Software Manual

Read GENERAL HELP also. This will give you a general overview of the program operation.

****STEPS TO PRINTING CHECK ON LAST PAGE****

Steps To Follow When Adding A New Distributor:

Step 1:

Press the icon at the top left of the main menu.

Step 2:

Press the add button. This will be your first entry. In most cases this will be you. Enter an ID Number for you. The sponsor area can be left blank. Fill in address and phone fields. Now press ok.

Step 3:

With information in hand, press the MLM Panel button at the top right of the screen. Then press the Sponsor button on the panel. Enter the sponsor's name (In this case it is your Name), then press tab. In this case, there is only one record- you, so it is very easy to find. Verify that the sponsor's ID Number is correct, then press the 'Press Here Then Press Select' Tab at the top right of the screen. Now press the 'Select' button.

Step 4:

Close the MLM Panel.
Press the 'Add' Button. Enter the ID Number. Press the small button to the right of the 'Sponsor ID' field with '...' on it. This will enter the Sponsor's name in the sponsor field along with the Sponsor's ID Number. Now fill out the address, etc.

Step 5:

After the browse screen returns, press the 'Post New Distributor' button. This will add the numbers to their downline.

Step 6:

You should make a back up file. Copy all records in the C:\smimlm folder that ends in .tps to a disk.

Genealogy

You can track an unlimited number of companies at the same time. When you enter the name and address in the browse mail file, enter a Company Code for the network marketing company name. This field is found below the sponsor information. YOU MUST DO THIS FOR EVERY PERSON if they are to have a downline. Example:
If you are tracking several companies, enter a different code for each company. If you have the same person in more than one company, they must be added in the main MAIL file once for each company. There is a copy record button for this purpose. If you only want to track 1 company, you don't need to enter a company code.

When you enter the genealogy browse screen, it will show all records that have a level number. If you have only 1 company, that will be the genealogy. If you are tracking more than one company, press the 'Search' button, enter the company code, press 'Begin Search' button and then the 'Select' button.

Only this company now appears on the screen. Press 'Print Genealogy' to print genealogy for this company.

MLM Panel

There are two 'MLM Panel' buttons. One is located at the top right of the screen on the tool bar. This will place a 'MLM Panel' button on the Windows tool bar at the bottom of the screen. This button allows you to open the 'MLM Panel' from anywhere within the program. The second botton is located at the top right corner of the browse screen. This botton opens a constant 'MLM Panel'. This panel must be closed before returning to the program.

GENERAL HELP

There are four sections to the program: (1) Menus, (2) Browse Screens, (3) Forms and (4) Reports. From Menus, (the Menu is on the first opening screen). You can select the option you wish to perform. The Browse Screen is a screen with scrolling information used to select records and buttons used to perform other functions. Forms are used to add, update and delete data from your data file. Reports are used to send printed information to your screen, printer or fax. Understanding the four sections above is the key to the fast successful operation of the program.

The program works like all programs written for the Windows environment and the same rules apply. This program is ready for Windows and Windows 95, and you will find many Windows 95 features running under Windows. There are several buttons throughout the program that, when used, make operations easier to perform or operate the program in
a certain way.

When buttons are pressed, they perform the function listed on the button.

ALT + underlined letter will select that function or move the cursor to that location.

The TAB key will move the cursor forward from field to field or from button to button.

The Shift Tab will reverse the direction of the cursor or back up.

The Enter key will generally save the current screen or confirm your choice.

Esc key will, in most cases, exit the current screen. Arrows will move the cursor up and down the scrolling screens or drop boxes.

PRINTER SETUP

If you have more than one printer on your system, or if you would like to send a report by fax, you must change the printer setup. A Printer Dialog Window will open before each report. Click on the Down Arrow, and select a printer or choose your fax driver for faxing. To fax, you must have a fax/modem and Windows Faxing Software in your system. From this window, you can also select options for your printer, print quality, color, etc.

BROWSE THE NAMES AND INFORMATION FILE AND OTHER BROWSE SCREENS

This is the section in which you add, change, delete and view your Names, Addresses, and much more. This selection is the heart of the Program. This screen is known as a Browse Screen. On the top of this screen you will find several TABS. Each of the Tabs has a choice on it. When you click on that Tab, your Selection Sort Order changes, and the Locator for the record search changes.

As you select Tabs, you can search and view records by different choices or Locators. The LOCATOR is found just below the Tabs such as ENTER FIRST NAME: by entering the first name you will be taken to that record or to the closest match. The Locator may behave differently on different Tabs. On some, you will enter your choice and then press the Tab Key. On others, as you type, the scrolling bar on the list box will go to the closest match. From this screen, you can add, edit or delete records by pressing the correct button on the screen.

There are also several other choices on this screen. On the bottom, a button labeled PHONES will pop up a phone window with the phone numbers of the record listed under the scroll bar in the list box. On the right side of the screen, there are several other choices. You can also dial the phone numbers listed by pressing the DIAL PHONE Button.

PRINT TAGGED MAIL LABEL

After tagging the record or records you wish to print, or using search to tag your records, select the style of label to print. Press the button and the label or labels will print.

CHANGING A CLIENT RECORD

This is what is known as a form. On the top of this form are more Tabs: Name Address Contacts, and Appointments. Each Tab will be covered below.

NAME ADDRESS FILE

On this form, you can enter the name, address and phone number information. In the Phone Field, you can press the Down Arrow for the Drop Box and choose a selection. In the ext. field you can use the spin arrow or enter the ext. There are 1 note line and Add'l Notes areas. The Add'l Notes opens another window for more notes.

BANK AND CHECK INFORMATION BUTTON

Fill in the Bank's Name and Address as it appears on the Client's Check. Next, fill in the Bank Federal Reserve ID Number. This number is usually a smaller number near the top of the check - often near the check number. Sometimes this number is on two lines.

The Check Transit Number is the group of 9 numbers on the bottom of the check with a leading small vertical line and two dots and ending with the same mark. The next group of numbers is the account number. If there is a group of numbers before the Transit Number, this is the check number. You don't need to enter that number at the bottom of the check. Do enter the check number from the top of the check, or the one the client gives you.

(NOTE*** if there are ||| dashes in the account number, use Shift D for the dashes on the account number field.)

Now enter to whom the check is to be paid. Then fill in the check memo area if you choose. The next field is used for a monthly bank draft. Fill in the day of the month for the draft. The Monthly Draft Amount or Check Amount is the amount for this check or monthly draft. If this is to be a monthly draft, enter the of drafts, ie 12 for 12 months. If the is no set limit on the number of months enter 999.

You can print checks directly from the Checks to Post And Print Screen without filling out this screen.

SEARCH AND SHOW TAGGED/SHOW ALL BUTTONS

With these buttons you can search, view and print almost any selection you choose. Press the search button. A search window opens. Enter your search selection in the field of your choice. Next, press the search type button. On this window you have several search radio buttons. Select the one that best fits your need. Next, press Begin Search. Your next choices are: Edit, Select, Unselect and Cancel. Edit will take you to the Edit Window for editing. Select will search your selections and place them on the Browse Window. You can then toggle between Tagged and Show All Records. When you make your search selection, you can search using as many fields as you choose. The more fields used in your search, the tighter your search will be. You can add to your tagged fields by not clearing old selections. Try several searches, and you will find all the power you have ever dreamed of at your finger tips. After your search has been completed, you can print a report with that information. In some cases, when numbers or date are used in your search you must first select search type, then enter number or date.

CONTACT INFORMATION:

Response Action: Click on the down arrow and make a choice, or enter your choice in the box. Response Date. Colored icon show status of contact or appointment.

APPOINTMENTS: From tis screen you can add new appointments. The scrolling colored icons show the status of the appointment. Green = Pending, Blue = Today, Red = Past.

BROWSE THE CONTACT FILE: On this Browse Screen, you can see all your contact notes. On the first Tab, they are listed by month. When you select the change button, you are taken straight to the Contact Form. All contact information should be entered first at the Browse the Mail File Screen. Use the search feature to locate contact information.

BROWSE THE APPOINTMENT FILE: The same as the Browse Contact except it's for appointments. This screen is sorted by date.

POSTING CHECKS TO PRINT BROWSE

From this screen, you will add the checks you wish to print. Start by pressing the Add Button. This opens the Check Information Screen covered below. You have two new buttons on this screen on the right side: (1.) Print Single Check, (2.) Print All Checks. Each button will lead you to a Selection Menu of the style of check to print.

ENTER CHECK INFORMATION FORM

You can enter the information you wanted on your check and save it, or if the Client has been added to the Client file, you can have this screen filled in for you. If you choose to press the Select Client Button, the Client Names and Information Screen will pop up. Select the client for which you wish to print a check, and click on their name and press the Select Button. The check screen will be filled out for you. Edit any information necessary and save the screen by pressing The OK Button. You can press the Post Monthly Draft Button and enter your monthly drafts in the same manner.

POST MONTHLY DRAFTS

Monthly Drafts are posted and printed in nearly the same way as posting and printing checks. The only difference is that instead of pressing the Select Client Button, Press The Post Monthly Draft Button. Select and print the day for printing, select checks to print and print the checks in the same manner as above.

AUTOMATIC MONTHLY DRAFTS

Select the Monthly Drafts Icon on the Main Menu. Select Search, enter the Search Type and enter Draft Day. Then print checks.

PRINT BLANK CHECKS

You can print checks on an unlimited number of checking accounts. You must first enter the checking account information in the client information file. Then add a check to print in the same manner as printing regular checks. Each page will print three checks or single checks as you choose, so if you want 3 blank checks to be printed, add the same check 3 times. If you want to print a larger number of checks, you can add more than 3 checks or reprint the same 3 repeatedly. For example, if you wish to print 50 checks, you could enter 25 checks and print twice. After you enter the check information you wish to print the first time, exit the Browse screen and re-enter to reset the check numbers. Next, press the Set Check Numbers button. Enter the last check number printed. The next check printed will be one number higher than the one you entered. Now, print your blank checks. If you wish to print more checks, repeat the above.

You can use the copy button to add additional checks also. If you want an image on a check, you must add the image on each check.

Checks must have an initial check number.

PRINT BLANK CHECKS TO BE USED WITH INTUIT'S QUICKEN PROGRAM.

Follow the same steps as in printing blank checks. The check that is produced can then be used with your Quicken check program. Quicken is the registered trademark of Intuit.

Print Business Cards

HELP FOR PRINTING CARDS AND LABELS

1. Press Add.
2. Fill in information.
3. Press Ok.
4. For Business Cards, press the copy button, then
   the ok button to create a total of 10 records.
   (30 records for Return Address Labels)
5. Press the button of your choice for printing
   cards or labels.
6. For Business Cards, if you want a logo on the card, open each file and select an
   image.

For Business Cards Uses: Avery Cards 5376 - 5377 Etc.
For Return Address Labels Use: Avery Labels 5160.

The above will print 1 page. If you wish to print several pages, repeate step 5. Your printer driver may offer a choice for number of pages to print. You can also add 20 records to print 2 pages etc.

The Clear button will clear all records so you can enter new information. You can also print two or more different cards at a time by creating half the records in one name and the other half in another name.

PRINT ENVELOPES

This feature works exactly like printing labels except that it prints the tagged addresses on the envelope. Before printing, you can select the desired return address for the envelope before printing.

Invoice:

You can produce invoices for all your sales. When you push the Invoice button on the top of the screen, you will come to a company window. Push the add button and add at least one company name the same way you add names to the mail file. You can have as many companies as you choose. This way you can print invoices for several companies. After you add your company name, re-enter the Invoice file, select the company name you wish for the current invoices. The name you choose will print on the top of the invoices and shipping labels. The browse screen works like the other browse screens. Press Add to enter a new invoice. If you have entered your customer's name in the mail file, you can push the button at the top of the screen and select the person or company for invoice. If you choose this method, the company information will be filled in for you. Before you enter your first invoice, you should add your inventory items. You will find an Inventory File Button on the Inventory Browse Screen. When entering inventory items on the invoice,
there is a small button left of each Item field. You can press this button and select your inventory item then tab to the quanity field repeat the above for the next item. When you haved finished, you can enter the shipping amount and then press OK. If you entered a tax percent in the company name file and entered Y in the taxable field, the sales tax will be added to the invoice. From the browse screen you can print unprinted invoices, tagged invoices, (invoices that you have tagged using the tag button), print tagged shipping
labels, and tagged invoices to a report.
****

D i a l e r

The Dial button accesses the Windows95 "Phone Dialer" to make your calls; therefore, "Phone Dialer" must be installed on your system for this function to work. If you do not have "Phone Dialer" installed, you may install it from your Windows95 CD-Rom.

You must also select the Windows95 phone dialer as your default dialing device. To do this :

1) Click START -> PROGRAMS -> ACCESSORIES -> PHONE DIALER

2) From within the Phone Dialer program, click on the TOOLS menu -> CONNECT USING -> then click next to the "USE PHONE DIALER TO HANDLE VOICE CALL REQUESTS FROM OTHER PROGRAMS".

To dial any valid phone number, simply click on the Blue Dial Icon next to the phone number to be dialed.

NOTE: The phone number dialed will be exactly as specified in the phone data field in which it is entered. To dial a long distance number, you must put a "1" in front of the phone number when you enter it into the data field.

****

I M P O R T   E X P O R T

Introduction
============

The import/export program is intended for experienced computer users only! And is not supported without a service fee!!! Import Export allows you have import and export support in this program. This provides you with a simple interface for importing new data to your system from another file format, or exporting existing data for use in other software packages. The real benefit is that you can control which fields are imported and exported, the order of the fields, and their format pictures. The file format is the standard comma-delimited ASCII (*.CSV), made popular by the BASIC programming language.

Import Export

==

This procedure allows you to import data from a comma-delimited ASCII file into one of your data files. The field assignments are decided by you at run-time. You can also specify the deformatting picture.

You can preview import records to determine which import fields are to be matched to the target fields. They can also strip the first record, in case it contains field names.

Once you have created your ImportBasic procedure, you must specify the target file. You do this using the [Files] button on the procedure properties window.

The default window contains the following controls:

Import Field List Box - This list box contains a separate entry for each field found in the import file. Beside each field is the picture. (For @S fields they will see "Alpha-num", for @N fields they will see "Numeric", and for all others they will see the actual "@..." picture.) Beside the picture is the value of the field in the current import record. If the first record in the import file contains field names, then the first values that the user sees will be these names. This can make it very handy for assigning the import fields to the target fields. They can press the [Next] button to view other records in the import file. As you move the highlighter bar over Import Fields that have been assigned to Target Fields, the Target Field list box will move its highlighter bar to the corresponding entry.

Target Field List Box - This list box shows which import fields will be assign to which target fields. (The fields that are available here are controlled by the Include and Exclude options behind the [ImportBasic Properties] button on the procedure properties window). As you move the highlighter bar over Target Fields with assigned Import Fields, the Import Field list box will move its highlighter bar to the corresponding entry.

[Next] Button - This button causes the next record to be read from the import file and displayed in the "Import Fields" list box. If you reach the end of the file, then the [Next] button is disabled.

**** [Picture] Button - This button calls the picture entry window for the currently highlighted Import Field. This picture will be used to deformat the import field. This is especially useful if the import field is a formatted date. ie date is @D1.

[Assign] Button - This assigns the currently highlighted Import Field to the currently highlighted Target Field.

[Unassign] Button - This button clears the assignment for the currently highlighted Target Field. You should not remove this button.

"Strip header record (field names)" Check Box - This controls whether the first record of the import file is ignored.

[OK] Button - This begins the import process.

[Cancel] Button - This cancels the import process.

[Help] Button - This calls the help window.

Selective Export

You have two methods of Export, all or selective. To export all tag all records and then export. To do a selective export tag the records you wish to export then export.

Disclaimer
==========

Success Marketing does not warranty this software for any use. Any expenses or lost time due to errors in this product are not the responsibility of Success Marketing. We will attempt to fix any errors that we are made aware of, but we are not legally liable for any lack of correctness of the product.

Steps To Follow to Produce A Check

1. From the Main Menu Screen, press Client Records Button.

2. From the Client Names & Information Screen, press Add Button and fill in Client Information on the screen and Bank Information on screen. Remember to fill in the Pay To and Check Memo. Fill in the Draft Day only if it is a Monthly Draft. You may fill in the Draft Amount for a Check or Draft as this amount will fill in the amount automatically on the Checks Information Screen . When complete, press OK and Return to Main Menu.

3. Press the Main Menu Button that reads Post and Print Checks. This will take you to the Enter Checks Information Screen. After pressing Add, this screen gives you 3 choices.

A. You may fill out the information on this screen, and Enter Check Information, for a one- time check.

B. You may press the Select Client Button and Select a designated client from the Client Names & Information Screen.

C. You may print Monthly Drafts by pressing the Post Monthly Draft Button. If you chose B, and pressed the Select Client Button you will go to the Client Names and Information Screen. With your mouse, click on the desired client. Now click on Select. This will automatically fill in the selected client information on the Enter Check Information Screen. Verify that the amount and Pay To are what you desire for this check. With your mouse, click on OK. You are now at the Posting Checks to Print Screen. From here, you may print the selected check or all checks on the Posting Checks to Print Screen. If printing a single check, highlight check to print and press Print Single Check Button. You may now Select the type of Check to be printed (Style 1 or Style 2), and press the appropriate button. The check will be printed. Once checks have been printed, they will leave this screen upon re-entry. If checks need to be reprinted, go to the Check Register and Reprint Check Button on the Main Menu.

Print Checks - The Print Checks Button prints all checks on the Posting Checks to the Print Screen. If you need to reprint a single check, go to the Check Register.

Installing Lost MIRC Fonts

Steps:

1. Place Program Disk In Drive A:
2. Press the Start Button
3. Select Settings
4. Select Control Panel
5. Press the Fonts Icon
6. Press File Top Left Corner
7. Select Install New Font
8. At Lower Right Corner, Select Drive A:
9. After font list appears in window, press Select All
10. Press OK. You are done