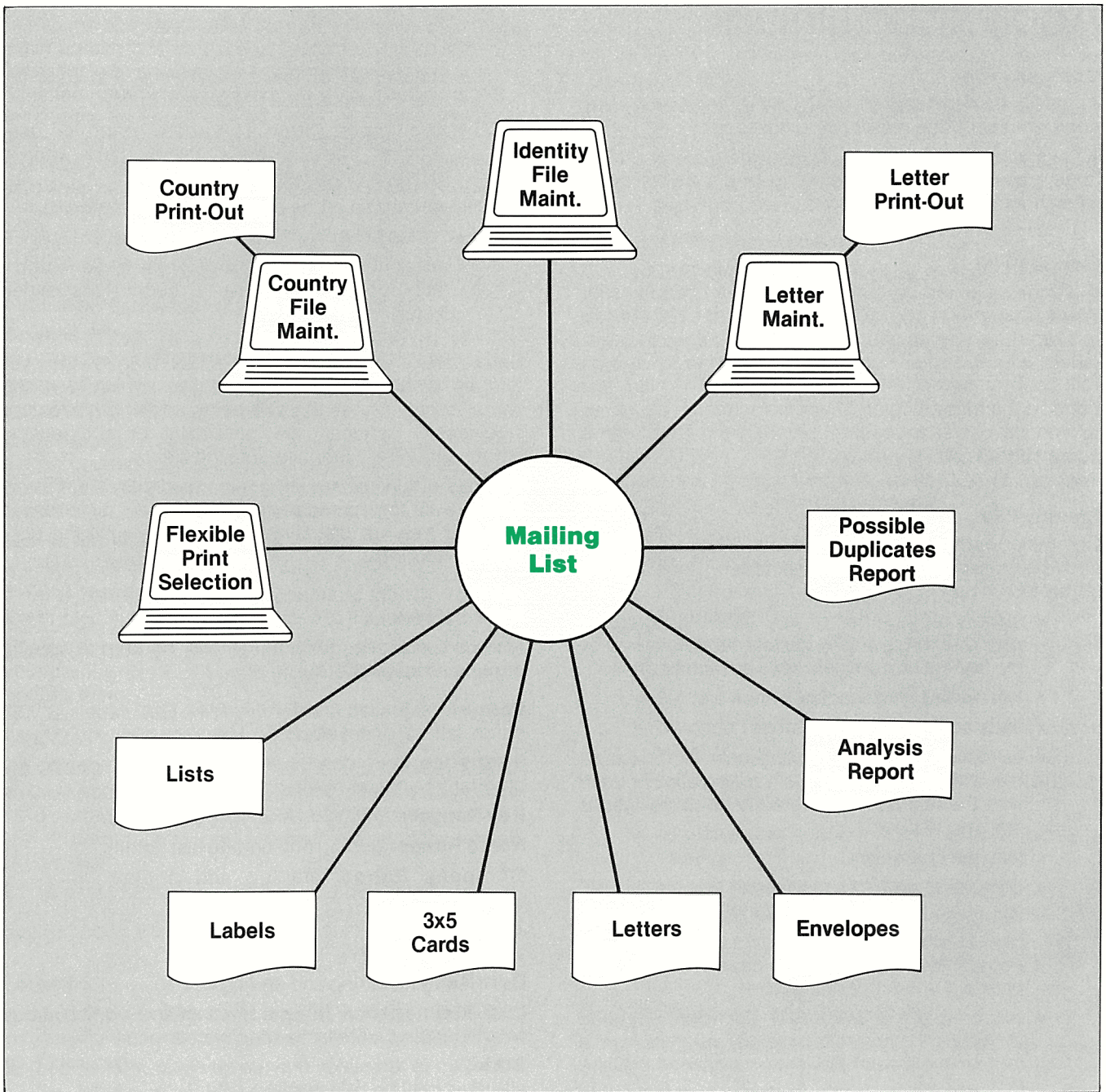# MAILING LIST – Release 1
in Texas Instruments COBOL (ANSI '74)

Application Overview

- Handles mailing lists for multiple companies.
- Allows maintenance of the "identity" file (an identity being a name and address for an individual or company).
- Prints lists, labels, 3"X5" cards and envelopes for all or selected identities in a choice of four different orders.
- Allows maintenance of up to 999 different letters, and prints letters to all or selected identities.
- Prints the *Possible Duplicates Report.*
- Prints the *Analysis Report.*

Application Details

Company File

An easily maintainable company file defines each company whose mailing list is to be processed.

This is also useful for sub-dividing the mailing list into large categories, i.e. customers, media contacts; or when handling distinct divisions of a corporation.

Country File

A country file, which contains a country abbreviation (three characters) and the full country name (30 characters) enables foreign country names to be spelled out on labels, letters, and envelopes without having to store the full country name with each identity. This file also controls the formatting of zip codes for foreign countries. (Some zip postal codes print before the country name, some after the country name, etc.)

Identity File

Complete identity file maintenance is provided through add, change/inquire and delete modes. Each identity record contains:

- identity ID number or key (ten characters — user defined: typically the last name followed by the first initial; duplicate keys are allowed)
- last name (15 characters)
- first name (15 characters)
- salutation (for letter printing only — for example: "Mr.", "Ms.", or "Dr.", automatically used with the last name; or first name abbreviations such as "Bill" or "Liz")
- title (ten characters)
- company name (30 characters)
- two street address lines (30 characters each), city (20 characters), state (two characters), zip code (seven characters), country code, and phone number (12 characters)
- source (eight characters — user defined: used to code the origin of the identity, such as from a certain advertisement or a purchased mailing list)
- date (user defined: usually the first date the identity was added to the mailing list)
- five codes (three characters each — user defined: used to code identity type, interest category, or other such data)
- special flag (one character — user defined)
- status (one character — user defined)
- letter number (allows an identity to be temporarily coded to receive a certain predefined letter)

Before allowing the addition of a new identity, the system will display any existing identities which have the same identity key as the one being added. This feature significantly reduces the possibility of accidentally entering duplicate identities into the file.

When changing or inquiring into the identity file, if duplicates exist for the requested identity key, all identities with that key are displayed one by one until the right identity is found.

Print Selections

A flexible selection program allows the user to specify printing as follows:

Format: list (called *Identity File Print-Out),* labels, 3"X5" cards, letters, or envelopes.

Sequence: by identity key, by identity name, by company name, or by zip code.

Key Range: starting and ending identity keys.

Name Range: starting and ending last names.

Company Range: starting and ending company names.

Zip Code Range: starting and ending zip codes (within a specified country).

Date Range: starting and ending dates.

Last Maintenance Range: starting and ending dates when identities were last added or changed.

State: up to ten states may be selected or excluded, or all states may be selected.

Country: up to ten countries may be selected or excluded, or all countries may be selected.

Source: up to ten sources may be selected or excluded, or all sources may be selected. Selection or exclusion of sources may be made using the entire source or only selected character positions within the source. For example, the user may use the source to record to which media advertisement an identity responded. The first four characters could be used for the magazine name and the last four characters for the month and year of publication. A selection could then be made of all identities who responded to a specific magazine, or only those who responded to the December issue; or those who responded prior to or later than a certain issue could be excluded.

Codes: up to ten codes may be selected or excluded, or all codes may be selected. Selection or exclusion of codes may be made using the entire code or only selected character positions within the codes. For example, all identities with a "5" in the first position of a code can be selected, or all identities with an "R" in the third character position of a code can be excluded. This can be used in a similar fashion to the source field. For example, the user may use the first character to designate interest in a particular product line, the second to indicate the type of prospect (such as wholesale or retail), and the third to track how qualified the prospect is. Then a selection could include anyone interested in a particular product, only potential retailers of the product, or only highly qualified prospective retailers of the product.

Special Flags: up to ten special flags may be selected or excluded, or all special flags may be selected.

Status: up to ten statuses may be selected or excluded, or all statuses may be selected.

Skip Factor: if desired, only a percentage of identities whose codes, source, zip code, etc., matched the selection criteria may be printed. This function might be used to make test mailings to a large mailing list.

Maximum Number to Print: if desired, the maximum number of identities to print may be specified.

Printer Number: if the user has more than one printer, the printed output may be directed to the desired printer.

The number of identities which match the specified print selection criteria may be counted before actually printing them.

Flexible Print Formatting

For label printing, the size of labels and number across may be specified, with defaults set to four across Cheshire format. During label printing, the user has the option to print the identity key on the label (if the label is big enough).

For letter and envelope printing, the heights of the continuous form letterhead and envelopes may be specified.

Letters

The text of up to 999 letters unique to a given company may easily be maintained through the system. Each letter includes:

- letter number (three digits)
- date created
- description (50 characters)
- text (up to 20 lines of 65 characters each)
- closing (such as "Sincerely," "Yours Truly," etc.)
- signatory and title (such as "William Z. Smith, President")
- author/typist initials (prints below signatory and title — for example: "WZS:ctg")
- enclosure (up to ten characters of user defined text which prints below author/typist initials — for example: "Enc.")

Although any printer may be used for letter printing, with the proper hardware interfaces a letter-quality printer can be used to achieve high print quality letters.

A single specified letter may be printed for all or selected identities, or different letters may be printed for different identities.

Envelopes or labels may also be printed for the same identities.

The contents of any letter may be printed by requesting the *Letter Text Print-Out.*

Possible Duplicates Report

On request, the *Possible Duplicates Report* may be printed. This report shows all identities with the same identity key. Using the delete function of the identity file maintenance program, actual duplicates may then be easily deleted.

Analysis Report

The *Mailing List Analysis Report* may also be printed on request. This report shows the distribution of identities on file, with subtotals and percentages:

- by state
- by zip code grouping (00000-09999, 10000-19999, etc.)
- by country
- by source (each unique eight-character code is totaled)
- by date added (grouping by year)
- by code (each unique three-character code is totaled)
- by special flag (each unique one-character special flag is totaled)
- by status (each unique one-character status is totaled)
- by last maintenance date and frequency of maintenance (these values are automatically kept by the package and printed on this report as information about the activity level of the list)

Coding Standards and Documentation

Complete source code is provided. It is written using structured coding techniques. Extensive use is made of copy library modules to make modification easy. The

paragraph and data names are descriptive, taking maximum advantage of COBOL's self-documenting feature. It is written to make changes and maintenance easy.

A *System Reference Manual* is provided which includes Installation Instructions, User Notes, Technical Notes, Operator Instructions, System Logic Flows, Program Specifications, Video Terminal Formats, Report Formats, File Load Sheets, and File Definitions.

Each manual is provided in a neat three-ring binder with convenient thumb tabs.