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Southfork Software, Inc.

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*
* THE OFFICE GENIE *
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SOUTHFORK SOFTWARE, INC.
68 FAIRLAKE DRIVE
HATTIESBURG, MS 39401

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READ ME FIRST

A NOTE TO USERS

This diskette contains the following files associated with The Office Genie:

ROLOMENU/BAS - the main menu program
ROLOINIT/BAS - the initialization program
FILENUMB/BAS - a card handling program
FILENAME/BAS - a card handling program
RBROWSE/BAS - a browsing program
LISTER/BAS - a report printing program
PRINTLBL - a label printing program
RINSTRUCT/BAS- an instruction program
RINDEX/BAS - an index maintenance program
RECOVERA/BAS - an index program
ROLOREC/BAS - a rolodex maintenance program
THE OFFICE GENIE - an initiating DO file

Before you attempt to use THE OFFICE GENIE, make a backup copy!

IF THIS COPY WILL NOT BACKUP, CANNOT BE READ, OR WAS
DAMAGED IN TRANSIT CONTACT SOUTHFORK SOFTWARE FOR A
PROMPT REPLACEMENT.

GETTING STARTED

To use THE OFFICE GENIE, boot the program diskette as per normal procedure. Whenever

TRSDOS READY

.....

appears, type

DO GENIE <RETURN>

Respond to prompts for the printer as requested. The screen of Figure 1 will appear; this screen is the Main Menu.

This menu will serve as the focal point of operations of THE OFFICE GENIE. We will now explore the function of each option under this menu.

THE OFFICE GENIE

Southfork Software, Inc.
Version 2.0 January 1982

<ACTIVITY>

<CODE>

FILE, REVIEW, OR CHANGE CARDS BY NAME	1
FILE, REVIEW, OR CHANGE CARDS BY REF NO	2
PRINT ADDRESS LABELS & ENVELOPES.	3
BROWSE THE ROLODEX.	4
PRINT LISTINGS	5
REVIEW INSTRUCTIONS	6
INITIALIZE AND INSTALL THE SYSTEM	7
TERMINATE THE SESSION	9

ENTER ACTIVITY CODE

?

FIGURE 1: THE MAIN MENU SCREEN - THE OFFICE GENIE

*** PLEASE NOTE: A WORD OF CAUTION ***

Never remove THE OFFICE GENIE diskette from the computer before selecting option 9. Never remove THE OFFICE GENIE diskette unless the screen prompts:

TRSDOS READY

.....

Option 9 will return the machine control to TRSDOS. Removal of the program diskette under other conditions may damage program or data files.

INITIALIZATION - SETTING UP THE OFFICE GENIE

The initialization or installation process includes three steps:

(1) file initialization, (2) entry of return address information and (3) entry of card category information. To proceed select option 7 (INITIALIZE AND INSTALL THE SYSTEM) on the Main Menu. The menu of Figure 2 should now appear.

- 1) To initialize files select option 1 on the menu of Figure 2. Respond "Y" to the safety prompt. The screen will display the list of files as they are initialized.

THE OFFICE GENIE
SYSTEM INITIALIZATION
Southfork Software, Inc.

FUNCTIONS:

- 1 -- INITIALIZE FILES (ERASES CURRENT FILES)
- 2 -- ESTABLISH REFERENCE CATEGORIES
- 3 -- ENTER RETURN ADDRESS LABEL
- 4 -- UPDATE REFERENCE CATEGORIES
- 5 -- UPDATE RETURN ADDRESS LABEL
- 6 -- RETURN TO MAIN MENU

FUNCTION DESIRED

FIGURE 2: SYSTEM INITIALIZATION MENU.

The files have been initialized. Now enter the return address label information and establish your category classifications.

HIT <RETURN> TO PROCEED?

Hitting the <RETURN> key will complete the process.

- 2) To enter return address information (i.e. your address), select option 3 on the System Initialization menu (Figure 2). The screen of Figure 3 should appear.

THE OFFICE GENIE
FOUR LINE RETURN ADDRESS LABEL
Southfork Software, Inc.

1
2
3
4

FIGURE 3: RETURN ADDRESS LABEL - FORMAT

Enter your return address label line-by-line. An example is shown in Figure 4. In case of errors select any of the four lines and re-enter that line.

THE OFFICE GENIE
FOUR LINE RETURN ADDRESS LABEL
Southfork Software, Inc.

1 DR. SAM L. TILLERY, D.D.S.
2 102 TUSCAN AVENUE
3 P.O. BOX 491
4 HATTIESBURG, MS 39403

LINE TO CHANGE <RETURN> TO CONTINUE

FIGURE 4: RETURN ADDRESS LABEL-EXAMPLE

- 3) To enter classification categories for THE OFFICE GENIE select option 2 (Establish Reference Categories) on the System Initialization Menu (Figure 2). THE OFFICE GENIE will now prompt for nine categories (1 through 9). Figure 5 shows an example of this screen and some categories. Reference categories may be used for selective label generation or for other purposes.

```

                ENTER CLASSIFICATION CATEGORIES

NO.             CLASSIFICATION CATEGORY

1               ? CUSTOMERS
2               ? DEALERS
3               ? ADVERTISERS
4               ? INQUIRY
5               ? RETAILERS
6               ? END-USERS
7               ? REPAIR SHOPS
8               ? PARTS HOUSES
9               ? REFERENCES

ENTER LINE TO CHANGE, <ENTER> TO FILE?
```

FIGURE 5: EXEMPLARY REFERENCE CATEGORIES

With these three steps initialization is now complete. Option 5 may be used to change the return address information at any time. Option 4 allows changes or additions to the reference categories. We will now explore the function of all the other main menu options.

FILE, REVIEW, OR CHANGE CARDS BY NAME - Main Menu Option 1

This option allows you to enter and retrieve information stored in the rolodex. It will also allow you to change the stored information at anytime. To proceed, select Main Menu option 1. The menu of Figure 6 should appear.

THE OFFICE GENIE
FILE, REVIEW, OR CHANGE CARDS BY NAME

FUNCTIONS:

- 1 -- FILE A NEW CARD ENTRY
- 2 -- CHANGE OR REVIEW A CARD ENTRY
- 3 -- DELETE A CARD ENTRY
- 4 -- REVIEW THE ROLODEX BY ALPHA NUMBER
- 5 -- PRINT MAILING LABELS
- 6 -- PRINT LISTINGS
- 7 -- FILE, CHANGE, OR REVIEW CARDS BY REF. NUMBER
- 9 -- RETURN TO THE MAIN MENU

FUNCTION DESIRED?

FIGURE 6: FILE BY NAME MENU

Each of the options of this menu are discussed.

File by Name Menu Option 1 - FILE A NEW CARD ENTRY

To enter information about a new person, select this menu option.
The screen of Figure 7 should appear.

THE OFFICE GENIE
FILE, REVIEW, OR CANGE CARDS BY REFERENCE NUMBER
CARD INFORMATION

01 CARD REF. NO..... 1
02 TITLE.....
03 FIRST NAME MI.....
04 LAST NAME.....
05 COMPANY.....
06 ADDRESS.....
07 CITY.....
08 STATE.....
09 ZIP.....
10 TELEPHONE (H).....
11 TELEPHONE (O).....
12 CATEGORY.....
13 REMARKS.....
14 REMARKS.....
15 REMARKS.....
16 REMARKS.....

FIGURE 7: CARD DATA ENTRY SCREEN

Note that the CARD REF. NO has already been assigned. Entries will automatically be numbered consecutively. You are asked to input information beginning at line 02 - TITLE. Fill in the information as requested. An example of the card data entry screen after data has been entered is shown in Figure 8.

THE OFFICE GENIE
FILE, REVIEW, OR CANGE CARDS BY REFERENCE NUMBER
CARD INFORMATION

01	CARD REF. NO.....	1
02	TITLE.....	MR.
03	FIRST NAME MI.....	JOHN L.
04	LAST NAME.....	DOE
05	COMPANY.....	ABC SOFTWARE
06	ADDRESS.....	PO BOX 123
07	CITY.....	ANYWHERE
08	STATE.....	AA
09	ZIP.....	12345
10	TELEPHONE (H).....	123-456-7890
11	TELEPHONE (O).....	987-654-3210
12	CATEGORY.....	3
13	REMARKS.....	YOUR COMMENTS
14	REMAKRS.....	
15	REMARKS.....	
16	REMARKS.....	

LINE TO CHANGE, (CR) TO CONTINUE?

FIGURE 8: CARD DATA ENTRY SCREEN - With Data

NOTE: When entering telephone numbers, enter them as a 10 digit number with no punctuation. You must enter area code, prefix and number.

Example: Number: (123) 456-7890
Enter as: 1234567890

The number will later be displayed with dashes in place.

Example: 123-456-7890

If any corrections are to be made type the number of the appropriate line and press <ENTER>. You will be allowed to enter data for that line again. When all the data is correct, and you once more see the prompt:

LINE TO CHANGE, (CR) TO CONTINUE?

simply press <ENTER>. You should then see Figure 9.

THE OFFICE GENIE
CARD FILING

HIT <F1> TO SAVE AND FILE THIS CARD

HIT <F2> TO EXIT WITHOUT SAVING THIS CARD

FIGURE 9: CARD FILING SCREEN

Pressing <F2> at this time deletes the card from memory, while pressing <F1> stores it.

File Name Menu Option 2 - CHANGE OR REVIEW A CARD ENTRY

After selecting this option, you should see:

PLEASE GIVE ME THE FIRST THREE LETTERS OF THE NAME THAT YOU ARE
LOOKING FOR ---> ?

Type the first three letters of the last name of the person whose card you wish to change or review and press <ENTER>. If only one matching record is found in the rolodex that record is displayed. If however, more than one match is found, you should see the screen of Figure 10.

THE OFFICE GENIE
FIND CARD BY NAME

1	JANE DOE
2	JOHN DOE

PRESS <C> TO CONTINUE LOOKING, <Q> TO QUIT OR SELECT NUMBER

FIGURE 10: EXAMPLE MATCHING RECORDS SCREEN

At this point, you may press <C> to continue looking (if there are more matches to be displayed), or you may press <Q> to quit and return to the File by Name menu. Another alternative is to press the number which corresponds to the person you wish to change or review. In the example, you could press <2> and the information for John Doe would be displayed.

The information for the selected person will be displayed as shown previously in Figure 8. You will be allowed to edit information in the same manner as when you were filing a new card.

File by Name Menu Option 3 - DELETE A CARD ENTRY

You will again be asked for the first three letters of the name of the person that you wish to delete. Matching records will be displayed as described under the previous option. After the information is displayed, you should see the following:

HIT <F1> TO DELETE THIS CARD
HIT <F2> TO STOP AND EXIT TO MENU

Pressing <F1> deletes this card entry, while pressing <F2> returns to the menu.

File by Name Menu Option 4 - REVIEW THE ROLODEX IN ALPHA ORDER

This option is identical to main menu option 4 - BROWSE THE ROLODEX. That option will be described later.

File by Name Menu Option 5 - PRINT MAILING LABELS

This option is the same as main menu option 3 - PRINT ADDRESS LABELS & ENVELOPES. This will be described in detail later.

File by Name Menu Option 6 - PRINT LISTINGS

This option is the same as main menu option 5 - PRINT LISTINGS.
This will be described in detail later.

File by Name Menu Option 7 - FILE, CHANGE, OR REVIEW CARDS BY
REF NUMB

This option take you to main menu option 2 which allows you to
retrieve records with the card numbers. This will be described in
detail later.

File by Name Menu Option 9 - RETURN TO THE MAIN MENU

This option simple returns the user to the main menu.

FILE, REVIEW, OR CHANGE CARDS BY REF NO - Main Menu Option 2

After selecting main menu option 2, the menu of Figure 11 will appear.

THE OFFICE GENIE
FILE, REVIEW, OR CHANGE CARD BY REFERENCE NUMBER

FUNCTIONS:

- 1 -- FILE A NEW CARD ENTRY
- 2 -- CHANGE OR REVIEW A CARD ENTRY
- 3 -- DELETE A CARD ENTRY
- 4 -- REVIEW THE ROLODEX BY CARD NUMBER
- 5 -- PRINT MAILING LABELS
- 6 -- PRINT LISTINGS
- 7 -- FILE, CHANGE, OR REVIEW CARDS BY NAME
- 9 -- RETURN TO THE MAIN MENU

FUNCTION DESIRED?

FIGURE 11: REFERENCE NUMBER MENU

This menu allows you to handle cards in the same way as main menu option 1. The difference is that when calling for a specific entry, you are asked for the card number rather than the name.

Reference Number Menu Option 1 - FILE A NEW CARD ENTRY

This option is identical to option number 1 of the File by Name Menu (Figure 6).

Reference Number Menu Option 2 - CHANGE OR REVIEW A CARD ENTRY

This option allows you to change or review a card by specifying the card reference number. After selecting this option, you will be asked:

CARD # ?

Type the appropriate number and press <ENTER>. The card information will be displayed as shown previously in Figure 8. You will then be allowed to change information as usual.

Reference Number Menu Option 3 - DELETE A CARD ENTRY

This option prompts for the:

CARD #?

and allows you to delete from the file in the same manner as File by Name menu option 3.

Reference Number Menu Option 4 - REVIEW THE ROLODEX BY CARD NUMBER

This option begins by prompting:

ENTER BEGINNING CARD #?

after you have entered a valid card number, the program displays the card and gives you the following options.

HIT <F1> TO VIEW NEXT CARD
HIT <F2> TO STOP AND EXIT TO MENU

Pressing <F1> will display the card next in numeric order. Pressing <F2> return to the menu.

Reference Number Menu Option 5 - PRINT MAILING LABELS

This option is the same as main menu option 3. This will be described later.

Reference Number Menu Option 6 - PRINT LISTINGS

This option takes you to option 5 of the main menu.

Reference Number Menu Option 7 - FILE, CHANGE, OR REVEIW CARDS BY NAME

This option takes you the File by Name menu of Figure 6.

Reference Number Menu Option 9 - RETURN TO THE MAIN MENU

This option returns control to the main menu.

PRINT ADDRESS LABELS AND ENVELOPES - Main Menu Option 3

This option allows you to print cards or labels in batches or singly, or print a single envelope. After selecting main menu option 3, you should see the following:

THE OFFICE GENIE PRINT LABELS, ENVELOPES, AND CARDS

FUNCTIONS:

- 1 -- PRINT SINGLE LABEL
- 2 -- PRINT SINGLE ENVELOPE
- 3 -- PRINT SINGLE CARD
- 4 -- PRINT BATCH OF LABELS
- 5 -- PRINT BATCH OF CARDS
- 6 -- PRINT RETURN ADDRESS LABELS
- 7 -- FILE, CHANGE, OR REVIEW CARDS BY NAME
- 8 -- FILE, CHANGE, OR REVEIW CARDS BY NUMBER
- 9 -- RETURN TO THE MAIN MENU

FUNCTION DESIRED ?

FIGURE 12: LABEL PRINTING MENU

Each of the options of the label printing menu will be described in detail.

Label Printing Menu Option 1 - PRINT SINGLE LABEL

After choosing this option, you will once again be asked to type the first three lettes of the name you are looking for. The name slection process will continue as described earlier and shown in Figure 10. After selection of a valid name, you should see the following menu:

FORMS SETUP ----> 3 1/2 X 1 GUM LABELS

A - ALIGN LABELS OR FORMS
B - BEGIN PRINTING
C - CANCEL AND EXIT

FIGURE 13: LABEL PRINTING CONTROL

To make sure your labels are aligned properly, press <A>. This prints 4 lines of X's to allow you to adjust the printer for your labels. To stop this routine without printing, simply press <C>, for Cancel and Exit. You may print the label by pressing . After printing, control returns to the main menu.

Label Printing Menu Option 2 - PRINT SINGLE ENVELOPE

You will first be asked to identify a particular entry in the rolodex. This is done by the normal procedure of typing the first three characters of the name and proceeding with the name selection process.

After selecting a name, the following screen should appear:

FORMS SETUP ----> SINGLE ENVELOPE

A - ALIGN LABELS OR FORMS
B - BEGIN PRINTING
C - CANCEL AND EXIT

FIGURE 14: ENVELOPE PRINTING CONTROL

This menu's options provide the same control as the Label Printing Control screen. To align envelopes, press <A>; to cancel and exit, press <C>; and to print a single envelope press .

Label Printing Menu Option 3 - PRINT A SINGLE CARD

This option allows you to select a particular card and print the address on a 4x2 card. The name selection process is identical to that in the two previous options. After name selection, the following should appear:

FORMS SETUP ----> 4X2 FILE CARD

A - ALIGN LABELS OR FORMS
B - BEGIN PRINTING
C - CANCEL AND EXIT

FIGURE 15: CARD PRINTING CONTROL

This menu provides functions identical to those in the previous options.

Label Printing Menu Option 4 - PRINT BATCH OF LABELS

This option allows you to print a batch of selected labels. This selection process allows you to print all categories, or only selected categories. It also allows you to choose numeric or alphabetical order. After selecting this option, you should see:

HIT <A> FOR ALPHA ORDER <N> FOR NUMERICAL ORDER.

After selecting an option for this, you will see:

SELECT CATEGORIES ----> ALL, SOME, OR NONE

Press <A> to select ALL categories, <S> to select some or <N> to select None. If you selected Some categories, you will now be asked to specify which categories to print labels for. You should see the following:

CATEGORY #1 YES NO

1- YOUR CATEGORY NAMES
2- APPEAR HERE
3-
4-
5-
6-
7-
8-
9-

Press <Y> for Yes, Print this category, or <N> for No. You will be asked for each of the 9 categories.

After the category selection process has been completed, you will return to the Label Printing Control screen of figure 13. The functions of this screen are exactly as described earlier.

Label Printing Menu Option 5 - PRINT BATCH OF CARDS

This option is exactly the same as option 4, except that the Card Printing Control screen (Figure 15) is substituted for the Label Printing screen. Form setup is for 4x2 card labels.

Label Printing Menu Option 6 - PRINT RETURN ADDRESS LABELS

This option allows you to print any number of return address labels. You will be asked:

HOW MANY RETURN ADDRESS LABELS DO YOU WISH TO PRINT?

After answering this prompt, you will see the Label Printing Control screen (Figure 13). Its options have been described previously.

Label Printing Menu Option 7 - FILE, CHANGE, OR REVIEW CARDS
BY NAME

This option allows you to move directly from here to the File by Name menu (Figure 6) without returning to the main menu.

Label Printing Menu Option 8 - FILE, CHANGE, OR REVIEW CARDS
BY NUMBER

This option allows you to move directly to the File by Number menu of Figure 11 without first returning to the main menu.

Label Printing Menu Option 9 - RETURN TO THE MAIN MENU

This option simply returns control to the main menu.

BROWSE THE ROLODEX - Main Menu Option 4

This option allows you to examine the rolodex entries. You can use this option to find card numbers or recall names. You can also print a listing of the name and number of all cards.

After selecting this option, the following menu should appear:

THE OFFICE GENIE
SOUTHFORK SOFTWARE, INC.
ROLODEX SYSTEM

FUNCTIONS:

- 1 -- DISPLAY CUSTOMERS
- 2 -- PRINT CARD LISTING
- 9 -- RETURN TO MAIN MENU

FUNCTION DESIRED?

FIGURE 16: ROLODEX BROWSE MENU

Each option will be described in detail.

Rolodex Browse Menu Option 1 - DISPLAY CUSTOMERS

This option requests a name to start at, and proceeds to list in groups of 10, the name and number of cards in alphabetical order.

First, you must specify a starting point. You will be asked:

PLEASE GIVE ME THE FIRST THREE LETTERS OF THE NAME THAT YOU ARE
LOOKING FOR ----> ?

After responding to this prompt, the display should show the first matching record and the next 9 entries in alphabetical order. If there are more entries in the rolodex you will be asked to:

HIT -CONTINUE BROWSING, <Q>-QUIT, <N>-NEW NAME.

If there are no more entries, your only options will be:

HIT <Q>-QUIT, <N>-NEW NAME.

To exit to the menu, press <Q> for Quit.

Rolodex Browse Menu Option 2 - PRINT CARD LISTING

This option allows you to print a complete list of names and card numbers. Be sure the printer is ready and on-line. You may press <X> at any time to stop listing and return to the rolodex Browse menu.

Rolodex Browse Menu Option 9 - RETURN TO MAIN MENU

This option returns control to the main menu.

PRINT LISTINGS - Main Menu Option 5

This option allows you to print complete card information on all cards in the system. These may be either numeric or alphabetic order. After selecting this option, you should see:

THE OFFICE GENIE PRINT LISTINGS

FUNCTIONS:

- 1 -- LIST IN NUMERIC ORDER
- 2 -- LIST IN ALPHA ORDER
- 3 -- FILE, CHANGE, OR REVIEW CARD BY NAME
- 4 -- FILE, CHANGE, OR REVIEW CARDS BY NUMBER
- 9 -- RETURN TO THE MAIN MENU

FUNCTION DESIRED?

FIGURE 17: PRINT LISTINGS MENU

Print Listings Menu Option 1 - LIST IN NUMBER ORDER

This option simple lists the entire rolodex in numeric order. It gives all information stored about each card. Be sure the printer is ready and on-line.

Print Listings Menu Option 2 - LIST IN ALPHA ORDER

This option simple lists the entire rolodex in alphabetical order. It prints all stored information about each card. Please be sure that the printer is ready and on-line.

Print Listings Menu Option 3 - FILE, CHANGE, OR REVEIW CARDS BY NAME

This option allows you to go directly to the File by Name Menu of Figure 6.

Print Listings Menu Option 4 - FILE, CHANGE, OR REVIEW CARDS BY
NUMBER

This option allows you to go directly to the File by Number menu of Figure 11.

Print Listings Menu Option 9 - RETURN TO THE MAIN MENU

This option returns control to the main menu.

REVIEW INSTRUCTIONS - Main Menu Option 6

This option allows the user to access on-line help for THE OFFICE GENIE system. All aspects of the system are discussed. Simple select option 6 at the main menu. You should then see:

THE OFFICE GENIE
ON-LINE INSTRUCTIONS AND HINTS
***** FILE RECOVERY PROCEDURES *****

<FUNCTION>	<CODE>
FILE, REVIEW, OR CHANGE CARDS BY NAME	1
FILE, REVIEW, OR CHANGE CARDS BY REF NO.	2
PRINT ADDRESS LABELS & ENVELOPES.	3
BROWSE THE ROLODEX	4
PRINT LISTINGS	5
SOME POTENTIAL PROBLEMS-FILE RECOVERY	6
INITIALIZE AND INSTALL THE SYSTEM	7
RETURN TO THE MAIN MENU	9

FOR HELP WITH <FUNCTION> ENTER <CODE>

FIGURE 18: INSTRUCTION MENU

To get help with a particular function of the system, simple select an appropriate option from the instruction menu.

INITIALIZE AND INSTALL THE SYSTEM - Main Menu Option 7

This main menu option was described earlier in the section entitled GETTING STARTED. Please refer to that section of the manual.

TERMINATE THE SESSION - Main Menu Option 9

This main menu option stops the system and returns the user to:

TRSDOS READY

.....

Execute this option at the end of each session. Do not remove disks prior to terminating the session.

INSTRUCTIONS FOR USING THE SOUTHFORK SAMPLER

First, make a backup of this diskette. The disk ID is SAMPLER; and the password is PASSWORD. The Southfork Sampler may be started in one of three ways.

- (1) Boot your Model II/12/16 as per usual using the Southfork Sampler diskette. The Sampler contains a copy of TRSDOS as well as an "auto" DO file to take you to the Sampler Master Menu. The Sampler Master Menu should appear after your entry of time and date.
- (2) The Southfork Sampler may also be started from the "TRSDOS Ready...." prompt by simply typing DO SAMPLER <ENTER> or
- (3) by typing BASIC SAMPMENU/BAS-F:2 <ENTER>

If the SOUTHFORK SAMPLER will not boot or is damaged in the mail, please contact Southfork Software for a prompt replacement.