

Boot up with DOS
At the A> type install.bat and follow
the install instructions.
Reboot your system.

USING THE ORDER PROSPECTOR

A. Preliminaries

The Order Prospector is designed to be simple to operate. No special computer training is necessary. It is recommended that you study your computer's operating manuals to insure that the equipment is installed and working properly.

The diskette supplied with your program package and all other diskettes must be handled with care. Do not touch the magnetic surfaces which show through the openings in the diskette cover. Do not write on the diskette or on the label attached to the diskette. To re-label a diskette, write on a label first, then attach it to the diskette cover. Always avoid dust, smoke, eraser crumbs, liquids or other contaminants, when handling and storing diskettes.

The Order Prospector uses two diskettes: program diskette and data diskette. The program diskette contains the actual instructions which tell the computer what to do and is supplied with the program package.

You supply the data diskette which is used to store the prospect information, the territory codes and passwords which are unique to your sales organization. The data diskette is a blank diskette which must be initialized which means formatted by your computer. The initialization procedure can be found in the DOS (Disk Operating System) Manual supplied with your computer.

MAKE CERTAIN YOU HAVE AN INITIALIZED DATA DISKETTE BEFORE STARTING THE COMPUTER

B. Power up

When you are ready to begin:

1. Turn your computer OFF.
2. Insert your program diskette in drive A (the oval opening goes in first and the label should face up as you insert the diskette). Close the drive latch.
3. Turn your computer on.

After the red "in use" light on the drive goes off the screen should announce "The Order Prospector" and:

REMOVE PROGRAM DISKETTE
AND INSERT DATA DISKETTE
IN DRIVE A

TYPE C -- TO CONTINUE

At this point you must remove the program diskette and insert a formatted or initialized diskette in drive A. For formatting see your DOS manual under FORMAT command.

Now be sure to engage the "caps lock" key and press C (but only after you are certain you have inserted the data diskette) and then press the ← key.

NOTE: Each time you respond to the computer by pressing a key the character corresponding with the key appears on the screen but the character is not input to the computer until you press the ← key. Before you press the ← key you can change your response by pressing the <LEFT POINTING ARROW> key. This "backspace" the cursor and lets you retype the character. When you press the ← key the characters which appear to the left of the cursor will be input to the computer.

If you press the ← key and input an inappropriate response (in this case anything other than a capital C the computer will make a "beep" sound, return the flashing cursor to the original position and await your next response. This pattern is followed throughout this program.

Since the program instructions have been completely read into the computer, the program diskette will not be needed again unless the computer is turned off. You may therefore remove the program diskette and store it at this time.

DO NOT RESPOND FURTHER UNTIL YOU HAVE READ THE NEXT SECTION

C. Passwords

The Order Prospector allows the user to specify the passwords which are required to start the program. The program places two passwords on the data diskette. Either of the passwords will start the program. You may wish to leave one of the passwords constant and change the other regularly. If you have secondary users you can share only the regularly changed password.

The routine which allows the user to set up new passwords is accessed by responding to the question:

HI, YOUR PASSWORD, PLEASE:

To set up new passwords and territories, type: ANFANGEN and don't forget to press ←.

ANFANGEN means "to initiate" in German and is used to reduce the chance of accidental access to the password and territory set up routine. Responses other than passwords already set up or ANFANGEN will result in:

SORRY YOUR PASSWORD IS NOT CORRECT

YOU GET ONE MORE TRY

HI, YOUR PASSWORD, PLEASE

If your second try is not successful the screen will display:

PASSWORD NOT CORRECT. STOP!

If this occurs you must shut off the computer and begin again. This prevents unauthorized users from tampering with your files.

When the computer accepts ANFANGEN the next display will be:

>>CHECK TO BE SURE DATA DISKETTE IN A
TYPE C -- TO CONTINUE

This message reminds you to check to be certain that the data diskette is in the drive indicated on the screen. When you are sure the data diskette is in the proper drive, respond with C. Don't forget to press ←. Next the computer asks:

PASSWORD #1 =

Respond with any word you wish up to a maximum of nine (9) characters and don't forget ←.

NOTE: <SPACE> is a "character" to the computer even though it is not visible on the screen. If you type a space after your password you must always type the space or your password will not be accepted. This also applies to "control characters" which are keys pressed in combination with the <CTRL> key. computer has accepted your first password it will display:

PASSWORD #2 =

After you have entered the second password of nine or less characters and pressed the ← key the computer will ask:

SET UP NEW TERRITORIES? (Y/N):

DO NOT RESPOND UNTIL YOU HAVE READ THE NEXT SECTION

NOTE: You may wish to remove this section and file it separately to prevent others from using the "ANFANGEN" routine.

D. Territory Set Up

The Order Prospector is designed to allow the user to customize the structure of the program to fit the structure of the user's sales organization. While the program uses the term "territory" the user may enter codes which designate geographic areas, market segments, customer groups, shifts or simply names to indicate salespersons or sales teams.

The program will set up each data diskette with up to 33 different codes of up to four (4) characters. The program maintains a list of prospective orders for each territory code on the data diskette. When the program is operating it will be necessary for the user to enter territory codes. Therefore, it is a good idea to keep the codes as simple as possible. At this time you may wish to make a list of territory codes which best represent your sales organization. Each code must be unique. Identical territory codes or the same data diskette will result in incorrect listing.

If your organization requires the use of more than 33 territory codes, you may want to set up additional data diskettes. Section II.F.2. Multiple Data Diskettes, contains some tips you may want to study at this time.

Once you have your list of territory codes, count them and note the total number of codes. When you have completed your list and total count you are ready to respond to the question:

SET UP NEW TERRITORIES? (Y/N)

The (Y/N) means that there are two acceptable responses: Y for YES and N for NO. If you had only wanted to put new passwords on the data diskette and had already set up your territory codes, you would respond N for NO. To enter your list of territory codes you respond Y ← for YES. Now the screen asks:

HOW MANY TERRITORIES? (1 - 33)

At this time you enter the total number of territory codes on your list or the number of territory codes you wish to code on this data diskette. The computer will accept any number from 1 through 33. Now type in the number of territory codes and remember to ←. After the computer accepts your response the screen will display:

TERRITORY #1 =

Respond with the first territory code on your list (must be four characters or less and don't forget ←). The computer will repeat the question until you have entered the number of territory codes which was entered previously. The order in which the codes are entered makes no difference. After you enter the last code the screen will display:

TERRITORIES ENTERED

C -- TO CONTINUE

Your response of C ← will send the program to the Main Action List

DO NOT RESPOND UNTIL YOU HAVE READ THE NEXT SECTION

E. Main Action List

The following is the Main Action List for The Order Prospector. It contains all the necessary actions necessary to maintain the prospect files and produce reports:

PROSPECTIVE ORDERS

ACTION	NUMBER
DISPLAY	1
ADD	2
CHANGE	3
DELETE	4
REPORT	5
PURGE	6
EXIT	7

CHOOSE NUMBER (1 - 7)

Each number from 1 through 7 designates an action
E.1. Add

Respond 2 for ADD (to add a prospect to the list). Next the computer asks:

ADD TO WHICH TERRITORY?

Respond to this question with one of the territories on your list. If your entry is not on the list on the data diskette the program will display the valid territory codes on the diskette and ask if you want to try again. If you respond Y the computer will repeat the above question.

After accepting a valid territory code the computer will request the elements of information that make up the prospective order record or entry. EACH ELEMENT OTHER THAN THE COMMENTS ELEMENT MUST RECEIVE A RESPONSE:

CUSTOMER NAME

You can respond with up to fifteen characters (15). If you attempt to enter more than 15 characters the computer will respond with a "beep" and the cursor will return to the first letter of the customer name being entered. At this point you can type in a shorter name or copy the first portion of the name by using the <RIGHT POINTING ARROW> key. Next the computer requests:

PRODUCT CODE (XXXX):

You can respond with up to four characters to represent the type or class of product to be ordered. Next the computer requests:

PROJECTED MONTH (XXX):

Your response should indicate the month in which the order is expected to be received. There are twelve acceptable responses: JAN, FEB, MAR, APR, MAY, JUN, JUL, AUG, SEP, OCT, NOV, or DEC. Next the computer requests:

ORDER AMOUNT (<100000):

Enter the expected amount of the order. The computer will not accept amounts over 99,999. Your response can be in any units or dollars. If your orders typically average more than 1000 you may want to enter only thousands of units or dollars. The computer will display and print the amount with one digit to the right of the decimal. Therefore an entry of 2.3 can represent \$2,300. Next the computer requests:

PROBABILITY (1 - 9):

This entry indicates the likelihood that your sales organization will receive the order. Enter a whole number from 1 through 9. To an entry of 3 the computer will assign a probability of .3 or 30%.

You may prefer to have your sales people respond with a stage of sale scheme. An example would be:

STAGE	PROBABILITY
Curiosity	1 (.1)
Interest	3 (.3)
Desire	5 (.5)
Conviction	7 (.7)
Commitment	9 (.9)

A stage of sale scheme helps sales people to understand and relate consistently to a scale of probability. Next the computer requests:

CLOSED? (Y/N):

A response of Y for yes indicates that the order has been received and can be "booked" according to accounting procedures. Further on in this manual we shall see that the program has an action called PURGE which automatically deletes all prospects which are coded Y for CLOSED. A response of N indicates that the order has not been received as yet. Next the computer requests:

COMMENTS:

You may enter any statement up to 30 characters to help you remember needed action or problems to be solved. If you attempt to enter more than 30 characters the computer will respond with a "beep" and the cursor will return to the beginning of your comment. You can type in a shorter comment or use the <RIGHT POINTING ARROW> key to copy the first portion of your comment. If you have no comment to enter simply press the ← key (this is the only element of information that can be left blank). The computer will now ask:

IS THE RECORD CORRECT? (Y/N)

A response of Y will cause the record to be added to the territory's list on the data diskette. A response of N will bring the next question:

WANT TO TRY AGAIN? (Y/N)

A response of N will cause the program to ignore all the elements entered. If you respond with a Y the computer will display the prospective order being entered as follows:

CUSTOMER NAME -- REF#	PROD PRJ ORDER CODE MO AMOUNT	PRB CLS	Y/N
ACME MFG	NUTS FEB 35.0	.7	N
SEND CREDIT AP			

* -- FOR NO CHANGE

The computer will now repeat the entry sequence. For any information element which is correct, simply enter * and the computer will copy the element as originally entered. Enter all changes according to the method used above.

This cycle can be repeated until the prospect is correctly entered and can be added to the territory's list on the data diskette. When the prospective order entry is completed, the computer will ask:

MORE PROSPECTS TO ADD?

A response of Y will repeat the ADD action. A response of N will return the program to the Main Action List.
E.2. Display

A response to the Main Action Menu of 1 will cause the computer to ask:

DISPLAY WHAT TERRITORY?

Respond with an acceptable territory code and the computer will display all prospects on the territory's list as follows:

CUSTOMER NAME -- REF#	PROD PRJ ORDER CODE MO AMOUNT	PRB CLS	Y/N
ACME MFG	NUTS FEB 35.0	.7	N
SEND CREDIT AP			
BASIC BLIMP	GAS JAN 125.4	.6	Y
CONFIRM DELIV			

When the screen fills up with prospective orders the computer will display at the bottom of the screen:

MORE PROSPECTS P -- FOR NEXT PAGE

A response of P will cause the computer to display more prospects one page at a time until the end of the list when the following message appears:

END OF LIST -- C TO CONTINUE

A response of C will send the computer back to the Main Action List.

II.E.3. Change

Respond to the Main Action List with a 3 and the computer will ask:

CHANGE IN WHICH TERRITORY?

A valid territory code will bring the next question:

WHAT CUSTOMER NAME?

Respond with a customer name and the computer will search the territory's prospect. The computer will display the first prospect it finds with the customer name and ask:

CHANGE THIS PROSPECT? (Y/N)

A response of Y will start a re-entry routine similar to the ADD action (Section II.E.1.). A response of N will cause the computer to continue to search the territory's list for another prospect with the same name. If another is found, that prospect will be displayed and the above question repeated. This will continue until the entire list for the territory has been searched. Then the following message will appear:

ALL PROSPECTS WITH THIS NAME DISPLAYED

WANT TO TRY ANOTHER NAME? (Y/N)

If no prospect with the name is found none will be displayed and the above message will appear. If there are no prospects on file for the territory the following message will appear:

NO PROSPECTS ON FILE

WANT TO TRY ANOTHER TERRITORY? (Y/N)

Appropriate responses will eventually lead you to the prospect or back to the Main Action List.

II.E.4. Delete

The response of 4 will initiate a search routine similar to that in the CHANGE action (Section II.E.3.). When the wanted prospect is found the following message will appear:

DELETE THIS PROSPECT? (Y/N)

A Y will cause the prospect to be removed from the list. A N will continue the search for another prospect with the same customer name. When the entire prospect list for the territory has been searched the following message will appear:

ALL PROSPECTS WITH THIS NAME DISPLAYED

WANT TO TRY ANOTHER NAME? (Y/N)

and the search will be continued as in the CHANGE action (Section II.E.3.).

A.5. Report

A response of 5 to the Main Action List will cause the computer to display the following message:

THIS ACTION SENDS A REPORT TO PRINTER
CONTINUE? (Y/N)

This question gives you an opportunity to change your mind. If you respond Y then the computer asks:

REPORT DATE? (DA MON YR)

Respond here with the date you want to appear on the report as the preparation date. Use any date format you wish up to 20 characters, but DO NOT USE COMMAS. A comma will cause all the characters after the comma to be ignored. The following message will signal this condition:

?Redo from start

Suggested date formats are:

26 JAN 82 or 1/26/82

Next the computer will ask:

SIX MONTH REPORT PERIOD

BEGINS WITH MONTH (XII)

Your response must be one of the twelve month abbreviations JAN, FEB, MAR, APR, MAY, JUN, JUL, AUG, SEP, OCT, NOV, DEC. The response will designate the first of

six months to be included in the report period. Next the computer displays the following:

<<READY PRINTER>>

1. PAPER SET AT TOP OF PAGE?

2. POWER ON?

3. ON LINE?

4. C -- TO CONTINUE

This message gives you a list of things to check to make sure your printer is ready to print a report. Be sure to check everything on the list. "ON LINE" means the printer is set to receive signals from the computer. Some printers use the term "select" to indicate this status. Check your printer user's manual if you are uncertain.

Next the computer asks:

PRINT ALL TERRITORIES
WITH SUMMARY (Y/N)

A response of Y will cause the computer to print reports for all territories and print a summary of projected orders for all territories with an overall total orders projected.

A response of N will bring up the question:

WHICH TERRITORY?

When a valid territory code is entered the computer will print a report for that territory only. While the computer is processing the reports, messages indicating that the computer is working will appear on the screen as follows:

PROCESSING REPORT FOR EAST TERRITORY

PROCESSING SUMMARY REPORT

REPORT COMPLETE -- C TO CONTINUE

A C will return the Main Action List.

E.6 Purge

A 6 in response to the Main Action List will start a routine which can be used at the end of the month or the report cycle to remove all prospective orders that have been received or closed. The computer will display the following message:

THIS ACTION DELETES ALL CLOSED ORDERS

TYPE THE WORD

PURGE

TO DELETE ALL CLOSED ORDERS

Any response other than PURGE will terminate the purge action and return the Main Action List. To continue the purge action you must enter the word PURGE. Then the computer will ask:

YOUR PASSWORD PLEASE:

Only a valid password response will initiate the purge action. Any other response prevents the purge. These precautions prevent accidental or unauthorized purging of closed orders.

When the purge is completed the following message appears:

ALL CLOSED ORDERS DELETED

C -- TO CONTINUE

A C returns the Main Action List

E.7. Exit

A response of 7 to the Main Action List will cause the program to terminate. The computer will return control to its internal "monitor". This is indicated by a flashing right bracket symbol. To restart The Order Prospector you must turn the computer off, reinsert the program diskette in drive A and turn the computer on.

F. Special Cases

F.1 Naming the customer

The computer uses the customer name as an identifier in searching to find a prospect. The computer can only recognize the name as it was originally entered. Small variations in spelling will result in the prospect not being found. Caution should be used to avoid characters entered using the <CTRL> key in combination with the character key. These "control characters" are invisible on the screen and will have to be remembered. The same caution should be exercised to avoid <SPACE> entries after the name since <SPACE> is also not visible.

Concise and standardized customer names will simplify the input for the program and save time in the search operations such as DELETE and CHANGE. The use of a number should indicate a customer location or perhaps a department number. A number is not recommended for indicating a second prospective order, since when the first order is closed the second will be the first and confusion will result.

F.2. Multiple Data Diskettes

If your sales organization requires more than 33 territory codes you can set up any number of data diskettes each with up to 33 territory codes. The data diskettes can be identified with labels on the disk cover and with unique passwords. The program will prevent the entry of prospects on the wrong diskette by screening for the proper territory code. Therefore, avoid duplicating territory codes on multiple diskette set ups. Try to assign territory codes to diskettes in a manner which reflects major divisions in your sales organization since summary reports will include information from one data diskette only.

You may want to copy your data diskette each month before purging closed orders. This will preserve an electronic record of the month's activity.

F.3. Forget your password?

If you have forgotten your password, the only way to recover is to specify new passwords as explained in section II.B. Be sure to respond with N to the question:

SET UP NEW TERRITORIES?

A response of Y will set up new prospect lists containing no prospects for each territory code.

Reports

A. Processing Methods

The reports are designed to be easily read and understood. The computer searches each territory prospect list for prospective orders which are expected in the six month report period. The computer first prints the prospective orders expected in the first month of the report period. Then it prints the prospects expected in the second month etc.

If no prospects on the territory's list are expected during the report period, the following message will appear on the printed report:

NO PROSPECTS FOR REPORT PERIOD

If there are no prospects on the territory's list the following message will appear on the territory's report.

NO PROSPECTS ON FILE

The "TOTAL" line at the end of each territory's report is calculated by first weighting the order by multiplying the probability times the amount of the order and then adding up the weighted order amounts for each month.

The SUMMARY report repeats the TOTAL amounts for each territory for each month of the report and shows a total amount for all territories for each month.

If you have any questions or problems with these programs or their instructions, please feel free to contact us.

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