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Create a new Company

Print

To create a new Company

1 Choose the Clear button or select Clear from the Record menu. If you are on the Contact tab choose the Whole Record button.

2 Choose the Contact tab. Choose the type of company you require - click on the down arrow to the right of the Drawer field. This will display a list of possible values from which you can click on the one you require.

3 Choose the Company tab. Enter the Code field using up to ten characters.

4 On the left of the screen, enter the remaining fields you require. To move from one field to the next, press the TAB key. To move to any field, click on it.

5 On the right of the screen, choose an entry for each category you require - click on the down arrow to the right of the field. This will display a list of possible values from which you can click on the one you require.

6 Choose the Extras tab and enter the fields you require.

7 Choose the Notes tab and enter the fields you require.

8 Choose the Save button or Save from the Record menu.

9 To enter Contacts for this Company refer to Create a new Contact.

10 Refer to:

Create a new Contact

Create a new Contact

To create a new contact

1 Ensure you have selected a Company first. Refer to Create a new Company, Update a Company.

2 Choose the Contact tab.

3 Choose the Clear button or Clear from the Record menu. Choose the Contact button.

4 Enter a Contact name. This is the name that will appear on selection lists, etc., so it should easily identify the person, e.g. Mr Chang, David in Development, or Clare (Sales).

5 Enter the remaining fields you require. To move from one field to the next, press the TAB key. To move to any field, click on it.

6 The phone and fax numbers are copied from the Company tab initially but you can type over these if you wish.

7 Choose the Save button or Save from the Record menu.

8 If this is the main Contact for the Company, refer to Set Default Contact.

9 Refer to:

Create a new Company
Update a Company
Set Default Contact

Update a Company

To update company information

1 Select the Company you require - refer to Find a Company.

2 Choose the tabs and amend the fields you require. To move from one <u>field</u> to the next, press the TAB key. To move to any field, <u>click</u> on it.

3 To add a Contact for this Company refer to Create a New Contact

4 To update a Contact for this Company refer to Update a Contact.

5 To create, update or remove a notice refer to Urgent Notice.

6 Choose the Save <u>button</u> or Save from the Record <u>menu</u>.

7 Refer to:

<u>Find a Company</u>
<u>Create a New Contact.</u>
<u>Update a Contact.</u>
<u>Create an Urgent Notice</u>

Find a Company

Print

To find a company record

1. Choose the Clear button or select Clear from the Record menu. There are three highlighted key fields on which you can search for a company - Code, Company and Postcode.

2. Enter part (starting at the beginning) or all of one of the key fields.

3. Choose the Find button or Find... from the Record menu, or enter <CTRL>F. Either the Company will be displayed immediately, a List will appear or a message will be shown - no records found.

4. If a List appears, choose the Company you require. If the Company is not on the list, double click the button in the top left hand corner of the window to close it and go back to step 2, trying another code.

5. If the message is shown, choose OK and try another code.

Update a Contact

Print

To update contact information

1 Select the Company to which the Contact belongs - refer to Find a Company.

2 Choose the Contact tab.

3 If the Contact you require is the main one for the Company, it will be displayed.

4 If not, choose the down arrow to the right of the Contact field. Choose the Contact you require by clicking on it.

5 Amend the fields you require. To move from one field to the next, press the TAB key. To move to any field, click on it.

6 Choose the Save button or Save from the record menu.

7 If you wish this Contact to become the main one for the Company, refer to Set Default Contact.

8 Refer to:

Find a Company.
Set Default Contact

Set Default Contact

Print

To set the default contact for a company

1 Ensure that the Contact you require is displayed in the Contact tab - refer to Update a Contact.

2 Click the small box to the right of the down arrow next to the Contact field. This places an x in the box and sets this Contact as the default. Any existing default will have the x removed.

3 Refer to:

Update a Contact

Create an Urgent Notice

Print

To create an urgent notice

1 Ensure that the Company to which you are giving the Notice is displayed on the Company tab - refer to Find a Company.

2 Choose Urgent Notice... from the Action menu.

3 To replace any existing text, choose the Clear button or press the Delete key. To just remove an existing notice, ignore the next step.

4 Enter the message to be displayed when a user selects this Company.

5 Choose the OK button.

6 Refer to:

Find a Company

Create a new User

Print

To create a new user

1 Choose Security from the Admin <u>menu</u>.

2 Choose Users... from the <u>submenu</u>.

3 Choose the Insert <u>button</u>.

4 Enter the User <u>field</u> using up to ten characters.

5 Enter the remaining fields you require. To move from one field to the next, press the <u>TAB</u> key. To move to any field, <u>click</u> on it.

6 To set the user's rights refer to Give Rights to a User.

7 Choose the OK button.

8 Choose the Close button.

9 Refer to:

Give Rights to a User

Give rights to a user

Print

To give rights to a user

1. First you must be in Edit User - refer to Update a User.
2. Choose the Insert... button.
3. You can assign a User to one or more Groups. This gives the User all the Rights for each of those Groups.   You can also give a User individual Rights.
4. Double click the Groups and Rights you require in the Rights List. (If the Rights List covers the user's rights it helps to drag it elsewhere on the screen.)
5. To set Group Rights refer to Give Rights to a Group and Remove Rights from a Group.
6. Close the list by pressing <ESC>.
7. Refer to:

Update a User.
Give Rights to a Group
Remove Rights from a Group

Update a User

Print

To update user information

1 Choose Security from the Admin <u>menu</u>.

2 Choose Users... from the <u>submenu</u>.

3 <u>Click</u> on the User you require.

4 Choose the Edit <u>button</u>.

5 Update the fields you require .To move from one <u>field</u> to the next, press the <u>TAB</u> key. To move to any field, click on it.

6 To alter the Rights refer to Give Rights to a User and Remove Rights from a User.

7 Choose the OK button.

8 Choose the Close button.

9 Refer to:

<u>Give Rights to a User</u>
<u>Remove Rights from a User.</u>

Remove rights from a user

Print

To remove rights from a user

1 First you must be in Edit User - refer to Update a User.

2 Click on the Group or Right you require in the Rights field.

3 Choose the Delete... button.

4 Refer to:

Update a User.

Give rights to a Group

To give rights to a group

1 First you must be in Edit Group - refer to Maintain Groups.

2 Choose the Insert... <u>button</u>.

3 Double <u>click</u> the Rights you require in the Rights List. (If the Rights List covers the user's rights it helps to <u>drag</u> it elsewhere on the screen.)

4 Close the list by pressing <ESC>.

5 Refer to:

[Maintain Groups](#)

Maintain Groups

To maintain groups to which users can belong

1 Choose Security from the Admin <u>menu</u>.

2 Choose Groups... from the <u>submenu</u>.

3 To add a group, choose the Insert <u>button</u>. Enter a code of up to ten characters in the Group <u>field</u>.

4 To amend a group <u>click</u> on the one you require and choose the Edit button.

5 Enter the Description field.

6 To alter the Rights refer to Give Rights to a Group and Remove Rights from a Group.

7 Choose the OK button.

8 Choose the Close button.

9 Refer to:

Give Rights to a Group
Remove Rights from a Group

Remove Rights From a Group

To remove rights from a group

1 First you must be in Edit Group - refer to Maintain Groups.

2 Click on the Right you require in the Rights field.

3 Choose the Delete... button.

4 Refer to:

Maintain Groups

Create a Todo

Print

To create a Todo

1 First you must be entering an Action for a Contact - refer to Create Actions. The fields for a Todo are enclosed in the box labelled "Next".

2 Enter a description for the Todo in the comment field.

3 Choose the user to carry out the next action - click on the down arrow to the right of the Assign To field. This will display a list of user codes, including yourself, from which you can click on the one you require.

4 In the same way choose the type of action from the Action field.

5 Specify the date and optionally the time when you wish the next action to be carried out, as follows:

6 > Enter the Date field in the form DDMMYYYY, without typing the / characters, e.g. 14021995 for 14 February 1995.

7 > Enter the Time field in the form HHMMSS, without typing the : characters, e.g. 151130 for 3.11 and 30 seconds in the afternoon.

8 To send a message to the user's screen shortly before the action is due refer to Set an Alarm.

9 Choose the OK button.

10 Refer to:

Create Actions

Set an Alarm

Create Actions

Print

To create an action

1 Ensure that the Company you intend the Action for is displayed in the Company tab - refer to Update a Company.

2 Press the F2 key or select Action... from the Action menu.

3 To change the Contact click on the down arrow to the right of the Contact field. This will display a list of possible names from which you can click on the one you require.

4 Choose the type of Action you require - click on the down arrow to the right of the What field. This will display a list of possible codes from which you can click on the one you require.

5 Enter a description of the event in the Comment field.

6 To print an address label if you are sending something in the post, refer to Print Labels.

7 To automatically phone the Contact if you have a modem connected refer to Autodial.

8 To generate the next Action for yourself or another user refer to Create a Todo.

9 To generate tasks and messages for other users in addition to any set up as your defaults in Automatic Todos and Automatic Notifications, choose the "people" button then proceed as follows:

10 > To add a To Do click the Assign field then choose the Insert... button. This will display the User List from which you can double click on the one you require. (If the User List covers the Operators it helps to drag it elsewhere on the screen.) Close the window by pressing the <ESC> key.

11 > To add a Notification, click the Notify field then continue as in step 10.

12 > Choose the Close button.

13 If you are logging the event after it has occurred, rather than timing it "live", choose the "clock" button. Enter the Start and Finish Date and Time fields as follows:

14 > Enter the dates in the form DDMMYYYY, without typing the / characters, e.g. 14021995 for 14 February 1995.

15 > Enter the times in the form HHMMSS, without typing the : characters, e.g. 151130 for 3.11 and 30 seconds in the afternoon.

16 > Choose OK.

17 Choose OK.

18 Refer to:

Update a Company
Print Labels
Autodial
Create a To Do.
Automatic Todos
Automatic Notifications

Print Labels

Print

To print mailing labels

1 You can print labels from either the Contact <u>tab</u> or the Action screen. Refer to Update a Contact and Create Actions.

2 From the Contact tab, ensure that the Contact to print on the Label is displayed. Choose the Label <u>button</u> or Label from the Action <u>menu</u>.

3 From the Action screen, choose the type of document you are sending - <u>click</u> on the <u>down arrow</u> to the right of the Send <u>field</u>. This will display a list from which you can click on the one you require.

4 Refer to:

<u>Update a Contact</u>
<u>Create Actions</u>

Autodial

To dial a phone number automatically

1 You can dial phone numbers automatically from either the Contact <u>tab</u> or the Action screen. Refer to Update a Contact and Create Actions.

2 From the Contact tab, ensure that the Contact to phone is displayed. Choose the Autodial <u>button</u> or Autodial from the Action <u>menu</u>.

3 From the Action screen, choose the "telephone" button.

4 The Contact's number is displayed but you can type over this if necessary.

5 Choose the type of call - <u>click</u> on the <u>down arrow</u> to the right of the Action <u>field</u>. This will display a list from which you can click on the one you require.

6 Choose the Dial button.

7 Choose the Close button.

8 Refer to:

Update a Contact
Create Actions

Automatic Todos

Print

To give someone a Todo automatically

1 Choose Actions... from the Admin <u>menu</u>.

2 This will display the Action Types list from which you can double <u>click</u> on the one you require.

3 Click in the Give Todo box then choose the Insert Op... <u>button</u>. This will display the User List from which you can double click on the one you require. Close the <u>window</u> by pressing the <ESC> key.

4 Choose the OK button.

5 Choose the Close button.

Automatic Notification

Print

To notify another operator of an action automatically

1 Choose Actions... from the Admin menu.

2 This will display the Action Types list from which you can double click on the one you require.

3 Click in the Notify box then choose the Insert Op... button. This will display the User List from which you can double click on the one you require. Close the window by pressing the <ESC> key.

4 Choose the OK button.

5 Choose the Close button.

Set an Alarm

Print

To set an alarm

1 First you must be entering a Todo for a Contact - refer to Create a Todo.

2 Click the small box by Set Alarm. This places an x in the box.

3 The default number of minutes before the event is due when the alarm is to be displayed will be shown in the Mins Before field. You can type over this if you wish.

4 Refer to:

Create a Todo

Create a Drawer

Print

To create a drawer

1 Choose Drawer Maintenance from the Admin menu.

2 Choose the Insert... button.

3 Enter the Code field using up to ten characters.

4 Enter the Name field, usually a longer description.

5 Enter the remaining fields in the Main tab. To move from one field to the next, press the TAB key. To move to any field, click on it. The text you enter will be displayed as the tab headings on your new Drawer.

6 Choose each tab in turn and enter the fields you require. The text you enter for a field will be displayed as the prompt for that field on the Drawer.

7 Note that the Tab 2 fields Ana 1, Ana 2, etc. are analysis fields. Each of these is a category of your choosing into which you will place a specific set of values - refer to Analysis Fields. Typical analysis fields are Industry Type, Sales Territory and Turnover range.

8 Choose the OK button.

9 Choose the Close button.

10 Refer to:

Analysis Fields

Analysis Fields

Print

To set up values for Analysis Fields

1 First you must be creating or amending a Drawer - refer to Drawer Maintenance.

2 Click on the Drawer for which you require Analysis Fields then choose the Analysis... button.

3 Choose the Analysis Field you require - click on the down arrow to the right of the Field Name field. This will display a list of possible fields from which you can click on the one you require.

4 Any existing values will be displayed in the box below.

5 To add a new value, choose the Insert button. Enter the Code and Description. Choose the OK button.

6 To amend an existing value click on the one you require then choose the Edit button. Enter the Description then choose the OK button.

7 To delete an existing value click on the one you require then choose the Delete button.

8 Choose the Close button.

9 Refer to:

Drawer Maintenance.

Drawer Maintenance

Print

To create a drawer

1 Choose Drawer Maintenance... from the Admin menu.

2 Choose the Insert... button.

3 Enter the Code field using up to ten characters.

4 Enter the Name field, usually a longer description.

5 Enter the remaining fields in the Main tab. To move from one field to the next, press the TAB key. To move to any field, click on it. The text you enter will be displayed as the tab headings on your new Drawer.

6 Choose each tab in turn and enter the fields you require. The text you enter for a field will be displayed as the prompt for that field on the Drawer.

7 Note that the Tab 2 fields Ana 1, Ana 2, etc. are analysis fields. Each of these is a category of your choosing into which you will place a specific set of values - refer to Analysis Fields. Typical analysis fields are Industry Type, Sales Territory and Turnover range.

8 Choose the OK button.

9 Choose the Close button.

10 Refer to:

Analysis Fields

Create a Document

Print

To create a document

1. To create a document addressed to a Contact ensure that the Contact is displayed in the Contact tab. Refer to Update a Contact.
2. Choose the Word Processing button or your word processor from the Action menu.
3. Choose a document template from the list by double clicking on the one you require.
4. Enter the Title, Subject and Keyword fields. The Author is yourself initially but you can type over this if you wish.
5. To include a description in the Action that will be created enter the Comment field.
6. Choose the OK button.
7. You will now be editing a new document in your particular word processing package.
8. Refer to:

Update a Contact

Retrieve a Document

Print

To retrieve a document created through Octopus

1 Ensure that the Company to which the document is addressed is displayed on the Company tab. Refer to Update a Company

2 Choose the Actions button or Action List... from the Action menu, or enter <CTRL>A.

3 Click on your document.

4 Choose the Word Processing button or your word processor from the Action menu.

5 After a few moments you will be editing your document.

6 Refer to:

Update a Company

Edit a Document

Print

To edit a document created through Octopus

1 Refer to the help screens or manual of your particular Word Processing package.

Print a Document

Print

.To print a document created through Octopus

    1 Refer to the help screens or manual of your particular Word Processing package.

Use a Todo

Print

To use an item on the Todo list

1 If the Todo list is not visible, choose Todo List from the <u>Window</u> <u>menu</u>.

2 <u>Click</u> on the Todo you wish to action. Summary details will be displayed below the list.

3 To see full details double click on the entry.

4 Amend the fields you require.

5 Choose the OK <u>button</u>. This will indicate that the Todo has been done and it will be removed from the Todo list.

Delete a Contact

Print

To delete a contact

1 Ensure that the Contact you wish to delete is displayed in the Contact <u>tab</u> - refer to Update a Contact.

2 Choose the Delete <u>button</u> or Delete from the Record <u>menu</u>, or enter <CTRL>D.

3 If you have chosen to delete accidentally you can choose the Cancel button to keep the Contact. Otherwise choose the Contact button.

4 Refer to:

Update a Contact

Delete a Company

Print

To delete a company

1 Ensure that the Company you wish to delete is displayed in the Company tab - refer to Find a Company.

2 Choose the Delete button or Delete from the Record menu, or enter <CTRL>D.

3 If you are on the Contact tab and have chosen to delete accidentally choose the Cancel button to keep the Company. Otherwise choose the Whole Record button. This will delete the Company and all its Contacts.

4 If you are on another tab a message is displayed - Are you sure you want to delete. If you have chosen to delete accidentally you can choose the Cancel button to keep the Company. Otherwise choose the OK button.

5 Refer to:

Find a Company

Mail Merge

Print

To perform mail merge operations

1 It is assumed you know how to run a mail merge in your Word Processor - refer to its manual and help screens.

2 Ensure the current Merge File is the one you require by checking on the status bar to the right of the time. To change it refer to Merge Information.

3 Choose a Contact to add to the Merge File - refer to Update a Contact.

4 Choose the Merge button or Merge from the Action menu.

5 Repeat steps 3 and 4 for all the Contacts to be mailed.

6 Load your word processor to run the Mail Merge. Create the letter in the word processor and take the names and addresses from the file to which you have just been adding Contacts. To identify the file and path name refer to Merge Information.

7 Refer to:

Merge Information
Update a Contact

Merge Information

Print

To specify name and address files used for mail merges

1 Choose Merge Info... from the Admin menu or enter <CTRL>M.

2 The Merge Info list is displayed showing merge files as messages that will identify Mail Out Actions.

3 To set up merge files used choose the Setup... button. The Merge Setup list is displayed, showing mail out messages and corresponding file names.

4 To specify a new merge file choose the Insert... button then enter the Description.

5 To specify a file used for an existing mail merge, click on the one you require and choose the Edit... button, or double click on the one you require.

6 Enter the Merge File name, including the full path. If you don't know it you can choose the Browse... button. This provides the standard Browse window for finding the required file.

7 Choose the OK button.

8 If required enter the Default Merge File including the full path. If you don't know it you can choose the Browse... button. This provides the standard Browse window for finding the required file.

9 Choose the Close button.

10 Choose the merge file for your next mail merge by clicking on the one you require in the Mail out Messages field.

11 Choose the Close button.

Query by Example

Print

To perform an ad hoc query

1 You can search on one or more fields in all tabs in any combination.

2 Choose the Query button or Query from the Query menu.

3 For each field you require, click on it and enter part (starting at the beginning) or all of the value on which to search. For more complex searches you can include "Wild Cards" - refer to Using Wild Cards.

4 Choose the Fire Query button or Query Fire from the Query menu.

5 Either one Company will be displayed immediately, a List will appear of all Companies meeting your criteria or a message will be shown - no records found.

6 If a List appears, choose the Company you require. If the Company is not on the list, double click the button in the top left hand corner of the window to close it and go back to step 2, trying different searches.

7 If the message is shown, no companies have met your criteria, so try again from step 2.

8 You can work through the Companies selected by clicking anywhere in the List window to bring it to the front again.

9 To save your selection criteria, refer to Save Queries.

10 Refer to:

Save Queries
Using Wild Cards

Save Queries

To save queries

1 To perform a Query refer to Query by Example.

2 Choose the Query <u>button</u> or Query from the Query <u>menu</u>. Your selection criteria will be redisplayed in the appropriate fields.

3 Choose the Save button or Save from the Record menu.

4 Enter a suitable Name that will easily identify the Query.

5 Choose the Query button or Query from the Query menu to exit query mode.

6 Refer to:

Query by Example

Using Wild Cards

To include Wild Cards in queries

1 To specify that at a particular position in a word or number there can be any single <u>character</u>, use underscore, i.e. _.

2 To specify that at a particular position in a word or number there can be any number of any characters (including none), use percent, i.e. %.

3 Examples:

(a) You are looking for a company called Jonathan Smith Ltd or Jonathon Smith Ltd, you don't know the spelling: enter Jonath_n in the company <u>field</u>.

(b) You are looking for all companies in postcode area N1: enter N1 ___ in the postcode field. By specifying a space and any three characters after N1 you will avoid selecting N10, N11, etc. as well.

(c) You are looking for a contact named Stephen, Steven or Steve: enter Ste%e% in the contact field. (This will allow "v" or "ph" for the first % and "n" or nothing for the second %.) Note this would also select Stephanie, Stevie, Steed, etc!

(d) You are looking for all companies in Grosvenor Place, or maybe Grosvener Place, London, you don't know the postcode, but you know that the phone numbers must start with 0171: enter %Grosven_r Place in the first address field and 0171 in the phone field. (This will allow a house number before the road name and either spelling, the phone number will eliminate this road in any other towns.)

Send EMail

Print

To send electronic mail

1 Choose Send EMail from the Action menu.

2 This will take you into your particular EMail package.

Receiving EMail

Print

To receive electronic mail

1 Choose Mail Messages from the Action <u>menu</u>.
2 Double <u>click</u> on the message you wish to read.
3 Choose the OK <u>button</u>.
4 Double click on the button in the top left hand corner of the Mail Messages <u>field</u> to close it.

Delete EMail

Print

To delete electronic mail

1 Choose Mail Messages from the Action <u>menu</u>.
2 <u>Click</u> on the message you wish to delete.
3 Choose the Delete <u>button</u>. Be quick or it will time out!
4 Double click on the button in the top left hand corner of the Mail Messages <u>field</u> to close it.

Edit Actions

Print

To edit an action

1 Ensure that the Company for which the Action took place is displayed in the Company <u>tab</u> - refer to Find a Company.

2 Choose the Actions <u>button</u> or Action History... from the Action <u>menu</u>, or enter <CTRL>A.

3 This displays the Action History from which you can double <u>click</u> on the Action you require.

4 Amend the fields you require.

5 Choose the OK button.

6 Refer to:

<u>Find a Company</u>

Delete Actions

Print

To delete an action

1 Ensure that the Company for which the Action took place is displayed in the Company tab - refer to Update a Company.

2 Choose the Actions button or Action List... from the Action menu, or enter <CTRL>A, to display the Action List.

3 Click on the Action you require.

4 Choose the Delete button or Delete from the Record menu, or enter <CTRL>D.

5 A message is displayed - Are you sure you want to delete. If you have chosen to delete accidentally you can choose the Cancel button to keep the Action. Otherwise choose the OK button.

6 Double click the button in the top left hand corner of the window to close it.

7 Refer to:

Update a Company

Reference

Select a topic from:

[Menu Commands](#)
[Keyboard Shortcuts](#)

Menu Commands

Select the <u>menu</u> from

[File](#)
[Edit](#)
[Record](#)
[Accounts](#)
[Action](#)
[Query](#)
[Admin](#)
[Window](#)
[Help](#)

File Menu

[New Form](#)
[Print Preview](#)
[Print](#)
[Reports](#)
[Printer Setup](#)
[Exit](#)

Creating a new form

To create a new Company form

1 Choose New Form from the File <u>menu</u>.

Print Preview

To display a report on the screen

1 Choose Print Preview from the File <u>menu</u>.

Printing

To print a report

1 Choose Print from the File <u>menu</u>.

Reports

To locate and run reports

1. Choose Reports... from the File <u>menu</u>.
2. To add a new report, choose the Insert <u>button</u>. Refer to Edit Report Definition.
3. To amend a report's location, <u>click</u> on the report you require and choose the Edit button, or double click on the report you require. Refer to Edit Report Definition.
4. To display a report on the screen choose the Preview button.
5. To print a report choose the Print button.
6. To delete a report choose the Delete button.
7. Choose the Close button.
8. Refer to:

[Edit Report Definition](#)

Edit Report Definition

To locate a report

1 First you must be adding or amending a report - refer to Reports.

2 Enter the Description <u>field</u>.

3 Enter the report file name in the Filename field including the full <u>path</u>. If you don't know it you can choose the Browse... <u>button</u>. This provides the standard Browse <u>window</u> for finding the required file.

4 Choose a right - <u>click</u> on the <u>down arrow</u> to the right of the Right field. This will display a list of possible rights from which you can click on the one you require. To have no rights, choose the C button to clear.

5 In the same way choose a Dialogue box, if any.

6 Choose the OK button.

7 Refer to:

<u>Reports</u>

Printer Setup

To select and set up your printer

1 Choose Printer Setup from the File <u>menu</u>.

2 <u>Click</u> on the report type you require in the large box..

3 Choose a printer - click on the <u>down arrow</u> to the right of the Printers <u>field</u>. This will display a list of possible printers from which you can click on the one you require.

4 To configure this printer choose the Setup... <u>button</u>. This enters the standard Windows Print Setup. Choose the OK button when you have finished setting up.

5 Choose the Change button

6 Choose the OK button.

Exiting Octopus

To exit Octopus

1 Choose Exit from the File <u>menu</u> or double <u>click</u> the <u>button</u> in the top left hand corner of the Octopus <u>window</u>.

Edit Menu

[Cut](#)
[Copy](#)
[Paste](#)
[Delete](#)

Cut

To remove text for inclusion elsewhere

1 First you must have selected some text to cut. To do this you <u>highlight</u> it.

2 Choose Cut from the Edit <u>menu</u> or enter <CTRL>X.

3 You can now paste the text in either Octopus or some other application. For Octopus refer to Paste.

4 Refer to:

<u>Paste</u>

Paste

To insert text taken from elsewhere

1 First you must have carried out a Cut or Copy on some text in either Octopus or some other application. For Octopus, refer to Cut, Copy.

2 Place the <u>mouse</u> <u>pointer</u> where you wish to insert the text.

3 Choose Paste from the Edit <u>menu</u> or enter <CTRL>V.

4 Refer to:

Cut
Copy

Copy

Print

To copy text

1 First you must have selected some text to copy. To do this you <u>highlight</u> it.

2 Choose Copy from the Edit <u>menu</u> or enter <CTRL>C.

3 You can now paste the text in either Octopus or some other application. For Octopus refer to Paste.

4 Refer to:

<u>Paste</u>

Delete

To delete text

1 First you must have selected some text to delete. To do this you <u>highlight</u> it.

2 Choose Delete from the Edit <u>menu</u> or press <Delete>.

3 To remove text for inclusion elsewhere, refer to Cut.

4 Refer to:

<u>Cut</u>

Record Menu

[First](#)
[Previous](#)
[Next](#)
[Last](#)
[Find](#)
[Clear](#)
[Save](#)
[Delete](#)

First Record

To access the first company on the current list

   1 Choose the First <u>button</u> (|<) or First from the Record <u>menu</u>, or enter <CTRL><Page Up>.

Previous

To access the previous company on the current list

1 Choose the Previous <u>button</u> (<) or Previous from the Record <u>menu</u>, or press <Page Up>.

Next Record

To access the next company on the current list

1 Choose the Next <u>button</u> (>) or Next from the Record <u>menu</u>, or press <Page Down>.

Last Record

To access the last company on the current list

1 Choose the Last <u>button</u> (>|) or Last from the Record <u>menu</u>, or enter <CTRL><Page Down>.

Clear

To clear the Company tab

1 Select the Clear button or Clear from the Record menu.

Save

To save a record you are adding or updating

1 Choose the Save <u>button</u> or Save from the Record <u>menu</u>.

Delete a Company or Contact

To delete a Company or Contact

1 To delete a Company refer to Delete a Company.

2 To delete a Contact refer to Delete a Contact.

3 Refer to:

Delete a Company
Delete a Contact

Accounts Menu

[Sales Open Items](#)
[Purchase Open Items](#)
[Customer Account Record](#)
[Supplier Account Record](#)
[Create SL Account](#)
[Create PL Account](#)
[Accounts System](#)
[OP Enquiry](#)
[OP Entry](#)
[Stock Enquiry](#)

Sales Open Items

To enquire on Sales Ledger Transactions

1 Ensure that the Company to enquire on is displayed in the Company <u>tab</u> - refer to Update a Company.

2 Choose the Sales Ledger <u>button</u> or Sales Open Items from the Accounts <u>menu</u>, or enter <CTRL>S.

3 To vary the display and view invoices refer to Sales Ledger Transactions.

4 To close the Sales Open Items <u>window</u>, double <u>click</u> on the button in the top left hand corner.

5 Refer to:

 Update a Company
 Sales Ledger Transactions

Sales Ledger Transactions

To vary the sales transactions display and view invoices

1 The initial display is for Open Items.

2 To view all transactions, <u>click</u> on the <u>button</u> All.

3 To view Open Items in a particular ageing band, click on the Current, 30, 60, 90 or 90+ Days button.

4 To view all Open Items again, click on the button Open.

5 To enquire on an invoice or credit note, double click on the entry. Double click on the button in the top left hand corner of the <u>window</u> to close it.

Purchase Open Items

To enquire on Purchase Ledger Transactions

1 Ensure that the Company to enquire on is displayed in the Company <u>tab</u> - refer to Update a Company.

2 Choose the Purchase Ledger <u>button</u> or Purchase Open Items from the Accounts <u>menu</u>, or enter <CTRL>P.

3 To vary the display refer to Purchase Ledger Transactions.

4 To close, double <u>click</u> on the button in the top left hand corner.

5 Refer to:

[Update a Company](#)
[Purchase Ledger Transactions](#)

Purchase Ledger Transactions

To vary the supplier transaction display

1 The initial display is for Open Items.

2 To view all transactions, <u>click</u> on the <u>button</u> All.

3 To view Open Items in a particular ageing band, click on the Current, 30, 60, 90 or 90+ Days button. To view all transactions, click on the button All.

4 To view all Open Items again, click on the button Open.

Customer Account Record

To enquire on the Customer Account

1 Ensure that the Company you require is displayed in the Company <u>tab</u> - refer to Update a Company.

2 Choose Customer Account Record from the Accounts <u>menu</u>.

3 You will be taken into the account enquiry of your particular accounting product.

4 To view transactions, choose the Open Items <u>button</u> and refer to Sales Ledger Transactions.

5 Refer to:

<u>Update a Company</u>
<u>Sales Ledger Transactions</u>

Supplier Account Record

To enquire on the Supplier Account

1 Ensure that the Company you require is displayed in the Company <u>tab</u> - refer to Update a
    Company.

2 Choose Supplier Account Record from the Accounts <u>menu</u>.

3 You will be taken into the account enquiry of your particular accounting product.

4 To view transactions, choose the Open Items <u>button</u> and refer to Purchase Ledger Transactions.

5 Refer to:

<u>Update a Company</u>
<u>Purchase Ledger Transactions</u>

Create SL Account

To create a Sales Ledger Account

1 Ensure that the Company to create an account for is displayed in the Company <u>tab</u> - refer to Update a Company.

2 Choose Create Sales Ledger Account from the Accounts <u>menu</u>.

3 The account code is the same as the Octopus Company Code initially but you can type over this if you wish.

4 Choose the OK <u>button</u>.

5 If the account code already exists choose the OK button. Go back to step 3 and try another code.

6 Once you have entered a unique code, you will be taken into the account entry process of your particular accounting product. Wherever possible, information is copied from Octopus.

7 Refer to:

<u>Update a Company</u>

Create PL Account

To create a Purchase Ledger Account

1 Ensure that the Company to create an account for is displayed in the Company tab - refer to Update a Company.

2 Choose Create Purchase Ledger Account from the Accounts menu.

3 The account code is the same as the Octopus Company Code initially but you can type over this if you wish.

4 Choose the OK button.

5 If the account code already exists choose the OK button. Go back to step 3 and try another code.

6 Once you have entered a unique code, you will be taken into the account entry process of your particular accounting product. Wherever possible, information is copied from Octopus.

7 Refer to:

Update a Company

Accounts System

To load your Accounting package

1 Choose the Accounts <u>button</u> or Accounts System from the Accounts <u>menu</u>.

OP Enquiry

To perform a Sales Order Processing enquiry

1 Ensure that the Company to enquire on is displayed in the Company tab - refer to Update a Company.

2 Choose OP Enquiry from the Accounts menu or press <F5>.

3 You will be taken into the order enquiry of your particular accounting product.

4 Choose the Close button.

5 Refer to:

Update a Company

OP Entry

To enter a Sales Order

1 Ensure that the Company to enter an order for is displayed in the Company <u>tab</u> - refer to Update a Company.

2 Choose OP Entry from the Accounts <u>menu</u> or press <F6>.

3 You will now be in the Order Entry process of your particular accounting package.

4 Refer to:

<u>Update a Company</u>

Stock Enquiry

To perform a Stock Enquiry

1 Choose Stock Enquiry from the Accounts <u>menu</u> or press <F7>.

2 Select the Warehouse by clicking on the ...   <u>button</u> by the Warehouse <u>field</u>. <u>Click</u> on the entry you require and choose the Select button, or double click on the entry.

3 Select the Product by product code by clicking on the ... button next to the Product field; or select it by alpha code by clicking on the ... button next to the Alpha field. Click on the entry you require and choose the Select button, or double click on the entry.

4 You will be taken into the stock enquiry of your particular accounting product.

5 Choose the OK button.

6 Choose the Close button.

Action Menu

[ToDos](#)
[Action History](#)
[Actions](#)
[Label](#)
[Merge](#)
[Mail](#)
[Autodial](#)
[Urgent Notice](#)
[Quick Entry](#)
[Send EMail](#)
[Mail Mesages](#)
[Word Processor](#)
[Spreadsheet](#)

Todos

To open the Todo List <u>window</u>

1 Choose Todos from the Action <u>menu</u>. If the window is already open this option will be unavailable - to bring the window to the front choose Todo List from the Window menu.

Action History

To edit an action

1 Ensure that the Company the Action belongs to is displayed in the Company <u>tab</u> - refer to Update a Company.

2 Choose the Actions <u>button</u> or Action History... from the Action <u>menu</u>, or enter <CTRL>A.

3 This displays the Action History from which you can choose the Action you require.

4 Amend the fields you require.

5 Choose the OK button.

6 Refer to:

[Update a Company](#)

Actions

To create an action

1 Ensure that the Company for the Action is displayed in the Company <u>tab</u> - refer to Update a Company.

2 Press the F2 key or select Action... from the Action <u>menu</u>.

3 To change the Contact <u>click</u> on the <u>down arrow</u> to the right of the Contact <u>field</u>. This will display a list of possible names from which you can click on the one you require.

4 Choose the type of Action you require - click on the down arrow to the right of the What field. This will display a list of possible codes from which you can click on the one you require.

5 Enter a description of the event in the Comment field.

6 To print an address label if you are sending something in the post, refer to Print Labels.

7 To automatically phone the Contact if you have a <u>modem</u> connected, refer to Autodial.

8 To generate the next Action for yourself or another user, refer to Create a To Do.

9 To generate tasks and messages for other users in addition to any set up as your defaults in Automatic Todos and Automatic Notifications, choose the Ops... <u>button</u> then proceed as follows:

10 > To add a Todo click the Give Todo field then choose the Insert Op... button. This will display the User List from which you can double click on the one you require. Close the <u>window</u> by pressing the <ESC> key.

11 > To add a Notification click the Notify field then choose the Insert Op... button. This will display the User List from which you can double click on the one you require. Close the window by pressing the <ESC> key.

12 > Choose the Close button.

13 If you are logging the event after it has occurred, rather than timing it "live", choose the Call Time... button. Enter the Start and Finish Date and Time fields as follows:

14 > Enter the dates in the form DDMMYYYY, without typing the / characters, e.g. 14021995 for 14 February 1995.

15 > Enter the times in the form HHMMSS, without typing the : characters, e.g. 151130 for 3.11 and 30 seconds in the afternoon.

16 > Choose OK.

17 Choose OK.

18 Refer to:

[Update a Company](#)
[Print Labels](#)
[Autodial](#)
[Create a To Do.](#)
[Automatic Todos](#)
[Automatic Notifications](#)

Mail

To print a mailing label and generate an action for it

1 Ensure that the Contact you require is on the Contact <u>tab</u> - refer to Update a Contact.

2 Choose the Mail Out <u>button</u> or Mail Out from the Action <u>menu</u>.

3 Refer to:

 <u>Update a Contact</u>

Quick Entry

To quickly enter basic Company and Contact details

1 Choose Quick Entry... from the Action <u>menu</u> or press <F4>.

2 Enter any description in the Comments <u>field</u>, this will appear in the Action comments..

3 Enter the Phone, Contact and Company fields.

4 To enter further Action information including Todos, choose the Action... <u>button</u>, otherwise choose the OK button. Refer to Actions.

5 Refer to:

<u>Actions</u>

Mail Messages

To view mail messages sent to you

1 Choose Mail Messages from the <u>Window</u> <u>menu</u>.

2 If the option is not present, choose Mail Messages from the Action menu.

3 A list of Mail Messages is displayed from which you can double <u>click</u> on the one you require to read the whole message.

4 Choose the OK <u>button</u> to return to the list.

5 To return to the main Company window behind, click anywhere on it or choose the Company name from the Window menu.

Create a Spreadsheet

Print

To create a spreadsheet

1 Choose the Spreadsheet button or your spreadsheet from the Action menu.

2 Choose a document template from the list by double clicking on the one you require.

3 Enter the Title, Subject and Keyword fields. The Author is yourself initially but you can type over this if you wish.

4 To include a description in the Action that will be created enter the Comment field.

5 Choose the OK button.

6 You will now be editing a new document in your particular spreadsheet package.

7 Refer to:

Update a Contact

Query Menu

- [Query](#)
- [Query Fire](#)
- [Query Save](#)
- [Queries](#)

Query

To define an ad hoc Query

1 You can search on one or more fields in all tabs in any combination.

2 Choose the Query <u>button</u> or Query from the Query <u>menu</u>.

3 For each <u>field</u> you require, <u>click</u> on it and enter part (starting at the beginning) or all of the value on which to search. For more complex searches you can include "Wild Cards" - refer to Using Wild Cards.

4 To run the query refer to Query Fire.

5 To save your selection criteria, refer to Save Queries.

6 Refer to:

Query Fire
Save Queries
Using Wild Cards

Query Fire

To run an ad hoc query

1 First you must have defined a query - refer to Query.

2 Choose the Fire Query <u>button</u> or Query Fire from the Query <u>menu</u>.

3 Either one Company will be displayed immediately, a List will appear of all Companies meeting your criteria or a message will be shown - no records found.

4 If a List appears, choose the Company you require. If the Company is not on the list, double <u>click</u> the button in the top left hand corner of the <u>window</u> to close it and go back to step 1, trying different searches.

5 If the message is shown, no companies have met your criteria, so try again from step 1.

6 You can work through the Companies selected by clicking anywhere in the List window to bring it to the front again.

7 To save your selection criteria, refer to Save Queries.

8 Refer to:

<u>Query</u>
<u>Save Queries</u>

Queries

To run a previously saved query

1 Choose Queries from the Query <u>menu</u>.

2 A list of queries is displayed from which you can double <u>click</u> on the one you require.

3 The screen is cleared and the selection criteria are placed in the appropriate fields. To run the query, refer to Query Fire.

4 Refer to:

[Query Fire](#)

Admin Menu

[Merge Info](#)
[Actions](#)
[Security](#)
[Drawer Maintenance](#)
[Change Password](#)
[User Options](#)
[Toolbar](#)
[Status Bar](#)
[System Keys](#)

Security

To administer the security of the system

1 To maintain users, refer to Create a New User, Update a User.
2 To maintain groups refer to Maintain Groups.
3 To maintain rights refer to Maintain Rights.
4 Refer to:

[Create a New User](#)
[Update a User](#)
[Maintain Groups](#)
[Maintain Rights](#)

Maintain Rights

To maintain rights available to users and groups

1 Choose Security from the Admin <u>menu</u>.

2 Choose Rights... from the <u>submenu</u>.

3 To add a Right, choose the Insert <u>button</u>. Enter a code of up to ten characters in the Right <u>field</u>.

4 To amend a Right <u>click</u> on the one you require and choose the Edit button.

5 Enter the Description field.

6 Choose the OK button.

7 Choose the Close button.

Change Password

To change your password

1. Choose Change Password from the Admin <u>menu</u>.
2. Enter the Old Password and New Password fields.
3. Enter the new password again in the Verify New Password <u>field</u>.
4. Choose the OK <u>button</u>.

User Options

To specify your user options

1 Choose User Options from the Admin <u>menu</u>.

2 To enter general options, choose the User <u>tab</u> and refer to User General Options.

3 To enter word processing options, choose the Wordprocessor tab and refer to Wordprocessor Options.

4 To enter spreadsheet options, choose the Spreadsheet tab and refer to Spreadsheet Options

5 To enter communications options, choose the Environment tab and refer to Environment Options.

6 Refer to:

[User General Options.](#)
[Wordprocessor Options.](#)
[Spreadsheet Options](#)
[Environment Options.](#)

User General Options

To enter general user options

1. First you must be entering user options and be in the User <u>tab</u> - refer to User Options.

2. Choose the Action you use most often - <u>click</u> on the <u>down arrow</u> to the right of the Default Action <u>field</u>. This will display a list of possible Actions from which you can click on the one you require.

3. In the same way, choose the number of days ahead to generate the next action, from the Days Ahead field.

4. In the same way, choose the number of minutes before an action is due to display the alarm, from the Alarm Mins Before field.

5. Enter the Logfile field including the full <u>path</u>. If you don't know it you can choose the Browse... <u>button</u>. This provides the standard Browse <u>window</u> for finding the required file.

6. Enter the Rows, Company List and Contact List fields.

7. Refer to:

<u>User Options</u>

Wordprocessor Options

To enter your word processing options

1 First you must be entering user options and be in the Wordprocessor <u>tab</u> - refer to User Options.

2 Choose your word processor - <u>click</u> on the <u>down arrow</u> to the right of the Word Processor <u>field</u>. This will display a list of possible products from which you can click on the one you require.

3 Enter the Exe <u>path</u> field to specify the directory for the word processor programs. If you don't know it you can choose the Browse... <u>button</u>. This provides the standard Browse <u>window</u> for finding the required path.

4 In the same way enter the Doc path and Template path fields to specify the directories of the word processor document and template files respectively.

5 Choose the Action to generate when using the word processor in the same way as for step 2.

6 Refer to:

<u>User Options</u>

Spreadsheet Options

To enter your spreadsheet options

1 First you must be entering user options and be in the Spreadsheet <u>tab</u> - refer to User Options.

2 Choose your spreadsheet - <u>click</u> on the <u>down arrow</u> to the right of the Spreadsheet <u>field</u>. This will display a list of possible products from which you can click on the one you require.

3 Enter the Exe <u>path</u> field to specify the directory for the spreadsheet programs. If you don't know it you can choose the Browse... <u>button</u>. This provides the standard Browse <u>window</u> for finding the required path.

4 In the same way enter the Doc path and Template path fields to specify the directories of the spreadsheet document and template files respectively.

5 Choose the Action to generate when using the spreadsheet in the same way as for step 2.

6 Refer to:

<u>User Options</u>

Environment Options

To specify your environment options

1 First you must be entering user options and be in the Environment <u>tab</u> - refer to User Options.

2 Choose your EMail system - <u>click</u> on the <u>down arrow</u> to the right of the Mail Service <u>field</u>. This will display a list of possible products from which you can click on the one you require.

3 Enter the Mail Polling field to specify the number of minutes between each check for mail received.

4 Choose the port your <u>modem</u> is connected to - click on the down arrow to the right of the Autodial field. This will display a list of possible ports from which you can click on the one you require.

5 Enter the Reports field to specify the directory for report files. If you don't know it you can choose the Browse... <u>button</u>. This provides the standard Browse <u>window</u> for finding the required <u>path</u>.

6 Refer to:

User Options

Tool Bar

To toggle the toolbar display on/off

    1 Choose Toolbar from the Admin <u>menu</u>.

Status Bar

To toggle the status bar display on/off

1 Choose Status Bar from the Admin menu.

System Keys

To set up the System Keys

1 NOTE: You set up initial values for system keys when you first install Octopus. Thereafter the system maintains them and they should not need any more updating, except for setting any new ones in upgrades or perhaps for changing descriptions.

2 Choose System Keys from the Admin <u>menu</u>.

3 To amend a system key <u>click</u> on the system key you require and choose the Edit... <u>button</u>, or double click on the system key you require.

4 To add a new system key choose the Insert... button. Enter the Code <u>field</u> using up to ten alphanumeric characters.

5 Enter the Value and Description fields.

6 Choose the OK button.

7 To finish setting up system keys choose the Close button.

Window Menu

[Cascade](#)
[Tile Horizontal](#)
[Tile Vertical](#)
[Arrange Icons](#)
[1- 9](#)
[More Windows](#)

Cascade

To arrange the windows staggered one on top of another

1 Choose Cascade from the Windows <u>menu</u>.

Tile Horizontal

To arrange the windows separately with horizontal divisions

1 Choose Tile Horizontal from the <u>Window</u> <u>menu</u>.

Tile Vertical

To arrange the windows separately with vertical divisions

    1 Choose Tile Vertical from the <u>Window</u> <u>menu</u>.

Arrange Icons

This has no effect within Octopus.

Window Menu Options 1 to 9

To bring a <u>window</u> to the front

1 Choose the window you require from the list numbered from 1 upwards or <u>click</u> anywhere on the window if it is visible.

More Windows

To bring the next set of ten windows (if any) onto the <u>window</u> <u>menu</u>

1 Select More Windows from the Window menu.

Help Menu

[Index](#)
[Using Help](#)
[About Octopus](#)

Help Index

To access the help index

    1 Select Help Index from the Help <u>menu</u>.

Using Help

To access the Help system

    1 Choose Using Help from the Help <u>menu</u>.

About Octopus

To access product and licence information

   1 Choose About Octopus from the Help <u>menu</u>.

Keyboard Shortcuts

Navigation

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[Switching between Windows](#)
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Deleting, copying and pasting

[Deleting text](#)
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Database shortcuts

[Finding companies](#)
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[Insert, update, delete companies](#)
[insert](#)
[update](#)
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Moving in a form

Print

Keyboard shortcuts for moving in a form

1 <TAB>: Moves to the next field.
2 <SHIFT><TAB>: Moves to the previous field.
3 Click: Moves to the field clicked.
4 <HOME>: Moves to the beginning of the current field.
5 <END>: Moves to the end of the current field.

Switching between Windows

Print

To switch between open windows

1 Click anywhere on the window if it is visible.

Switching between applications

To switch between active applications

1 Enter <ALT><TAB> repeatedly until the application you require is displayed in the box in the centre of the screen, or

2 Enter <CTRL><ESC> to display the Task List. Click on the application you require then choose the Switch To button, or double click on the application you require.

Moving between companies

Print

To move between companies

   1 <u>Click</u> anywhere on the <u>window</u> of the Company you require if it is visible.

Insert, update, delete, companies

Print

To insert, update and delete companies

1 To insert a Company refer to Creating a New Form and Create a new Company.

2 To update a Company refer to Update a Company.

3 To delete a Company refer to Delete a Company.

4 Refer to:

Creating a New Form
Update a Company
Delete a Company
Create a new Company

Support

About KAI

About KAI Computer Services Ltd

KAI Computer Services Ltd is a company that has for many years specialised in bespoke programming work.

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Find

Insert

To insert a Company

1 After entering all the details, choose the Insert <u>button</u> or Insert from the Record <u>menu</u>, or enter <CTRL>I.

Update

To update a Company

1 After entering all the details, choose the Update <u>button</u> or Update from the Record <u>menu</u>, or enter <CTRL>U.

Query Save

Label

Merge

To add a Contact to a mail merge

1 Ensure the current merge file is the one you require. It is displayed on the status line to the right of the time. Refer to Merge Information.

2 Ensure the Contact you require is on the Contact <u>tab</u> - refer to Update a Contact.

3 Choose the Merge <u>button</u> or Merge from the Action <u>menu</u>.

4 Repeat steps 2 and 3 for each Contact to be mailed.

5 To run the mail merge, use your Word Processor. Create the document to send to each Contact here. The names and addresses are in the file you have just been adding Contacts to. To check its <u>path</u> and name, refer to Merge Information.

6 Refer to:

Merge Information
Update a Contact

Others

Deleting text in a field

Print

To delete the text in a <u>field</u>

   1 First you must have selected some text to delete. To do this you <u>highlight</u> it.

   2 Press <Delete>.

Finding companies

To find a company

INI File

Ini file description goes here

INI File Option

Title

Options

Reindex

Rights

To give rights to a user

1 First you must be amending user details - see Edit Users.

2 Choose Security from the Admin <u>menu</u>.

3 <u>Click</u> on the User you require in the Users + Groups list.

4 Find the Right you require in the Rights + Groups list.

5 <u>Drag</u> and Drop the Right into the large box underneath the Users + Groups list.

6 Choose the Close <u>button</u>.

Sending EMail

Sending EMail

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To view electronic mail

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WinMark INI

Word Processor

[Print]

button

labelled rectangle on the screen that you can click to perform a particular operation.

character

anything that you can enter from the keyboard, i.e. an upper or lower case letter, a number or a punctuation mark.

click
press a button on a mouse.

down arrow
symbol on the screen or key on the keyboard labelled with an arrow pointing downwards.

drag

move a window with the mouse as follows: 1. Move the pointer over the title bar of the window you wish to move. 2. Hold down the mouse button. 3. Move the pointer to take the window to its new position. 4. Let go of the mouse button.

field

box on the screen into which you can type information.

highlight

select a piece of text with the mouse as follows. 1. Place the pointer just in front of the required text. 2. Hold down the mouse button. 3.   Move the pointer to a position just beyond the end of the text. 4. Let go of the mouse button.

menu
list of options from which to select a task.

modem

acronym for Modulator Demodulator, a device attached between a computer and a telephone or fax that enables the computer to automatically dial a number.

mouse

device attached to a computer by a cable used in conjunction with a keyboard. It has two buttons on top and a tracker ball underneath.

path
drive letter and sequence of directories identifying a file's location on a disk.

pointer
arrow on the screen controlled by a mouse.

status bar
bottom line of the screen displaying date, time, messages, etc.

submenu
second menu displayed after selecting a particular entry of another menu.

tab
labelled marker attached to an otherwise hidden page of information to enable its selection.

window
rectangular display area occupying part or all of the screen.