters.

To illustrate the use of label codes, let's develop a four-letter label code for a short mailing list wherein the first letter of the code designates the addressee's income; the second, age; the third, month hired; and the fourth, employment status. The letters A, B, C, and D indicate the following categories:

Column Number	Label Code A	B	C	D
1 Income	0-11,999	12,000-24,999	25,000-30,999	40,000+
2 Age	0-20	21-40	41-60	61+
3 Month hired	Jan-Mar	Apr-Jun	Jul-Sept	Oct-Dec
4 Employment status	Professional	Nonprofessional	Unemployed	

Table 5-1. Label Codes Categories

Label codes that use these categories might look like this:

Name	Label Codes
Judy Black	ADBB
Bob Brown	CCBA
Betty Brown	ABAB
Jake Jones	BABA
Mary Smith	BCAA

The code for Judy Black says that she earns less than $12,000 per year (A), is 61 or older (D), was hired during the second quarter of the year (B), and is a nonprofessional (B). You decipher the others.

Using these label codes and the Print/Display or Merge/Filter options, you could create a mailing list containing records that include any combination of these categories. You might, for example, want to print the records of addressees who are professionals between 21 and 40 who were hired during the fourth quarter of the year and who earn more than $40,000 per year.

A complete description of how label codes are used to print or display selected records on a mailing list is included in the chapter on printing and displaying records.

Primary and Secondary Sort Fields

The next two fields are the primary (line 9) and secondary (line 10) sort fields. The Mail List Manager enters information into these fields as you enter information into the corresponding label or comment field. If you want to place information in a sort field that is different than the information in the corresponding label or comment field, simply move the cursor to the sort field and overwrite the sort field's contents.

A sort field can only contain letters, numbers, left parentheses, right parentheses, hyphens and spaces. All other characters appear in the sort field as spaces. Thus, if you were to specify one of your sort fields as COMPANY and then enter the name "R & D Inc." into the COMPANY field, the COMPANY sort field would display "R   D INC ".

Saving Your Mailing Records

After you have completed entering information into a mailing record, press the ENTER key. Then a blank record is displayed. You can either continue to enter records, or press the ESCAPE key to return to the Mail List Menu.

Your mailing records are safely stored on diskette only after you press ESCAPE and return to the Mail List Menu. If you turn off the Mail List Manager or press CONTROL-RESET before the Mail List Menu is displayed, none of your records will be saved on diskette. You will have to reenter your list of records.

If you enter record information into a record displayed on the screen and then decide not to save that record on your diskette, press the ESCAPE key instead of the ENTER key. The current record is erased and you are returned to the Mail List Menu.

If you create a record, press ENTER, and then realize that the record contains an error, there is no quick way to return that record to the screen. Instead you must press the ESCAPE key when a blank mailing record is displayed to return to the Mail List Menu and then select option 4, FIND / MODIFY / DELETE RECORDS. You then can find the record that contains the error, and modify that record.

You should always make backup copies of each mailing list that you create. To make backups, use the Utilities diskette that comes with the Apple III. Instructions on making backups are in the Apple III Owner's Guide. It is also good practice to write-protect your backups.

Continuing Your List on a Second Diskette

After you have entered 960 records onto your mailing records diskette, the Mail List Manager displays this message:

```
***ERROR: Diskette is now full.
Press RETURN key to go on.
```

When you press RETURN, the Mail List Menu is displayed. Select Option 1, DEFINE MAILING RECORD FORMAT. When the Define Mailing Record Format screen is displayed, select option 3, Previous Record Format. Follow the directions for using a previous record format in Chapter 3. After your previous record format has been copied onto your new mailing records diskette, you are ready to continue entering mailing records.

You may want to continue your list on a second diskette before your first diskette is completely full. That way, you can go back and insert records on the first diskette and then sort the records using the SORT MAILING RECORDS option. Remember that to sort a mailing list that occupies more than one diskette, you need to use the MERGE / FILTER option.

Exercise 2: Entering Record Information

In this exercise, you will enter record information into records using the format you created in Exercise 1. These records contain names and addresses of a few tenants of the LAKEVIEW APARTMENT complex.

Each subsequent exercise in this manual tells you to reboot the Mail List Manager before beginning that exercise. This is to insure that the instructions we give are the same for every user. If you feel fairly comfortable using the Mail List Manager, you don't need to reboot each time. Simply begin each exercise with the Mail List Menu displayed. If you don't reboot, it is possible that the prompts you see on the screen will not be in exactly the same order as those listed in the exercises. (You may not, for example, always see the Choose Mailing Record Storage Drive prompt.)

1. Reboot the Mail List Manager. Next place the LAKEVIEW APARTMENTS diskette containing the record format you created in Exercise 1 into Drive 2.

2. Select option 3, ENTER MAILING RECORDS, from the Mail List Menu and press RETURN. The Mail List Manager prompts:

```
Mailing Record Storage Drive (2-4)? [2]
```

3. Press ENTER. The screen displays the diskette directory as:

```
Diskette "LAKEVIEW APARTMENTS"
has 0 records on it
and 960 empty records remaining.
```

4. Press RETURN to enter record information.

5. The screen displays a blank record format showing the field names you selected in Exercise 1. The cursor is in the record frame in the NAME field. Enter the information from the following tenants list. Press ENTER after you finish entering the information for each record.

When you enter the records into your list, use the CONTROL-P feature to repeat information that is the same as that of the corresponding line of the previous record.

Ron Lindquist
2D
1606 E. 98th Pl.
Chicago,▲IL
60201
5-1-80▲L1▲6-81
(312) 493-0800

Jamie Neylon
6E
1607 E. 98th Pl.
Chicago,▲IL
60201
12-1-79▲L2▲4-81
(312) 493-0187 x333

Karna Lind
6G
1609 E. 98th Pl.
Chicago,▲IL
60201
4-1-75▲L3▲5-81
(312) 493-2111

Jessica Loncala
2A
1609 E. 98th Pl.
Chicago,▲IL
60201
5-1-80▲L3▲6-81
(312) 493-2220

6. After you have entered the last record and a blank record format is displayed, press ESCAPE to return to the Mail List Menu. Remove the diskette from Drive 2. You will use this list again in later exercises.

Exercise 3: Creating a Second Mailing List

This exercise shows you how to use the record format you created in Exercise 1 to create a new mailing list that contains the records of tenants living in a second apartment complex. You'll need a formatted diskette for storing the new mailing list. Before you begin, reboot the Mail List Manager.

1. Place the mailing records diskette labeled LAKEVIEW APARTMENTS into Drive 2. Select option 1, DEFINE MAILING RECORD FORMAT, from the Mail List Menu and press RETURN. The Mail List Manager displays the Define Mailing Record Format screen.

Select option 3, Previous Record Format, and press RETURN. The screen displays:

```
Mailing Record Storage Drive (2-4)? [2]
```

2. Press ENTER. The screen displays:

```
Diskette "LAKEVIEW APARTMENTS"
has 4 records on it
and 956 empty records remaining.
```

If you find that the Mail List Manager tells you that you have more than this number of records, you probably inadvertently entered one or more blank records. This won't prevent you from successfully completing the exercises.

3. Press RETURN to display the record format on the screen. Remove the diskette from its drive and replace it with a blank formatted diskette. Press ENTER. The Mail List Manager prompts:

```
Mailing Record Storage Drive (2-4)? [2]
Diskette Name? [                              ]
```

4. Press RETURN and name the diskette CREEKSIDE APARTMENTS. Press ENTER. The screen displays the warning reminder about overwriting the contents of the diskette. Since this is the diskette you want to use, press RETURN. The screen displays

the Mail List Menu. You are now ready to enter record information into a new mailing list.

5. Select option 3, ENTER MAILING RECORDS, from the Mail List Menu and press RETURN. You will be prompted for the number of your storage drive. Follow the Mail List Manager's instructions. When the ENTER MAILING RECORDS screen is displayed, enter these records for tenants of CREEKSIDE APARTMENTS.

Kathy Markouc
5A
1961 Orrington Ave.
Evanston,▲IL
60625
4-1-77▲C2▲6-81
312-497-0801

Mary E. Mills
7B
1963 Orrington Ave.
Evanston,▲IL
60625
10-1-78▲C1▲6-81
312-497-0043

Buck Floyd
4B
1963 Orrington Ave.
Evanston,▲IL
60625
6-1-80▲C2▲5-81
312-497-7451

6. After you have entered the final record on your list and pressed ENTER, press ESCAPE to return to the Mail List Menu. Remove the diskette from Drive 2 and label it CREEKSIDE APARTMENTS. You will use both the LAKEVIEW APARTMENTS and the CREEKSIDE APARTMENTS diskettes again in exercises later in this manual, so we suggest you make backup copies.

6

Updating Your Mailing List

83 Adding Records to a Mailing List
84 Finding, Modifying, and Deleting Records
86 The Search Options
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88 Searching by Secondary Sort Field
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89 First
90 Last
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92 Exercise 4: Updating a Mailing List

6

Updating Your Mailing List

To keep your mailing list up-to-date, you periodically may need to modify your mailing records, add new records, or delete outdated ones. It also is likely that, on occasion, you will want to examine the content of a particular record.

To add new records to your list, you use option 3 on the Mail List Menu, ENTER MAILING RECORDS. To modify a record, delete a record, or check the content of a record, you use option 4 on the Mail List Menu, FIND / MODIFY / DELETE RECORDS.

This chapter explains how these options are used. The chapter concludes with an exercise in which you modify and delete records on one of the mailing lists you previously created.

Adding Records to a Mailing List

To add records to a mailing records diskette, select option 3, ENTER MAILING RECORDS, from the Mail List Menu and press RETURN.

If you have not already identified your storage drive, you will be prompted for the number of the disk drive containing your mailing records diskette. Enter the appropriate drive number and press ENTER. The diskette directory is displayed. Press RETURN to continue.

When a blank mailing record is displayed, enter mailing record information as described in Chapter 5.

You need to define a mailing record format only once for each mailing records diskette that you use.

Finding, Modifying, and Deleting Records

Figure 6-1 illustrates the steps you take to find, modify, or delete a mailing record. Each of these steps is explained in the following paragraphs.

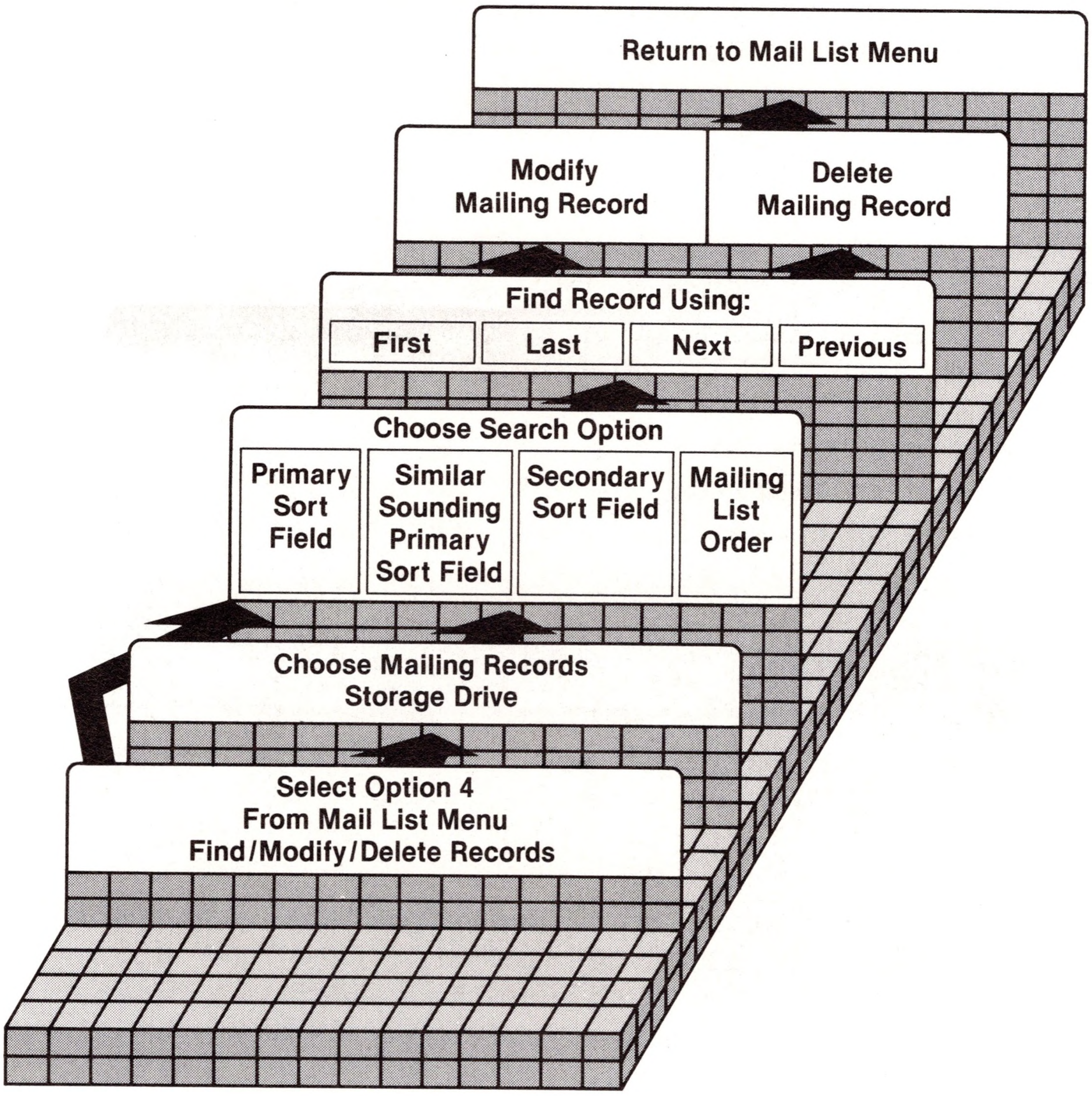

Return to Mail List Menu
Modify Mailing Record
Delete Mailing Record
Find Record Using:
First
Last
Next
Previous
Choose Search Option
Primary Sort Field
Similar Sounding Primary Sort Field
Secondary Sort Field
Mailing List Order
Choose Mailing Records Storage Drive
Select Option 4 From Mail List Menu Find/Modify/Delete Records

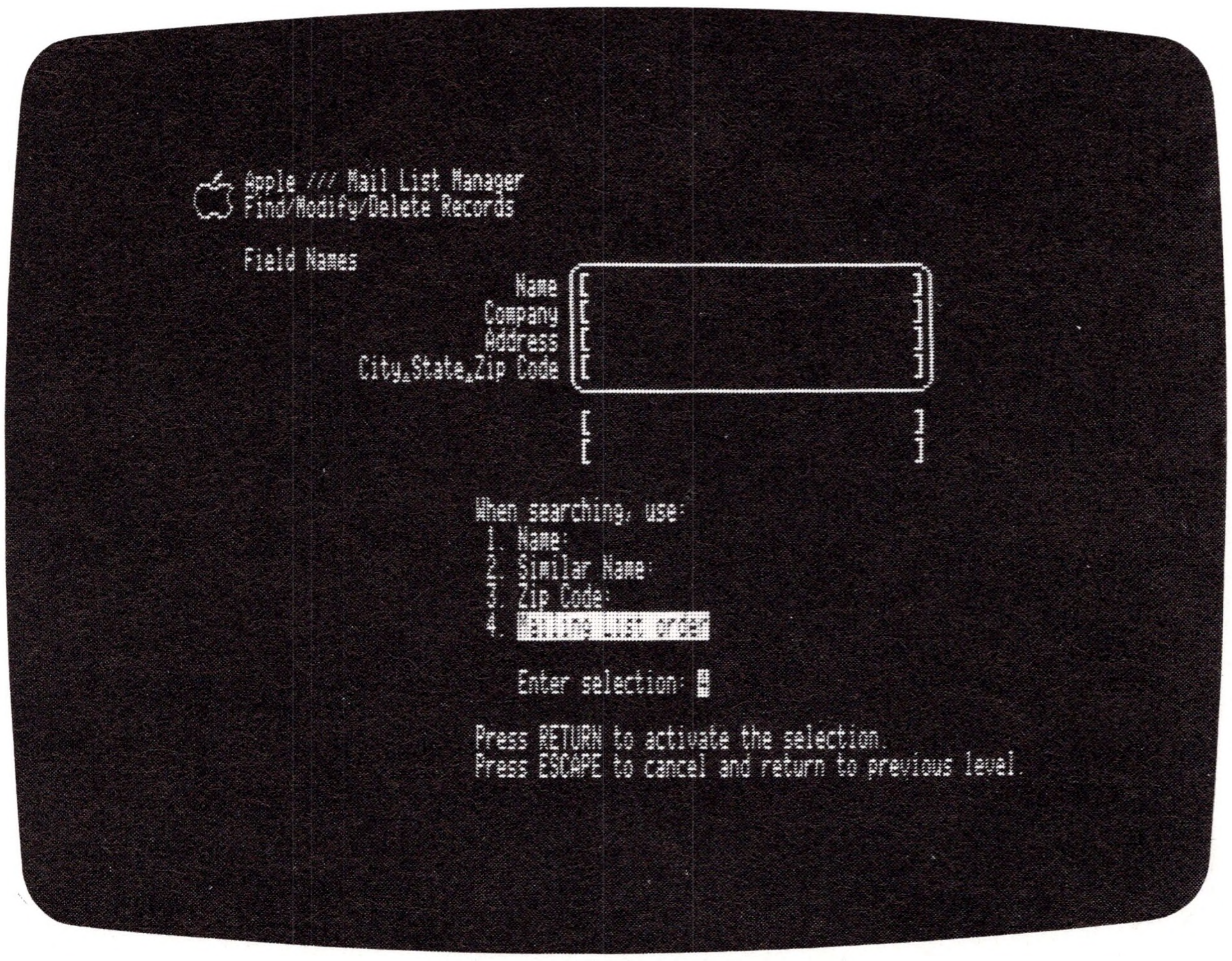
Figure 6-1. Steps in Finding, Modifying, and Deleting Mailing Records

To find, modify, or delete a mailing record, select option 4, FIND / MODIFY / DELETE RECORDS, from the Mail List Menu and press RETURN.

> If you have not already identified your storage drive, you will be prompted for the number of the storage drive that contains your mailing records diskette. After you type the appropriate number and press ENTER, the diskette directory is displayed. Press RETURN to continue.

The top half of the screen displays the label and comment field names on your current mailing record format. The bottom half displays the four search options available for locating a record on your mailing records diskette.

If you are using the standard format and you select option 4, FIND / MODIFY / DELETE RECORDS, from the Mail List Menu, this screen is displayed:



```
 Apple /// Mail List Manager
 Find/Modify/Delete Records

   Field Names
                     Name [                               ]
                  Company [                               ]
                  Address [                               ]
      City,State,Zip Code [                               ]

                          [                               ]
                          [                               ]

             When searching, use:
              1. Name:
              2. Similar Name:
              3. Zip Code:
              4. Mailing List order

                 Enter selection: █

             Press RETURN to activate the selection.
             Press ESCAPE to cancel and return to previous level.
```

Figure 6-2. Search Options

The first and second search options search for a record based on the record's primary sort field name, and the third search option bases its search on the record's secondary sort field name. Thus, when the standard format is used, the first and second options search based on Name and the third option searches based on Zip Code.

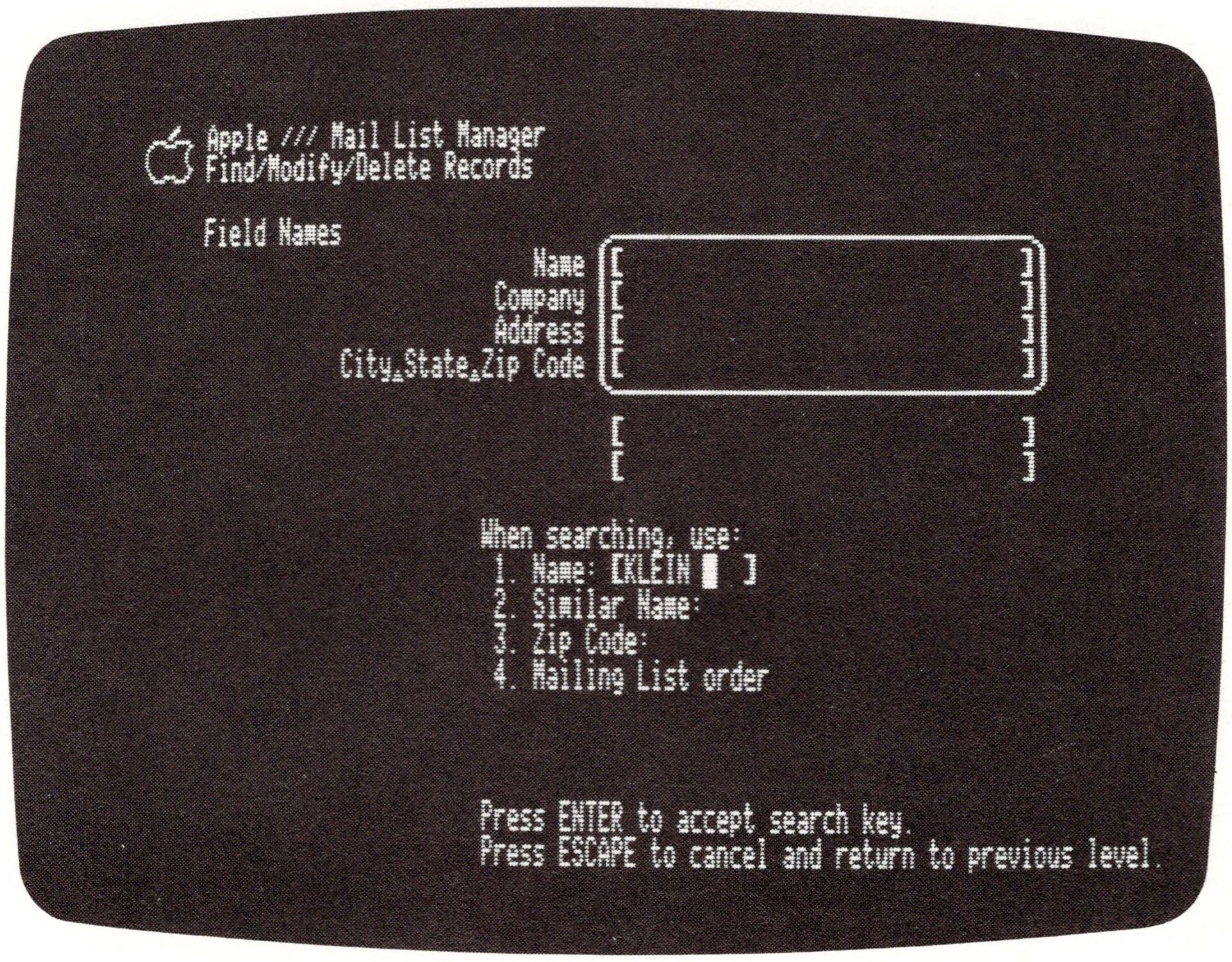
The Search Options

The following is a brief description of the four search options.

Searching by Primary Sort Field

After you select option 1, the Mail List Manager looks for records whose primary sort field contains the exact word or group of characters that you specify.

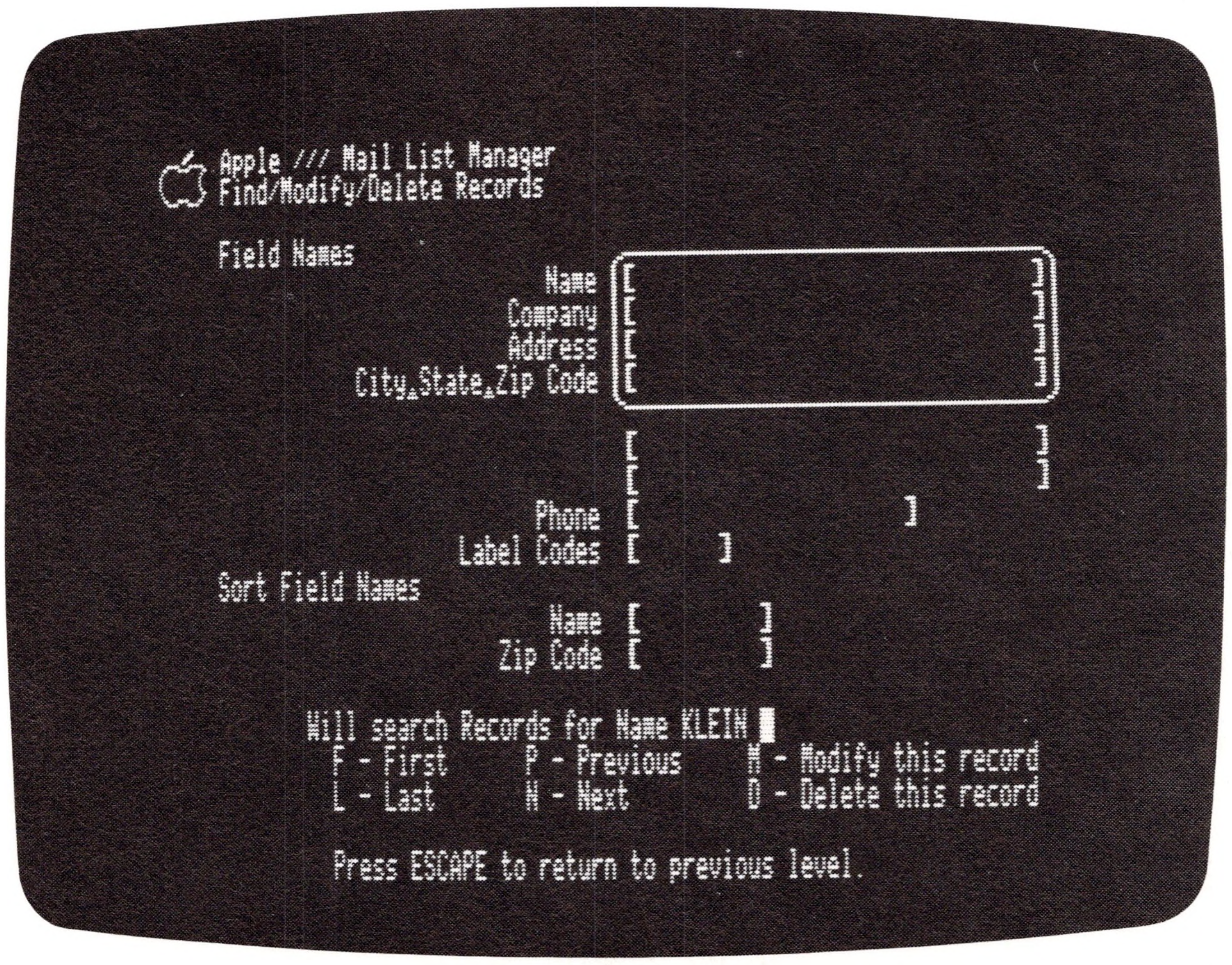
After you select this option and press RETURN, brackets appear next to the option you've selected. Enter the contents of the primary sort field of the record you are searching for. Thus, if you are using the standard format and looking for the name Klein, the screen would look like this:



```
Apple /// Mail List Manager
Find/Modify/Delete Records

Field Names
                    Name [                    ]
                 Company [                    ]
                 Address [                    ]
  City,State,Zip Code [                    ]

                         [                    ]
                         [                    ]

           When searching, use:
            1. Name: [KLEIN █ ]
            2. Similar Name:
            3. Zip Code:
            4. Mailing List order



           Press ENTER to accept search key.
           Press ESCAPE to cancel and return to previous level.
```

Figure 6-3. Searching for Name

Now press ENTER again. The Mail List Manager displays a message telling you the field it will search for and a list of update codes for you to select from. Here is what the screen looks like, again using the standard format:



```
Apple /// Mail List Manager
Find/Modify/Delete Records

Field Names
                       Name [                          ]
                    Company [                          ]
                    Address [                          ]
        City▵State▵Zip Code [                          ]

                            [                          ]
                            [                          ]
                      Phone [                  ]
                Label Codes [     ]
Sort Field Names
                       Name [        ]
                   Zip Code [        ]

     Will search Records for Name KLEIN █
      F - First    P - Previous    M - Modify this record
      L - Last     N - Next        D - Delete this record

      Press ESCAPE to return to previous level.
```

Figure 6-4. Update Codes

The six options, or update codes, shown at the bottom of the screen are used to find records on your list, based on the search option you select, and to delete or modify a record after it has been found.

Update codes are explained later in this chapter.

The Mail List Manager does not distinguish between uppercase and lowercase when searching records to find matching fields. You can enter the characters in any combination of uppercase and lowercase.

Searching by Similar Sounding Primary Sort Field

After you select Option 2, the Mail List Manager looks for records whose primary sort fields contain a word that sounds similar to the word that you specify.

For example, suppose you are using a standard format and want to find Peter Klein's record, but are not sure whether "Klein" is spelled Klein, Klien, or Cline. If you select search option

2 and then enter either Klein, Klien, or Cline in the brackets, the Mail List Manager looks through the mailing records diskette to find all the records whose primary sort fields sound like the name you have entered. Soundexing, the method used by the Mail List Manager to locate similar-sounding names, is described in Appendix A.

You use the same series of keystrokes when you select option 2 that are described in the discussion of option 1.

Searching by Secondary Sort Field

After you select option 3, the Mail List Manager looks for records whose secondary sort fields contain a secondary sort field that you specify.

For example, if you are using the standard format, you can use option 3 to find all records that contain a particular zip code. You use the same series of keystrokes when you select option 3 that are described in the discussion of option 1.

Searching by Mailing List Order

Option 4, Mailing List Order, lets you locate records by searching sequentially through the records on a mailing records diskette.

If you have not sorted the records on your mailing records diskette, the Mail List Manager searches through your list in the order in which you entered the records. If you have used option 5 on the Mail List Menu, SORT MAILING RECORDS, to change the order of your mailing records, the Mail List Manager searches through the list in the order in which the records have been sorted.

After you select option 4 and press RETURN, The Mail List Manager displays a message telling you that it will search through your list in mailing list order and a list of update codes to select from.

The Update Codes

After you specify a search option and, where applicable, tell the Mail List Manager the sort field you are looking for, a list of update codes is displayed at the bottom of the screen. Here is a summary of the update codes and the function each serves:

Update Code	Description
F(irst)	displays the First record on the diskette satisfying the current search option
L(ast)	displays the Last record on the diskette satisfying the current search option
N(ext)	displays the Next record on the diskette satisfying the current search option
P(revious)	displays the Previous record on the diskette satisfying the current search option
M(odify)	lets you Modify the currently displayed record
D(elete)	lets you Delete the currently displayed record

When update codes are displayed, your first task is to find the record on your mailing records diskette that you want to modify, delete, or examine. Once the record is found (and displayed on the screen) you either can modify it, delete it, or just check its content. The four update codes used to find a record are First, Last, Next, and Previous. Each is described in the following paragraphs.

If you choose the Modify or Delete update code before you have found a record and displayed it on the screen, you get one of these two messages:

```
***ERROR: No record to modify.
Press RETURN to go on.
```

```
***ERROR: No record to delete.
Press RETURN to go on.
```

Press RETURN and then choose an appropriate update code.

First

Choosing the First update code instructs the Mail List Manager to search through your mailing list until it comes to the first record that fits the search criterion that you specified. Thus, if you choose search option 4, telling the Mail List Manager to search through your list in sequential order, and then type F for First when the update codes are displayed, the first record on your mailing list is displayed. If you tell the Mail List Manager to search by primary sort field, specify a primary sort field to search for, and then select First, the Mail List Manager displays the first mailing record on your list that has the specified primary sort field.

If the Mail List Manager finds no record that fits your specification, this message appears at the bottom of the screen:

```
No such record.
Press RETURN to continue.
```

When you press RETURN, you can either select another update code or press ESCAPE.

Last

Choosing the Last update code instructs the Mail List Manager to search through your mailing list from the end of the list forward until it comes to the last record that fits the search criterion that you specified. Thus, if you choose search option 4, Mailing List Order, and then type L for Last when the update codes are displayed, the last record on your mailing list is displayed. If you tell the Mail List Manager to search by secondary sort field, specify a secondary sort field to search for, and then type L for Last the Mail List Manager displays the last mailing record on your list that has the specified secondary sort field.

Next

Choosing the Next update code tells the Mail List Manager to find the next record on your mailing list based on the previous record that the Mail List Manager found and the search option that you specified.

Suppose that you are using the standard format and select search option 2, which, in this case, searches your list based on Similar Name. Next you instruct the Mail List Manager to search for a name that sounds like Klein. When the update codes are displayed, you type F for First and the first record in your list whose primary sort field sounds like Klein is displayed.

But suppose the record that is displayed is not the one you are looking for. Your next move is to type N for Next. The next record in the list whose primary sort field sounds like Klein is displayed. If there is no other record in the list whose primary sort field sounds like Klein, the "No such record" message is displayed.

The Next update code is frequently used to look through a mailing list one record at a time when search option 4, Mailing List Order, has been selected.

Previous

Choosing the Previous update code tells the Mail List Manager to find the previous record on your mailing list based on the last record that the Mail List Manager found and the search option that you specified. If you have already found the first record in a list and choose the Previous update code, the "No such record" message is displayed.

Modifying Records

To change information on a record, find the record using the update codes previously described. Then, when the record you are looking for is displayed, select the Modify update code. The cursor appears in the brackets on the first line of the record.

Use the same procedure to modify a record that you used to correct errors when entering a record.

When you finish modifying a record, press the ENTER key. The Mail List Manager stores the modified record on your mailing records diskette. If you decide not to change a record after typing the M update code, press the ESCAPE key. The Mail List Manager cancels the changes and retains the original record on your diskette.

Deleting Records

To delete a record from your mailing list, first find the record using update codes. Then, after the record you want to delete is displayed, type D to select the Delete update code. Next the Mail List Manager replaces the update codes at the bottom of the screen with the prompt:

```
Do you wish to delete this record? [  ]

Press "Y" then ENTER to delete this record.
Press ESCAPE to cancel and return to previous level.
```

To delete the record, press Y. After you press ENTER to confirm the deletion, the next record on your list is displayed.

If, after you have found, modified, or deleted a record, you decide you want to search your list using a different search option, simply press ESCAPE to return to the search options menu. Note that when you press RETURN to accept the new search option, the record that was displayed when you exited from the update codes screen is still displayed.

Exercise 4: Updating a Mailing List

This exercise shows you how to find and change records on a mailing list. Use the LAKEVIEW APARTMENTS mailing list you created in Chapter 3. Then change or delete the records according to the directions below. Before you begin this exercise, reboot the Mail List Manager.

1. Place the diskette that you labeled LAKEVIEW APARTMENTS in Drive 2. From the Mail List Menu, select option 4, FIND / MODIFY / DELETE RECORDS, and press RETURN.

2. You are prompted for the storage drive number. Press ENTER to indicate Drive 2. The diskette directory is shown. Press RETURN. The record format and search options are displayed.

3. Now you want to find Jamie Neylon´s record but are unsure how Jamie spells his name. Thus, you decide to use the Similar Name Search option. To do this, type 2 and press RETURN. Brackets appear after option 2 on the screen. You think Jamie spells his name "Nelon", so you type this name in the brackets and press ENTER. When the list of update codes appears, type F (for First). The Mail List Manager displays Jamie Neylon´s record.

4. Type M (for Modify) to change the record. The cursor jumps to the beginning of the first field. Press RETURN five times to move the cursor to the beginning of the line containing the RENT STATUS field. Use the right arrow key to move the cursor to this field.

5. Make the following changes to the record. Change the Rent Status from 4-81 to 5-81 by placing the cursor over the "4" and typing 5 over it.

6. Press ENTER when you finish making the changes. The screen displays the corrected record.

7. Press ESCAPE to return to the search options. Select option 4, Mailing List Order, and press RETURN. Note that Jamie Neylon's record is still displayed.

8. Karna Lind moved before her June rent was due. Thus, your next task is to delete her record from the mailing list. As you know, a record must be found before it can be deleted. To find the first record in the list, type F for First. Ron Lindquist's record appears. Type N for Next to display the next record in the list. This still is not the record you want. Type N again to display the next record. Karna Lind's record is displayed. Delete this label by typing D. Now type Y to tell the Mail List Manager that you do indeed want to delete Karna's record and then press ENTER to confirm the deletion. The next record on your list is displayed.

9. Press ESCAPE twice to return to the Mail List Menu. Remove the mailing records diskette from the drive and store it in a safe place for later use.

7

Sorting Mailing Records

98 Why Sort?
99 Using the Sort Option
100 Exercise 5: Sorting Mailing Records

7

Sorting Mailing Records

The Mail List Manager's Sort option is used to sort or change the order of records on a mailing records diskette. When you enter mailing records, the records are stored on diskette in the order in which you enter them. Using the Sort option, you can change the order of the records based on the content of the records' primary or secondary sort field. Figure 7-1 is an overview of the steps you take when you sort the records on a mailing records diskette.

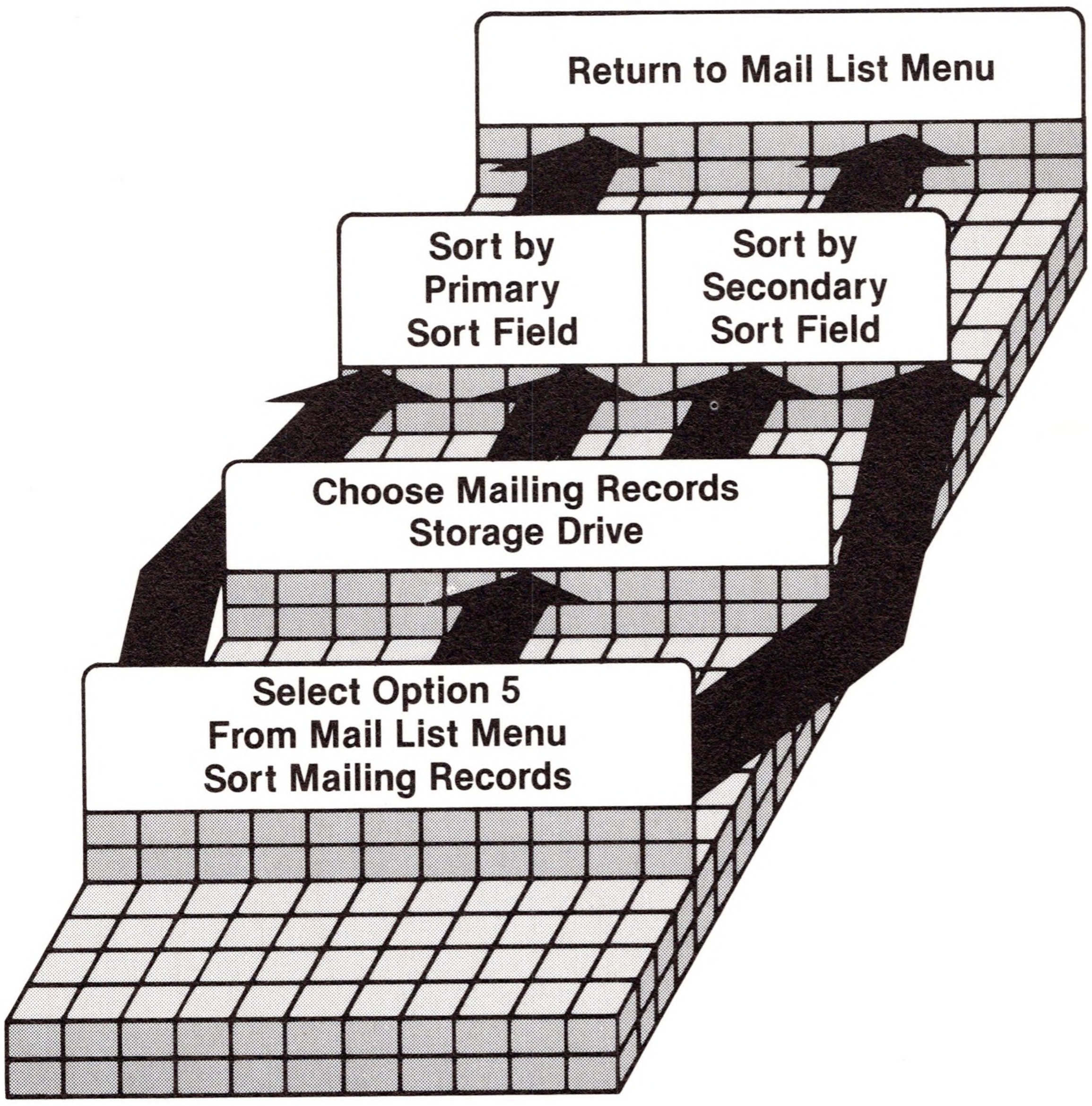

Return to Mail List Menu
Sort by Primary Sort Field
Sort by Secondary Sort Field
Choose Mailing Records Storage Drive
Select Option 5 From Mail List Menu Sort Mailing Records

Figure 7-1. Steps in Sorting Mailing Records

This chapter explains how to use the Sort option. It ends with an exercise in which you sort the records in a mailing list created in an earlier chapter.

Why Sort?

After using the Sort option to change the order of mailing records, you can use option 6, PRINT / DISPLAY MAILING RECORDS to display or print your records in their new order.

The Sort option can only be used to sort the records on one mailing records diskette. If the mailing records on your mailing list are stored on more than one mailing records diskette, you must use the MERGE / FILTER option to sort the records on your entire list.

There may be times when you want to sort the records on your mailing records diskette by using first the primary and then the secondary sort field. For example, you first may want to sort by ZIP CODE so you can produce a mailing list of records organized by geographical area and then sort the records by NAME so you can produce a phone list arranged in alphabetical order by last name.

In most instances, the order in which records appear after they have been sorted is fairly predictable. Records that are sorted on the NAME sort field are sorted in alphabetical order; records sorted on the ZIP CODE sort field are sorted in numerical order. There may, however, be occasions when a sort field contains letters, numbers, and punctuation. (Remember, the only punctuation marks that can appear in a sort field are parentheses and hyphens.) In these instances, the Mail List Manager does its sorting in the following order: space, left parenthesis, right parenthesis, hyphen, numbers in ascending order, and letters in alphabetical order.

For example, suppose a record format includes a sort field named CODE. After the records are sorted on CODE, the sort fields of the appropriate records would appear in this order:

```
*999        (The asterisk represents a space.)
1234
1234--a
1234-4
1234a
1234b
2163
```

If two records have identical information in the same sort field, they are sorted based on their other sort field.

Using the Sort Option

To sort a mailing list, select option 5, SORT MAILING RECORDS, from the Mail List Menu and press RETURN.

If you have not already identified a storage drive, you will be prompted for the drive number of your mailing records diskette. Enter the appropriate number and the diskette directory is displayed. Press RETURN to continue.

The screen displays the names of your record format's sort fields. Select the field on which you want your mailing list sorted and press RETURN. A message similar to this one appears:

```
Sorting (on Name)........
```

Then when the sort is complete, a message similar to this is displayed:

```
Diskette in drive #2 sorted by Name.
```

To return to the Mail List Menu, press RETURN.

Exercise 5: Sorting Mailing Records

In this exercise, you will sort the records on the mailing list that you created in Exercise 2. Before you begin this exercise, reboot the Mail List Manager and then place the diskette named LAKEVIEW APARTMENTS into Drive 2.

1. Select option 5, SORT MAILING LABELS, from the Mail List Menu by typing 5 and pressing RETURN. The Mail List Manager prompts:

```
Mailing Record Storage Drive (2-4)? [2]
```

2. Press ENTER. The screen displays the diskette directory.

3. Press RETURN and the screen displays:

```
Sort by
1. Name
2. bldg. code
```

4. Suppose you want the records on your list to be sorted or arranged by building code. To sort by bldg. code, type 2 and press RETURN. The Mail List Manager begins sorting the records on the mailing list and displays on the screen:

```
Sorting (on bldg. code)........
```

When it finishes sorting, the screen displays:

```
Diskette in drive #2 sorted by bldg. code
```

5. Press RETURN to return to the Mail List Menu. Your mailing list is now sorted in alphabetical order by building code.

6. Remove the mailing records diskette from Drive 2 and store it in a safe place. You will use this mailing list again later in this manual.

8

Printing or Displaying Your Mailing List

103 Printers
104 Printing and Displaying Records
106 Designating a Printer
107 Printing a Mailing List
108 Format Values
113 Filtering Your Mailing Records
117 More Than One Diskette Per List
117 Stopping the Printer or the Display
118 Changing Printed Format Default Values
119 Exercise 6: Displaying Records and Printing Labels

8

Printing or Displaying Your Mailing List

This chapter explains how to print or display your mailing labels, mailing records, or a phone list containing each addressee's name and phone number. You may either print this information on a printer or display it on the screen.

If you want to print or display only a portion of your list, the Mail List Manager provides this option also. Perhaps you need to print only a specific selection of records from your mailing list, such as those within a specified range of zip codes or label codes.

The Mail List Manager also lets you set the dimensions of your mailing labels so they are properly positioned as they are printed.

This chapter ends with an exercise in which you print a mailing list that you created in an earlier exercise.

Printers

When you buy the Mail List Manager, your system diskette is set up to let you use a Qume Sprint 5 printer, a high-speed letter quality printer, that must be connected to your Apple III through the RS-232-C serial interface on the back of the Apple III. The system diskette also is set up to let you use the Silentype III, a small desk-top serial printer. The Silentype is connected to the Apple III through Port A on the back of the Apple.

The Silentype requires thermal paper. Thus, it cannot be used to produce mailing labels. You may want to use it to get a printed copy of your mailing list.

If you want to use the Mail List Manager with a printer other than the Qume or Silentype, your system diskette must be reconfigured to include the appropriate printer driver. Your dealer can do this for you or you can read the section of the Apple III Standard Device Drivers manual on reconfiguring your system. When reconfiguring, you'll have to make sure that there is room for your driver file before adding it to the Mail List Manager diskette.

For information about using various printers with the Apple III, refer to the Apple III Owner's Guide and the Apple III Standard Device Drivers manual.

Printing and Displaying Records

Figure 8-1 shows the steps you take to print or display mailing labels, complete mailing records, or a phone list.

Select option 6, PRINT / DISPLAY MAILING RECORDS, from the Mail List Menu when you want to print or display mailing information, and press RETURN.

If you have not already chosen a drive number, the screen displays the prompt asking for the number of the drive containing your mailing records diskette. After you identify your storage drive, the screen displays the directory of your mailing records diskette. Press RETURN to continue.

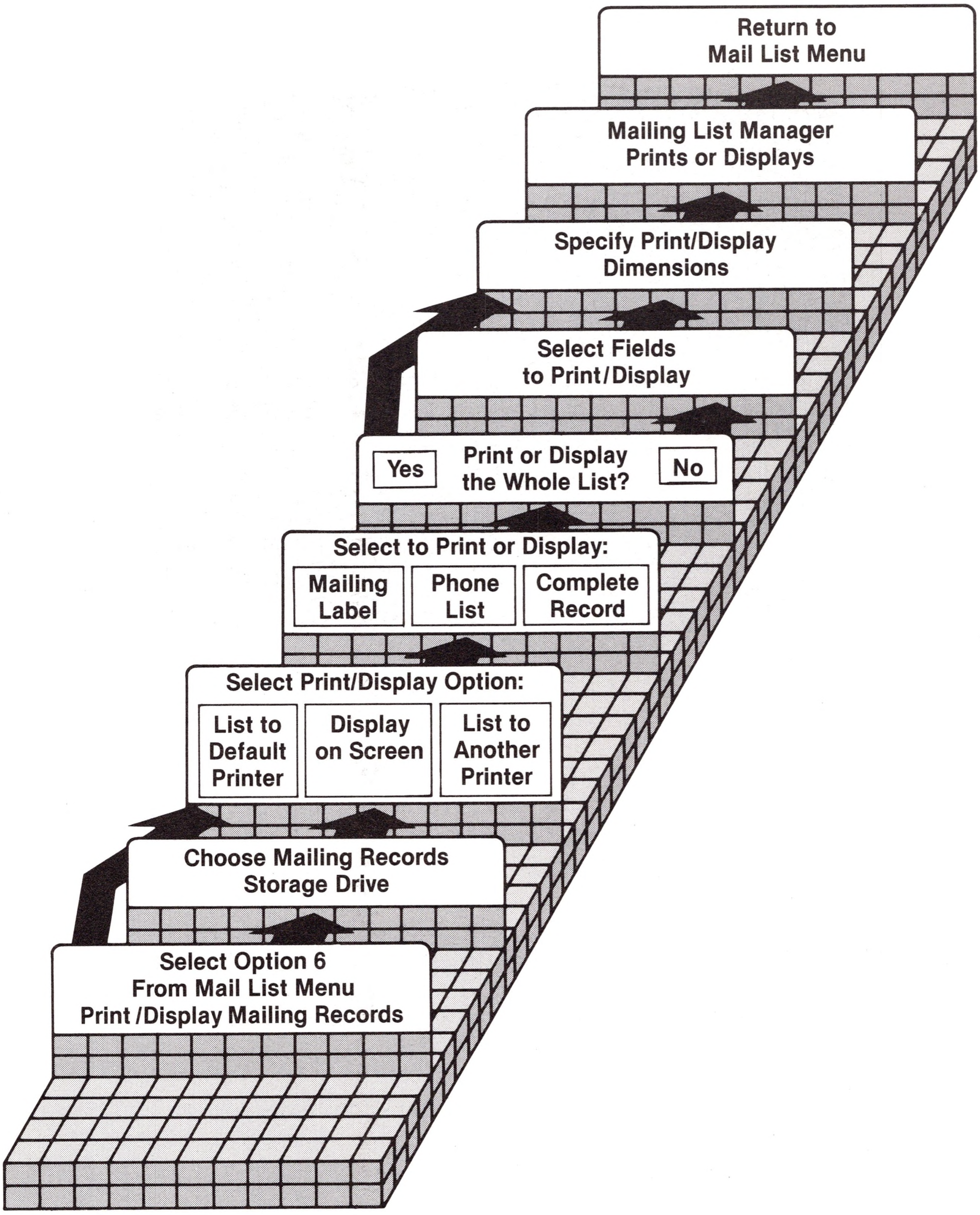
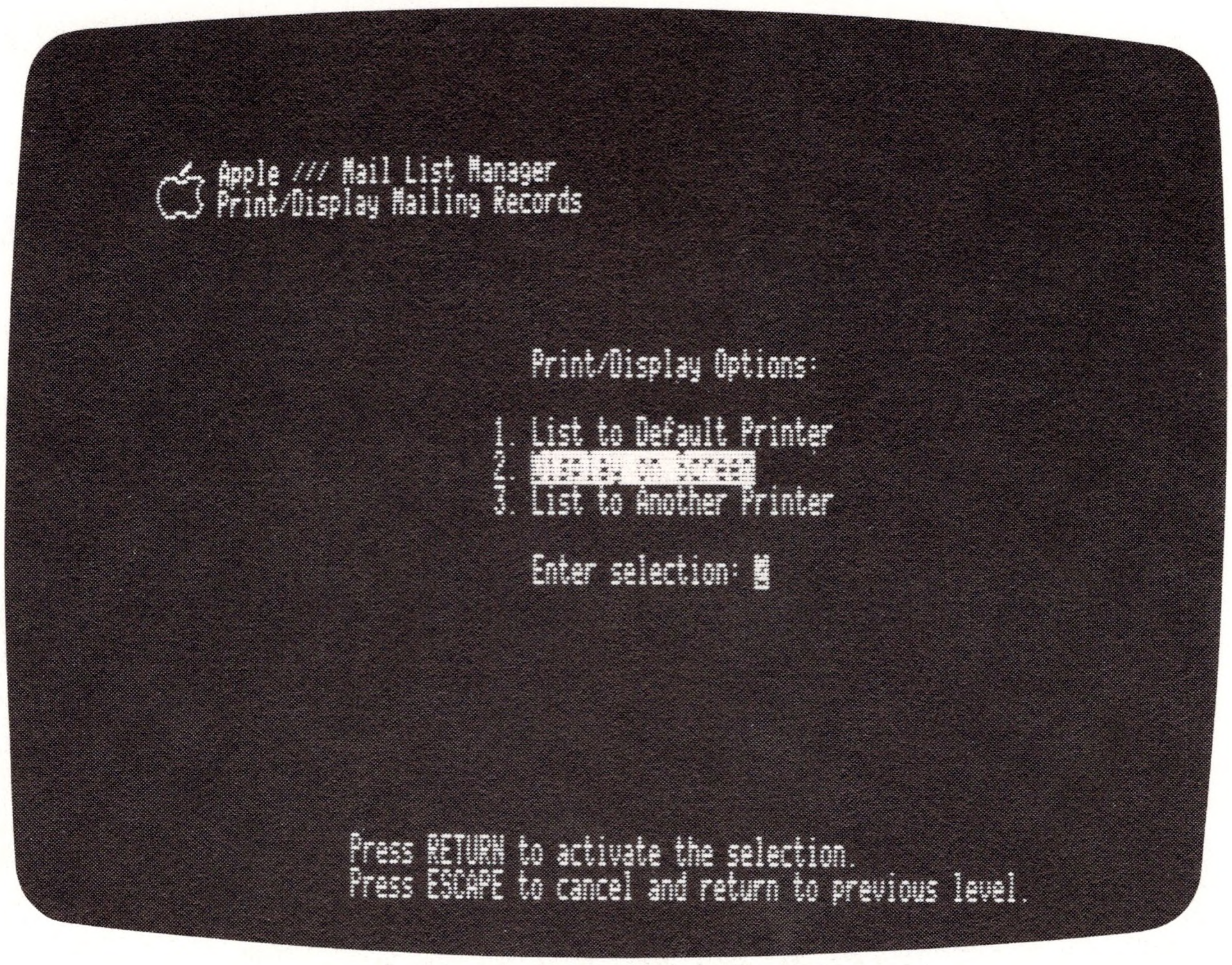

Return to Mail List Menu
Mailing List Manager Prints or Displays
Specify Print/Display Dimensions
Select Fields to Print/Display
Yes
Print or Display the Whole List?
No
Select to Print or Display:
Mailing Label
Phone List
Complete Record
Select Print/Display Option:
List to Default Printer
Display on Screen
List to Another Printer
Choose Mailing Records Storage Drive
Select Option 6 From Mail List Menu Print /Display Mailing Records

Figure 8-1. Steps in Printing and Displaying Mailing Lists

The following screen appears:



```
Apple /// Mail List Manager
Print/Display Mailing Records

                    Print/Display Options:

                  1. List to Default Printer
                  2. Display on Screen
                  3. List to Another Printer

                    Enter selection:

         Press RETURN to activate the selection.
         Press ESCAPE to cancel and return to previous level.
```

Figure 8-2. Select Print or Display

The only difference between options 1 and 3 and option 2 is that options 1 and 3 send the mailing information to a printer and option 2 displays it on the screen.

Designating a Printer

Selecting option 1 from the previous screen sends the output to the default printer. The Mail List Manager system diskette as purchased designates the Qume printer as the default printer.

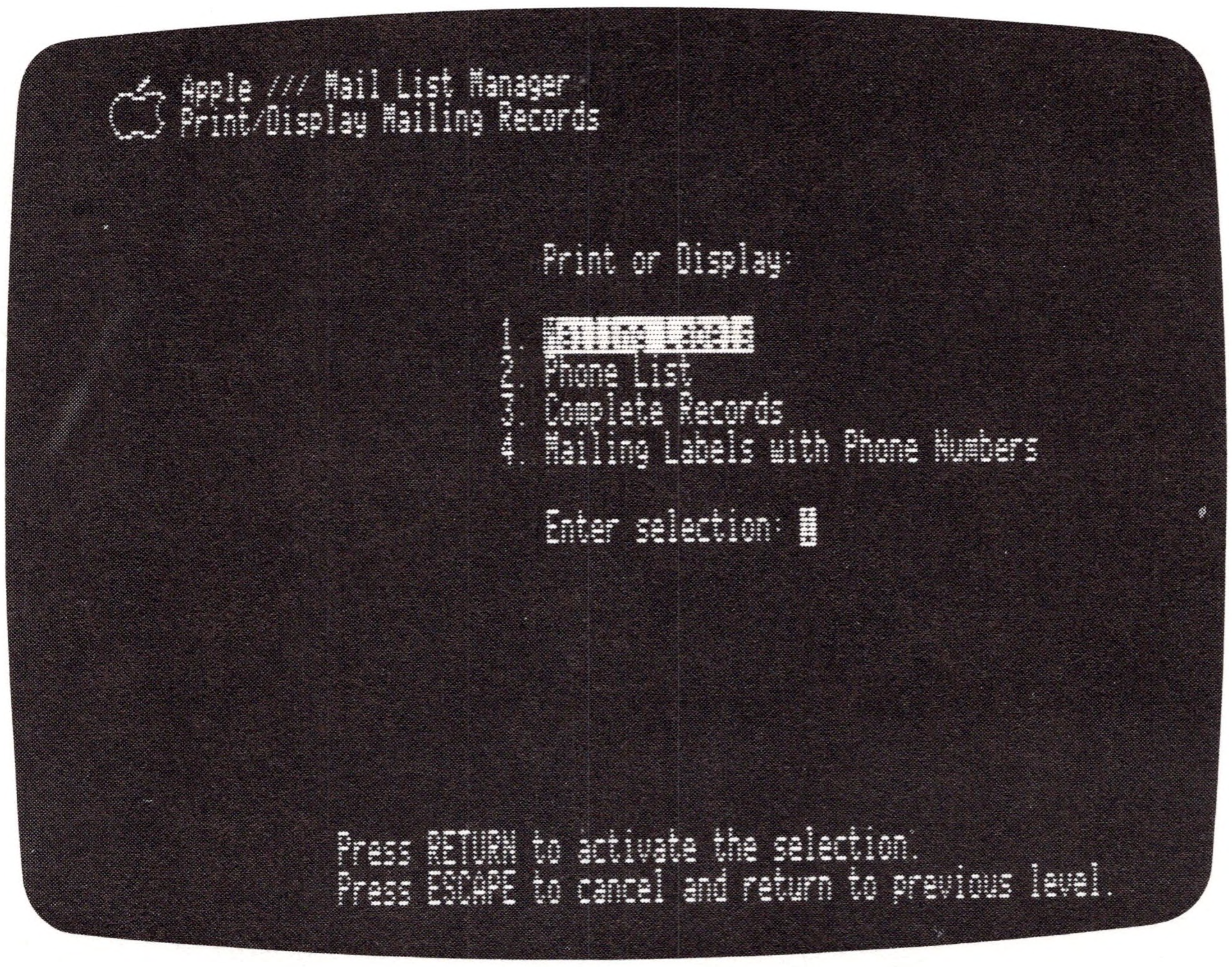
If you do not own a Qume printer, but are using another printer, your dealer can change the default so that it will be your printer.

If you want to send the output to a printer recognized by the Mail List Manager other than the default printer, type 3 and press RETURN. Brackets appear. Type the name of the driver preceded by a period. For example, if you want to send your list to the Silentype, type .Silentype within these brackets.

Note that a period is necessary for the Mail List Manager to recognize the Silentype as an output device.

Printing a Mailing List

After you have chosen an option designating where your mailing information will be sent and pressed RETURN, the screen displays:



```
Apple /// Mail List Manager
Print/Display Mailing Records

                 Print or Display:

                1. Mailing Labels
                2. Phone List
                3. Complete Records
                4. Mailing Labels with Phone Numbers

                 Enter selection: █

        Press RETURN to activate the selection.
        Press ESCAPE to cancel and return to previous level.
```

Figure 8-3. Selecting What to Print

You can now choose to print mailing labels (option 1), a phone list consisting of names and phone numbers (option 2), or complete mailing records (option 3).

From now on we'll use "print" to mean both "print" and "display" unless it is specifically stated otherwise, since the following description is the same for both.

After you select your option and press RETURN, you are asked:

```
Do you want to print your complete list? (Y/N) [Y]
```

or

```
Do you want to display your complete list? (Y/N) [Y]
```

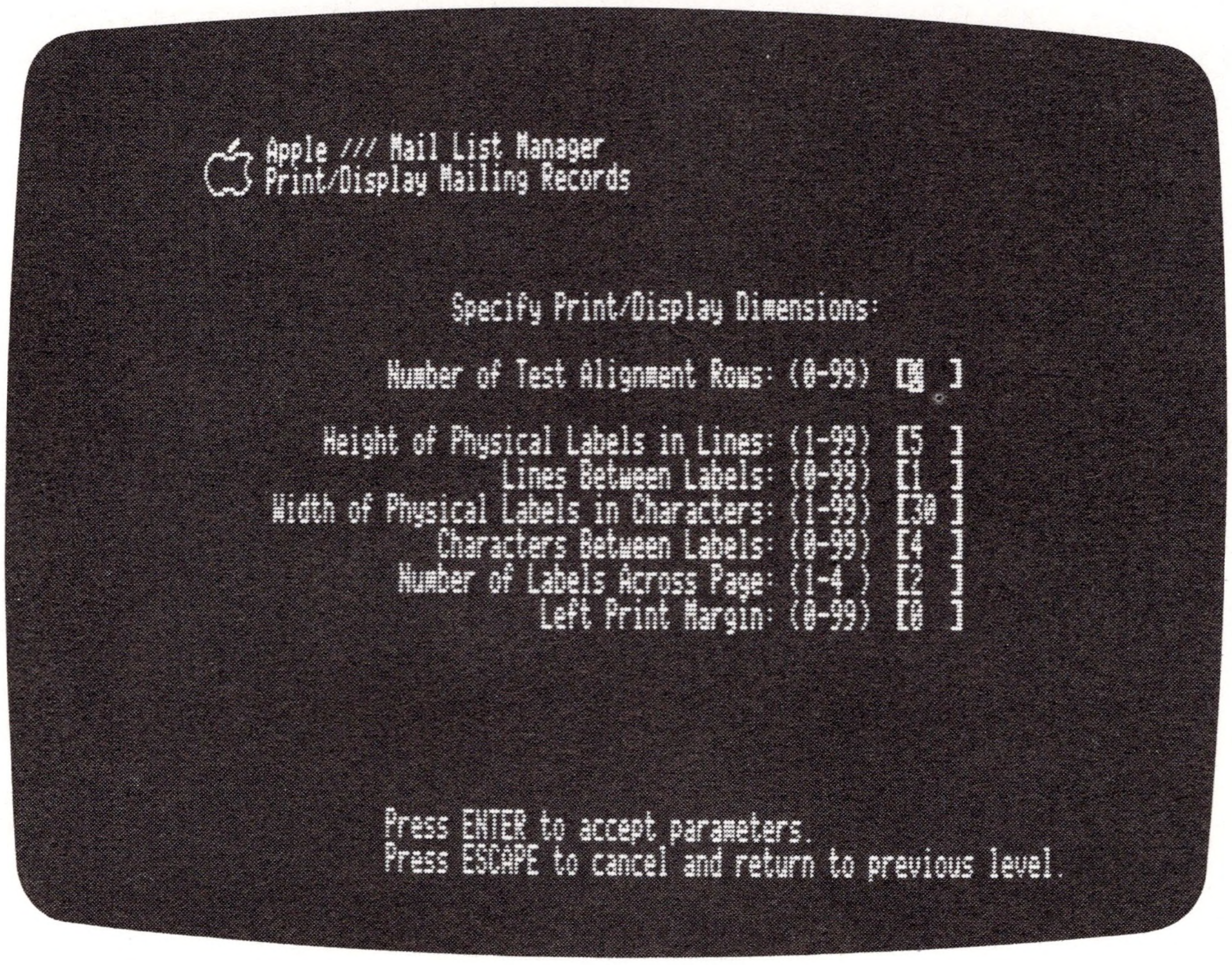
depending upon where you have chosen to send your mailing information.

If you want to print all of the records or labels, just press the ENTER key, since Y for YES is the default response.

If you want to print only some of the records or labels on your list, type N for NO. You then can filter your list by choosing the range of labels you want to print or display. Instructions for filtering your list are included in the following section, Filtering Your Mailing Records.

Format Values

If you choose to print all the information, this screen appears:



```
Apple /// Mail List Manager
Print/Display Mailing Records


                    Specify Print/Display Dimensions:

               Number of Test Alignment Rows: (0-99)  [0  ]

         Height of Physical Labels in Lines: (1-99)  [5  ]
                        Lines Between Labels: (0-99)  [1  ]
     Width of Physical Labels in Characters: (1-99)  [30 ]
                   Characters Between Labels: (0-99)  [4  ]
                  Number of Labels Across Page: (1-4 )  [2  ]
                          Left Print Margin: (0-99)  [0  ]



              Press ENTER to accept parameters.
              Press ESCAPE to cancel and return to previous level.
```

Figure 8-4. Format Values

This screen lets you change the dimensions of your printed mailing labels, records, or phone list so the printed information is properly positioned as it is printed. The numbers in the parentheses indicate the range of values that can be provided for each dimension. The number within the brackets is the default value. If you want to change a default value, just move the cursor inside the appropriate set of brackets and enter a new value.

The following paragraphs describe each Print/Display dimension. Figure 8-5 illustrates how these dimensions are measured on a sheet of mailing labels.

NUMBER OF TEST ALIGNMENT ROWS: Test alignment rows are used to check where on a page your labels, records, or phone list will be printed.

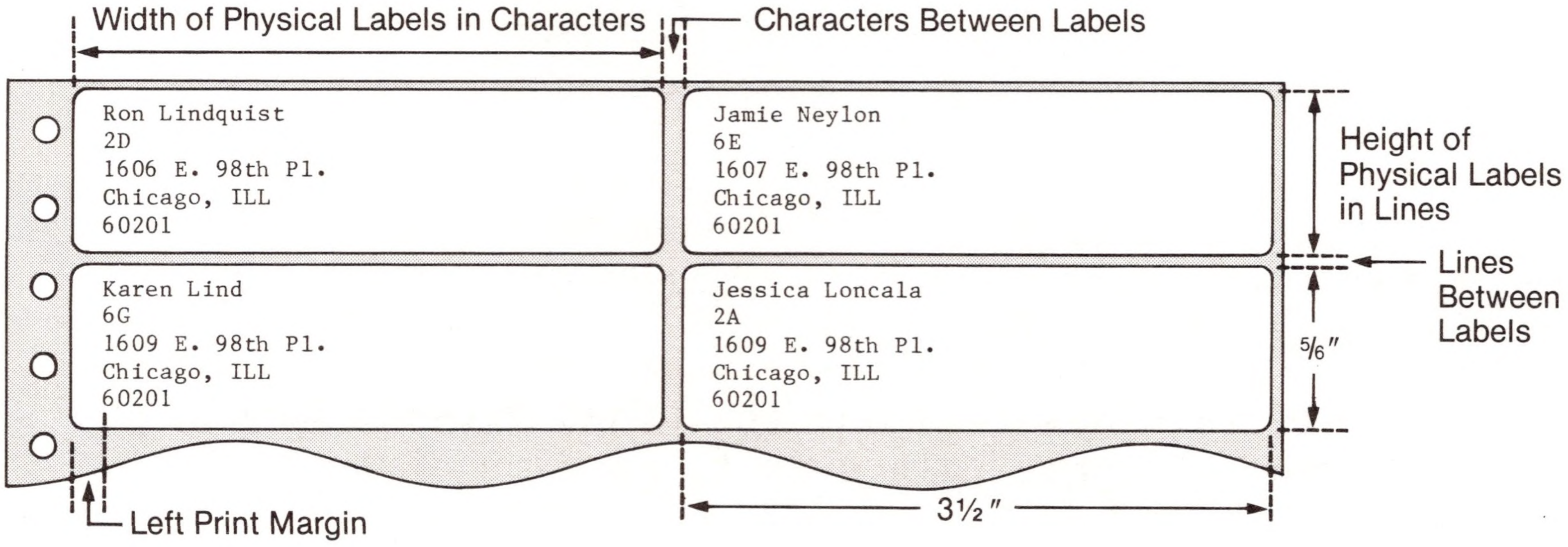
When you change the number of test alignment rows to some number between 1 and 99 and then press ENTER, the specified number of test rows is printed (or displayed) as rows of Xs. The Format Values screen is then redisplayed with the number of test alignment rows reset to zero. You can continue to change various format values and then print test alignment rows to test the way the label will appear until the labels are arranged in a way that suits you. Usually one or two test rows of labels are sufficient.

HEIGHT OF PHYSICAL LABELS IN LINES: This value determines the total number of lines, printed and blank, that can appear on a mailing label. Depending upon the height of your labels, you can set this value to any number from 1 to 99; the default value is 5. To determine the Height of Physical Labels in Lines, measure the actual height of the label in inches and multiply it by six (assuming the lines are single spaced). On most printers six single-spaced typed lines are equivalent to one vertical inch. For example, if the labels are one inch high, the Height of Physical Labels in Lines is 6.

If the Height of Physical Labels in Lines is less than the number of lines printed on physical label that you set when you used Option 1 of the Mail List Menu to define the record format, you will receive this message when you attempt to print or display your labels:

```
***WARNING: Physical label has too few rows.
Press RETURN to go on, ESCAPE to return to previous level.
```

Reproduction of mailing labels printed on a Qume printer using Elite (12 pitch) type:



Width of Physical Labels in Characters
Characters Between Labels
Ron Lindquist
2D
1606 E. 98th Pl.
Chicago, ILL
60201
Jamie Neylon
6E
1607 E. 98th Pl.
Chicago, ILL
60201
Karen Lind
6G
1609 E. 98th Pl.
Chicago, ILL
60201
Jessica Loncala
2A
1609 E. 98th Pl.
Chicago, ILL
60201
Height of Physical Labels in Lines
Lines Between Labels
5/6"
3½"
Left Print Margin

Here are the format values used to print these labels:

Height of Physical Labels in Lines: (1-99) [5]
Multiply height of label (5/6 inch) by 6.

Lines Between Labels: (0-99) [1]
One blank line separates rows of labels.

Width of Physical Labels in Characters: (1-99) [42]
Multiply label width (3-1/2") by 12 characters/inch (or 10 characters/inch if Pica type).

Characters Between Labels: (0-99) [1]
One character space measured horizontally separates columns of labels.

Number of Labels Across Page: (1-4) [2]
Two labels appear across the sheet of label paper.

Left Print Margin: (0-99) [3]
The left margin is 3 character spaces or 1/4 inch (This is about equivalent to 2 character spaces if Pica type is used).

Figure 8-5. Print / Display Dimensions

LINES BETWEEN LABELS: This value determines the number of blank lines between physical labels. Six single-spaced typed lines are equivalent to one inch. You can set this value to any number from 0 to 99; the default value is 1.

If you want to print a list of labels on paper (as opposed to on mailing labels) without breaking a label into two parts as the printer begins to print a new page, make sure that the sum of the value for Height of Physical Labels in Lines plus the value of Lines Between Labels is an even divisor of the number of lines per page. For example, if the page length is 66 lines, set the Height of Physical Labels in Lines to 5 and the Lines Between Labels to 1. The sum of these values is 6, an even divisor of 66.

WIDTH OF PHYSICAL LABELS IN CHARACTERS: This value determines the number of characters that can appear on one line across the entire width of a label. You can set this value to any number from 1 to 99. To determine the Width of Physical Labels in Characters, measure the width of the label in inches and multiply that by the number of horizontal characters per inch. Twelve characters of Elite type correspond to one inch; ten characters of Pica type correspond to one inch. For example, if you are using Elite type and labels that are 2-7/8 inches wide, the Width of Physical Labels in Characters should be set to 34.

If the value of Width of Physical Labels in Characters is less than the maximum characters per line that you set when uou used Option 1 of the Mail List Menu to define the record format, the following message appears when you try to print or display your labels:

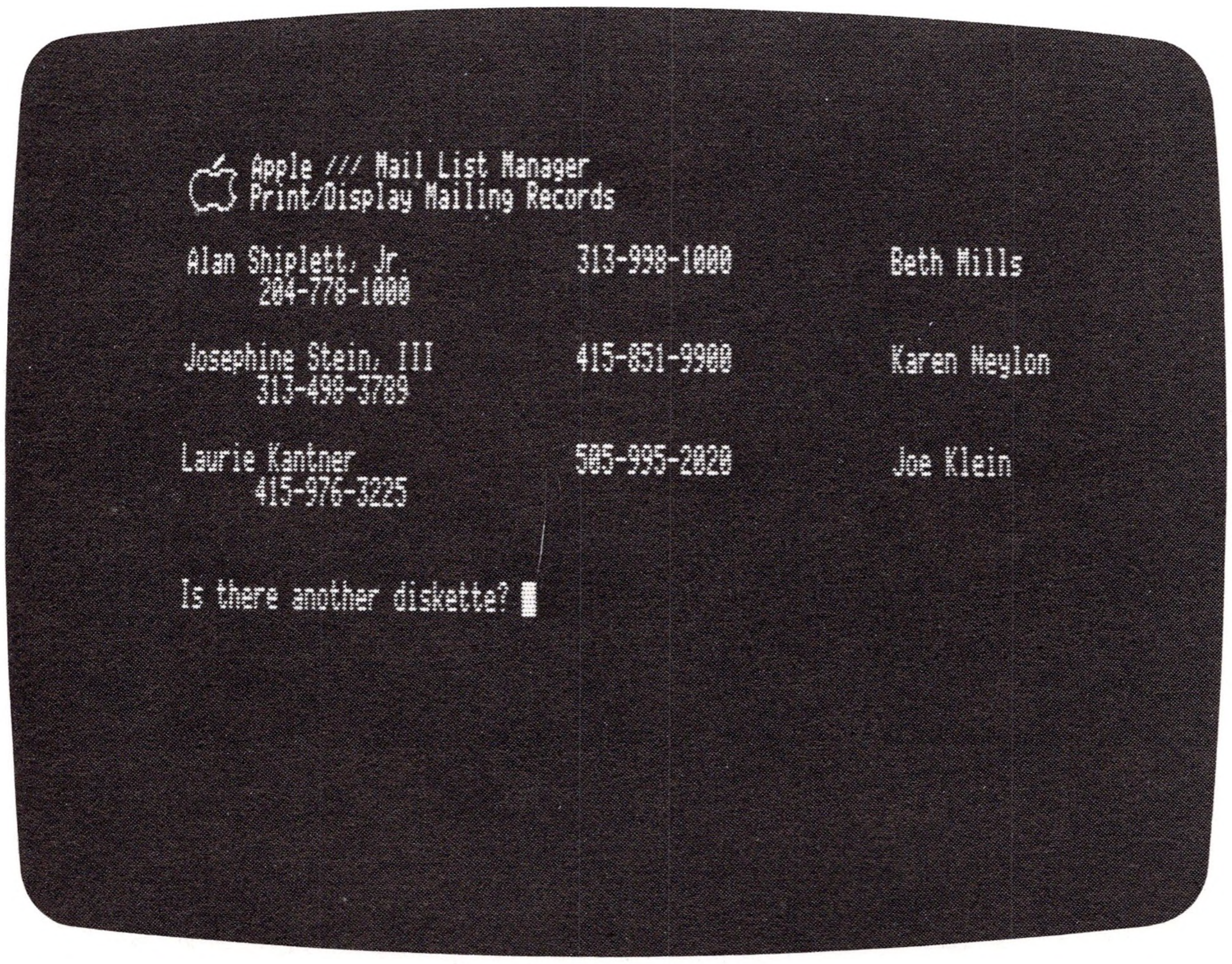
```
***WARNING: Physical label has too few columns.
Press RETURN to go on, ESCAPE to return to previous level.
```

If you set both the Height and the Width of Physical Labels to a number that is smaller than the values set when you used Option 1 of the Mail List Menu to define the record format, the message regarding too few rows will appear when you attempt to print or display your labels. Then, after you press RETURN, the previous message will appear.

CHARACTERS BETWEEN LABELS: This value determines the number of horizontal spaces between columns of labels across the page. It can be any number from 0 to 99; the default value is 4 characters.

NUMBER OF LABELS ACROSS PAGE: This value determines the number of columns of labels that will be printed across a page. Choose a value between 1 and 4; the default value is 2.

The position of mailing information may differ depending upon whether labels are displayed on your screen or printed on a printer. The screen displays a maximum of 80 characters across, while your printer may print up to 120 characters across. If you set the format values to accommodate your printer, the information may "wrap around" when you display it on the screen. If you want to display a phone list on the screen, set the Number of Labels Across the Page to 1 to avoid wraparound. The following screen displays the result of printing a phone list with the Number of Labels Across Page set to 2.



```
Apple /// Mail List Manager
Print/Display Mailing Records

Alan Shiplett, Jr.            313-998-1000         Beth Mills
     204-778-1000

Josephine Stein, III          415-851-9900         Karen Neylon
     313-498-3789

Laurie Kantner                505-995-2020         Joe Klein
     415-976-3225


Is there another diskette? █
```

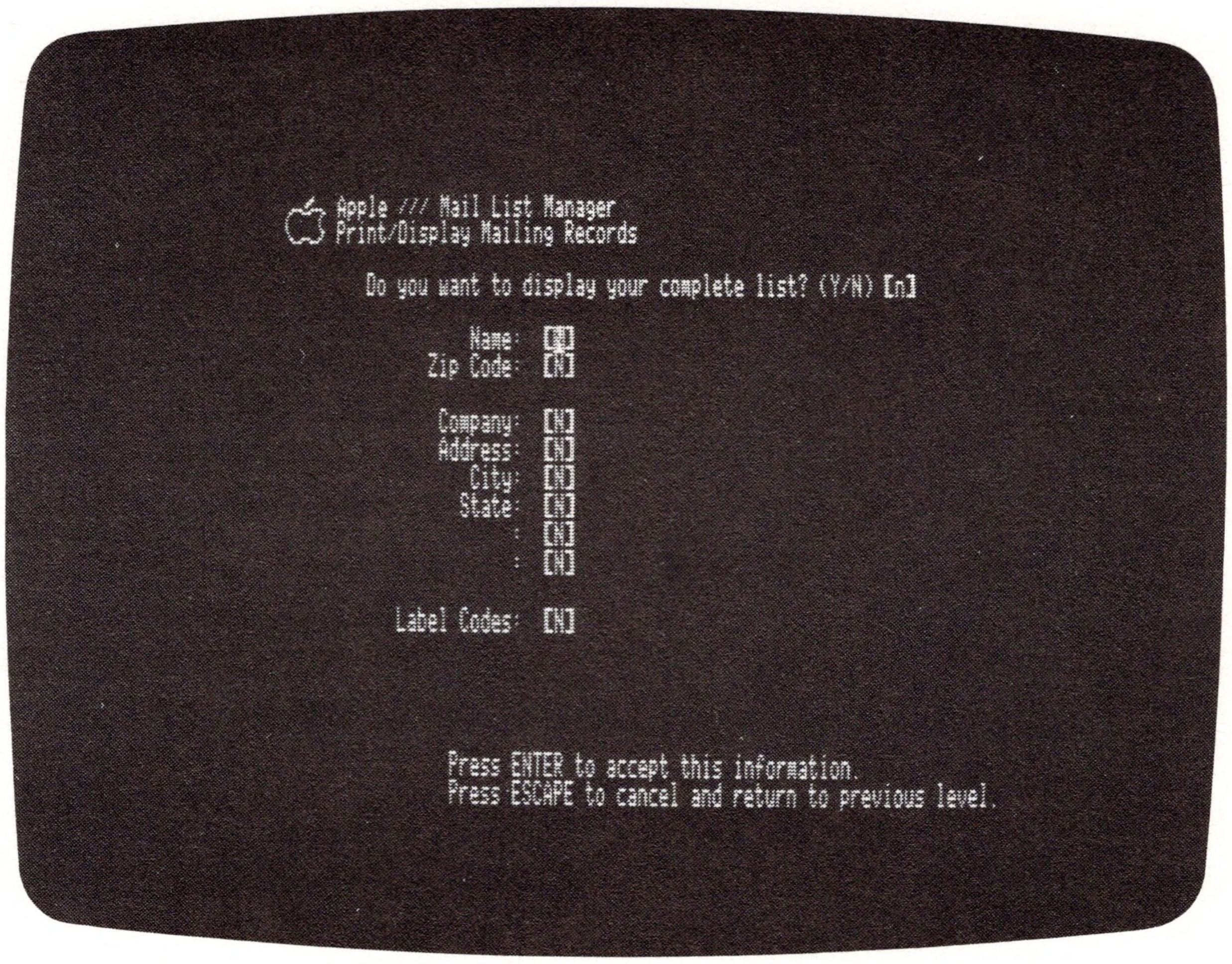
Figure 8-6. Example of Wraparound

LEFT PRINT MARGIN: This value determines the left margin the printer uses when it prints your labels. It begins printing at the column number you enter (0 is at the extreme left edge, the position of the first character that can be printed). You can set the left margin from 0 to 99; the default is 0.

Filtering Your Mailing Records

Filtering your mailing records lets you print selected records on your mailing list.

Let's go back to the section PRINTING A MAILING LIST. If, when prompted about how much of your mailing list you want to print, you type N, meaning that you want to display only some of the labels, the screen that appears lists the field names on your mailing record format. For example, if you are using the standard format, this screen appears:



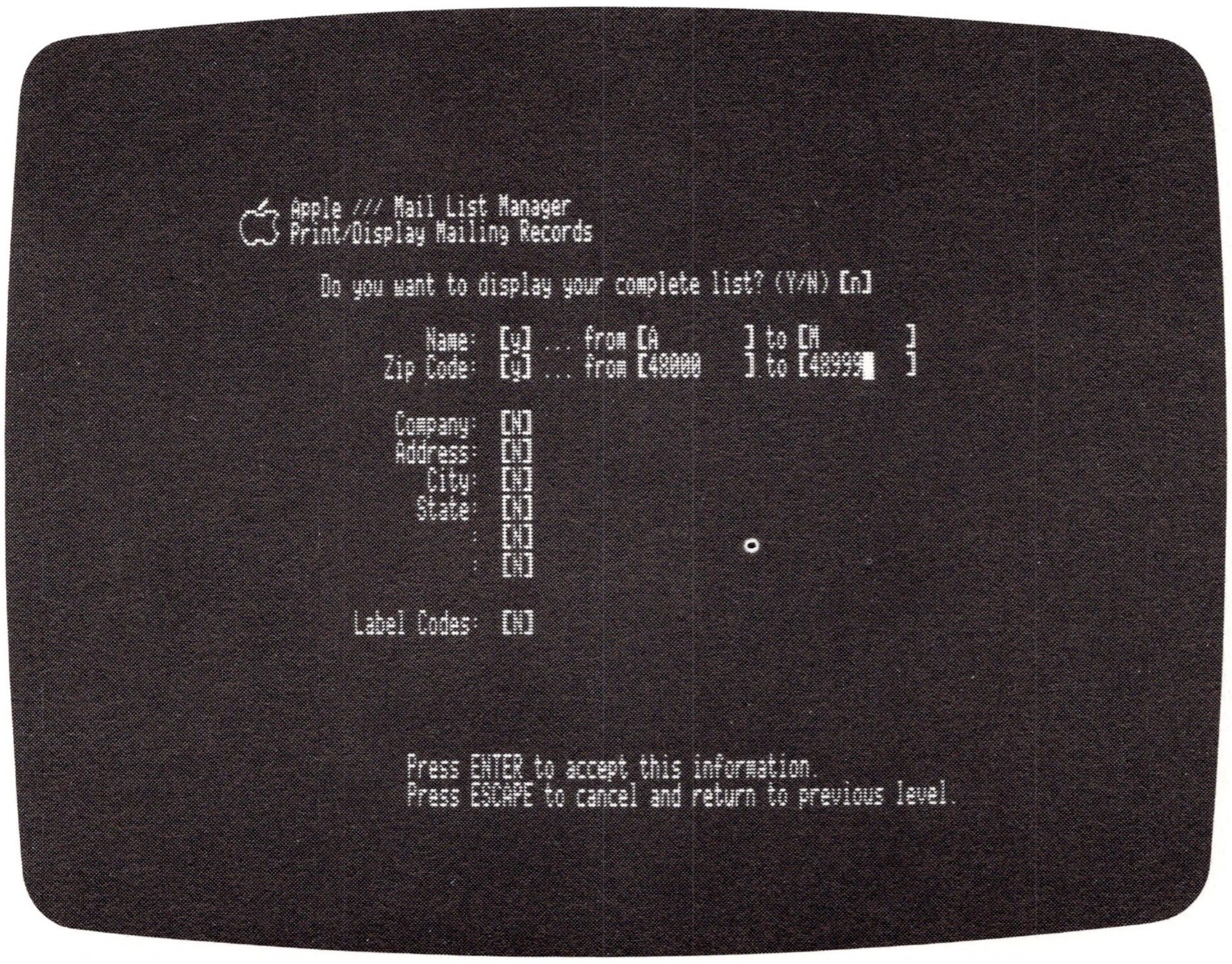
```
Apple /// Mail List Manager
Print/Display Mailing Records

     Do you want to display your complete list? (Y/N) [n]

                   Name: [N]
               Zip Code: [N]

                Company: [N]
                Address: [N]
                   City: [N]
                  State: [N]
                       : [N]
                       : [N]

            Label Codes: [N]


         Press ENTER to accept this information.
         Press ESCAPE to cancel and return to previous level.
```

Figure 8-7. Filter Records Screen

From this screen, you can choose those fields you want the Mail List Manager to use when filtering your list. To choose a field for filtering, type Y over the N in the brackets following the field name. After you type Y, two sets of wider brackets appear to the right of the field name that you select.

Next, type the beginning character(s) of the range that you want to print for that field name. Press RETURN. The cursor moves to the beginning of the TO brackets. In this set of brackets type the first character(s) of the end of the range. Then press RETURN.

For example, suppose you want to select only labels with last names beginning with A through M and zip codes between 48000 and 48999. First, change the N to a Y in the NAME field. Now type A in the FROM brackets of the NAME field and press RETURN. Type M in the TO brackets and press RETURN. Next move the cursor to the line labeled ZIP CODE and type Y. Then enter the numbers 48000 in the first set of brackets and 48999 in the second set. The screen now shows:



```
Apple /// Mail List Manager
Print/Display Mailing Records

     Do you want to display your complete list? (Y/N) [n]

           Name: [y] ... from [A      ] to [M      ]
       Zip Code: [y] ... from [48000  ] to [48999  ]

        Company: [N]
        Address: [N]
           City: [N]
          State: [N]
               : [N]
               : [N]

    Label Codes: [N]


            Press ENTER to accept this information.
            Press ESCAPE to cancel and return to previous level.
```

Figure 8-8. Filtering by Name and Zip Code

Another way in which you can filter your records is to select on the basis of label codes. Take a minute and refer to the short example in Chapter 5 where we developed label codes using the letters A, B, C and D to designate certain catagories of information. We created the following list:

Name	Label Code
Judy Black	ADBB
Bob Brown	CCBA
Betty Brown	ABAB
Jake Jones	BABA
Mary Smith	BCAA

Suppose you want to print the records of addressees who have incomes less than $25,000 per year. As you can see from the code in Table 5-1, the first label code position represents income. Thus, when specifying label codes to filter, you respond with a Y next to the LABEL CODE field. Then, when specifying this Label Code range, you enter A in the first position of the FROM label code field and B in the first position of the TO label code field.

This tells the Mail List Manager to print all the labels that have either an A or B in the first label code position and to ignore the contents of all other label code positions. If you carry out all the remaining necessary steps, the labels of Judy Black, Betty Brown, Jake Jones, and Mary Smith will be printed.

You must type the label code into the range field using the same case (upper or lower) that you used when you entered your records using option 3, ENTER MAILING RECORDS, on the Mail List Menu.

Now suppose you want to print the records of all addressees who earn less than $40,000 per year and were hired during the first quarter of the year. Enter AAA in the FROM label code field and CDA in the TO field.

The letters A to C in the first positions of the field select the desired income range, A to D in the second positions include every addressee, and the A in the third positions selects only those hired during the first quarter of the year. The only labels that will be printed are those of Betty Brown and Mary Smith.

If you had entered the label code fields as:

```
FROM (A A) TO (C A)
```

the Mail List Manager would select no records. Do not leave spaces to indicate a code you don't want to use; instead select an inclusive range.

The only way in which you can use label codes to select addressees who are less than 21 and over 60 years old from the label codes in Table 5-1 is to filter your records twice, once on age (0-20) using the range (A) to (A), and then on age (61+) using the range (D) to (D). The first time you print your records, Jake Jones's record will be selected; the second time, Judy Black's record will be selected.

After you've established the way in which you want your mailing lists to be filtered, press ENTER. The screen shown in Figure 8-3, Change Printed Label Format, is displayed. You can now set your format values. After you make any necessary changes, press ENTER. Your mailing information will be printed or displayed.

More Than One Diskette Per List

When the Mail List Manager finishes printing all of the complete rows of mailing labels on your mailing records diskette, this prompt appears:

```
Is there another diskette?
```

If your complete mailing list is stored on a single diskette, type N. Any remaining labels on your list are printed and you receive the prompt:

```
Press RETURN to continue.
```

When you press RETURN, the Mail List Menu is displayed.

If your mailing list occupies more than one diskette, type Y when you answer the question: Is there another diskette? You then receive the prompt:

```
Enter drive number (2-4) then ENTER, or ESCAPE to cancel [2]
```

Type the number of the drive containing the diskette that holds the next portion of your mailing list and press the ENTER key, If your diskette is in drive 2, simply press ENTER. The Mail List Manager continues printing any remaining labels on your first mailing records diskette and then prints the labels on the mailing records diskette you have inserted. When your entire list has been printed, press the RETURN key when prompted to do so to return to the Mail List Menu.

Stopping the Printer or the Display

To stop a printer that is printing mailing information or to stop the display, press ESCAPE. The printer or display stops, and this message appears on the screen:

```
Press ESCAPE again to abort printing.
Press RETURN to continue printing.
```

If you respond to this message by pressing ESCAPE, printing or displaying will not be resumed and the Mail List Menu will be displayed. Press RETURN to continue printing or displaying.

Changing Printed Format Default Values

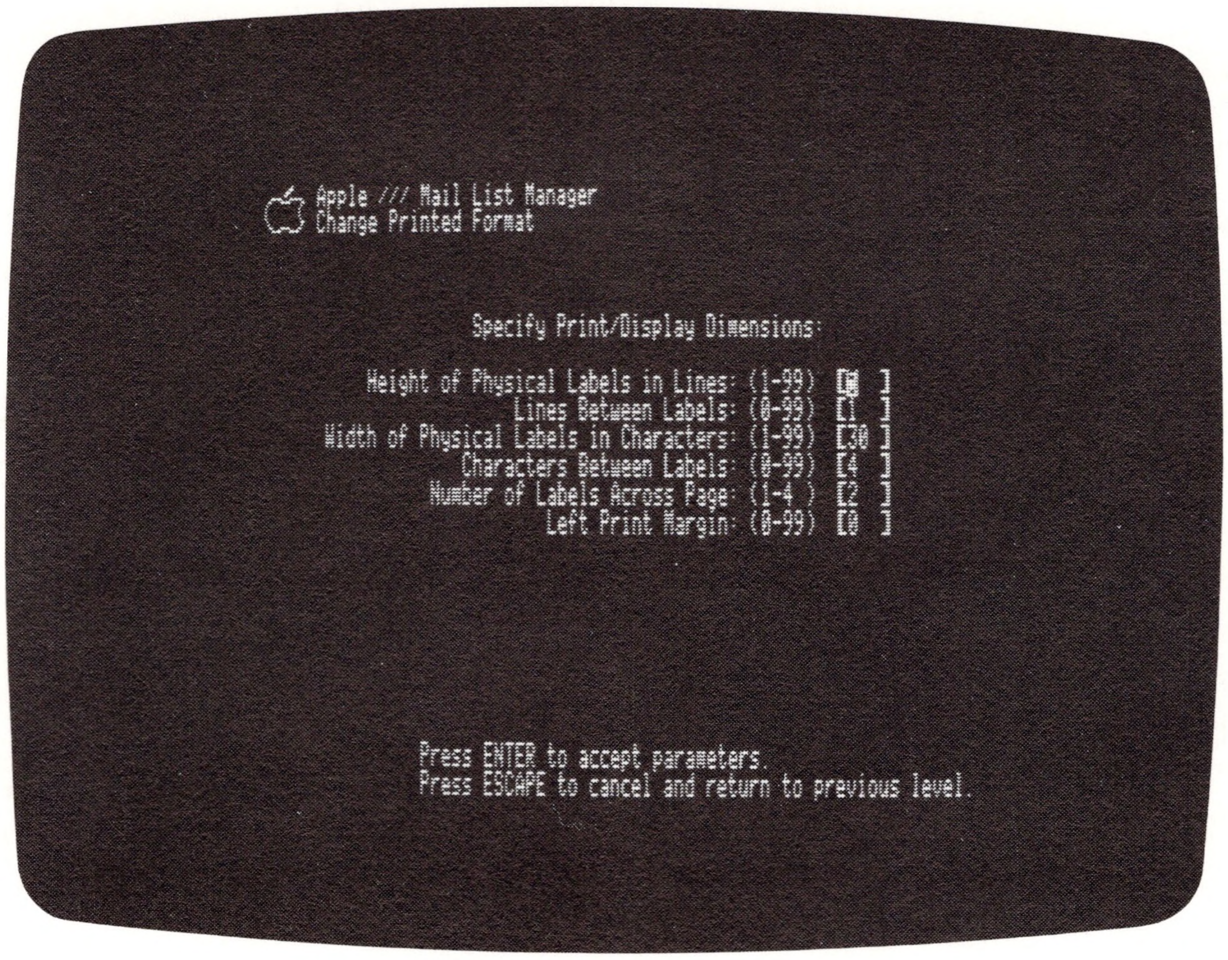
The printed label format values that you set before you printed or displayed mailing information do not remain after the information is printed. Instead, the Mail List Manager returns to the original default values.

However, the Mail List Manager lets you change these default values permanently, that is, until you want to change them again. You may want to change default values if you frequently use a mailing list with a printed label format different than the Mail List Manager's default printed label format.

To change the default values, select option 7, CHANGE PRINTED FORMAT, from the Mail List Menu and press RETURN.

If you have not already identified a storage drive, you will be prompted in the usual fashion for the number of the drive containing your mailing records diskette. Type that drive number and press the ENTER key. The directory of your diskette appears. Press RETURN as you are prompted to do.

The screen displays:



```
Apple /// Mail List Manager
Change Printed Format


                     Specify Print/Display Dimensions:

           Height of Physical Labels in Lines: (1-99) [[illegible] ]
                          Lines Between Labels: (0-99) [1 ]
   Width of Physical Labels in Characters: (1-99) [30 ]
                     Characters Between Labels: (0-99) [4 ]
                Number of Labels Across Page: (1-4 ) [2 ]
                              Left Print Margin: (0-99) [0 ]



                Press ENTER to accept parameters.
                Press ESCAPE to cancel and return to previous level.
```

Figure 8-9. Change Printed Format

Notice that this screen is the same as the screen the Mail List Manager displays just before it begins to print your mailing list, with one exception: it does not contain the line for Number of Test Alignment Rows.

You can change any of these default values by moving the cursor with the ARROW keys and typing over the number to be changed. When you are satisfied with your selections, press the ENTER key to return to the Mail List Menu.

If you want to be certain that you have actually changed the default values, select option 6 and follow the prompts until the Change Printer Label Format screen is displayed.
Notice that the values in the brackets are now the same ones you entered using option 7 of the Mail List Menu.

Using option 7, CHANGE PRINTED FORMAT, of the Mail List Menu to change print/display dimensions does not preclude your changing these dimensions when you select option 6, PRINT / DISPLAY MAILING RECORDS. After you have finished using option 6, the dimensions are again given the default values you assigned them.

Exercise 6: Displaying Records and Printing Labels

This exercise shows you how to display all of the records on the LAKEVIEW APARTMENTS mailing list, and then how to print the mailing labels of those addressees whose last names are between A and O who have not paid their June rent. You must have a printer properly connected to your Apple III to print labels. Before you begin, reboot the mail List Manager.

1. Select option 6, PRINT / DISPLAY MAILING RECORDS, from the Mail List Menu and press RETURN. The Mail List Manager prompts:

```
Mailing Record Storage Drive (2-4)? [2]
```

2. Place the diskette labeled LAKEVIEW APARTMENTS into Drive 2 and press ENTER. The diskette directory is displayed:

```
Diskette "LAKEVIEW APARTMENTS"
has 3 records on it
and 957 empty records remaining.
"bldg. code" runs from L1 to L3
```

Press RETURN. The Mail List Manager prompts:

```
1. List to Default Printer
2. Display to Screen
3. List to Another Printer
4. Mailing Lables with Phone Numbers.
```

3. To display the records on the screen, press RETURN. The Mail List Manager prompts:

```
1. Mailing Labels
2. Phone List
3. Complete Records
```

4. Select option 3, Complete Records, by typing 3; press RETURN. The Mail List Manager prompts:

```
Do you want to display your complete list? (Y/N) [Y]
```

5. Press ENTER to indicate that you want to display your complete list. The default printed record values are displayed. Change the Number of Labels Across Page to 1 and press ENTER. The records on your list are displayed. Now you are prompted:

```
Is there another diskette?
```

6. When you type N, the Mail List Menu is displayed.

7. This time you will print your mailing labels on a printer. Select option 6, PRINT / DISPLAY MAILING RECORDS, and press RETURN. The Mail List Manager prompts:

```
1. List to Default Printer
2. Display on Screen
3. List to Another Printer
```

8. Select option 1, List to Default Printer, by typing 1 and pressing RETURN. The Mail List Manager prompts:

```
1. Mailing Labels
2. Phone List
3. Complete Records
```

9. Select option 1, Mailing Labels, by typing 1 and pressing RETURN. The Mail List Manager prompts:

```
Do you want to print your complete list? (Y/N) [Y]
```

10. Type N to respond NO. The Mail List Manager displays field names from the record format.

11. Enter a Y after the NAME field. Brackets appear. Type A in the first set of brackets and press RETURN. Type 0 in the second set of brackets and press RETURN. Move the cursor down to the RENT STATUS field and type Y followed by 3-81 to 5-81. Press ENTER. The Mail List Manager displays the default dimensions for the printed record format.

12. You'll have to set the format values to correspond to the size and spacing of your labels. When you are satisfied with the values you have set, press ENTER. If you are using standard mailing labels, you probably have set the Number of Labels Across Page to a number greater than two. The Mail List Manager only has one label to print and this label does not make up a complete row. Thus, instead of printing labels the Mail List Manager prompts:

```
Is there another diskette?
```

13. Type N to respond NO. Jamie Neylon's record is printed.

14. When the Mail List Manager finishes printing, press RETURN. You are returned to the Mail List Menu.

9

Merging and Filtering Mailing Lists

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9

Merging and Filtering Mailing Lists

Option 8 on the Mail List Menu, MERGE / FILTER MAILING LISTS serves three functions: to combine two or more mailing lists to create a new mailing list, to sort a mailing list that occupies more than one mailing records diskette, and to filter a mailing list, thereby creating a subset of that list. Here is a brief description of each of these functions:

MERGING MAILING LISTS: When the MERGE / FILTER option is used to combine records from two or more mailing lists, the records on the lists you merge must all have the same mailing record format and must be sorted on the same field name before the merge begins. You also can use the Merge option to combine selected records from mailing lists. For example, you may want to combine only those records whose zip codes fall within a specified range. You need at least two external disk drives to combine mailing lists.

SORTING MULTI-DISKETTE MAILING LISTS: You already have seen that once you fill a mailing records diskette, you can continue your mailing list on a second mailing records diskette. The only way to sort such a list is to use the MERGE / FILTER option. Before you use this option, you should sort the records on each mailing records diskette using option 5, SORT MAILING RECORDS, on the Mail List Menu. You need at least two external disk drives to sort a mailing list that occupies more than one diskette.

FILTERING A MAILING LIST: When you filter a mailing list, you create a new mailing list that is a subset of your original list. For example, you may want to use the Filter option to create a mailing list that only includes addressees who work for a particular company or live in a particular state. You only need one external disk drive to filter a mailing records diskette.

This chapter explains how to merge and filter mailing records. The exercise at the end of the chapter shows you how to merge the two mailing lists you created in earlier exercises.

Figure 9-1 illustrates the steps you take to merge and filter your mailing lists.

Disk Drives Needed

You can connect a maximum of three external drives to an Apple III. Under ideal conditions, you will have one external drive for each of the mailing lists being merged or sorted. But what if you only have two external drives and want to sort a mailing list that occupies three diskettes or you have three external drives but want to merge four mailing lists? As long as you have two external drives and a bit of patience and ingenuity, it can be done.

If, for example, you have two external drives but want to merge records on more than two mailing lists, you first can merge two of the lists and then use the Merge option a second time to merge the list you've created with another unmerged list. You can continue this process, placing your merged list in one drive and your unmerged list in another, and then merging the two, until all your lists have been merged. A similar procedure can be used if you have three external drives and want to merge more than three mailing lists.

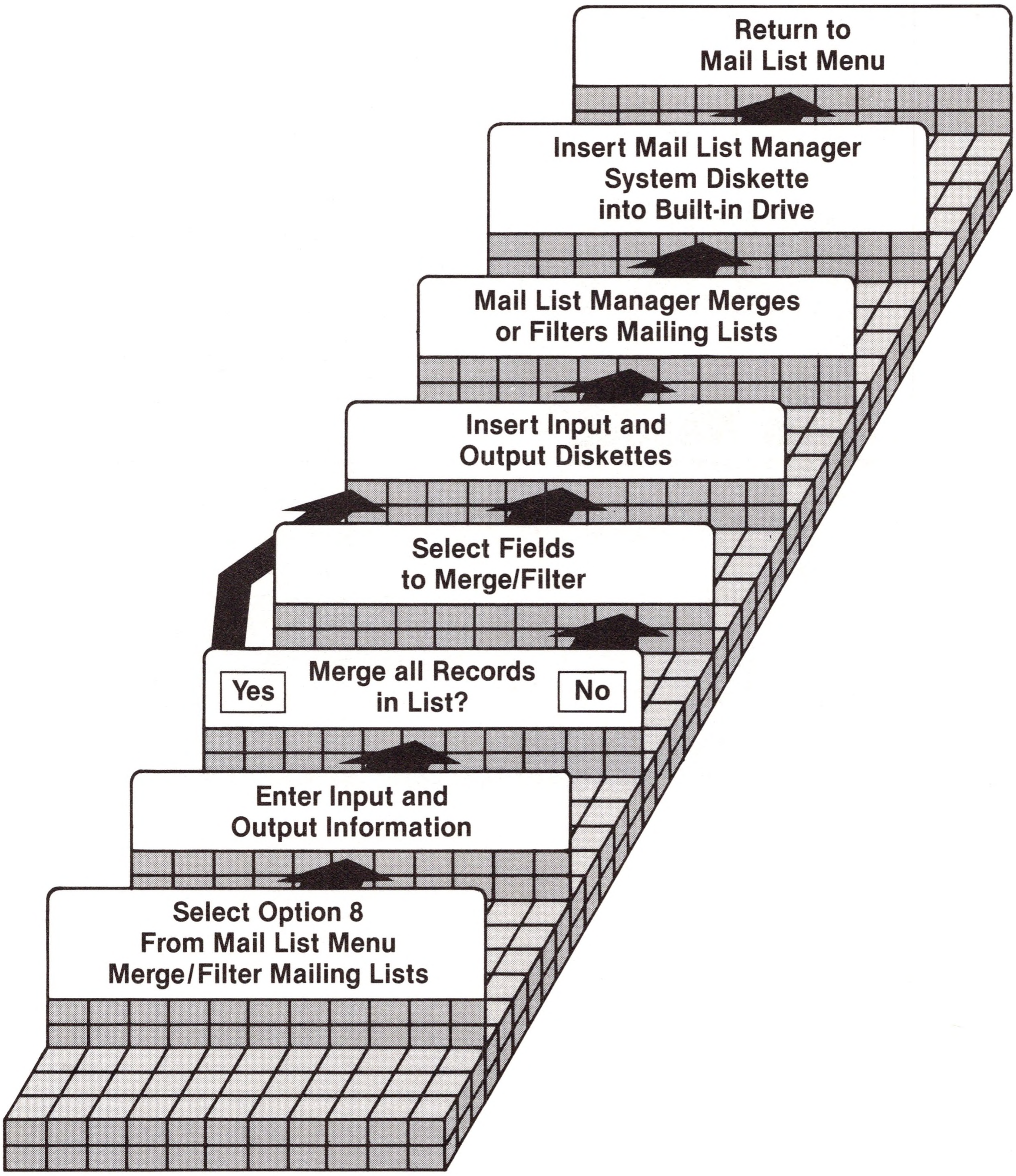
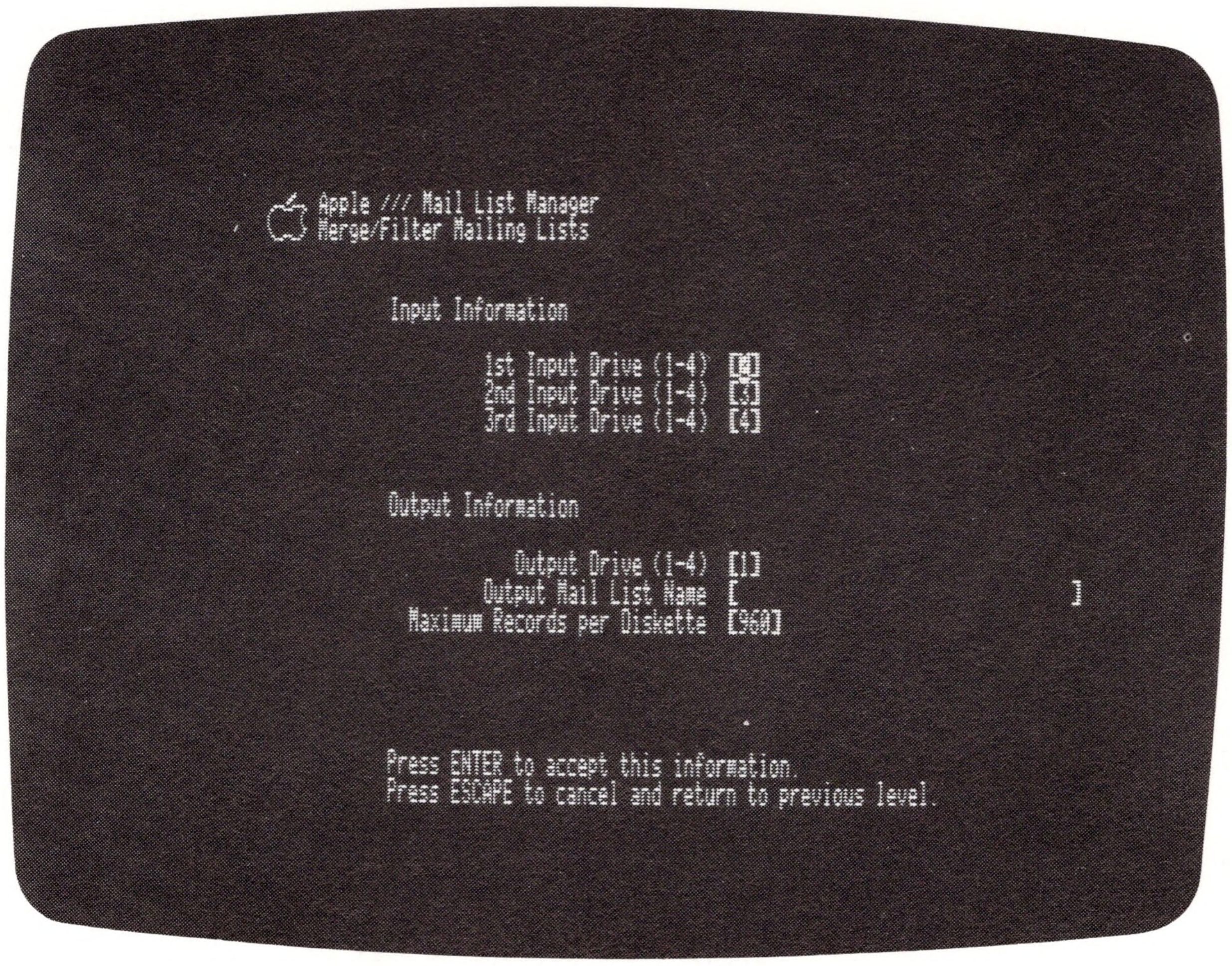

Return to
Mail List Menu
Insert Mail List Manager
System Diskette
into Built-in Drive
Mail List Manager Merges
or Filters Mailing Lists
Insert Input and
Output Diskettes
Select Fields
to Merge/Filter
Yes
Merge all Records
in List?
No
Enter Input and
Output Information
Select Option 8
From Mail List Menu
Merge/Filter Mailing Lists

Figure 9-1. Steps in Merging and Filtering Mailing Records

Entering Diskette Information

To merge or filter mailing lists, select option 8 on the Mail List Menu and press RETURN. The screen displays:



```
Apple /// Mail List Manager
Merge/Filter Mailing Lists

      Input Information

                1st Input Drive (1-4)  [2]
                2nd Input Drive (1-4)  [3]
                3rd Input Drive (1-4)  [4]

      Output Information

                   Output Drive (1-4)  [1]
                Output Mail List Name  [                    ]
         Maximum Records per Diskette  [960]



      Press ENTER to accept this information.
      Press ESCAPE to cancel and return to previous level.
```

Figure 9-2. Input and Output Information Screen

This screen tells the Mail List Manager the drive numbers of the input diskettes (the diskettes that contain the mailing lists you want to merge or filter) and output diskettes (the diskettes that will contain your merged or filtered mailing list). This screen also lets you name and specify the maximum number of records that you want the Mail List Manager to store on the output diskette. Note that when the screen is first displayed, the cursor appears in the brackets on the first input information line.

You must specify a different input drive number for each mailing list you want to merge. The output drive number must be a different number from any of the input drive numbers.

Input Diskette Information

The Mail List Manager requests the numbers of the drives you plan to use for the input mailing records diskettes. The default drives are 2, 3, and 4.

On the first line of input information, enter the number of the drive that contains the first mailing list you want to merge or filter. The default drive number is 2.

Remember that before a merge can begin, the diskette in the input drive must be sorted.

To specify Drive 2, press RETURN. To specify a different drive, type that drive number and press RETURN. The cursor moves down to the second input information line on the screen.

On the second line of input information, press RETURN to specify that your second input drive is Drive 3, enter a different drive number, or enter a space to indicate that you are not using this drive. Proceed in the same way for the "3rd Input Drive".

Output Diskette Information

The first line of output information requests a drive number for the output diskette. Enter the number of the drive that will contain the merged mailing list. The default drive number is 1. To specify Drive 1, press RETURN. To specify a different drive, enter that drive number and press RETURN.

When the Mail List Manager merges or filters mailing records diskettes, it destroys the current contents of the output diskette and stores on that diskette the list being created. Thus, the diskette you use as an output diskette either should be blank or should contain information you no longer need.

The cursor moves to the second output information line, Output Mailing List Name. On this line, type a mailing list name of up to 31 characters and press RETURN. The cursor moves down to the last output information line, Maximum Records per Diskette.

On the last output information line, enter the maximum number of records you want the merged diskette to contain. The default number, 960, is the maximum number of records a diskette can hold. To enter the default number, press RETURN. To indicate that the merged diskette should contain fewer records, enter a number less than 960 and press RETURN. Note that this field must contain three digits. Thus, if you want to enter a number less than 100, you need to precede the number with a zero. If you want to enter a number less than 10, you need to precede the number with two zeros.

Lists created using the MERGE / FILTER option frequently occupy more than one mailing records diskette. You may later want to add records to such lists. Specifying a maximum number of records per diskette that is less than 960 makes it possible for you to add records to the appropriate mailing records diskette and then sort the records on that particular diskette rather than having to add records to the end of your list and then resort the records on the entire list.

If you specify a drive number greater than 4, or a maximum number of records greater than 960, the Mail List Manager prompts at the bottom of the screen:

```
***ERROR: Incorrect parameter.
Press RETURN to go on, ESCAPE to return to previous level.
```

Press RETURN and replace the incorrect value on the screen with an acceptable number.

When you finish entering values on the Input and Output Information Screen, press the ENTER key to continue.

Merging Mailing Lists

You are now ready to merge mailing lists. The Mail List Manager prompts:

```
Insert first diskette of first input list,
then press RETURN (or ESCAPE to cancel).
```

Insert the diskette that contains the first mailing list that you want to merge or filter into the drive that you have specified. Then press RETURN.

If the diskette you insert has not been sorted, you'll get this message:

```
***ERROR: 1st mailing list is not sorted!
Press RETURN to go on.
```

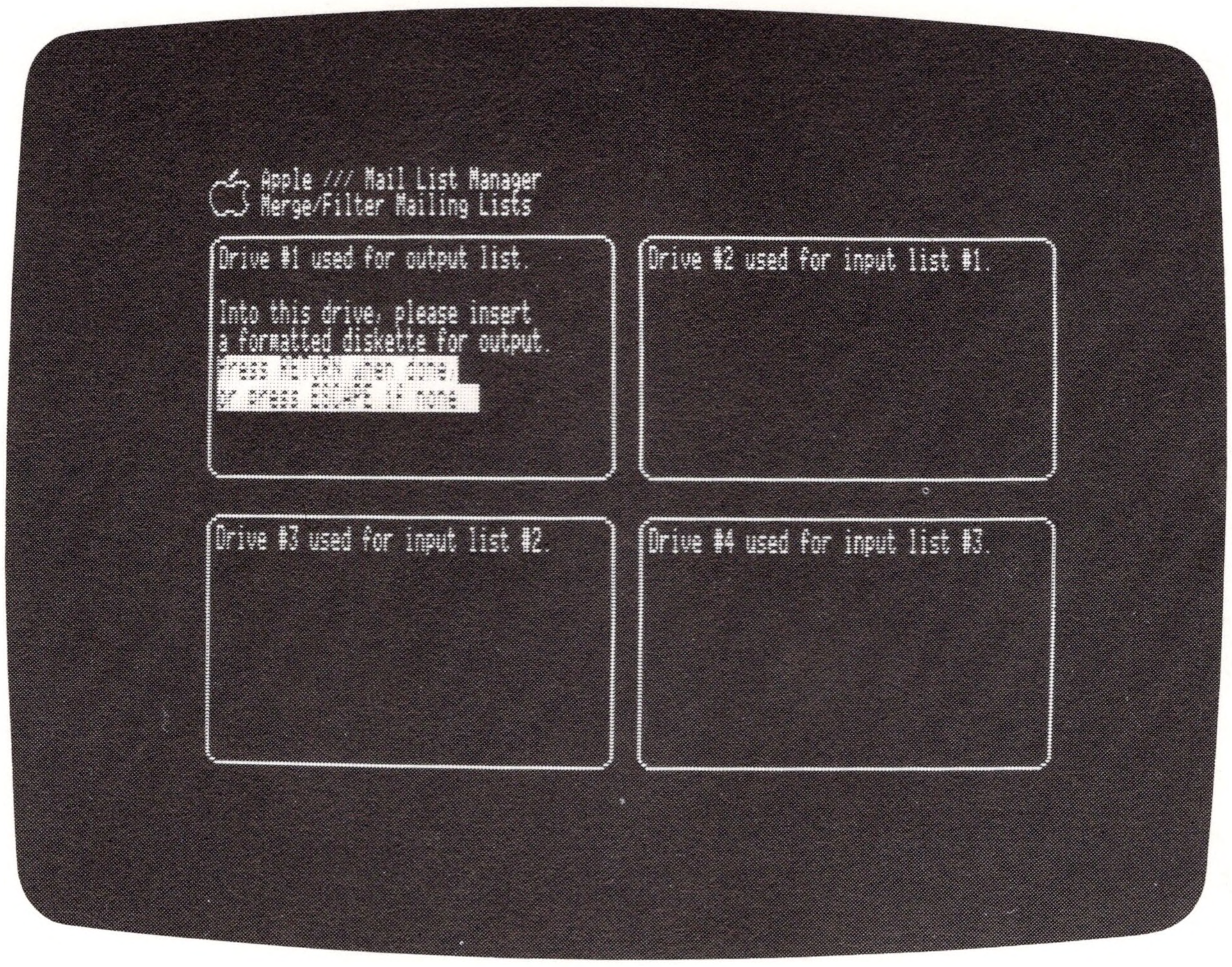
When you press RETURN, the Input and Output Information Screen is displayed. Press ESCAPE to return to the Mail List Menu, and then use the Sort option to sort the records on the diskettes you want to merge or filter.

The Mail List Manager reads the record format from the first mailing list and then asks:

```
Do you want to merge all the records in your list? (Y/N) [Y]
```

If you type N, the field names of the records being merged are listed. You use the same procedure to select only certain records for merging or filtering that you used when the identical screen was displayed when you used the PRINT / DISPLAY option. The PRINT / DISPLAY option is described in Chapter 8.

After you specify the records that you want to merge, the Mail List Manager displays one frame for each drive used in the merge. For example, if you are using the default drives, the screen displays:



```
Apple /// Mail List Manager
Merge/Filter Mailing Lists

Drive #1 used for output list.

Into this drive, please insert
a formatted diskette for output.
Press RETURN when done,
or press ESCAPE if none.

Drive #2 used for input list #1.

Drive #3 used for input list #2.

Drive #4 used for input list #3.
```

Figure 9-3. Merge Frames

If you are using only Drives 1 through 3, the screen displays three frames. The Mail List Manager uses these frames to prompt you to insert mailing records diskettes into their appropriate drives and to inform you of the status of the merge.

Follow the instructions on the screen and insert diskettes as you are prompted to do.

It is important that, when prompted, you remove the system diskette from drive 1 and insert either an input or an output diskette. If your system diskette is write-protected and you press RETURN without replacing the system diskette, the Mail List Manager will not be able to function properly and you will have to reboot. If you press RETURN without replacing the system diskette and the system diskette is not write-protected, you will destroy the information on the diskette.

Your first instruction is to insert the output diskette in the drive that you specified on the Input and Output Information Screen. After you do this and press RETURN, the Mail List Manager informs you of the new name of the diskette that has been placed in that drive. Once you press RETURN, any information contained on the output diskette is lost.

Note that when you use the MERGE / FILTER option to create a mailing list, the Mail List Manager assigns a sequence number to each diskette that makes up the list. Thus, if you merge diskette 1981 OFFICERS with diskette 1982 OFFICERS onto an output diskette that you name NEW OFFICERS, the Mail List Manager automatically names the output diskette NEW OFFICERS #1. If the list is continued on a second output diskette, it will be given the name NEW OFFICERS #2.

Next, you are instructed to insert the first diskette of the first input list. If you have been following the Mail List Manager's instructions, this diskette should already be in place.

If, when prompted for an input diskette, you insert a diskette that contains a sequence number and that sequence number is out of order, you receive this message in the appropriate frame:

```
Wrong sequence number #____
```

At the bottom of the screen, the Mail List Manager displays:

```
Press RETURN to proceed anyway, or press ESCAPE
to insert a different diskette.
```

If you press RETURN, the mailing records on your output diskette may not be properly sorted.

You next are prompted for the first diskette of the second input list. Insert the appropriate diskette and press RETURN. Here again you will receive the "Wrong sequence number" message if you insert a diskette that is out of order.

We already have mentioned that each of the mailing lists being merged must use the same mailing record format. If you insert two diskettes for merging that do not have the same format, you get this message:

```
***ERROR: The diskette loaded has incompatible field definitions!
Press RETURN to go on.
```

Press RETURN to continue. You either can insert a diskette with a compatible format or else press ESCAPE.

If you are merging three mailing lists, you next will be prompted for the first diskette of the third input list. Insert the appropriate diskette and press RETURN.

If your input diskette contains a sequence number, the Mail List Manager automatically prompts you for the next diskette in the sequence after all of the records on the original input diskette have been read. Thus, if you are merging a diskette named OFFICERS #1 with a diskette named MEMBERS, the Mail List Manager, upon reading all records on the OFFICERS #1 diskette, prompts in the appropriate box:

```
Into this drive please insert
"OFFICERS" #2
Press RETURN when done
or ESCAPE if none
```

Remember that a mailing records diskette is assigned a sequence number when it serves as an output diskette in a merge or filter.

If there is a diskette named OFFICERS #2, place it in the appropriate drive and press RETURN. If there is no OFFICERS #2 diskette, press ESCAPE.

If, when prompted for "OFFICERS" #2, you insert a diskette with a different name, say DONORS, you get this message:

```
Wrong diskette ID
DONORS
```

Press RETURN and place the appropriate diskette in the drive.

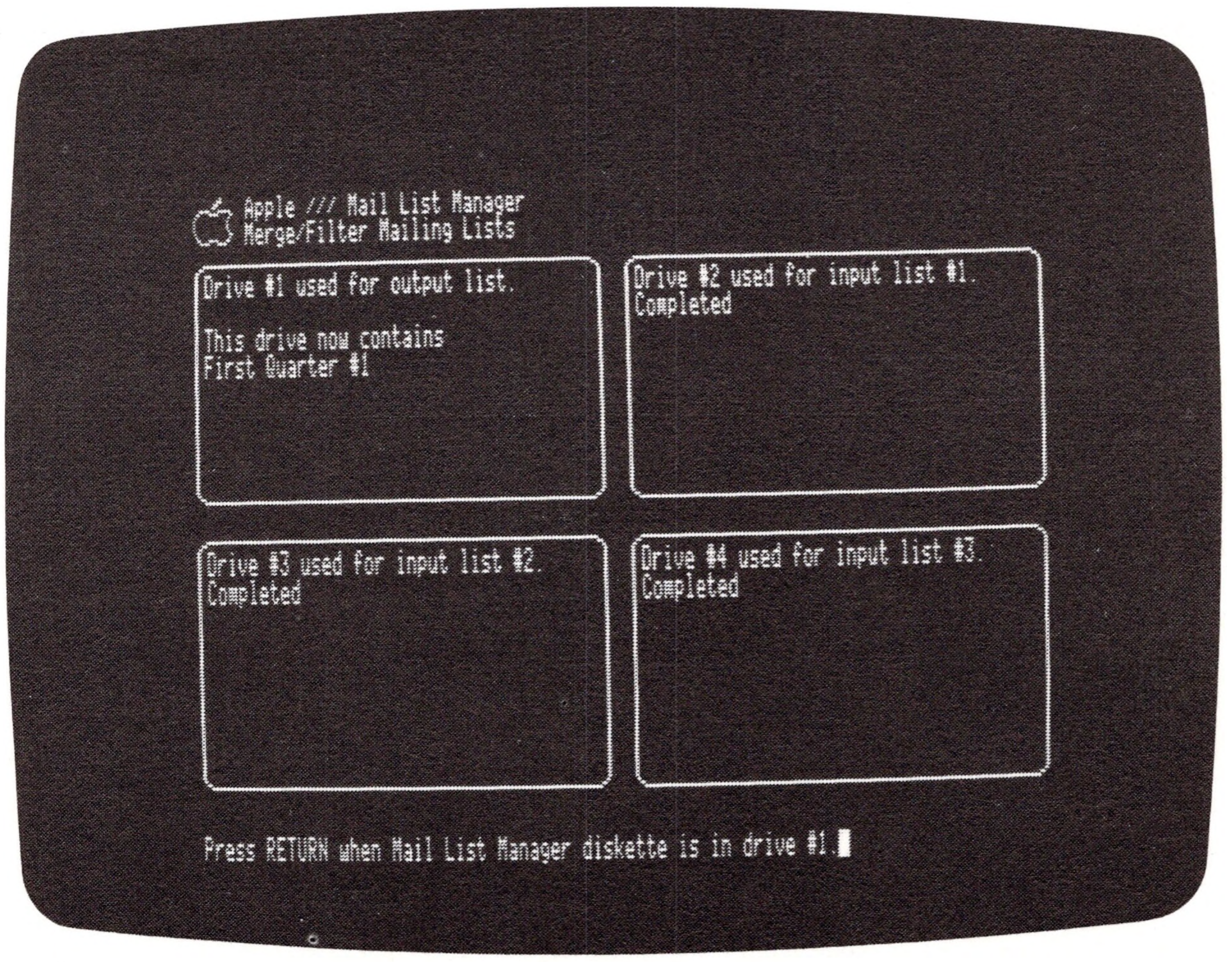
Note that the Mail List Manager won't prompt you for diskette "MEMBERS" #2, since there is no diskette named "MEMBERS" #1.

Suppose you are merging three mailing lists, January, February, and March, into a single list called First Quarter.

After you have followed the prompts and inserted all of the input diskettes into their appropriate drives, the merge begins. As the Mail List Manager finishes merging the records from each mailing list, the corresponding frame for that diskette displays:

```
Completed
```

Here is what the Merge screen looks like after lists January, February, and March have been merged.



```
Apple /// Mail List Manager
Merge/Filter Mailing Lists

Drive #1 used for output list.

This drive now contains
First Quarter #1

Drive #2 used for input list #1.
Completed

Drive #3 used for input list #2.
Completed

Drive #4 used for input list #3.
Completed

Press RETURN when Mail List Manager diskette is in drive #1.
```

Figure 9-4. Completed Merge

As soon as your output diskette contains the maximum number of records that you specified in the Input and Output Information Screen, you are prompted to insert another output diskette and press RETURN.

Once the merge is complete, the Mail List Manager prompts:

```
Press RETURN key when Mail List Manager diskette is in Drive #1.
```

Remove the diskette in the internal drive, insert the Mail List Manager diskette, and press RETURN. The Mail List Manager displays:

```
Merge complete.
Press RETURN to continue.
```

Press RETURN. The Mail List Manager displays the Input and Output Information screen. To return to the Mail List Menu, press the ESCAPE key.

Sorting Multi-Diskette Mailing Lists

To sort a mailing list that occupies more than one diskette, use the same procedure described in the previous section, Merging Mailing Lists, placing each of the mailing records diskettes to be sorted in a different input drive. If, for example, you are sorting a mailing list called Home Owners that occupies two diskettes, you would place the diskette containing the first part of the mailing list in the first input drive and the diskette containing the second part of the mailing list in the second input drive.

Remember that, for your output list to be properly sorted, you must sort the individual mailing records diskettes that comprise that list using option 5 on the Mail List Menu, SORT MAILING RECORDS, before you select the MERGE / FILTER option.

Filtering a Mailing List

To filter a mailing list, place the mailing list to be filtered in the first input drive. After you have entered information into the Input and Output Information Screen (shown in Figure 9-2), you are prompted:

```
Do you want to merge all records in your list? (Y/N) [Y]
```

If you type N, the field names contained on the records of the mailing list you want to filter are displayed. Select the fields you want to use to filter your list and press ENTER. Since you are filtering, as opposed to merging, only two frames are displayed, one for the output list and one for the first input list. Then follow the same procedure discussed in the section Merging Mailing Lists.

Exercise 7: Merging Mailing Lists

This exercise shows you how to merge the mailing lists LAKEVIEW APARTMENTS and CREEKSIDE APARTMENTS. You need two external drives to do this exercise. Before you begin, be sure you have a formatted diskette on which to store the merged mailing list. Also, before you begin, reboot the Mail List Manager.

Because mailing records diskettes being merged must contain the same record format and be sorted on the same sort field name, you need to sort the CREEKSIDE APARTMENTS mailing records diskette. You already have sorted the LAKEVIEW APARTMENTS mailing records diskette by the BLDG. CODE field. Before you begin this exercise, use the same procedure to sort the records on the CREEKSIDE APARTMENTS mailing records diskette by BLDG. CODE.

1. Select option 8 on the Mail List Menu by typing 8 and pressing RETURN. The Input and Output Information Screen is displayed.

2. Use the default Drives 2 and 3 for the input mailing list drives. Since you are not going to use Drive 4 as an input drive, move the cursor to the third line of the input information and replace the 4 with a blank by pressing the SPACE BAR. Press RETURN.

3. The cursor is now on the first line of the output information. Use Drive 1 for the output diskette. Since Drive 1 is the default, just move the cursor to the second line and type **June Mailing** for the output diskette name. Press RETURN. Leave the default number 960 for the maximum records per diskette. To continue the merge process, press ENTER.

4. At the bottom of the screen, the Mail List Manager prompts you to insert the first input diskette into the first input drive. Insert the mailing records diskette CREEKSIDE APARTMENTS into Drive 2 and press RETURN.

5. The Mail List Manager now asks if you want to merge all of the records. Press ENTER to indicate that you do.

6. The screen displays the input and output drive frames. In the output drive frame the Mail List Manager prompts you to insert the output diskette. Remove the Mail List Manager system diskette from Drive 1 and insert your formatted diskette; then press RETURN. The Mail List Manager informs you that Drive 1 contains the diskette June Mailing #1.

7. The second drive frame now prompts you to insert the first mailing records diskette in Drive 2. Because you already have inserted CREEKSIDE APARTMENTS into this drive, press RETURN. The Mail List Manager informs you that Drive 2 contains the diskette CREEKSIDE APARTMENTS.

8. The third drive frame prompts you to insert the second mailing records diskette into Drive 3. Insert LAKEVIEW APARTMENTS into Drive 3 and press RETURN. The Mail List Manager informs you that Drive 3 contains the diskette LAKEVIEW APARTMENTS.

9. The Mail List Manager combines all the records from both mailing records diskettes and stores the records in alphabetical order by building code on the output diskette. The following messages appear:

In drive #1 frame

```
This drive now contains June Mailing #1
```

In drive #2 frame

```
Completed
```

In drive #3 frame

```
Completed
```

When the merge is complete, the Mail List Manager prompts you to insert the Mail List Manager system diskette into Drive 1. Remove the output diskette from Drive 1 and insert the Mail List Manager system diskette. Press RETURN.

10. The Mail List Manager indicates on the screen that the merge is complete. Press RETURN. The Input and Output Information screen appears. Press ESCAPE to return to the Mail List Menu.

A

Soundexing Rules

A

Soundexing Rules

Soundexing is the method used by the Mail List Manager to find a record when you are unsure of the record's primary sort field's correct spelling (or at least unsure of how the sort field was spelled when it was entered into the mailing record). Soundexing is used each time you select option 4, FIND / MODIFY / DELETE MAILING RECORDS, from the Mail List Menu and then select Option 2 on the Sort Options screen.

Soundexing is most often used when a record's primary sort field is named NAME, although it can be used with any primary sort field name containing alphabetic information.

The classic version of the Soundexing algorithm was patented in 1918 and used in the analysis of census data. The Soundexing technique used by the Mail List Manager is very similar to the original version.

Each time the Mail List Manager is used to create a mailing record, a Soundex code is calculated based on the content of the record's primary sort field. When you choose Option 2 on the Sort Options screen and enter the "Similar Sort Field" to be searched for, another Soundex code is calculated. Then, when a "Similar Sort Field" search is done, the Mail List Manager searches for a record whose primary sort field has the same Soundex code.

Here is how a Soundex code is calculated.

1. Assign the following values to each character in the primary sort field:

character	value
a,e,h,i,o,u,w,y	0
all non-alphabetic characters	0
b,f,p,v	1
c,g,j,k,q,s,x,z	2
d,t	3
l	4
m,n	5
r	6

2. If two or more characters with the same value are adjacent, omit all but the first of them.

3. Remove all characters, other than the first character, that have 0 values.

4. Convert the primary sort field to the form

digit, digit, digit, digit

by dropping the rightmost digits (if there are more than four digits) or by adding trailing zeroes (if there are fewer than four digits).

Suppose, for example, that you want to determine the code for the name Jones. First you assign a value to each letter in the name:

J = 2
O = 0
N = 5
E = 0
S = 2

Next, check to see if any two letters having the same value are adjacent. In this instance, none are. Now, drop all letters that have a zero value. In this case you drop the O and the E and end up with the following:

J = 2
N = 5
S = 2

Now, you must convert the name to a four digit code. Since the current name has only three digits, you will add a trailing 0 at the end. Thus the Soundex code for Jones is 2 5 2 0.

Here are a few similar names and their respective codes:

1. Gold 2 4 3 0 Golde 2 4 3 0

Note that the 0 value assigned the letter O is dropped when the name is converted to code. Also note that a code must contain four digits. Thus a final 0 was added at the end of each code.

2. Mulligan 5 4 2 5 Miligan 5 4 2 5

In this instance the second L in Milligan is not coded because it is next to another letter (also an L) assigned the same code. (See Rule 2 above). Note that, because vowels are not coded, the two names have the same Soundex code even though their vowels are different.

3. Morganstein 5 6 2 5 Morgenstern 5 6 2 5

The full code for these names is 5 0 6 2 0 5 2 3 0 0 5. However, as stated above, the Soundexing algorithm can contain a maximum of four characters.

4. Meril 5 6 4 0 Merit 5 6 3 0

These two names do not have the same codes. Thus, the Mail List Manager will not make the match.

B

Error Messages

B

Error Messages

When using the Mail List Manager, you may press an incorrect key or mistype an entry. The Mail List Manager responds by displaying a message on the bottom of the screen. Most of these messages are self-explanatory. There are, however, a few that you may find somewhat baffling. The following is a list of these messages as well as possible reasons for each message and ways to correct the mistake.

MESSAGE

```
I-O Error #2 on drive #____ .
Press RETURN to try again, or ESCAPE to exit Mail List Manager.
```

or

```
I-O Error #2 on drive #____ .
Press RETURN to try again, or ESCAPE to return to previous level.
```

Cause:

You are trying to access a diskette in a drive that is not configured into your system.

Response:

Remove your diskette and place it in a drive that is properly configured.

MESSAGE

```
I-O Error #9 on drive #____ .
Press RETURN to try again, or ESCAPE to return to previous level.
```

Cause:

The drive containing your mailing records diskette is not properly connected to the Apple III.

Response:

Press ESCAPE to return to the previous level. Then, either turn off your Apple and reconnect the disk drive in question or place your diskette in a disk drive that is properly connected.

MESSAGE

```
I-O Error #16 on drive #____ .
Press RETURN to try again, or ESCAPE to exit Mail List Manager.
```

or

```
I-O Error #16 on drive #____ .
Press RETURN to try again, or ESCAPE to return to previous level.
```

Cause:

You tried to write to a write-protected diskette.

Response:

If you do not mind losing the information that is on your diskette, remove the write-protect tab from the diskette before you insert it in the drive again.

If you do not want to destroy the information currently on your diskette, remove it from the drive and insert a diskette that is not write-protected.

MESSAGE

```
I-O Error #64 on drive #____ .
Press RETURN to try again, or ESCAPE to exit Mail List Manager.
```

or

```
I-O Error #64 on drive #____ .
Press RETURN to try again, or ESCAPE to return to previous level.
```

Causes:

You have specified a drive that contains no diskette.

Your drive door is open.

The diskette may be scratched or bent and thus the information on the diskette is bad.

Responses:

Insert a formatted diskette in the drive or shut the door.

Replace the bad diskette with a good one.

MESSAGE

```
***ERROR: A good mailing record diskette is not seated properly in that drive.
Press RETURN to go on.
```

Causes:

The diskette is not formatted.

The diskette does not contain a mailing record format.

The diskette may be inserted incorrectly in the drive.

Response:

Press RETURN. If you know that the inserted diskette has been formatted and contains a mailing record format, there is a chance that the diskette is damaged. Replace it with another diskette that contains a mailing record format.

If the diskette does not contain a mailing record format, press RETURN and then, when the Mail List Menu is displayed, choose option 1, DEFINE MAILING RECORD FORMAT.

MESSAGE

```
It seems a different diskette is now in drive ____; press ESCAPE
to return to main menu, or insert proper diskette and press RETURN.
```

Cause:

You have inserted a different mailing records diskette into an external drive but have neglected to use option 2 on the Mail List Menu, CHOOSE RECORD STORAGE DRIVE, to officially inform the Mail List Manager of the diskette change.

Response:

To continue using the original diskette, remove the newly-inserted diskette and replace it with the original diskette. Press RETURN.

To continue using the newly-inserted diskette, press ESCAPE to return to the Mail List Menu. Then select option 2, CHOOSE MAILING RECORD STORAGE DRIVE, and press ENTER. Type the number of the drive that contains the new diskette. The diskette directory is displayed. Press RETURN to return to the Mail List Menu.

MESSAGE

```
***WARNING: About to overwrite current content of diskette in Drive #____ .
Press RETURN to go on, ESCAPE to return to previous level.
```

Cause:

You are trying to define the format of a diskette.

Response:

To avoid writing over the contents of the diskette, press ESCAPE to return to the previous level, or replace the diskette with a diskette you are willing to write over and press RETURN.

To write over the contents on the diskette, press RETURN. The system stores the label format on the diskette and erases all other information.

MESSAGE

```
***ERROR: Diskette just loaded is not sorted appropriately!
Press RETURN to go on.
```

Cause:

An attempt was made to merge using a diskette that was not sorted, or was not sorted on the same field name as the other mailing record diskettes being merged.

Response:

Before using the MERGE / FILTER option, sort on the same field name all the mailing lists to be merged.

MESSAGE

```
***ERROR: Improper parameter, please re-enter.
Press RETURN to go on, ESCAPE to return to previous level.
```

Causes:

You tried to enter a parameter value when using option 6 or option 7 of the Mail List Menu that was larger than the value that was defined in the record format.

You tried to enter a parameter value that exceeds the bounds defined on the screen.

Response:

Enter an acceptable value for the parameter indicated by the cursor after you press RETURN.

MESSAGE

Insert volume: MLM/
in Device: D1
then press the Alpha Lock key twice

Cause:

The Mail List Manager system diskette is not in the built-in drive.

Response:

Return the system diskette to the built-in drive and reboot.

Glossary

ARROW keys - Keys on the Apple III keyboard that move the cursor up, down, right, or left as indicated on the key.

Backup - A duplicate copy of a diskette.

Comment line - A line on a record that contains information that is not printed on an actual mailing label.

Comment field - A field on a record that contains information that is not printed on an actual mailing label.

Default - Any mailing list characteristic that already is set up for you in the Mail List Manager program.

Delimiter - A separator that divides fields on a line. To create a delimiter, hold down the CONTROL key and press the SPACE BAR. The delimiter appears as a small triangle on your screen and as a space on a printed label or record.

Dimensions - The measurements of an actual label.

Field - An area on a line of a record designated for a specific type of information. A record can contain a maximum of 12 label and comment fields, not counting the PHONE and LABEL CODES fields. Multiple fields on a line are separated by delimiters.

Field name - The name or title assigned to a field. A field name is at most 11 characters.

Filter - To select a group of records from a mailing list based on the content of specified fields.

Fixed format - A mailing record format that contains label and comment fields.

Free format - A mailing record format that contains no label or comment fields, except for the PHONE and LABEL CODES fields.

Label - The information on a record that appears on a printed mailing label. When displayed on the screen, a label is enclosed in a box.

Label code - A code on a mailing record that specifies up to six different pieces of information about an addressee.

Label field - A field on a record that contains information that will appear on an actual mailing label.

Label line - A line on a record that contains information that will appear on an actual mailing label.

Line - One horizontal row across a record; a line may contain several fields separated by delimiters.

Mailing list - A list of mailing records stored on diskette. A mailing list may be stored on several diskettes but one diskette can contain only one mailing list.

Mailing list name - The name assigned to a mailing list stored on a diskette. The maximum number of characters in a diskette name is 31.

Mailing records diskette: A diskette used to store mailing records. A mailing records diskette can store a maximum of 960 records.

Merge - To combine records from two or more mailing lists to create a new mailing list.

Phone list - A printed or displayed list that contains addressees' names and phone numbers.

Primary sort field - The first sort field on a record.

Prompt - A request from the Mail List Manager, displayed on the screen, for information from the user.

Record - The information that has been entered for one addressee.

Record format - The position and names of fields in a record. The record format also specifies the maximum number of characters per line and the number of label lines on the record.

Secondary sort field - The second sort field on a record.

Sort - To order the records in a mailing list based upon the alphabetic or numeric value of its primary or secondary sort field.

Sort field - A field on a mailing record that contains information the Mail List Manager uses when it looks for a record or changes the order of records on a mailing records diskette.

Soundexing - A Mail List Manager feature that lets you find records containing similar-sounding words.

Standard record format - A predefined record format. When you use the standard record format, the first line of your record contains the addressee's name, the second company, the third street address, and the fourth city, state, and zip code.

System diskette - The diskette that contains the Mail List Manager program.

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Mail List Manager
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Editing Keys

To move the cursor on the screen	Use the UP-, DOWN-, LEFT-, and RIGHT-ARROW keys.
To move the cursor to the next line of a record	Press the DOWN-ARROW, RETURN or TAB key.
To move the cursor to the previous line of a record	Press the UP-ARROW key or CONTROL-TAB
To add characters to the end of a line	Move the cursor to the end of line; begin adding characters.
To replace characters	Position the cursor on the character you want to replace. Type the new character over the old.
To insert characters	Position the cursor on the character to the right of where you want to begin inserting. Press CONTROL-I and then begin inserting text. To end the insertion, press any of the following keys: UP- or DOWN-ARROW, CONTROL-I, RETURN, CONTROL-TAB or TAB.
To delete characters	Position the cursor on the character you want to delete. Press CONTROL-D for each character you want to delete.
To create a delimiter	Hold down the CONTROL key and press the SPACE BAR.
To display the corresponding line of the previous record	Move the cursor to the appropriate line; press CONTROL-P.

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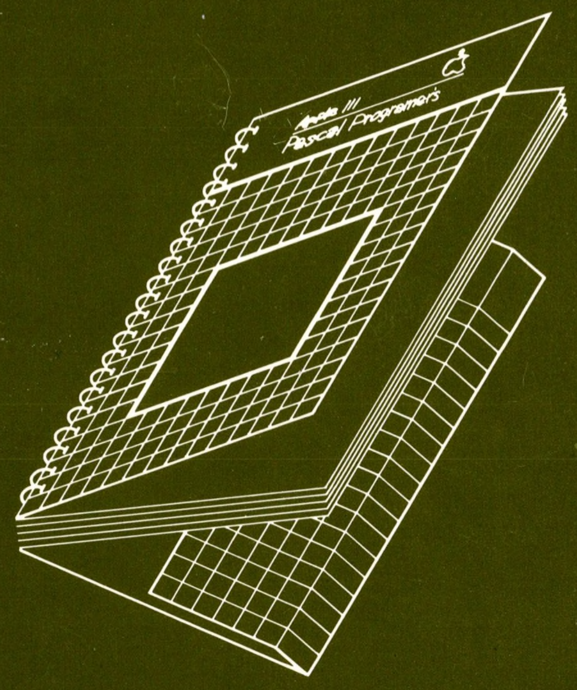
Vital Statistics

Maximum number of records per diskette	960
Maximum number of characters per record	105
Maximum number of label and comment fields per record (not counting PHONE and LABEL CODES fields)	12
Maximum number of label and comment field names per line	7
Maximum number of characters per field name	11
Maximum number of characters (including delimiters) per line of field names	33
Maximum number of characters in label codes field	6
Maximum number of characters in phone field	20
Maximum number of characters in diskette name	31

Tuck end flap
inside back cover
when using manual.



Mail List Manager

apple computer
10260 Bandley Drive
Cupertino, California 95014
(408) 996-1010

030-0267-A