



BROLIN CORPORATION

Enterprise Software for Facilities and Asset Management

MCS

Users Manual

MCS User's Manual

FIRST EDITION

Revision Two

July 21st 1998

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MCS USER'S MANUAL

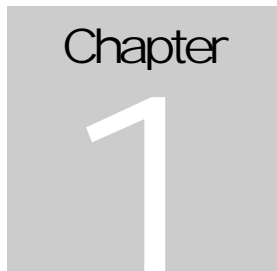
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INTRODUCTION/ OVERVIEW

Software Purpose

MCS is a powerful software package exclusively designed by Brolin Corporation to meet the specific needs of the commercial real estate management. MCS maintains your real estate database and serves as a powerful tool to research and analyze the real estate market. It completely manages your relations to your clients and contributors including sales and subscription management. It has all the necessary billing, accounts receivable tracking and payment processing features. It makes it easy for you to publish your data and to maintain your documents. MCS is a very flexible product. It can securely and conveniently link to third party applications to let you fully and more productively use your data and documents saved in different formats.

Software Features

- capabilities for managing large databases
- capabilities for working with local (MS Access) and server (MS SQL) databases
- fast data searching and uploading with large databases
- task-oriented Windows 95/NT standard-based intuitive interface which displays data in formats that are most meaningful for the needs of commercial real estate management
- smooth multi-user environment operation
- user access and rights controlling and managing
- easy installation and simplified administration
- options for user customization
- special fast data input screens

- customized report generation
- custom report templates
- various search features, including multiple criteria search, look-up pop-ups and in-field search
- user-definable filters for fast and customized data searches
- data transfer to and from various database formats
- export to MS Word and MS Excel
- form/grid view options
- automatic data input / manual data input options
- automatic field calculation on/off option
- automated publications management
- automated subscription management
- external documents management
- tracking the location, usage and the status of the documents.
- linking external documents to the relevant database records
- user-friendly Help
- interactive error-handling
- automated contact to the technical support desk

Chapter 2

GETTING STARTED

How to Use this Manual




This manual is designed to serve as a self-explanatory course and a reference book either.

If you are new to MCS, it is recommended that you start with reading the **OVERVIEW** (page 1) and proceed to the **GETTING STARTED**. While practising tasks, you may need to see explanations of the MCS windows in **THE MCS WINDOWS** chapter. If you are an experienced user, refer to **THE MCS WINDOWS** chapter and **ADDITIONAL SOFTWARE FEATURES** chapter of the **STEP-BY-STEP GUIDE** (page **Error! Bookmark not defined.**).

Software Terminology

Because MCS is a Windows interface based program, this manual uses the standard windows terminology. According this terminology, a strict distinction is made between the terms “screen” and “window” (which is not always the case in colloquial speech where “windows” are often referred as “screens”). A “screen” is what you see of an application if there are no windows listed when you open the Window menu. The application’s screen usually contains a standard menu bar (with File, View, Window, Help, etc. menus) and serves as an application’s “desktop” within which you open, close and work with the applications windows. An application’s “window” is an area listed in the Windows menu (except for the pop-up type windows) within which you can manipulate application-specific data. The following basic terms are extensively used throughout the manual: Criteria State, Dump Reports, Main Data Area/Header, Form View, Look-up Button, Primary Product, Spreadsheet (Grid) View, Status Bar, Subrecord, Tab Area, Tab Area Button Bar, Working Window's Button Bar. Please refer to the Glossary

ICON KEY

-  'How to' explanation
 -  Note
 -  Windows features
-

section at the end of this manual to make sure you have correct understanding of these terms.

The notion of “spreadsheet” used attributively designates the grid (table-like) format for visual representation of data and does not refer to electronic calculations. The notion “table” refers to the way data is graphically presented in the interface and not to the database structure. Analogically, “cells”, “fields” and “records” are elements of the interface window and not of a database table. The following pairs of terms are used interchangeably: header/main data area; spreadsheet view/grid view; field/cell.

System Requirements

MCS user’s workstation has the following system requirements:

Hardware Requirements:

- Pentium processor at 133 MHz or higher
- 32 Mb of RAM or more

Software Requirements:

- Windows 95/NT
- 32-bit ODBC installed if SQL server database is used

User Requirements

Experienced-user proficiency level in Windows 95/NT and basic understanding of databases is required.

Database Design & Organization

WHAT IS A DATABASE?

A database is a collection of information related to a particular subject or purpose, such as tracking customer orders or maintaining a list of real estate properties for investment purposes. The database information is stored as a table in which every row (called “record”) gives all the information about one entity and all characteristic features of the

entities form columns (called “fields”). A database of real estate properties, for example, should constitute a table in which every row describes one property (i. e. every property is entered as a single record) and all characteristics of this property are organized in such fields (columns) like Property Name, Address, City, State, Property Type, Market, Rent, Contact Name, Contact Phone, Date Entered, etc.

HOW IS YOUR COMPANY'S DATABASE ORGANIZED?

Your MCS database contains information that is related to investments in real estate property. Because this information is very versatile, i. e. it contains a lot of different informational types (topics), such as Properties, Clients, Publications, etc., and because it serves for different purposes (like contributor service, market analyses, billing and invoicing, products solicitation and so on), it is impossible to organize all the data in one table. That is why your company's database consists of many tables and each table stores information on one main topic. For example, a table called “Clients” may contain all the information that is relevant to working with clients, such as their names, addresses, contact phones, billing and products order history, personal information, how the lead has been generated, etc. and a table called “Publications” may describe each publication, its publishing frequency, price and so on.

You will notice that different topics may share the same informational characteristics, so different tables would require the same fields. For example, the names and the addresses of the property owners should appear as “Property Owners Names” and “Property Owners Addresses” fields in both “Clients” and “Properties” tables. Duplicating the data, however, would be a very inefficient way of organizing a database. So, whenever an informational topic (table) needs a field that is already present in another table, the database links this table to that field of the other table instead of creating the field one more time and transferring all the data from table to table. This is the most advanced way of organizing a database and such databases are called “relational databases” because of the links (“relations”) between their tables. This makes it possible for MCS to take full advantage of the programming tools it is created with in order to give the user maximum performance and versatility.

The tool that you use to work with the database (called “user's interface”) is MCS.

HOW DOES MCS WORK?

With MCS you view, add, and update table data using online forms; find and retrieve just the data you want applying filters; and analyze or print data in a specific layout using reports. To store your data, there is one table for each type of information you track. To bring the data from multiple tables together in a filter, form, or report, there are defined relationships between the tables.

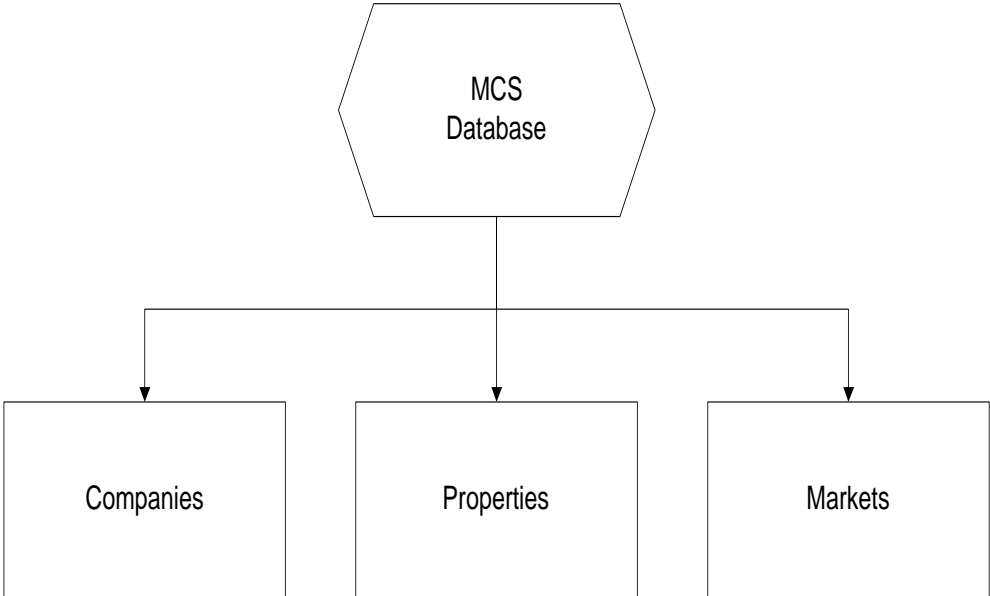
To find and retrieve just the data that meets the conditions you specify, including data from multiple tables, you can create a filter.

To easily view, enter, and change data, MCS displays the information from the database tables in grids (also called “spreadsheets”) or forms. When you open a spreadsheet/form, MCS retrieves the data from one or more tables and displays it on the screen.

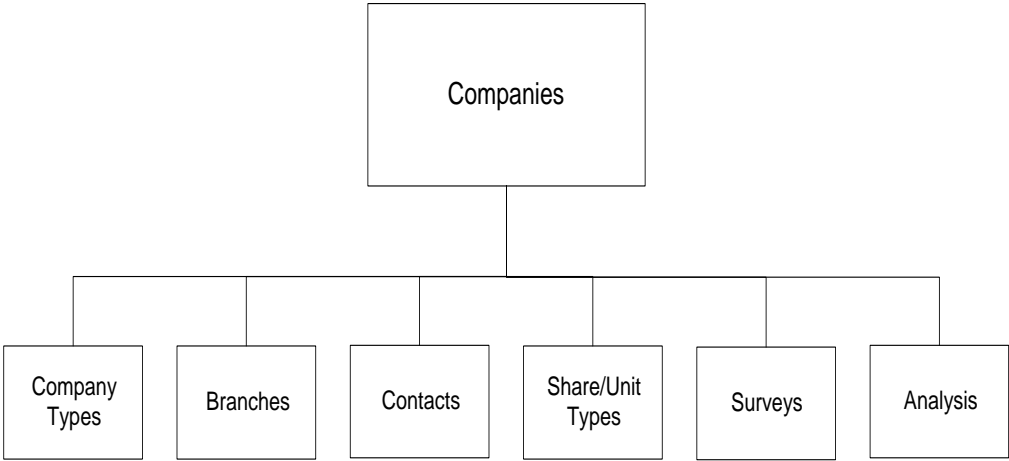
To analyze your data or present it in a certain way in print, you can create a report profile. For example, you might print one report that groups data and calculates totals, and another report with different data formatted for printing mailing labels. You may also import data from other sources and export data to other programs, for example, to your favorite desktop publishing system to create a publication

The diagrams on the following pages illustrate the basic data structure and relationships for the main data sets of the system. The boxes in the diagrams represent Available Data Types and Data Groups. They are shaded because they are user definable.

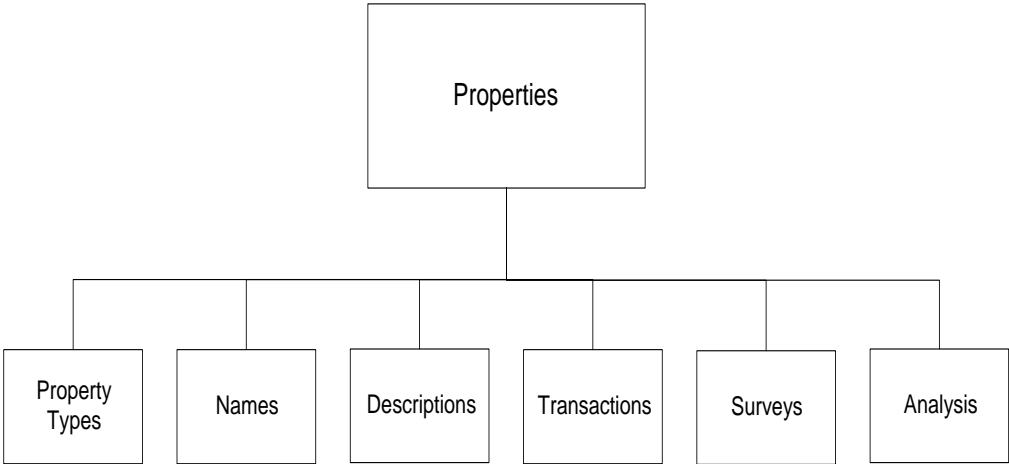
Overview of MCS Database - ResearchCategories



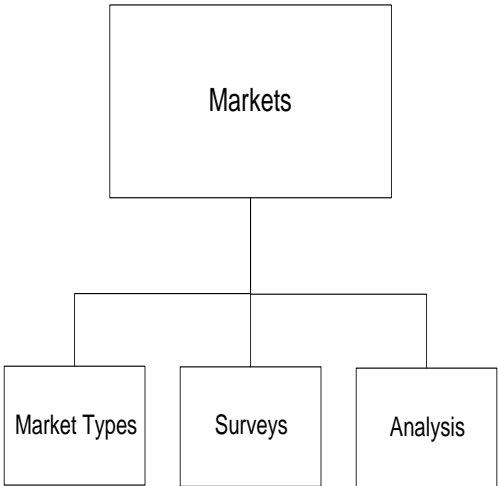
MCS Database Design - Companies



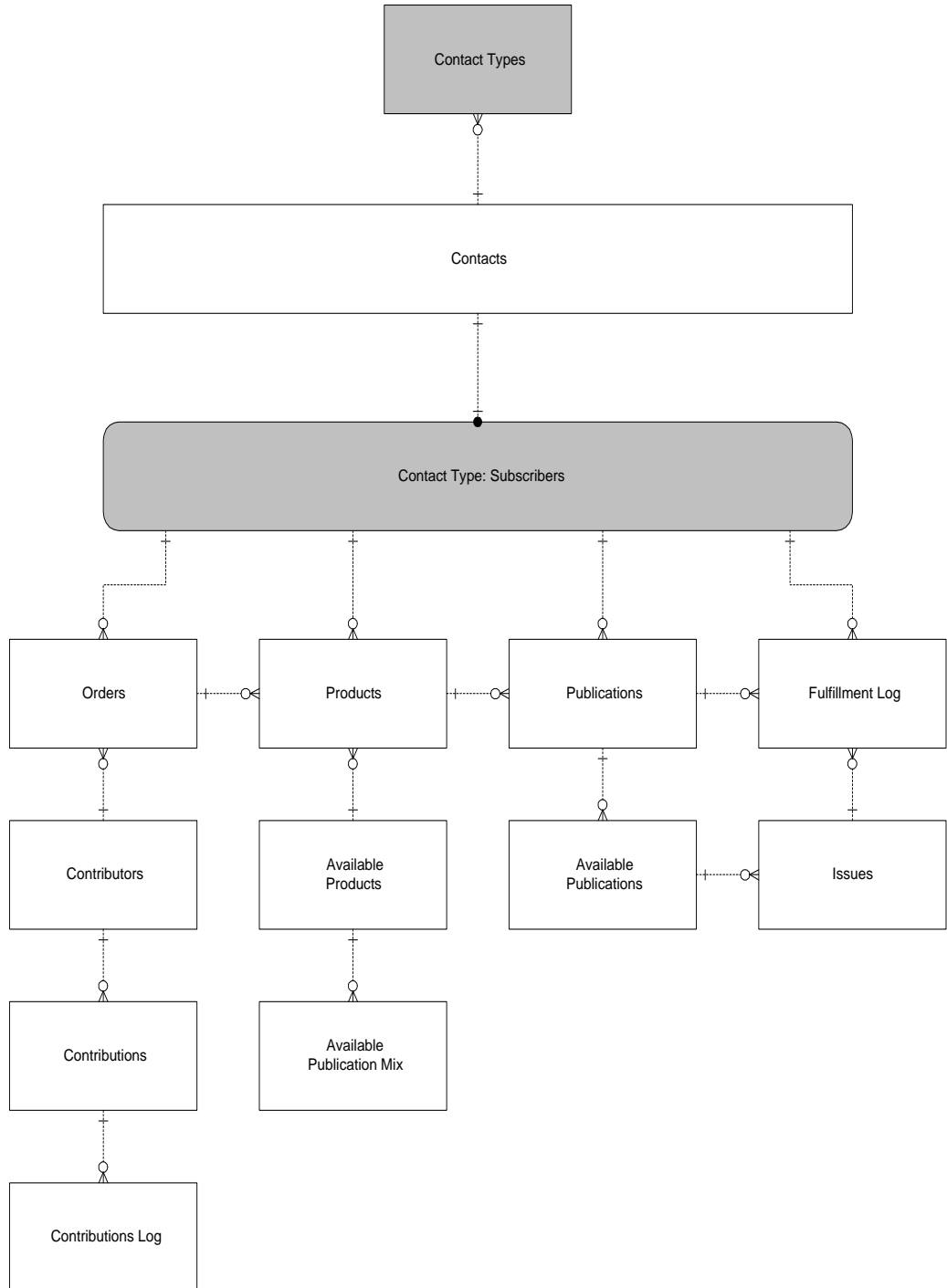
MCS Database Design - Properties



MCS Database Design - Markets



MCS DATABASE DESIGN FOR SUBSCRIPTION, FULFILLMENT, & CONTRIBUTOR SECTIONS



Installing the Software

MCS is first installed on the system administrator's workstation and then the initial users' setup is implemented.

On user's workstations MCS installs automatically requiring almost zero user involvement in the installation process. This step copies the MCS executable (called "Koll.exe") to the users hard disk into the MCS directory, pointing back to the central database on the server. It also creates shortcuts in the user's Start Menu, making it easier to run MCS.

To install MCS on a user workstation put the first installation diskette in the user's computer floppy and run the installation program (called "Setup.exe"). At some point of the installation you will be asked to specify the directory in which you want the MCS files to reside. You may simply confirm the default directory suggested by the program if you prefer. At the end of the installation process a Start Menu program group is created (called "MCS") and MCS is ready to be used from that machine.

The MCS installation program copies the MCS program file to.

For removing MCS from the user's computer, use the standard procedure for uninstalling Windows 95 applications ("Add>Remove Programs" icon from the Control Panel).

Starting MCS



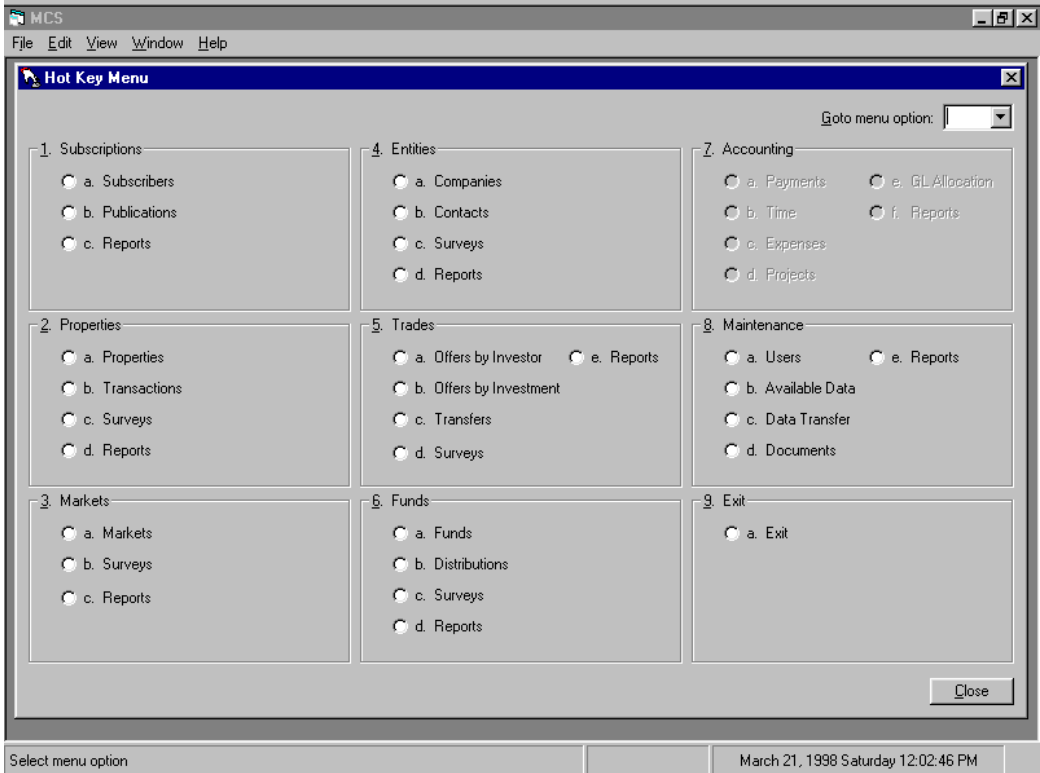
You start MCS like any other Windows 95 application. The most typical way is to click the Start button of your Windows 95 taskbar and point to the "Programs" folder. When the folder opens, point to the "MCS" folder and when the "MCS" folder opens, click the "MCS" item (typically the only item in the folder). MCS will prompt you for your user name and password. Type your user name and password and click OK. This will bring you the MCS screen.

Chapter 3

HOW TO USE THE STANDARD FEATURES

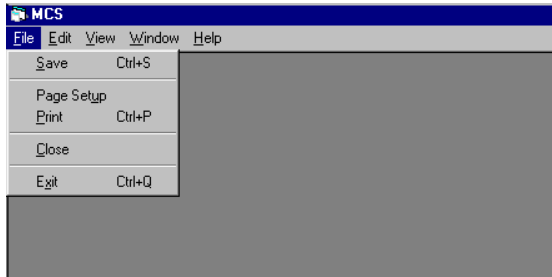
The Standard MCS Screen is displayed every time the program is started and the user name and the password have been entered correctly. The MCS Screen contains the MCS general menu and remains opened until the session is over. You can best view

Figure 1 - The MCS screen with the Hot Key menu activated in the working area



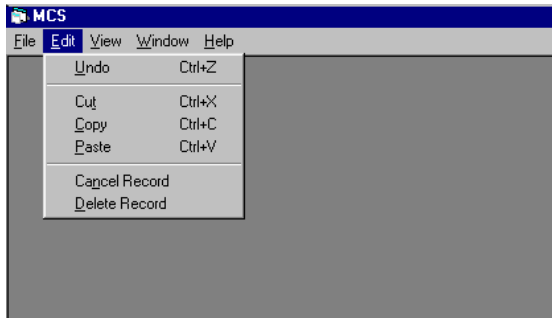
the MCS screen and windows if you hide the Windows taskbar (at 800x600 pixels).

Figure 2 – The File Menu



The MCS screen consists of menu bar (at the top), status bar (at the bottom) and working area (the space between the menu bar and the status bar). (Figure 1) The MCS menu bar has five drop-down menus: File, Edit, View, Windows and Help. The File menu displays the Save, Page Setup, Print, Close and Exit commands.

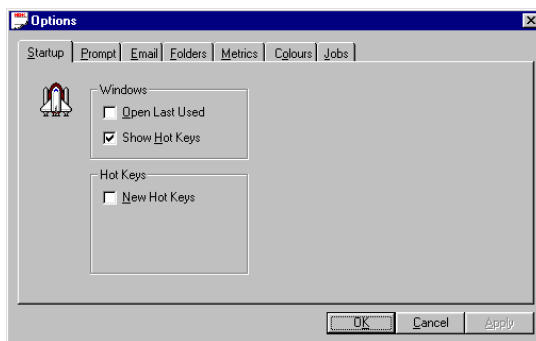
Figure 3 - The Edit Menu



The Save command in the File menu (Figure 2) saves the record you are currently working on. The Page Setup is a standard Windows command. The Print command displays the relevant report window because data can be printed only as a report. The Close command closes the active window and the Exit command ends your MCS session.

The Edit menu has five standard Windows commands (Undo, Cut, Copy and Paste) and two database commands – Cancel Record and Delete Record. (Figure 3)

Figure 4 - The Options dialog selected – Startup tab

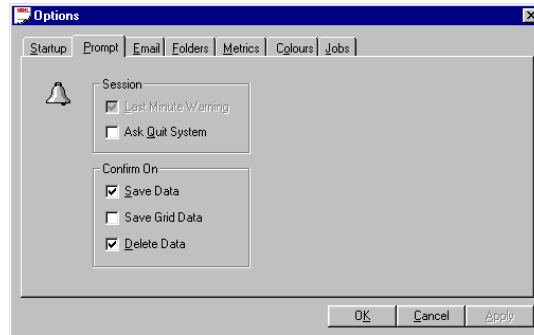


The Delete Record command deletes the current record in a spreadsheet and the Cancel Record command cancels any changes made to a record after its last saving.

The View menu shows the E-mail and Options commands.

The E-mail command starts your E-mail client and the Options command displays the Options pop-up window that sets up the user-controllable default MCS settings. The Options pop-up window has six tabs – Start-up, Prompt, E-mail, Folders, Metrics, Colors and Jobs. (Figure 4)

Figure 5 - The Options window – Prompt tab



The Start-up tab controls what the working area of your MCS screen will be filled with when you start MCS. You can see three check boxes there – Open Last Used, Show Hot Keys and New Hot Keys (Figure 4). When the Open Last Used box is checked, MCS will automatically open the last active window from the previous MCS session. If checked, the Show Hot Keys box will force the Hot Key Menu window to appear any time the last active window is closed. The same holds true for the New Hot Keys check box and the New Hot Key menu respectively. If the Hot Key (New Hot Keys) box is checked and the Open Last Used box is clear, the Hot Key (New Hot Keys) Menu window will become your default start-up window. The priority of these three check boxes is as follows: 1. Open Last Used, 2. New Hot Keys, 3. Show Hot Keys.

Figure 6 - The Options window - E-mail tab

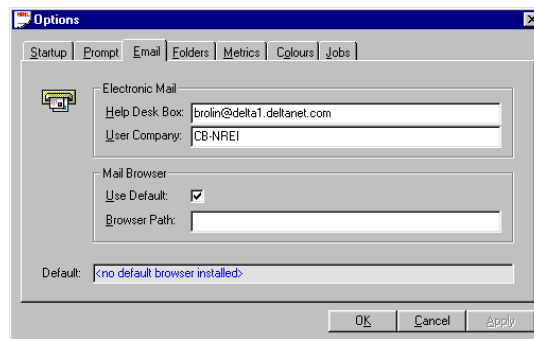
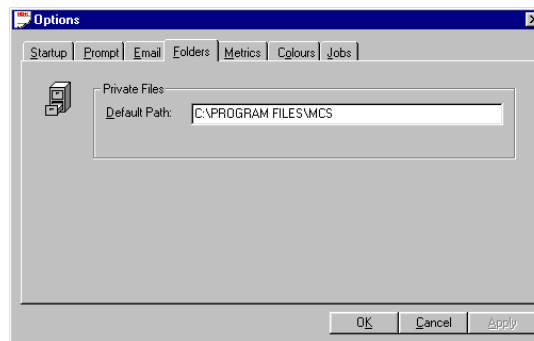


Figure 7 - The Options window - Folders tab



The Prompt tab reveals five check boxes: Session – Last Minute Warning, Confirm, Session – Ask Quit System, On - Save Data, Confirm On - Grid Data and Confirm On – Delete Data. (Figure 5)

If the Last Minute Warning box is checked, the system will warn you one minute before your session time to elapse. If you have no limits to the duration of your sessions, this check box is disabled. The Ask Quit System check box makes MCS asking for confirmation before quitting the program. The Confirm On – Save Data check box forces the system to ask for confirmation any time the changes to your main data are to be saved. The Confirm On – Grid Data check box does the same for the data hold in spreadsheet format. The Confirm On – Delete Data check box serves

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to prevent unintended lost of information by asking for confirmation before deleting data.

The E-mail tab has a box for entering the Brolin’s Help Desk E-mail address and for the path in which your mail browser is located (Figure 6).

Figure 8 -The Options window - Metrics tab

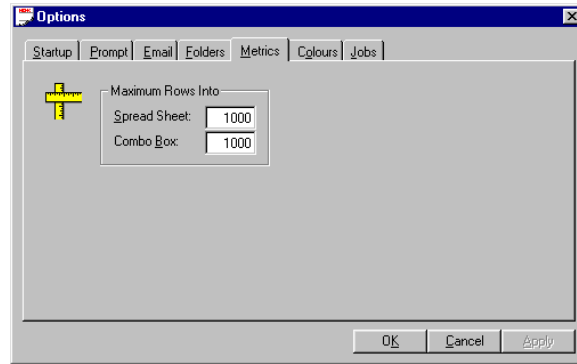


Figure 9 - The Options window - Colors tab

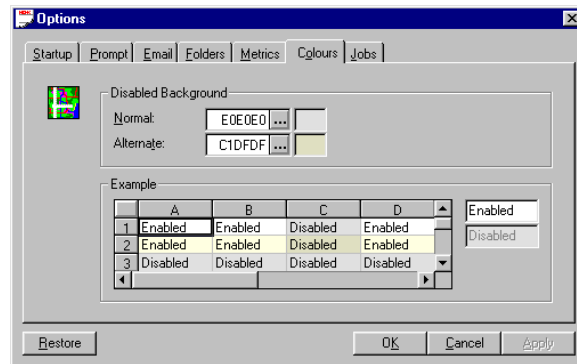
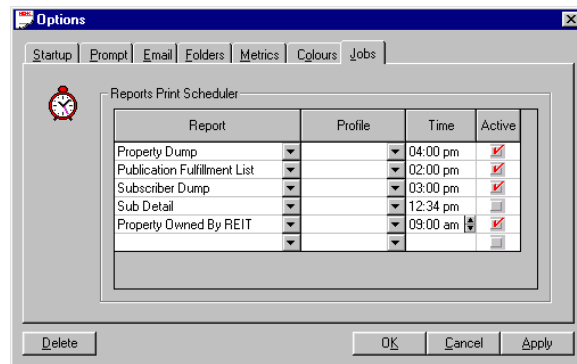


Figure 10 - The Options window - Jobs tab



You don’t need to enter your mail browser’s path if you check the Use Default dialog box. The Folders tab lets you specify a folder to store private files (Figure 7) and the Metrics tab (Figure 8) determines the maximum number of rows that may be loaded in spreadsheets and combo boxes at a time. This lets the user having sent a request to the system to start viewing the data the system returns without having to wait until all the data loads up. The maximum figure allowed for both spreadsheets and combo boxes is 30,000. The Colors tab (Figure 9) lets you set your own custom color combinations for the MCS fields and background.

The Jobs tab (Figure 10) enables you to set up daily report printing job at an hour you specify (on Monday-to-Friday schedule). To set up a printing job click on the Report cell of the last (empty) row of the Report Print Scheduler grid and select a report from the drop-down list. Select a Profile, if any or press Enter. In the Time cell press “0” or “1” for the first digit of the hour (only two-digit 12-hour format with minutes is allowed, like “09:45 am”) or double click the Time cell to display the spin buttons. Then

type in the desired time or select it with the spin buttons. Click the Active checkbox to activate the job and click Apply (or OK if you want to leave the Options window). To disable a printing job uncheck the Active checkbox and click Apply (or OK if you want to leave the Options window). To remove a job permanently, position the focus on the relevant row and click Delete.

The Window menu has only one command – Hot Keys, which opens the Hot Keys window. (Figure 1) The Hot Keys window is described in the next chapter. The Window menu is also lists the active windows, if any.

The Status Bar gives you information that is relevant to the active window. The left-hand side of the Status bar gives you a clue of the action that is most appropriate for the moment. The middle part displays some quantitative information about the number of characters in the active database cell (explained in The MCS Working Windows section). The right-hand side gives you the current date, day of the week and time.

The Working Area is the place where the Hot Key window and all MCS working windows are opened. The MCS working windows are explained in the section after next.

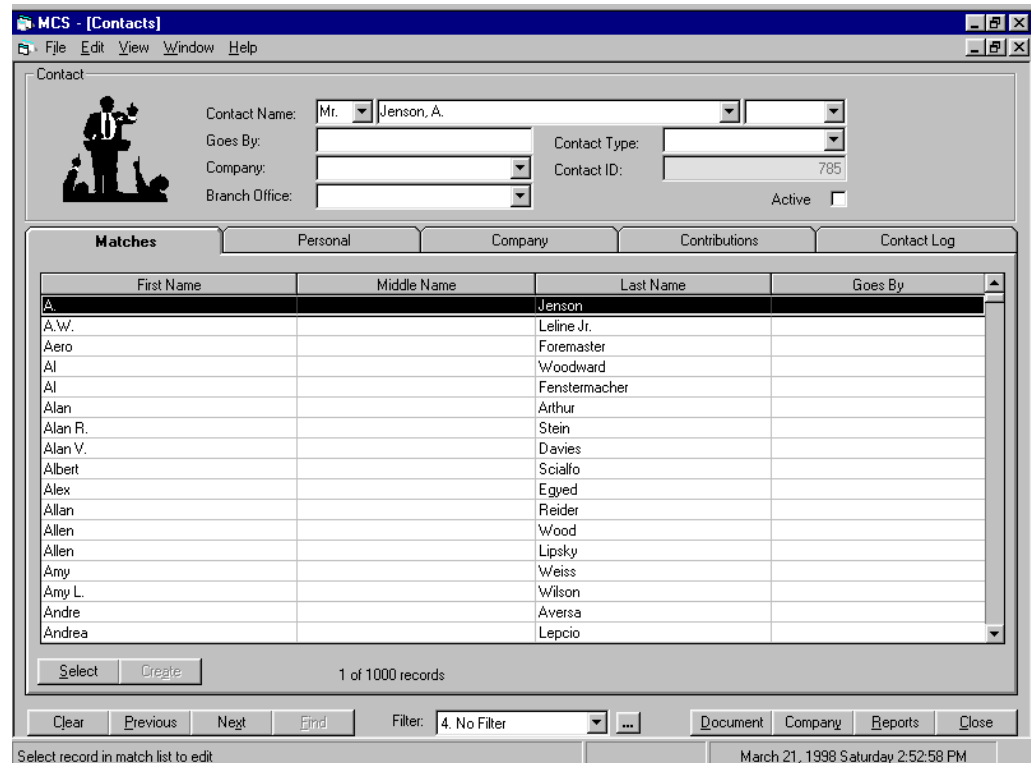
How to Use the The MCS Working Windows

The MCS working windows are the windows you use to view, manipulate and output database data. You can access the MCS working windows from the Hot Keys menu window. There are two categories of user working windows – windows for data manipulation and windows for creating reports. To make your work with MCS easier, all windows in a category have the same structure logic and look much alike. Thus, having worked in just one working window you are able to work in all windows of that category with ease. Following is an explanation of the data manipulation windows, while the reports windows are explained in the Reports Generation chapter.

The MCS Data Manipulation Windows

Let's take the Companies window as an example of a data manipulation window. If the Hot Key menu is not on screen, press F9 to activate it. Click on the “a. Companies” radio button in the “4. Entities” frame. The Companies window appears in the working area. You will see no data in the cells because MCS does not know yet which records you want to view. To see any records in a data manipulation window you have to specify your search criteria. For now, the Companies window is open in criteria state (i.e. all cells are empty and the program waits for your search criteria). The criteria state is the initial state of every data manipulation window when opened from the Hot Key

Figure 11 - A sample MCS Data Manipulation Window



menu. Select the “No Filter” option in the Filter list field and click Find to view all records. (Figure 11)

The Companies window displays data in two ways because the data itself falls into two main categories – main data and additional data. The main data is displayed in the upper part of the window (called “main data area” or “header”). Its stored in the following cells: Name, Type, Address 1, Address 2, CSZ, County, Country, GIS Code, ID, Region, Metro, Securities Trading and GEO Scope. The main data is displayed as a form, which means that you can view only one record at a time. The additional information relevant to the main data is displayed in the lower part of the screen in either spreadsheets (i.e. as tables) or forms. Each category of the additional information is graphically represented by a tab, that is why we call this area of the window “the Tab Area”. Selecting a tab easily takes you to a specific category and allows you to move quickly between the categories. For the Companies data there are six categories: Description, Share Status, Properties, Branches, Contacts and Contact Log. If you select the Branches tab, you will see all the branches the company in the header has. If you switch to the Contacts tab, you will see the contacts names and addresses for this company. Please notice that when you switch between the tabs, the content of your Main Data Area remains the same. Thus, you always know which main record you are viewing the details of. The Matches tab is a tab that displays the main specified by the Filter combo box data in spreadsheet form. The Matches tab is a common tab for all types of main data. The Select button on the Matches tab makes the selected record the active one, i.e. gets it displayed in the Main Data Area.

The Look-up button (the button that has tree dots on it [...]) on the right of some cells lets you implement searches for the contents of that field in order to display the right information for that cell. Clicking the Look-up button brings out the Look Up window for that particular field.

When a cell is selected, the middle part of the MCS screen Status Bar counter gives you some useful information about the characters in that particular cell in $n1>n2>n3$ format. $N3$ is the maximum number of characters the cell may contain. $N2$ is the number of characters the cell actually contains and $N3$ shows on which character the cursor is currently positioned. For example, $1>6>25$ means that in cell that may contain the maximum of 25 characters the cursor is positioned on the first character and the current data in that cell consists of 6 characters. $N1=0$ signifies that the selected cell is not in editing mode. If you highlight a cell, but the character numbers does not appear on the Status Bar, this means that the contents of the cell cannot be edited in this view.

At the bottom of the tab area there are several buttons relevant to the displayed tab. Generally these are New, Previous, Next and View. The Previous and the Next buttons are used to browse to the previous and the next records. The View button toggles the record between spreadsheet and form views. The Report button is used to generate a report. The tab area buttons vary from tab to tab.

Right below the tab buttons is the Working Window Button Bar. Typically it has the Clear, Previous, Next and Find buttons on the left and the Reports and Close buttons on the right. The Filter combo box and the small Create/Edit filter button (marked with ellipsis dots - [...]) are in the middle. The Previous and Next buttons display the previous and the next record of the main data. The Clear button clears the working window from any records and the Find button implements the search specified by the criterion in the Filter combo box. The Create/Edit button is used when the search criteria you want to apply are not available in the Filter combo box. The Reports button takes you to the Reports Selection window (Figure 38). The Close button closes the window.

OPENNING SCREEN

MCS offers four user-definable opening screen options:

- Hot Key menu – this menu offers fast single-click access to all MCS windows (Figure 1);
- New Hot Key menu – similar to the Hot Key menu, but displays the MCS window groups (Figure 12). Position the mouse pointer over the group name that contains the window you want to open (the font color of that name turns from blue to red), click and select the desired button from the pop-up toolbar. If, instead of opening a window, you decide to close the pop-up toolbar, press Escape.

Figure 12 - The New Hot Key menu



- Last window used – automatically opens the last active screen at the last MCS session shutdown;
- Specific default window – especially helpful if there is a window with

which you work more often than with the others.

To set your default opening screen to the Hot Key menu or the last window used chose the Options command from the View menu, select the Startup tab and check the appropriate box (Show Hot Keys, New Hot Keys or Open Last Used respectively). If you prefer to have a specific default window, contact your system administrator.

Chapter 4

INQUIRY AND DATA INPUT

Figure 13 - The Property Maintenance window - Transactions tab

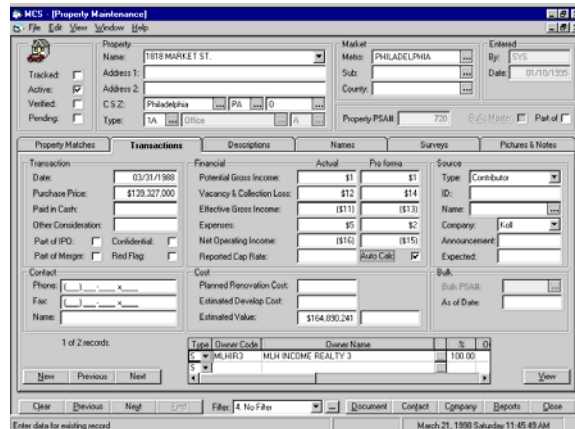
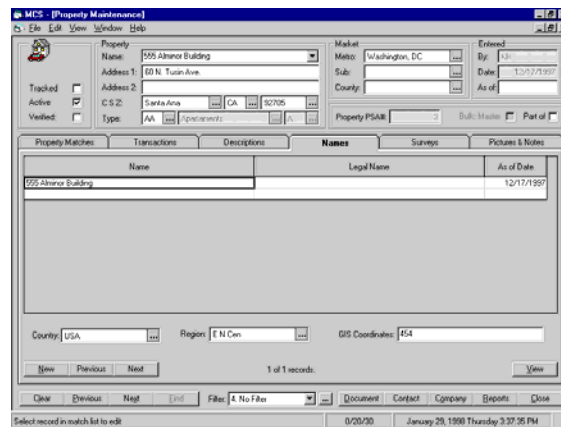


Figure 14- The Property Maintenance window - Names tab



Property Information

HOW TO USE THE PROPERTY MAINTENANCE WINDOW

The Property Maintenance Window (Hot Key menu (F9) > Properties > Properties) lets you edit the property data after the selection of a property. The information in the As Of Date field in the Entered frame and the Type field in the Property frame (main data area) comes from the property description record currently chosen in the Descriptions tab. The status of the checkbox "Part of" (main data area) comes from the currently chosen property transaction record in the Transactions tab. All other fields are connected to the corresponding property. The Names tab contains information that is part of the main data, including Country,

Region and GIS coordinates. The Property Matches tab shows all matches for the user-entered search criteria.

The Transactions tab (Figure 13) shows all transactions of a given property, newest first. You can edit or add property transactions. The fields “Planned Renovation Cost” and “Estimated Develop Cost” are available in the frame Cost in form view only and do not exist in spreadsheet view because they are part of the property description. These fields exist in the Descriptions grid and Cost frame on the Descriptions tab form, frame “Financial”. The fields Effective Gross Income (both Actual and Pro forma) are calculated as $\text{Effective Gross Income} = \text{Potential Gross Income} - \text{Vacancy \& Collection Loss}$ (Actual and Pro-forma respectively). The Net Operating Income fields (both Actual and Pro forma) are calculated as $\text{Net Operating Income} = \text{Effective Gross Income} - \text{Expenses}$. If the Auto Calc box is checked the Effective Gross Income and the Net Operating Income fields calculate automatically. Checking the Auto Calc box forces recalculation of these fields.



Note:

The same is valid for the corresponding columns in the Transactions spreadsheet but the cells are disabled instead of read-only (current FarPoint spread control version does not support read-only cells).

The Source frame combo box Type contains four hard-coded items in the following order: Contributor, Contact, Periodical and Listing. When a Contributor or Contact type was chosen, the ID textbox is accessible for entering the corresponding ID. The Name textbox is read-only (you can view but not change the information in it). When a Periodical or Listing type was chosen, the ID textbox is disabled and the Name textbox is accessible.



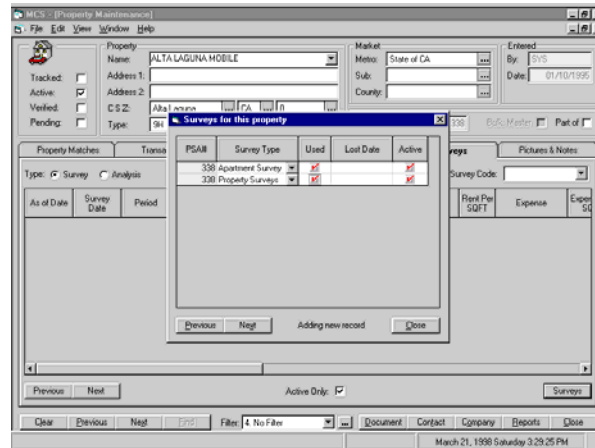
Note:

The same is valid for the Source Type, Source ID and Source Name columns in the Transaction grid.

The field (or cell) “Bulk PSA#” is enabled only when Part Of Bulk is checked. The Owners spreadsheet at the bottom of the tab form is linked to the Property Owners table. A record can not be saved without the Owner ID. The field Contact ID is not available until a valid Owner is entered. Contacts are limited to the ones that belong to the Owner.

The Names tab (Figure 14) shows all names (both common and legal) of a given property, newest first. You can edit or add property names. The last available name must exist in the Properties table (field Name). For this reason, editing the last available name immediately reflects the Name field of the property and vice versa. Adding of a new record in the Names table changes the Name field of the property. Deleting of the last available name record changes the Name field of the property to the last available name after deleting. A record can not be saved with an empty Name field. The fields Country, Region and GIS coordinates belong to the property itself (to the header of the form). The Country field defaults to “USA”.

Figure 15 - The Property Maintenance Window - Survey tab with the “Surveys for this property” window popped up.



The Surveys tab (Figure 15) shows the available surveys and analysis in which the given property is included. To enable a given property to be included in surveys, it must have the proper settings in the “Surveys for this property” window (this window pops up on clicking the Surveys button next to the down-right corner of the Surveys tab): a Survey Type must be selected and the Used

and Active boxes must be checked (checking the Used box is enabled when the Active box is checked). There may be more than one Survey Type per property.

HOW TO VIEW A PROPERTY

:

To view a property in the Matches tab:

1. Press F9 to activate the Hot Key window.
2. Select the Properties option box (2a).
3. In the Filter combo box select the criteria you want to apply for the filter (if you want to view all records select “4. No Filter” (default)) or select a particular record from the Name combo box in the header.



4. Click Find. The main data record(s) appear in spreadsheet view in the tab area of the window with the first record highlighted and displayed in form view in the Main Data Area.
5. If you want to view the previous or the next record of the main data, click the Previous or Next button on the working window's Button Bar

See also: The MCS Data Manipulation Windows

To view the additional information on a property:



1. Do steps 1-4 described above to list the desired record in spreadsheet view in the tab area.
2. Click on the record you want to view to highlight it.
3. Click on the Select button. The selected record becomes the active record with its main data displayed in form view in the Main Data Area. The additional information of the record is displayed in the tab area of the window with the first tab next to the Matches tab automatically selected and its data displayed.
4. To view the particular type of data you need to click the relevant tab. If the tab contains more than one subrecord of the additional data, the Previous and Next buttons appear on the tab area Button Bar to let you navigate among the subrecords.
5. Some subrecords allow you to toggle Spreadsheet and Form views. When this option is available, the View button appears on the tab area Button Bar. Click it to toggle the view mode.

See also: The MCS Data Manipulation Windows

HOW TO ADD A PROPERTY

To add a new property:

1. From the Hot Key menu select the Properties (2a) option box.
2. In the Main Data Area cells enter the main data of the new record. Use the Enter key or the tab key to navigate between the cells.



3. Click the Find button. If there is no duplicate for that record, MCS returns the message “No matching records found. Add new record?”
4. Click Yes. The new record becomes the active one. You can start entering some additional data in the tab area.

HOW TO CHANGE A PROPERTY

To modify a property:



1. In the Matches tab of the Property Maintenance window (Hot Key menu (F9) > Properties (2a) > Find) select the record you want to modify by clicking on it.
2. Click Select.
3. Click on the cell or combo box of the record you want to modify. If the cell you want to modify is in the tab area, choose the appropriate tab.
4. Type the new information for that cell or choose a new content from a combo box list.
5. Press Enter. The highlight moves to the next cell.

Your changes are automatically recorded when you go to another tab or record.

Property Transactions Information

HOW TO USE THE TRANSACTION BATCH ENTRY WINDOW

Figure 16 - The transaction Batch Entry Window - Transaction Data tab

The screenshot shows the MCS - [Transaction Batch Entry] window with the Transaction Data tab selected. The window is divided into three main sections: Property Matches, Transaction Data, and Pictures & Notes. The Transaction Data section is further divided into several sub-sections: Financial, Cost, Description, Area, Year, and Contact. The Property Matches section shows a list of records with columns for Buyer, Owner ID, Owner Name, %, and Cd. The Pictures & Notes section shows a list of records with columns for PSA#, Bulk Record ID, and As of Date. The Transaction Data section contains the following fields:

- Property:** Name: 555 Alminor Building, Address 1: 60 N. Tusin Ave., Address 2: , C S Z: Santa Ana CA 92705, Type: AA Apartments
- Market:** Metro: Washington, DC, Sub: , Entered By: KH, Date: 12/17/1997
- Source:** Type: , ID: , Name:
- Transaction Data:**
 - Financial:** Potential Gross Income, Vacancy & Collection Loss, Effective Gross Income, Expenses, Net Operating Income, Reported Cap Rate
 - Cost:** Planned Renovation Cost: \$4,535, Estimated Develop Cost, Present Value at Purchase
 - Description:** Rental Units: 200, Floors: 25, Buildings: 1, Warehouse %: 55.00, Occupied %: 55.00, Exp. Completion
 - Area:** Land: 123,000, Gross Lse.: 130,000, Net Lse.: 100,000
 - Year:** Built: 1962, Remodeled: 1985, Last Sold
 - Contact:** Name, Phone, Fax

The window also has a menu bar (File, Edit, View, Window, Help) and a status bar at the bottom showing 'Select record in match list to edit' and 'January 29, 1998 Thursday 4:15:00 PM'.

The Transaction Batch Entry Window is basically the same as the Property Maintenance window, but its design is optimized for fast data input. The window has three tabs: Property Matches, Transaction Data and Pictures & Notes.

The Transaction Data tab (Figure 16) is a composition of two Property Maintenance screen tabs – Transactions and Descriptions. All cells of the Area, Year, Description frames and the Planned Renovation Cost and Estimated Development Cost cells are equivalent to the ones in the Descriptions tab of the Property Maintenance window. The others are equivalent to the ones in the Transactions tab of the Property Maintenance window. The tab area counters for the Transactions and Descriptions tabs of the Property Maintenance window are available in the Transaction Data tab but they are placed next to the relevant grid's name (in form view). When a record is

selected in criteria state, the Transaction Data tab is automatically selected in “Adding new record” mode with the last data description record displayed in the Description grid.



Notes:

1. On the head of the form:

1.1. Changing of the name of a property leads to creation of a new record for the available property names.

1.2. The fields Entered by and Entered Date can not be modified by the user

1.2.1. When an existing property record is chosen, these fields display information about the user and the date the property record was created;

1.2.2. When a new property record is to be created, these fields are automatically filled in with your initials and the current date.

1.3. Property type can be entered in two ways:

1.3.1. By entering a property type code in the first field

1.3.2. By entering property type and property sub-type in the second and third fields.

1.3.3. Entering property type code disables the option for changing independently the type and sub-type. In order to enter type and sub-type, the type code must be empty. When a combination of type and sub-type is selected, the type code is filled automatically.

1.4. Source frame:

1.4.1. The source ID can be entered only when source type is Contributor or Contact. In this case, you can not change the name of the source.

1.4.2. The source name can be entered only when the source type is Periodical or Listing. In this case, you can not enter source ID.

1.4.3. When source type is not selected, the rest of source information can not be entered.

2. On the Transactions tab page

2.1. The values of Effective Gross Income (Actual or Pro-Forma) are calculated automatically as $\text{Effective Gross Income} = \text{Potential Gross Income} + \text{Vacancy and Collection Loss}$, and can not be changed by you.

2.2. The values of Net Operating Income (Actual or Pro-Forma) are calculated automatically as $\text{Net Operating Income} = \text{Effective Gross Income} - \text{Expenses}$, and can not be changed by you.

2.3. When you create a new transaction, a new description record is automatically created. If you save the new transaction, the description record is saved automatically, too. If you refuse to save the transaction, the description record is not saved, too.

HOW TO VIEW A PROPERTY TRANSACTION

To view a property transaction in the Matches tab:



1. Press F9 to activate the Hot Key window.
2. Select the Transactions option box (2b).
3. In the Filter combo box select the criteria you want to apply for the filter (if you want to view all records select "4. No Filter" (default)) or select a particular record from the Name combo box in the header.
4. Click Find. The main data record(s) appear in spreadsheet view in the tab area of the window with the first record highlighted and displayed in form view in the Main Data Area.
5. If you want to view the previous or the next record of the main data, click the Previous or Next button on the working window's Button Bar

See also: The MCS Data Manipulation Windows

To view the additional information on a property transaction:



1. Do steps 1-4 described above to list the desired record in spreadsheet view in the tab area.
3. Click on the record you want to view to highlight it.
4. Click on the Select button. The selected record becomes the active record with its main data displayed in form view in the Main Data Area. The additional information of the record is displayed in the tab area of the window with the first tab next to the Matches tab automatically selected and its data displayed.
5. To view the particular type of data you need to click the relevant tab. If the tab contains more than one subrecord of the additional data, the Previous and Next buttons appear on the tab area Button Bar to let you navigate among the subrecords.
 6. Some subrecords allow you to toggle Spreadsheet and Form views. When this option is available, the View button appears on the tab area Button Bar. Click it to toggle the view mode.

See also: The MCS Data Manipulation Windows

HOW TO ADD A PROPERTY TRANSACTION

To add a new property transaction:



1. From the Hot Key menu select the Transactions (2b) option box.
2. In the Main Data Area cells enter the main data of the new record. Use the Enter key or the tab key to navigate between the cells.
3. Click the Find button. If there is no duplicate for that record, MCS returns the message “No matching records found. Add new record?”
4. Click Yes. The new record becomes the active one. You can start entering some additional data in the tab area.

HOW TO CHANGE A PROPERTY TRANSACTION

To modify a property transaction:



1. In the Matches tab of the Property Maintenance window (Hot Key menu (F9) > Properties (2a) > Find) select the record you want to modify by clicking on it.
2. Click Select.
3. Click on the cell or combo box of the record you want to modify. If the cell you want to modify is in the tab area, choose the appropriate tab.
4. Type the new information for that cell or choose a new content from a combo box list.
5. Press Enter. The highlight moves to the next cell.

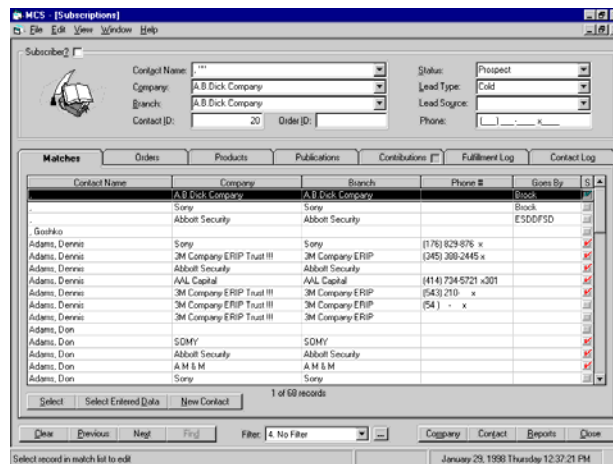
Your changes are automatically recorded when you go to another tab or record.

Subscriptions Information

HOW TO USE THE SUBSCRIPTIONS WINDOW

The Subscriptions window (Hot Key menu (F9) > Subscriptions > Subscribers) serves to maintain your subscribers database. It gives you the advantage of quickly and conveniently viewing, editing and adding subscribers and subscriptions. From the criteria state of the Subscriptions window you can not only apply filter but add a new contact (the New Contact Button) or a new subscription for an existing contact as well (the Select Entered Data button). The right column of cells in the main data area of this window is updateable. In criteria state the Branch field lists the branches of the company shown in the Company field. In editing state the Branch field shows the branches for which the selected contact (in the Contact Name field) works. In addition to the standard MCS search capabilities, there are three screen-specific ways to perform searches for this window: by contact ID, by order ID and by phone number. To do this, simply enter the appropriate number in the relevant field (Contact ID, Order ID or Phone) and press Enter.

Figure 17 - Subscriptions Window - The Matches tab



When you implement search to the Subscriptions window in criteria state with no data entered in the Main Data Area, the Matches tab grid (Figure 17) lists not only the subscribers but also the entire contacts database. This feature allows you to quickly add new subscriptions for existing subscribers or other contacts. The Matches tab here has three specific buttons: Select, Select Entered Data and New Contact. The Select button causes the grid data for the

selected contact to get displayed in the other tabs of the window. The Select Entered Data creates a new subscription record with the name taken from the current record's Contact Name cell (the Matches tab) and company name equivalent to the content of the Company cell in the main data area. This is especially convenient when you need to

enter a new subscription for an existing contact that has moved to another company. The New Contact button takes the default values for the new record for both the contact name and the company from the Contact Name and Company cells from the Main Data Area. All these three buttons bring you to the Orders tab. Double-clicking a record is equivalent to single-clicking a record followed by clicking the Select button.

Figure 18 - The Payments window – Payments Available tab

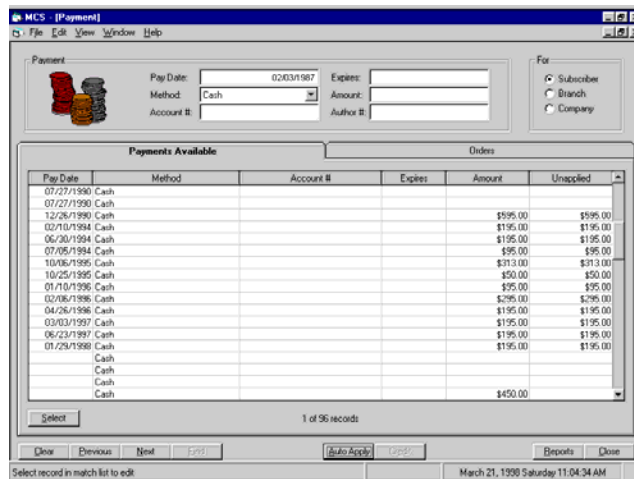
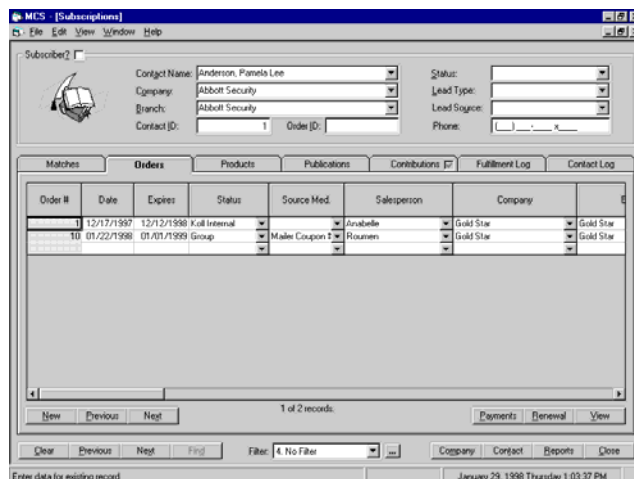
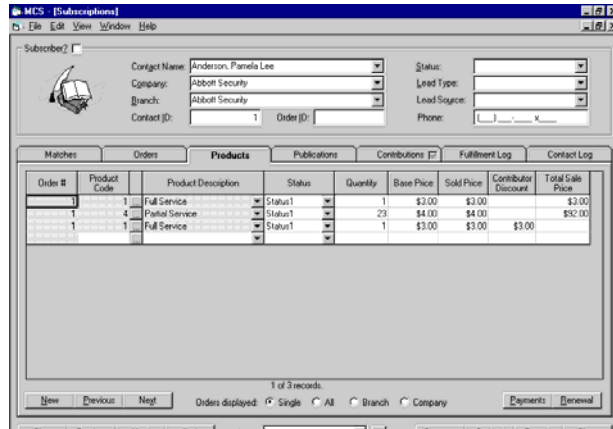


Figure 19 - The Subscriptions window - Order tab



The Payments Button appears in Orders, Products and Publications tabs. The Products tab lists the products included in the current order with each product displayed as a separate record in the Products tab grid. The Publications tab lists the products and the publications of the current order with every publication of every product displayed as a separate record in the Publications tab grid. The Payments buttons introduces the Payment window (Figure 18), which is used process and manage payments. The Auto Apply button allocates the exact amounts of the total sum paid to the separate orders in case there is a single payment for multiple orders. Deleting an order results in deletion of the relevant records for that order in the Products tab and Publication tab grids. Deleting a Product results in deletion of the Publication tab records for that product. You cannot delete a product or a publication from the Products or Publications tabs respectively if there is a record for them in the Fulfillment log tab. You can, however, delete them from the Orders tab.

Figure 20 - The Subscriptions Window - Products tab



The Orders tab (Figure 19) brings you all the information about the contact's order(s) excluding the product information. It displays the first order for the current contact name in form view by default. The grid in spreadsheet view (use the View button) shows all orders for the current contact. The Bill To and Ship To buttons (form view) fill the Bill To and Ship To frames with data for the company and branch that are currently shown in the Company and

Branch fields of the Order frame. The Branch cell lists the company's branches for which the contact works. The Renewal button is used to easily create a repeated order. It creates a new order record with default values equivalent to the values of the record on which the focus is currently positioned. When pressed, a new order, products and publications record is created with the following values:

I. Order record:

Date = current system date

Expires = Previous expire + one year.

Status = Renewal

All fields in Payments and ShipBy frames are left empty. All other fields default to previous orders values.

II. Products record:

All fields default to previous orders values.

III. Publications record:

Starting Issue, Starting

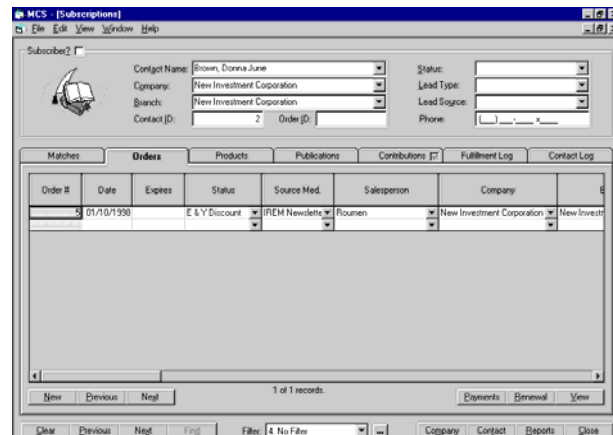
Period, # Issues, and #

Remain are left empty.

Expiration Date defaults to new order's Expires date.

All other fields default to the previous orders' values.

Figure 21 - The Subscriptions Frame - Publications tab



The Ship To -> Bill To button fills the Bill To frame fields with the data contained in the Ship To frame fields. This button useful in case the

recipient is the one to be charged for the order.

The Products tab (Figure 20) displays the contents of the orders (i.e. the products ordered) according to the current selection in the Orders Displayed radio buttons. Single shows only the currently selected order, All – all orders made by the current contact, Branch lists all orders made by the current company branch and Company – all orders made by the current company. The default is Single. The Product Code and Product Description fields are related to each other. If one of them is changed, the other changes too. The Quantity field is set to 1 by default. The Total Sales Price field calculates as follows: Total Sales Price = Quantity * Solid Price – Contribution Discount. The Total Sales Price Field calculates automatically, but allows for keyboard input as well.

Figure 22 - The Subscriptions Window - Contributions tab

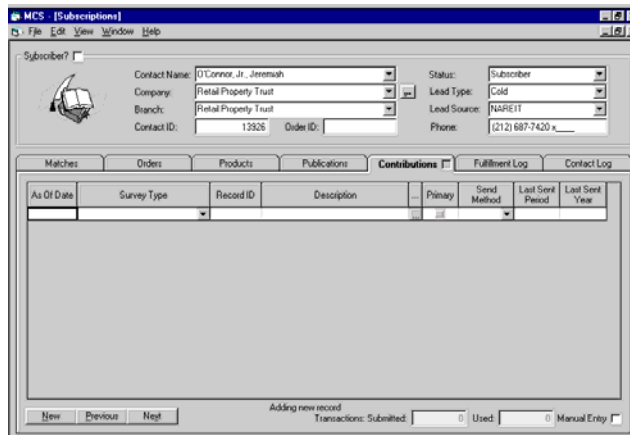
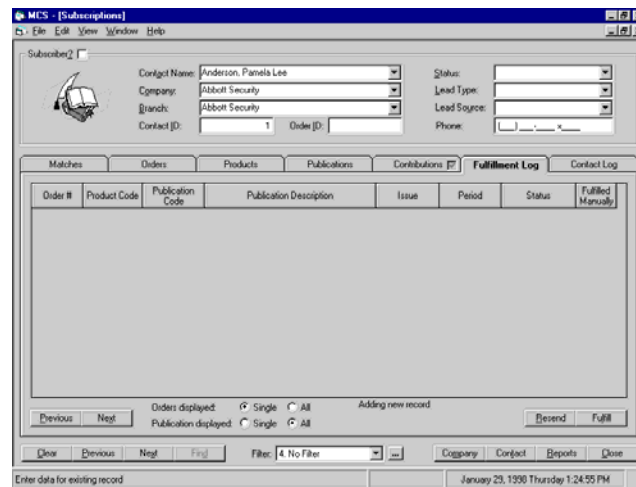


Figure 23 - The Subscriptions window - Fulfillment Log tab



When you create a product record for a new order, one or several records are created in the Publications tab (Figure 20) spreadsheet. The number of records created depends on the number of publications constituting the current product. The Starting Issue, Starting Period and As of Date fields are interrelated. The default values for them are the values for the pending issue of the publication (in the Issues tab of the Publication Maintenance Window). If there is no pending issue, these fields do not fill automatically. In this case the As of Date field has to be filled manually with the approximate date of issuing of the Starting Issue. Let's say, for example, that the product is a magazine published quarterly and its first issue for 1998 is Issue 1, Vol. 19 and is due at March 15th, 1998. A client subscribes for one year (i.e.

four issues). In this case Starting Period should be “1 Qtr 1998”, # Issues – “4”, # Remain – “4” and As of Date – “03/15/98”. By default, # Remain = # Issues. The value is taken from the # of Issues column of the Products tab of the Maintenance window. The Starting Issue and # Issues Ordered fields are not mandatory, but they have to be filled, otherwise the Fulfillment Log record for this order cannot be created (A Fulfillment Log record is created automatically by clicking the Create Fulfillment button). In the above example, # of Issues = “4”, # Remain = “4” (at the time of placing the order) and Initially and Expiration Date = “15/03/99”. Initially, no Orders Displayed radio button selected because what is displayed on start-up are the publications comprising the current product. Once a product order is created, the product description cannot be changed (the Product Description cell for this record becomes read-only). Should you need to change the product description after the record has been created you will have to delete the entire product record and create it again. If you need to delete a product record, you have to delete the appertaining records in the Fulfillment Log tab. The Product Description combo box and in the Product Code Look-up window (activated by the Look-up button ([...]) of the Product Code fields) list products that are checked in the Active column of the Publication Maintenance window’s Products tab.

The Contributions tab (Figure 22) has a check box indicating whether the contact is a contributor with existing contributions. You can enter new contributions from this tab. The Transactions Submitted and Transactions Used are counter-type fields though manual entry for them may be enabled, too (through checking the Manual Entry box). They are calculated automatically when the Manual Entry box is not checked. In the automatic calculation mode they work as follows:

- the value in the Transactions Submitted field increases or decreases by 1 every time a contribution record is added or deleted respectively;
- the value in the Transactions Used field increases or decreases by 1 every time a contribution record marked as “Primary” (i.e. its Primary checkbox is selected) is added or deleted respectively

The Resend and Fulfill buttons in the Fulfillment Log tab (Figure 23) are used to change the fulfillment status. The Resend button changes the Status of the current record to Resent. The Fulfill button changes the Status of all records currently displayed in the grid to Shipped. It affects only those issues that have already been issued. The Sent Date cells for those records that have been promoted to “Shipped” are filled with the current date value.

The Renewal button in the Contact Log tab enters new contact log records with cells initially filled with data from the selected record.

HOW TO VIEW SUBSCRIPTIONS

To view subscriptions in the Matches tab:



1. Press F9 to activate the Hot Key window.
2. Select the Subscribers (1a) radio button.
3. In the Filter combo box select the criteria you want to apply for the filter. If you want to view all records select “4. No Filter” (default). If you want to view the active data only leave the Active check box checked (default).
4. Click Find. The main data records appear in spreadsheet view in the tab area of the window with the first record highlighted and displayed in form view in the Main Data Area.
5. If you want to view the previous or the next record of the main data, click the Previous or Next button on the working window's Button Bar

See also: The MCS Data Manipulation Windows

To view the additional subscriptions information:



1. Do steps 1-4 described above to list the desired record in spreadsheet view in the tab area.
2. Click on the record you want to view to highlight it.
3. Click on the Select button. The selected record becomes the active record with its main data displayed in form view in the Main Data Area. The additional information of the record is displayed in the tab area of the window with the first tab next to the Matches tab automatically selected and its data displayed.
4. To view the particular type of data you need to click the relevant tab. If the tab contains more than one subrecord of the additional data, the Previous and Next buttons appear on the tab area Button Bar to let you navigate among the subrecords.

Some subrecords allow you to toggle Spreadsheet and Form views. When this option is available, the View button appears on the tab area Button Bar. Click it to toggle the view mode.

See also: The MCS Data Manipulation Windows

HOW TO ADD A NEW SUBSCRIBER

Adding a New Subscriber from the Subscriptions Window

Every new subscriber falls into one of the following two categories: new subscriber, already existing as a contact in the Contacts list and a new subscriber that has to be entered as a new contact.

To enter an existing contact as a subscriber:



1. In the Subscriptions Window's Contact Name cell (Hot Key menu (F9) > Subscriptions > Subscribers) enter the contact's name. You can either type the name or select from the drop-down list. The drop-down list is automatically reduced to the matches of what you type, so you can type a few letters first and then make a selection from the drop-down list.
2. If necessary, select another company and branch from the Company field in the Matches tab.
3. Click Select..
4. Enter the relevant information in the Orders Tab grid.
5. Click on the Previous or Next button to save the new record or New to create a new order for the current contact.

To enter an existing contact as a new subscriber for a different company:



1. In the Subscriptions Window's Contact Name cell (Hot Key menu (F9) > Subscriptions > Subscribers) enter the contact's name. You can either type the name or select from the drop-down list. The drop-down list is automatically reduced to the matches of what you type, so you can type a few letters first and then make a selection from the drop-down list. (The correct order for cells containing person's name is *Firstname Middlename Lastname* or *Lastname comma Firstname Middlename*)
2. Type the name of the new company in the Company field in the header or select company from the drop-down list.
3. If necessary, select a different branch.
4. Click Select Entered Data button
5. Enter the relevant information in the Orders Tab grid.
6. Click on the Previous or Next button to save the new record or New to create a new order for the current contact.



To add a new contact as a subscriber:

1. In the Subscriptions Window's Contact Name cell (Hot Key menu (F9) > Subscriptions > Subscribers) enter the contact's name.
2. Select a company from the drop-down list or type a new one (Company cell).
3. If necessary, select a different branch.
4. Click New Contact.
5. Enter the relevant information in the Orders Tab grid.
6. Click on the Previous or Next button to save the new record or New to create a new order for the current contact.

Adding a New Subscriber from the Contacts Window

Adding a subscriber from the Contacts window allows for more detailed input of data about the contact.

To add a new subscriber from the Contacts window:



1. Create new contact record following the instructions in the “Adding a New Contact” topic or select an existing contact from the Matches tab of the Contacts window (Hot Key menu (F9) > Contacts > Find)
2. Click the Company tab.
3. Click “New”.
4. From the Contact Type combo box list select “Subscriber”.
5. Enter the other relevant data in the record's fields.



Notes:

1. The Company field is mandatory.
2. Upon entering the company name in the Company field, the Branch field is automatically filled with the default value for that company.
3. There can be only one Subscriber contact type record for a given contact per company branch, i.e duplicate subscriber records are not allowed (the criteria for duplication are the contents of Company and Branch fields).

PLACING A NEW PRODUCT ORDER

To place a new product order:

1. In the Subscriptions Window's Contact Name cell (Hot Key menu (F9) > Subscriptions > Subscribers) enter the contact's name. (The correct order for cells containing person's name is *Firstname Middlename Lastname* or *Lastname comma Firstname Middlename*)
2. Click Find. The subscribers of the same name appear in the Matches tab.

**Note:**

If, instead of opening the Matches tab, the system moves the cursor to the Company field and changes the background of that field, this means that there are no matches for that name and you can add a new subscriber by entering a company name in the Company field.



3. Double-click the desired subscriber record or click it once and then click "Select".
4. Click "New". A new order is created with default data taken from the current defaults.
5. Enter the appropriate data in the Orders tab cells.

**Note:**

If you change Company or Branch in the Orders tab, use the Bill To and Ship To buttons (form view) to automatically fill the Bill To and Ship To frames with data for the company and branch that are currently shown in the Company and Branch fields of the Order frame.

6. Click the Products tab and enter the appropriate product data in the Products tab grid.
7. If you want to change the default subscriptions periods, click the Publications tab and make the necessary changes.
8. If you want to add another product, go back to Products tab and click "New"

Notes:

1. Once the product record is entered, the Product Description and Product Code fields in the Products tab are disabled.
2. The Total Sales Price field is automatically calculated.

**CHANGING AN EXISTING PRODUCT ORDER**

1. In the Orders tab of the Subscriptions window select the order record you want to change.

To change an existing order record:

Notes:

1. Use the View button to switch to grid view if you need to see many records displayed simultaneously.
2. You may need first to perform search to find and select the desired contact in the Matches tab.



2. Navigate between the cells of the record and make the necessary changes.

Note:

1. If you want to use the Ship To and Bill To buttons you may need to switch to form view (use the View button).
2. Deleting an order recursively deletes all its products, publications, fulfillment and the information as to what the payment applies. The user gets a warning message about this prior to deleting. Deleting an order does not delete the information that the particular payment has been made, but this payment cannot be viewed any more in the Order tab. To view a payment or to assign the payment to a different order, click the Payments button in the order tab.

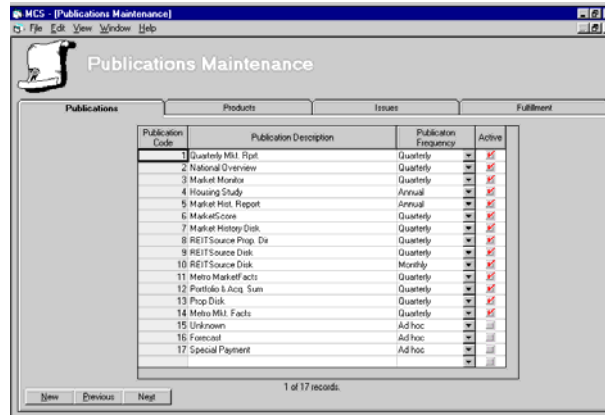


Publication Information

HOW TO USE THE PUBLICATIONS MAINTENANCE WINDOW

The Publications Maintenance Window (Hot Key menu (F9) > Subscriptions > Publications) has four tabs: Publications, Products, Issues and Fulfillment.

Figure 24 - The Publication Maintenance window - Publications tab

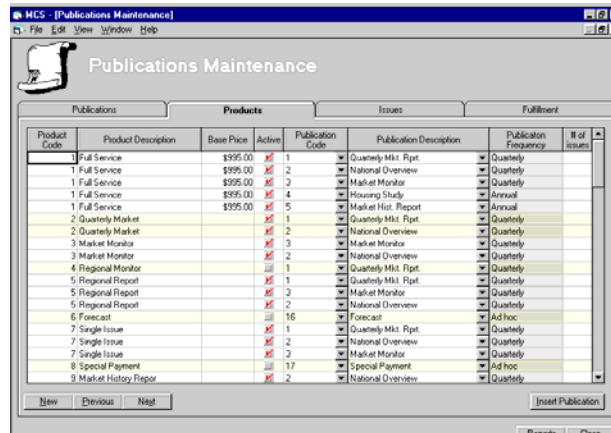


The Publications tab (Figure 24) is the active tab for the criteria state of this window. All available publications are listed. This is the tab used to enter new publications. When a new publication is created, the primary product for this publication is created automatically. The Report button displays the Report Selection window with Subscriber as default Report

Group. The publications for which the Active box is unchecked are not displayed in the Publication Description drop-down list in the Products tab.

The Products tab (Figure 25) lists both the company's products and publication. Every possible product-publication combination is presented in the grid as a separate record.

Figure 25 - The Publication Maintenance window - Products tab



For example, if a product includes three publications, there will be three separate Product tab records for this product. One and the same publication can be a constituent of more than one product. The Publication Description combo box lists only those publications that are checked as active in the Active column of the Publications tab. The Insert Publication Button is used to create a new publication in an existing product. It inserts a

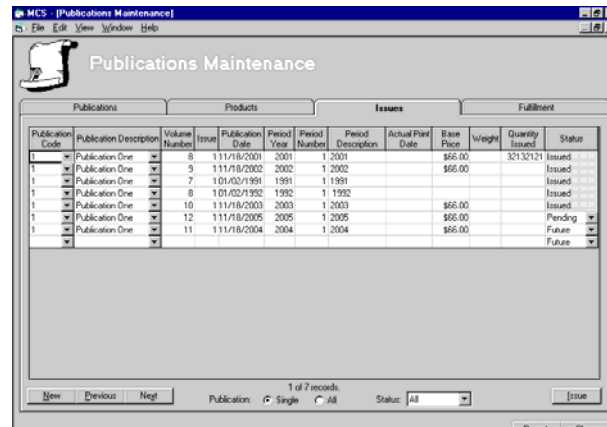
new row after (beneath) the selected record with default values equivalent to the ones of the selected record with Publication Code, Publication Description and Publication

Frequency cells left empty for data input. Other publications cannot be added to primary products. To easily view the grid, there are different background colors for the odd and the even product code records.

The Issues tab (Figure 26) displays issue information in grid view. The Publication Single/All check boxes and Status combo box filter the grid. If the Single option is selected, only the current publication in the Publications tab will be displayed. The Issue button implements the following actions:

- ◆ Creates fulfillment log record for each ordered publication with Ready issue;

Figure 26 - The Publication Maintenance window - Issues tab



- ◆ Promotes next issue record with Future status to Pending status for each issue record with a Ready status;

- ◆ Creates issue records with Future status for up to 1 year after the last issue with status "Pending";

- ◆ Updates all issues

with Ready status to Issued status

You should always maintain a Pending issue for every publication because the Pending Issue values are used as defaults for the new Publications tab records of the Subscribers window.

The Fulfill button of the Fulfillment tab changes the status of all product order records (not only of those displayed in the grid!) to Shipped. The Sent Date cells for those records that have been promoted to “Shipped” are filled with the current date value.

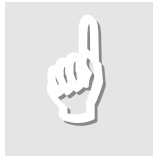
HOW TO PROCESS READY AND PENDING ISSUES

To Process Ready or Pending Issues:

1. From the Publications Maintenance window (Hot Key menu (F9) > Subscriptions > Publications Maintenance) click the Issues tab.



2. If you prefer to view only the Pending issues, select Pending from the Status combo box on the Tab Area toolbar
3. Select All from the Publication Single/All radio buttons.
4. In the Status field of the spreadsheet change the desired publication(s) status from Pending to Ready.
5. Click the Issue button. MCS displays an info dialog window with a notification of the changes. All Ready issues are promoted to Issued. For each publication that has just had a Ready issue promoted, the soonest Future issue is promoted to Pending.

Notes:

1. You can promote only one Pending issue per publication to Ready.
2. The Issue button Creates issue records with status Future for up to 1 year after each issue with status "Pending".

Company Information

HOW TO USE THE COMPANIES WINDOW

The Companies window displays all the information that is needed to use and maintain your Companies database. (Hot Key Menu (F9) > 4. Entities > Companies)

The Matches tab lists companies in spreadsheet view according to the specified filter(s).

The Description tab lists basic contact information for the selected company (Phone, Fax, Web site) and the business areas the company specializes in. On the right-hand side of the Phone and Fax cells there are buttons with a telephone symbol (☎) on them. They are used to automatically dial the number in the cell. (Figure 27)

Figure 27- The Companies window - Description tab

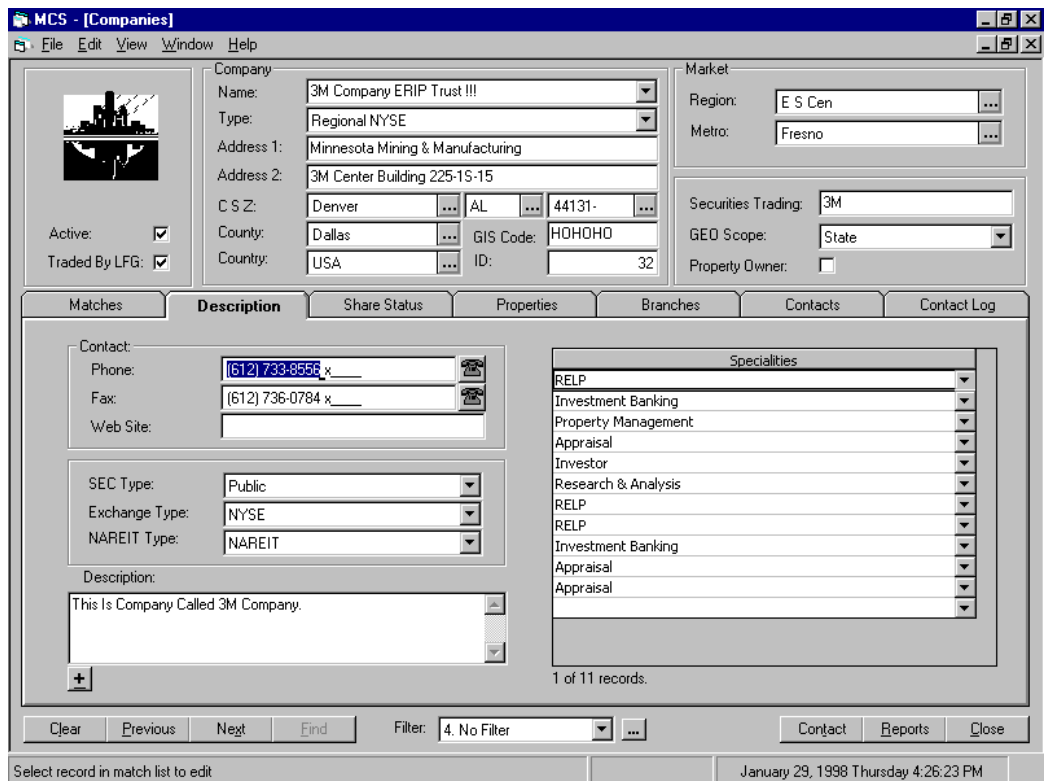


Figure 28 - The Companies Window - Share Status tab

The screenshot shows the MCS - [Companies] window with the Share Status tab selected. The window title bar includes 'MCS - [Companies]' and standard window controls. The menu bar contains 'File', 'Edit', 'View', 'Window', and 'Help'. The main area is divided into several sections:

- Company Information:** Name: A.G. Edwards & Sons, Inc.; Type: [dropdown]; Address 1: One North Jefferson Avenue; Address 2: [empty]; C S Z: St. Louis, MO, 63103; County: [empty]; Country: [empty]; ID: 550.
- Market Information:** Region: [dropdown]; Metro: [dropdown]; Securities Trading: [checkbox]; GEO Scope: [dropdown]; Property Owner: [checkbox].
- Share Status Table:**

Share/Unit Type	Outstanding	Fully Diluted	Date of IPO
CA Class A Common		<input checked="" type="checkbox"/>	

Notes: [empty text area]

1 of 1 records.
- Properties Table:**

Valuation Date	Offer Revised Date	Offer Revised Time	Status Type	Old Offer Status	UOM	Value Per Share/Unit	Qty Share/Unit This Trade	Total Qty Subscribed	Reeduct/Distrib Amount	Bench Offer
					#					

At the bottom, there are navigation buttons: Trade, New, Previous, Next, Adding new record, Distribution, View, Clear, Previous, Next, Find, Filter: 4. No Filter, Document, Contact, Reports, Close. The status bar at the bottom shows 'Enter data for existing record' and 'March 21, 1998 Saturday 6:51:39 PM'.

The Share Status tab is designed to maintain data about the company's shares. (Figure 28) The Distribution Button displays the Share/Unit Distribution window for that record in the upper grid (in grid view) on which the focus is positioned. Use View button to switch between spreadsheet and form views. To create a new record click New.

The Properties tab lists all properties for this particular company in spreadsheet view. The Property button is used when you want to see more details about a particular property. The Property button opens the Property Maintenance window and displays the selected record in the main data area. (Figure 29)

The Branches tab lists all branches of the active company in spreadsheet view. This tab supports automatic dialing to a branch of the company (through [☎] buttons). If you want to add some additional information on a branch, click the Notes button. (Figure 30)

The Contact tab lists all relevant information for any contact for the company. (Figure 31) You have the choice between viewing the contacts for the entire company or just for the branch that is selected in the Branch cell. Make your choice using the Company and Branch radio buttons on the tab area Button Bar. You can implement search among the contact names for the company by clicking the Look-up button [...] on the

right on the Contact cell. If you are not able to view the Contact tab information for a particular company, this means that this information has been marked as private by the user who created it (through the Private checkbox in the Company tab of the Contacts window). In this case, contact your system administrator about the access rights.

The Contact Log tab gives information about the history of communicating with the particular company. (Figure 32) The topic of every contact is signified by a plus sign (+) in the Topics Discussed cell. You can see some more details on the topic if you click the plus sign. You can choose to display the Contact Log by company, branch or contact by selecting the Company, Branch or Contact radio button. The Contact button takes you to the Contact window with the selected contact displayed in it.

Figure 29 - The Companies window - Properties tab

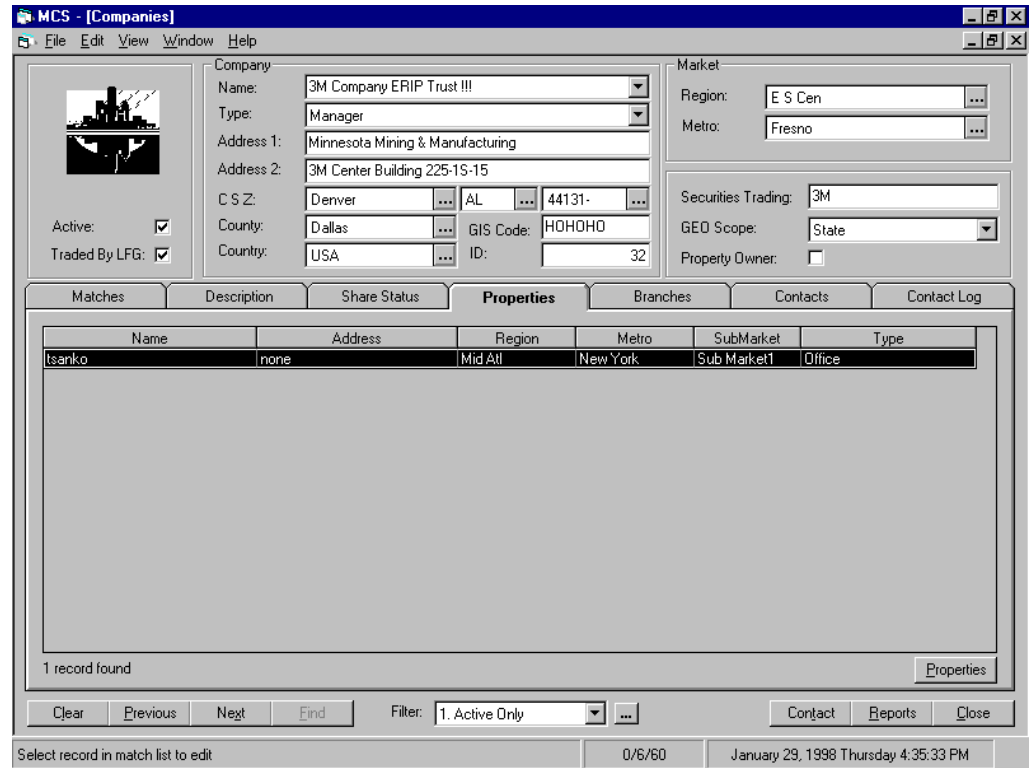


Figure 30 - The Companies window - Branches tab

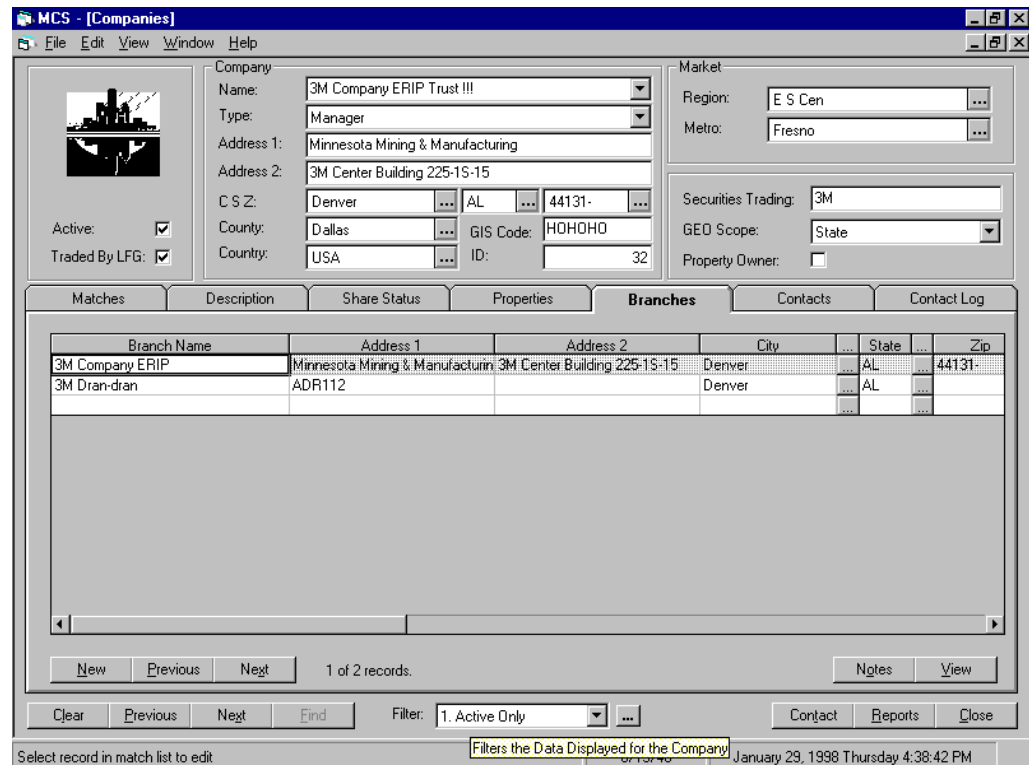


Figure 31 - The Companies window - Contacts tab

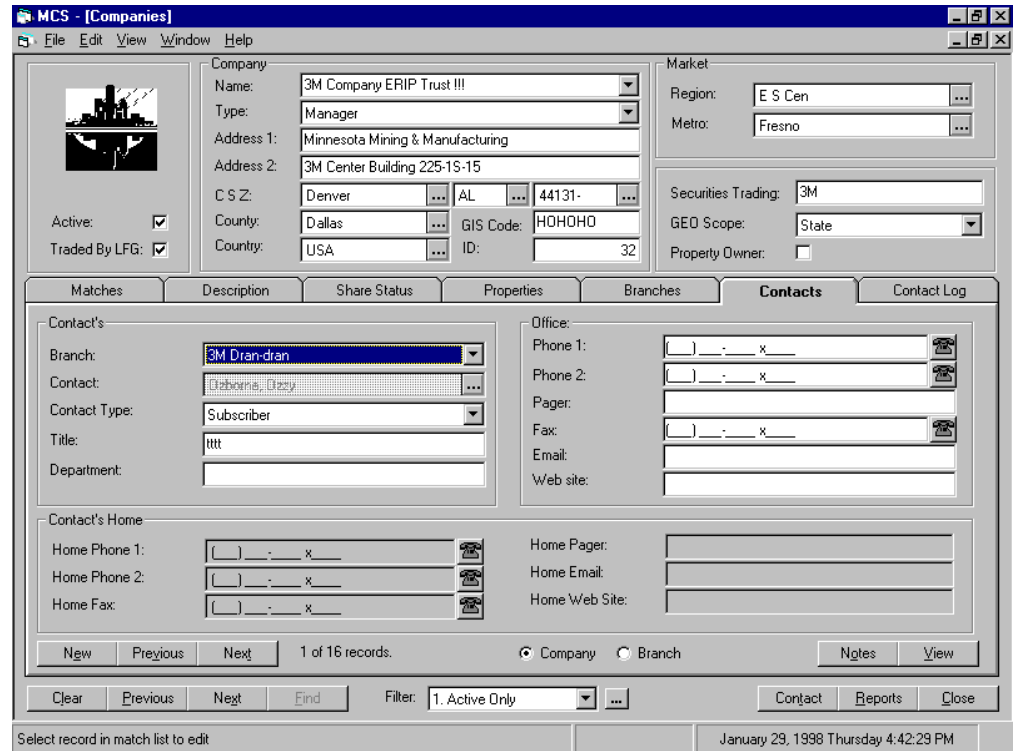


Figure 32 - The Companies window - Contact log tab



HOW TO VIEW A COMPANY

To view a company
in the Matches tab:



1. Press F9 to activate the Hot Key window.
2. Select the Companies option button (4a).
3. In the Filter combo box select the criteria you want to apply for the filter (if you want to view all records select “4. No Filter” (default)) or select a particular record from the Name combo box in the header.
4. Click Find. The main data record(s) appear in spreadsheet view in the tab area of the window with the first record highlighted and displayed in form view in the Main Data Area.
5. If you want to view the previous or the next record of the main data, click the Previous or Next button on the working window's Button Bar

To view additional
information on a
company:



1. Do steps 1-4 described above to list the desired record in spreadsheet view in the tab area.
2. Click on the record you want to view to highlight it.
3. Click on the Select button. The selected record becomes the active record with its main data displayed in form view in the Main Data Area. The additional information of the record is displayed in the tab area of the window with the first tab next to the Matches tab automatically selected and its data displayed.
4. To view the particular type of data you need to click the relevant tab. If the tab contains more than one subrecord of the additional data, the Previous and Next buttons appear on the tab area Button Bar to let you navigate among the subrecords.

Some subrecords allow you to toggle Spreadsheet and Form views. When this option is available, the View button appears on the tab area Button Bar. Click it to toggle the view mode.

HOW TO ADD A COMPANY

To add a new company:



1. From the Hot Key menu select the Companies (4a) option box.
2. In the Main Data Area cells enter the main data of the new record. Use the Enter key or the tab key to navigate between the cells.
3. Click the Find button. If there is no duplicate for that record, MCS returns the message “No matching records found. Add new record?”
4. Click Yes. The new record becomes the active one. You can start entering some additional data in the tab area.

HOW TO CHANGE A COMPANY

To modify a company record:



1. In the Matches tab of the Companies window (Hot Key menu (F9) > Companies (4a) > Find) select the record you want to modify by clicking on it.
2. Click Select.
3. Click on the cell or combo box of the record you want to modify. If the cell you want to modify is in the tab area, choose the appropriate tab.
4. Type the new information for that cell or choose a new content from a combo box list.
5. Press Enter. The highlight moves to the next cell.

Your changes are automatically recorded when you go to another tab or record.

Contacts Information

HOW TO USE THE CONTACTS WINDOW

The Contacts window displays the Contact Name, Goes By, Company, Branch Office, Contact type and Contact ID cells as main data. The additional data is displayed in four tabs: Personal, Company, Contributions and Display Log. (Hot Key Menu (F9) > 4.Entities > Contacts) The window has a shortcut to the Companies window (the Company button) and an option to create a report (the Reports button). The Companies button opens the Companies window with the selected record displayed in the Main Data Area.

The Company tab (Figure 33) lists data about the contact's company. It contains a check box called "Private" that lets you indicate whether the information on that

Figure 33 - The Contacts window - Company tab

The screenshot shows the MCS - [Contacts] window with the following data:

Field	Value
Contact Name	Mr. , ""
Goes By	Brock
Company	Sony
Branch Office	Sony
Contact Type	Broker
Contact ID	20
Active	<input checked="" type="checkbox"/>

The Company tab is selected, showing the following details:

Field	Value
Contact's	Broker
Private	<input type="checkbox"/>
Source Type	
Source Name	
Status	
Source Med	
Company	Sony
Branch	Sony
User Contact	MMC
User Contact Company	SOMY
Title	
Department	9999999
Geo Scope	

Office information:

Field	Value
Office	
Phone 1	() - . x
Phone 2	() - . x
Pager	
Fax	() - . x
Email	
Web site	

Branch Office information:

Field	Value
Branch Office	
Address 1	One Sony St.
Address 2	blablabla
Phone	() - . x
Fax	() - . x
Web Site	

Navigation and status: New, Previous, Next, 1 of 2 records, Filter: 4. No Filter, Company, Reports, Close. Status bar: Select record in match list to edit, January 29, 1998 Thursday 4:51:36 PM.

Figure 34 - The Contacts window - Contact Log tab

company should be considered private. If you check this box, only you, your system administrator and users who have been explicitly granted access rights by the system administrator would be able to view this information. If you need to access company's data that have been marked as private by someone else, ask your system administrator for the access rights.

The Contact Log tab (Figure 34) contains Private checkbox, too. It indicates if the contact log for that contact should be considered private or not.

HOW TO VIEW A CONTACT

1. Press F9 to activate the Hot Key window.
2. Select the Contacts option button (4b).
3. In the Filter combo box select the criteria you want to apply for the filter (if you want to view all records select "4. No Filter" (default)) or select a particular record from the Name combo box in the header.

To view a contact in the Matches tab:



4. Click Find. The main data record(s) appear in spreadsheet view in the tab area of the window with the first record highlighted and displayed in form view in the Main Data Area.
5. If you want to view the previous or the next record of the main data, click the Previous or Next button on the working window's Button Bar

To view additional information on a contact:



1. Do steps 1-4 described above to list the desired record in spreadsheet view in the tab area.
2. Click on the record you want to view to highlight it.
3. Click on the Select button. The selected record becomes the active record with its main data displayed in form view in the Main Data Area. The additional information of the record is displayed in the tab area of the window with the first tab next to the Matches tab automatically selected and its data displayed.
4. To view the particular type of data you need to click the relevant tab. If the tab contains more than one subrecord of the additional data, the Previous and Next buttons appear on the tab area Button Bar to let you navigate among the subrecords.

Some subrecords allow you to toggle Spreadsheet and Form views. When this option is available, the View button appears on the tab area Button Bar. Click it to toggle the view mode.

HOW TO ADD A NEW CONTACT

To add a new contact:

In criteria state of the Matches tab of the Contacts window (Hot Key menu (F9) > Contacts) (click Clear to switch to criteria state) type the relevant information in the header fields (Contact Name, Goes By, Company, Branch Office, Contact Name and Contact ID).

Notes:

1. The correct syntax for the Contact Name field is *Firstname Middlename Lastname* or *Lastname comma Firstname Middlename*.
2. Except for the Contact Name, no other fields are mandatory.



1. Click "Find". MCS searches the database and if the contact does not exist returns the message: "No matching records found. Add a new message?"
2. Click "Yes".
3. Enter the additional information about the contact in the tab area fields of the window.

**Note:**

You can force MCS to add the new contact without prior searching the database. To do this, use the Create button instead of Find.

HOW TO ADD AN EXISTING CONTACT AS A CONTACT FOR ANOTHER COMPANY OR BRANCH

To add an existing contact as a contact for another company or branch:



1. With the relevant company selected in the Matches tab of the Companies window (Hot Key menu (F9) > Companies > Find) click the Contacts tab.
2. Click New
3. Fill the Contacts tab cells with the relevant information about the contact. In the Contact cell enter the name of the contact or select from the database list using the Look-up button.

Note:

The Branch, Contact and Contact type fields are mandatory.

HOW TO ADD A NEW CONTACT LOG RECORD

To add a new contact log record:



1. In the Matches tab grid of the Contacts window select the contact record to which you want to add the new contact log record.
2. If necessary, click the View button to display the Contact Log spreadsheet/form in form view.
3. Click New.
4. Fill the cells in the Contact Log frame. You can use the left and right arrow keys to navigate between fields.
5. When you come to the Available Topics cell, select a subject from the list by clicking on it. A plus sign (+) appears on the left of the selected subject.
6. Click on the plus sign to open the list of topics for that subject.
7. Select an item from the topic list by clicking it and click the Add button. The selected topic appears in the Topics Discussed cell.

**Notes:**

1. You can open the topics list more quickly by double clicking a subject.
2. You can add more than one topic to a contact log record. Simply repeat steps 6-7 as many times as necessary. You can write down some additional information in the Notes cell.

8. Click Next or Previous button (or New if you want to add another contact log record) to save the new record.

HOW TO CHANGE CONTACT INFORMATION

To modify a contact record:



1. In the Matches tab of the Contacts window (Hot Key menu (F9) > Companies (4b) > Find) select the record you want to modify by clicking on it.
2. Click Select.
3. Click on the cell or combo box of the record you want to modify. If the cell you want to modify is in the tab area, choose the appropriate tab.
4. Type the new information for that cell or choose a new content from a combo box list.
5. Press Enter. The highlight moves to the next cell.

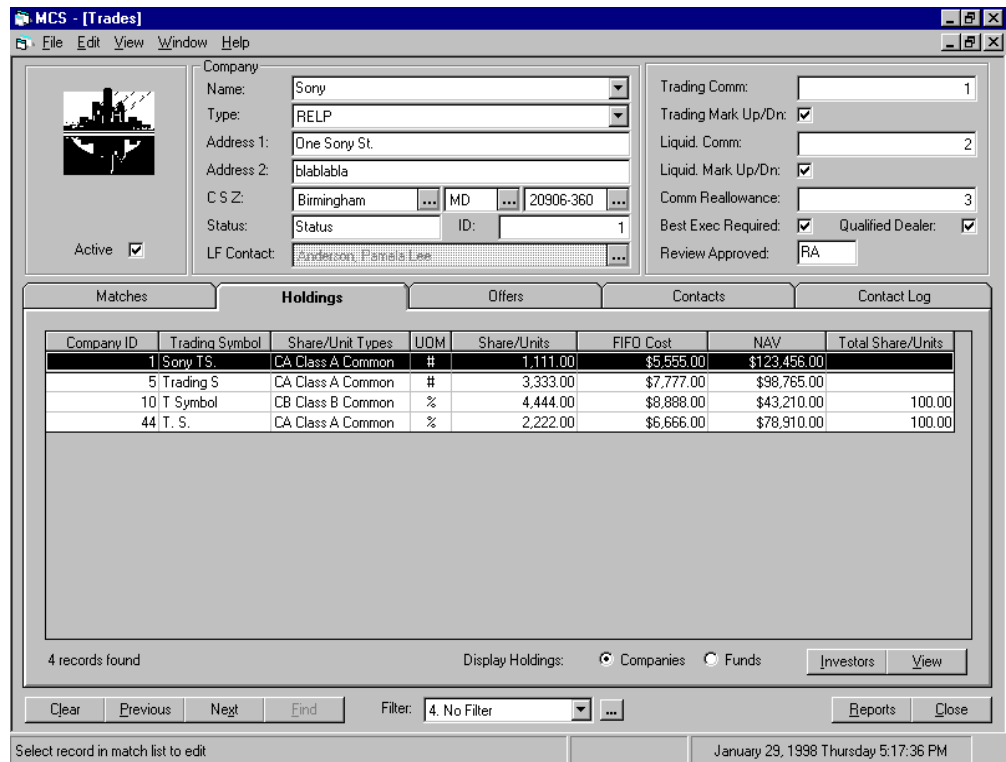
Your changes are automatically recorded when you go to another tab or record.

Investment Information

HOW TO USE THE OFFERS-BY-INVESTOR WINDOW (TRADES WINDOW)

The Trades window displays only the investor type companies. These are companies having “Investor” as one of their Specialties in the Description tab of the Companies

Figure 35 - The Holdings & Offers window - Holdings tab



window.

The Holdings tab (Figure 35) displays the holdings for the current company. You have the choice whether to view the company or the fund type of holding (the Display Holdings Radio Button). The default is Companies. If you double click a record or

click the Investors button, a pop-up window lists all shareholders for the company described in the current record (in the Company ID and Trading Symbol cells).

The Offers tab (Figure 36) lists offers for trading shares or units. The current selection of the Display Holding radio buttons in the Holdings tab affects the contents of the Offers tab. The Investors radio button gives you the choice to view all the offers or only the offers from the company in the header. When the selected option is All, the offers from the current company have yellow background. The display Offers radio box gives you the option to view offers for a particular investment by entering it in the text box on the right and choosing the Selected Investment option. The Look-up button [...] next to the Investment field opens a pop-up Look-up window displaying companies whose shares are traded by LFG. These are companies that have records in

Figure 36 - The Holdings & Offers window - Offers tab

The screenshot shows the 'Offers' tab of the 'MCS - [Trades]' window. The window title bar includes 'MCS - [Trades]' and standard window controls. The menu bar contains 'File', 'Edit', 'View', 'Window', and 'Help'. The main area is divided into several sections:

- Company Information:** Name: Sony, Type: RELP, Address 1: One Sony St., Address 2: blablaba, C S Z: Birmingham MD 20906-360, Status: Status, ID: 1, LF Contact: Anderson, Patricia Lee.
- Trading and Commission:** Trading Comm: 1, Trading Mark Up/Dn: , Liquid Comm: 2, Liquid Mark Up/Dn: , Comm Reallowance: 3, Best Exec Required: , Qualified Dealer: , Review Approved: RA.
- Offers Section:** Type: A (Ask), Investment: [empty], Share/Unit Type: [empty], Share/Units: # [empty], Price: [empty], NAV Date: [empty], Offer Date: [empty], Status: [empty], Comments: [empty].
- Expiration and Offering Details:** Expiration Date: [empty], Confirm date: [empty], Unit Limit: [empty], Offering Company: Sony, Dealer: [empty], Guarantee: , Active: , Qualified: .
- Navigation and Controls:** Buttons for New, Previous, Next, Adding new record, Notes, Trade, Investors, View, Clear, Previous, Next, Find, Filter: 4. No Filter, Reports, Close.
- Status Bar:** Select record in match list to edit, January 29, 1998 Thursday 5:20:09 PM.

the Share Status tab of the Companies window.

For details on the Contacts and Contact Log tabs see HOW TO USE THE COMPANIES WINDOW (page 43); HOW TO HOW TO ADD A NEW CONTACT (page 52)

HOW TO USE THE OFFERS-BY-INVESTMENT WINDOW

The function of the Offers by Investment window is to allow for fast access to the data in the Offers tab of the Offers by Investor (Trades) window. The structure and the data contents of the Offers by Investment window is equivalent to the structure and the data contents of the Offers tab in Offers by Investor (Trades).

HOW TO USE THE FUNDS MAINTENANCE WINDOW

The primary purpose of this window is to set up and maintain funds. This screen's perspective starts with the Fund and allows you to drill down into the detail data associated with the Fund. There are seven fields in the Main Data area (Header) of the window (Name [Fund Code], Name [Fund Name], Fund Trading Symbol, Fund ID, , Company ID, General Partner and General Partner ID) and six tabs containing the additional data about the fund displayed in the Main Data area (Matches, Description, Dates, Costs, Holdings and Investors). Since every fund has a corresponding company record, the ID of the corresponding company is displayed in the Company ID field. The General Partner field contains the name of that company. General Partner ID gives the Company ID where Company Type = "General Partner".

The Matches tab has the following fields: Fund Code, Fund Name, Fund Trading Symbol, General Partner (Company Name), Total Funds Placed and Current Remaining Value. The Description tab fields store non-date and non-dollar amount information about the fund. The Dates tab is designed to store all available date-type information relative to the fund. The Costs tab consists of all dollar amount fields. The Holdings tab lists the holdings of the selected fund. The Company button brings forward the Companies window for company in currently highlighted row/record. The Investors tab has Contact and Company buttons taking you to the Contacts and Companies windows respectively with information on the currently selected Investor.

HOW TO VIEW OFFERS ON A PARTICULAR INVESTMENT

To view the offers on a particular investment:



1. In the Trades window (Hot Key menu (F9) > Holdings and Offers) with a record displayed in the main data area (click Find if you are in criteria state) double-click a record to select it.
2. Click the Offers tab.
3. Make sure you see tab data in spreadsheet view. Click View if necessary.
4. In the Display Offers text box type the name of the property or click the ellipsis button [...] on the right and select an investment from the Lookup window.
5. In the Display Offers option click the Selected Investment radio button.
6. To see all offers on the particular investment, click the All radio button of the Investors option. To see the offers on the particular investment that are made by the company in the header, click the Selected radio button of the Investors option.

To see what a particular company is offering:



VIEWING OFFERS MADE BY A PARTICULAR COMPANY

1. In the header of the Trades window (Hot Key menu (F9) > Holdings and Offers) select the company you want to view from the drop-down list of the Name field.
2. Click the Offers tab.
3. Click Selected radio button in the Investor option (default).

VIEWING THE HOLDINGS OF A PARTICULAR COMPANY

To see the holdings of a particular company:

In the Trades window (Hot Key menu (F9) > Holdings and Offers) select the company you want to view by double clicking its record in the Matches tab or by clicking the Select button. The Holdings tab is selected automatically.

HOW TO ADD INVESTMENT INFORMATION

To add investment information:



1. From the Hot Key menu select the respective option box (Offers by Investor, Offers by investment, Funds or Transfers).
2. In the Main Data Area cells enter the main data of the new record. Use the Enter key or the tab key to navigate between the cells.
3. Click the Find button. If there is no duplicate for that record, MCS returns the message “No matching records found. Add new record?”
4. Click Yes. The new record becomes the active one. You can start entering some additional data in the tab area.

HOW TO CHANGE INVESTMENT INFORMATION

To change investment information:



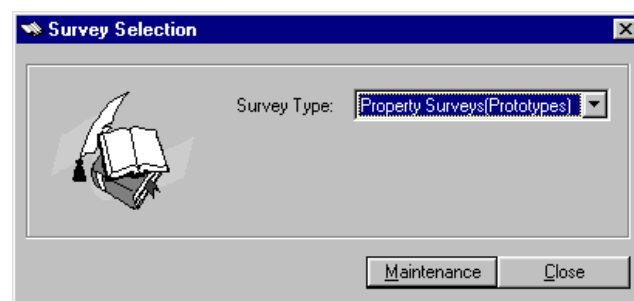
1. In the Matches tab of the respective investment window (Offers by Investor, Offers by investment, Funds or Transfers) select the record you want to modify by clicking on it.
2. Click Select.
3. Click on the cell or combo box of the record you want to modify. If the cell you want to modify is in the tab area, choose the appropriate tab.
4. Type the new information for that cell or choose a new content from a combo box list.
5. Press Enter. The highlight moves to the next cell.

Your changes are automatically recorded when you go to another tab or record.

Survey Information

HOW TO USE THE SURVEY SELECTION WINDOW

Figure 37 - The Survey Selection window



Open the Survey selection window (Figure 37) by clicking a Surveys radio button in the Hot Key menu (F9). From the Survey Type drop-down list select the survey type you want. Then click the Auto Create button to create a new survey or Maintenance to edit an existing one.

HOW TO ENTER AND EDIT AN EXISTING SURVEY

To enter and edit data using Survey Maintenance:



1. In the Hot Key menu (F9) click on a Surveys radio button to activate the Survey Selection window
2. In the Survey Selection window select a survey type from the Survey Type drop-down list.
3. Click Maintenance. The Survey Property window shows up.
4. In the header of the Survey Property window enter the values for (some of) the Survey ID, Survey Code, Period, Year, NML# and PSA# fields that will be used as search criteria.
5. If necessary, you can limit your search to the active or non-active surveys. Use the Filter combo box on the main data area button bar.
6. Click "Find". If there is only one survey matching your criteria, it gets automatically displayed in the Property tab. If there are more than one surveys matching your criteria, they are displayed in the Matches tab grid.

You will need to double-click the desired survey (or to click on it once and then click the Select button) to switch to the Property tab.

7. In the Survey Property tab grid make the changes you want and move to another record to save the changes.



Notes:

1. You can directly go to the desired survey by selecting its code from the Survey Code combo box. (Step 4)
2. The survey ID will be printed on all survey forms. Surveys can be deleted using the Delete option on the Edit pull-down menu.
3. When the Auto Calc box is checked, the following cells in the Properties tab are automatically calculated: "Rent per SQFT", "Expense per SQFT", "Occupancy %" and "SQFT". Enabling the automatic calculation mode does not disable these cells for manual data input and editing.
4. The Mix tab is disabled for the Property (Prototype) survey type.
5. Clicking Next on the last survey record (in Property tab) enters you in "Adding an New Record" mode, i.e. you can create new records for the active survey by inputting data in the Property tab cells.

HOW TO CREATE A NEW SURVEY

To create surveys using Create Survey form:



1. Select a Surveys radio button from the Hot Key (F9) menu.
2. On the Survey Selection window, select a Survey Type from the drop-down list of available survey types.
3. Click "Auto Create". The Create Surveys form pops up.
4. Enter the appropriate data in the fields of the Create Surveys form.
5. If necessary, select a filter to be applied to the survey (the Filter combo box).
6. Click Create. The Create New Survey dialog box pops up asking you for confirmation for creating the new survey.

7. Click Yes. An info-type dialog box pops up telling you how many records have been created for the new survey.
8. Click OK.

Notes:

1. You can enter the year in short (two-digit) format, e.g. *99* instead of *1999*.
2. Enter a descriptive code in the Survey Code field. The Survey Code can later be used to identify and select the survey issue. E.g. Survey Code = “97Q1”. There may be only one survey per period per survey type.
3. If you try to create a new survey for a period and year for which there is an existing survey and you enter a survey code that is different from the code of the existing survey, a dialog box pops up asking you to confirm the replacement of the old survey code with the new one.
4. A property will be included in a survey only if it has proper settings in the “Surveys for this property” window (this window pops up on clicking the Surveys button next to the down-right corner of the Surveys tab of the Property Maintenance window): a Survey Type must be selected and the Used and Active boxes must be checked (checking the Used box is enabled when the Active box is checked). Make sure all properties that are to be included in the survey have the right settings in the “Surveys for this property” window. There may be more than one Survey Type per property

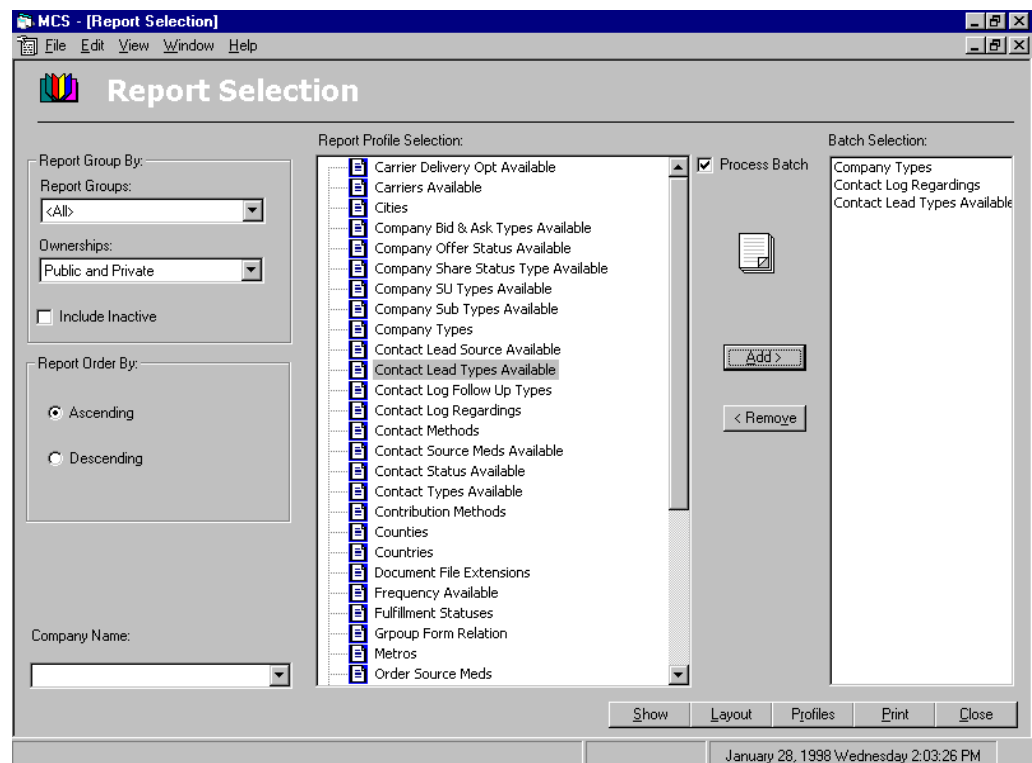
Chapter 5

REPORT GENERATION

How to Use the Report Selection Windows

The Report Selection windows are the other category of MCS user working windows (Figure 38). The user can choose from a list of report profiles or define a profile of his own. The list of report profiles that match the specified criteria appear in the Report Profile Selection field in the middle section of the window. The search criteria are represented by three combo boxes at the left-hand side of the screen. The Report

Figure 38 - A MCS Report Selection Window



Groups combo box lets you filter the reports by their main subject. The Ownership combo box has three options: “Public”, “Private” and “Public and Private”, allowing respectively for listing the public reports only, the private reports only or both. The Company Name combo box lets you view the reports generated by a particular company. When you open the Report Selection window, the reports in the Report Profile Selection field are listed alphabetically. You can reverse the list order by selecting the Descending radio button in the Report Order By frame. Only active data will be included in the reports if you leave the Include Inactive check box unchecked (default).

The typical buttons for The Report Selection window are Show, Layout, Profiles, Print and Close (on the lower right-hand side of the screen). The Show button lets you view the programming structure of the selected reports. The Layout button carries out a preview of the selected report displaying its first page. The Profiles button lets you create a new Report Profile (new report based on new filtering criteria) if this is allowed for the current report. The Print button brings forward the Print Selection window, which allows for output not only to a printer but also to the screen, MS Office applications (Word and Excel) or text file.

How to Generate Reports

GENERATING A REPORT

All MSC reports fall in one of the following three types: Available Data Reports, Dump Reports and Filter Reports. You work the in the same way with all reports of a given type. The Available Data Reports output all the information that is contained in certain fields of the MCS database. You cannot filter the data they return. You have, however, the option to select the output destination: screen, printer, other application or file, like with all other reports. Dump Reports are used to present as a report the records that are currently available in the screen form you are working with. This means that the search criteria and/or filters that you have just applied to your active screen will be applied again in the report output (i.e. the data from the screen form will be "dumped" into the report). When activated, Dump Reports pop up the Setup Report dialog window. It gives you an option to produce an exact match of your active screen (the Use Last Selection radio button - default) or to generate a different output by selecting a filter from the pre-defined ones for that screen (The Use Filter radio button. When selected, the list of pre-defined filters appears in the From Filter drop-down box.). Filter Reports brings forward a filter form to enter the search criteria to match data against.

Because they are too many, it might be inconvenient for you to select a report if you have all of them listed in the Report Selection window. For that reason, reports are broken down into several groups according the type data they contain and the way they present it. In the Report Groups drop-down list you can choose a group and narrow your view only to those reports that belong to that group. You can list all reports again by choosing the All option. For a description of the current MCS reports, see the Appendix.

To generate a report:



1. From the Hot Keys (F9) window select the Reports radio button in the frame you want to view or from the current working window click the Reports button.
2. Apply the appropriate filters on the left-hand side of the Report Selection window (Report Groups, Ownerships, Include Inactive and Company). If necessary, switch the sort order by selecting a Report Order By frame radio button (Ascending or Descending). The list of report profiles that match the specified criteria appear in the Report Profile Selection field in the middle section of the window.

3. In the Report Profile Selection field click on the report profile name you want to use. If you want to view multiple reports, check the Process Batch box and then click the Add button after selecting each desired button.
4. If you want to preview the first page of the report, click the Layout button. To directly view the report, click the Print button instead and enter the appropriate settings in the dialog boxes that appear.

See also: How to Use the Report Selection Windows

GENERATING A DUMP REPORT

To generate a dump report:

1. From the relevant tab of the relevant window (see the Note below) open the Print command from the File menu or press Ctrl+P.
2. Select the desired options in the dialog boxes that appear and click "Print" or "OK".



Notes:

1. Dump reports can be activated from the following windows:
 - Subscription Dump – Subscriptions window (Matches tab);
 - Subscriber Dump - Subscriptions window (Matches tab);
 - Companies Dump – Companies window (Matches tab);
 - Contacts Dump – Contacts window (Matches tab);
 - Property Dump – Property Maintenance window (Matches tab);
 - Trades Dump – Trades window (Matches tab);
 - Contact Log Dump - the Contact Log tab of the following

windows: Contacts window, Companies window, Subscriptions window and Trades window

2. Activating dump reports from the Matches tab of Subscriptions window brings forward a dialog box asking you to specify whether you want a more detailed (Sub Detail option) or less detailed (Dump Report option) report.
3. The Contact Log Dump report pops up a dialog box asking you whether you would like to view the Notes on the contact log records.
4. The Trades Dump report pops up a dialog box asking you whether you would like to view data on holdings, offers or both. Simply check the appropriate boxes.

How to Create a New Report Profile

With MCS you can easily create a New Report Profile by modifying an existing one.

To create a new report profile:



1. Open the window containing the type of data for which you want to create a new report profile. For example, if you want to create a new report profile on your companies data, open the Companies window.
2. Click Reports. The Report Selection window appears on the screen.
3. In the middle section of the window select a report that is initialized as modifiable by clicking on it.
4. Click Profiles. The Profile Maintenance window appear on the screen.
5. In the Profile Description frame enter the appropriate information.
6. In the Enter Your Criteria spreadsheet create the filter for the new report profile.
7. Add notes in the Notes cell if necessary.

8. Click Ok to create the report profile or Print to export it to a screen, printer or application.

Chapter 6

ADDITIONAL SOFTWARE FEATURES

Printing Data

MCS prints data as a report.

To print data:



1. From the Hot Keys (F9) window select the Reports radio button in the relevant frame or from the current working window click the Reports button.
2. Apply the appropriate filters on the left-hand side of the Report Selection window (Report Groups, Ownerships, Include Inactive and Company). If necessary, switch the sort order by selecting a Report Order By frame radio button (Ascending or Descending). The list of report profiles matching the specified criteria appear in the Report Profile Selection field in the middle section of the window.
3. In the Report Profile Selection field click on the report profile name you want to use. If you want to print multiple reports, check the Process Batch box and then click the Add button after selecting each desired button.
4. If you want to preview the first page of the report, click the Layout button. To directly print the report click the Print button instead and in the Print Selection window that have just appeared click the select the Output to Printer radio button.
5. Click Print.

Exporting Data to Microsoft Word or Microsoft Excel Format:

To export data to Microsoft Word or Microsoft Excel format:



1. From the Hot Keys window (F9) select the Reports radio button in the relevant frame or from the current working window click the Reports button.
2. Apply the appropriate filters on the left-hand side of the Report Selection window (Report Groups, Ownerships, Include Inactive and Company). If necessary, switch the sort order by selecting a Report Order By frame radio button (Ascending or Descending). The list of report profiles matching the specified criteria appear in the Report Profile Selection field in the middle section of the window.
3. In the Report Profile Selection field click on the report profile name you want to use. If you want to print multiple reports, check the Process Batch box and then click the Add button after selecting each desired report.
4. If you want to preview the first page of the report, click the Layout button. To directly print the report click the Print button instead and in the Print Selection window that have just appeared click the select the Output to other Applications radio button (on the left) and the appropriate application (on the right).
5. Click "Print".

Defining a New Filter

With MCS, you can easily define your own filters.

To define a new filter:



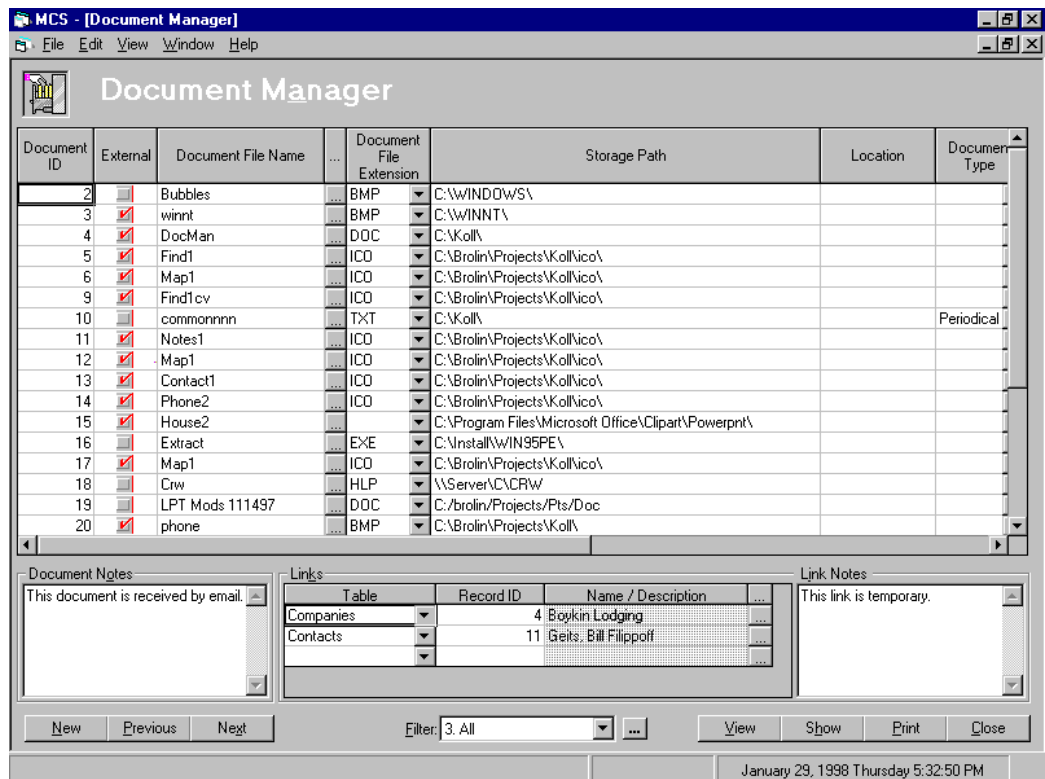
1. Open the window in which you want to apply the filter.
2. Click the ellipsis button [...] next to the Filter combo box. A Find screen, containing the fields from the main data area pops up.
3. Type the text you are going to use as search criteria in the relevant fields. You may use the ellipsis button [...] next to each cell to create advanced search definitions.
4. Click "Save". A pop-up dialog box prompts you to give a name for your filter.
5. Type the filter's name and click "OK".
6. Click "Save". Your new filter is saved and automatically applied. From this moment on, you are able to apply your filter directly from the Filter drop-down list.

Working with Documents

HOW TO USE THE DOCUMENT MANAGER WINDOW

The Document Manager Window is designed for easy adding, finding and viewing MCS database related documents. (Figure 39) With the Document Manager you enter

Figure 39 - The Document Manager window



documents in different formats as Document Manager Records. You can link each document according to its content to a MCS database entry – property, company or contact or even to another Document Manager Record (the Links spreadsheet). One document can be linked to multiple entries. You can also add notes about documents (the Document Notes cell) and about links (the Link Notes cell).

**Note:**

If you are not the system administrator, you can view only the Public and your own Private documents. Also, you can edit only the documents that are either not read-only or are your own.

HOW TO WORK WITH AN EXISTING DOCUMENT

Viewing, Editing and Printing an Existing Document

To view, edit or print a document that has already been added to the Document Manager:



1. Click the Document button of your current window.
2. Select a filter from the drop-down list in the Filter combo box. All records meeting the specified search criterion appear in the Document Manager window.
3. Click on the document you want to work with.
4. Click the Show button. The application associated with that document opens it.
5. View, edit or Print the document using the application's features.

Notes:

1. You need to have the application installed on your computer and the file extension of the document registered in the Windows registry in order to be able to open the document.
2. To print the document with the application's default print settings and without viewing it perform steps 1-3 as from above and click Print button.

Modifying an Existing Document Manager Record

You can modify the data in a Document Manager record manually or:

To Modify a Document Manager Record:



1. Click on the Look-up button [...] next to the Document File Name or Storage Path cell.
2. Select the file you want to substitute the existing record with.
3. In the Select a Document File window mark the Open As Read-only check box if necessary and click Open. The Document Manager Record is updated with the new file.

HOW TO ADD A DOCUMENT TO THE DOCUMENT MANAGER

Manually Adding a Document to the Document Manager

To add a document to the Document Manager manually:



1. Click the Document button of your current window.
2. Click "New"
3. Enter the appropriate data in the appropriate cells.
4. Click "Previous" or "Next" to save the new record or "New" if you want to add another record.

Adding a Document to the Document Manager through Select-a-Documnt Window

To add a document to the Document Manager through Select a Document File window:



1. Click the Document button of your current window.
2. Click "New".
3. Click on the Look-up button [...] next to the Document File Name or Storage Path cell.
4. Select the file you want to add.
5. In the Select a Document File window mark the Open As Read-only check box if necessary and click "Open". The file is added as a Document Manager Record.

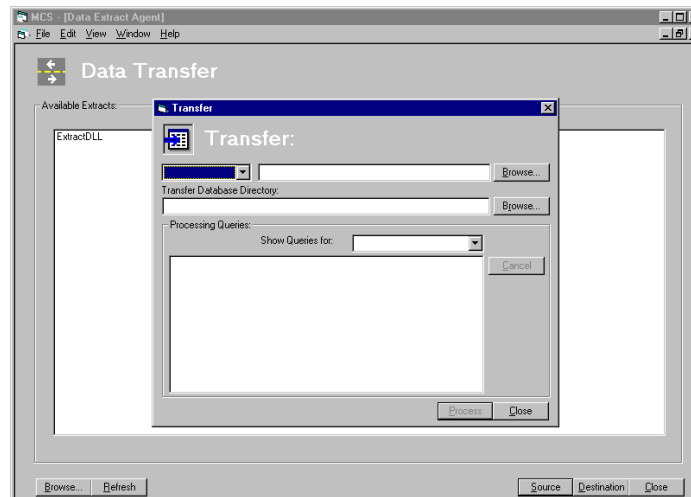
6. Click "Previous" or "Next" to save the new record or "New" if you want to add another record.

Transferring Data between Databases

HOW TO USE THE DATA EXTRACT AGENT

The MCS the Data Extract Agent window (Figure 40) serves to transfer database extracts from one database to another. To open the Data Extract Agent window, click the Data Transfer radio button in the Maintenance frame of the Hot Key (F9) window.

Figure 40 - The Data Extract Agent window with the Transfer pop-up window opened



The Available Extracts field of the window lists the pre-defined filters you can use to create database extracts. You can also use the Browse button to locate and register filters that are not currently listed. (Use the Refresh button to list the filter you have just located)

Both Source and Destination buttons bring forward the Transfer pop-up window. Use the

Source button when you create the transferring text files from the source database. Use the Destination button when you import data from the transferring text files to the destination database.

The Database cells of the Transfer window allow you to select the desired database or to locate it yourself. This will be the source database if you have entered the Transfer window through the Source button and the destination database if you have entered the Transfer window through the Destination button.

The Transfer Database Directory cell is used to enter the directory where the transferring database extract text files are stored or should be created. You can also use the Browse button on the right to locate the transfer database directory by yourself.

The Processing Queries frame lists the filtering procedures to be implemented when creating the database extract. You can view and choose pre-defined queries (filter sets) from the Show Queries from combo box.

HOW TO TRANSFER DATA BETWEEN DATABASES

MCS has a feature allowing you to transfer data extracts from one database to another. This feature, called “Data Extract Agent”, supports all database file formats (in both exporting and importing mode) used by Koll companies and requires no technical knowledge from the user. The Data Extract Agent uses pre-defined filters creating data extracts. The data transfer process involves three procedures: exporting the desired data extract to text files by the sender (1); sending that text files to the recipient’s machine or network (typically done by the sender via Internet as an attached file to an E-mail message) (2); importing the data extract from the text files to the recipient’s database (done by the recipient) (3).

See also: HOW TO USE THE DATA EXTRACT AGENT (page 77)

To export a data extract to a text file:



Exporting Data Extracts to Text Files

1. From the Hot Key Menu (F9) click the Data Transfer radio button in the Maintenance frame. The Data Extract Agent window appears on the screen.
2. In the Available Extracts field, select the data extract you want to export.

Notes:

1. If the desired filter exists, but does not appear in the Available Extracts field., you may try to locate it using the Browse button. (Use the Refresh button to list the filter you have just located)
2. If the filter you need to create the desired extract does not exist, contact your system administrator.



3. Click "Source". The Transfer window pops up.
4. Select a database from the Database drop-down list or enter the database path and name in the cell to the right. Use the Database Browse button if necessary.

4. In the Transfer Database Directory cell enter the directory for the transfer text files to be created or select the directory using the Transfer Database Directory Browse button.



Note:

It would be more convenient for you if the directory you have chosen is empty.

5. Select the desired set of queries from the Show Queries for combo box.
6. Click "Process" to implement the transfer.

Importing Data Extracts from the Transferring Text Files into a Database

To import a data extract from thto a text file:



1. From the Hot Key Menu (F9) click the Data Transfer radio button in the Maintenance frame. The Data Extract Agent window appears on the screen. (Figure 40)
2. In the Available Extracts field, select the data extract you want to export. Click "Destination". The Transfer window pops up.
3. Select the destination database from the Database drop-down list or enter the database path and name in the cell to rhe right. If the name of the desired extract is not present, use the Database Browse button to find the required .dll file.
4. In the Transfer Database Directory cell enter the directory for the transfer text files containing the data extracts or select the directory using the Transfer Database Directory Browse button.



Note:

It is advisable that the transfer text files directory should contain only the files needed for this transfer.

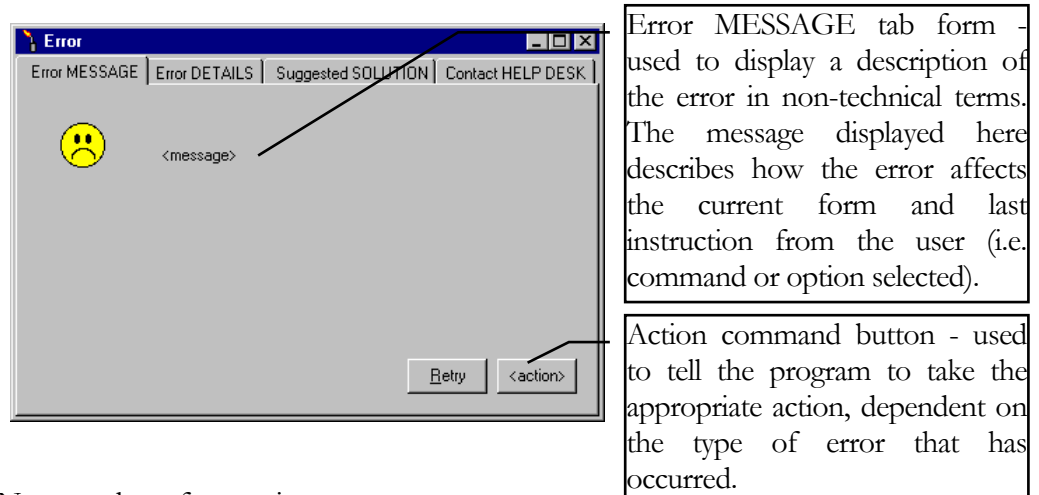
5. Click “Process” to implement the transfer.

Help - If Something Goes Wrong

HOW TO HANDLE ERROR MESSAGES

Whenever an error occurs during your MCS session, the following Error pop-up screen is displayed (Figure 41):

Figure 41 - The Error Window - Error Message tab



Now you have four options:

- * To click the Retry button to repeat the action that has brought you the message;
- * To click the <action> button to implement the default solution;
- * To click the Suggested Solution to see a detailed explanation of the error message and choose between the other options;
- * To contact Brolin's Help Desk. Click the Contact HELP DESK tab to proceed further.



HOW TO ASK QUESTIONS, REPORT PROBLEMS AND MAKE SUGGESTIONS ON MCS

MSC provides you a convenient way to ask your questions, report any problems or suggest what you find useful about MCS. Thus you can actively improve your MCS user's skills and help solve problems and make MCS even better. The MCS feature letting you add remarks, comments, etc on any MSC screen is the User Notes feature. It opens a pop-up form containing a text field in which you can type what you want to say about a particular screen, its features, how it works and so on. All User Notes added by you and the other MCS users are retrieved by your system administrator and sent to Brolin Corporation's technical staff. You can expect feedback with answers to your questions, solutions to your problems and comments on your suggestions.

The User Notes pop-up window explained:

Figure 42 - The User Notes pop-up window

The User Notes pop-up window can be activated from any MCS window by pressing F12 (Figure 42). The notes written in it always refer to the active MCS window. You cannot write notes on a window that is currently inactive.

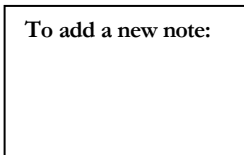
THE USER NOTES POP-UP WINDOW HAS THE

FOLLOWING FIELDS:

- **Created Date:** Shows the date the note is created. You cannot change the content of this field.
- **Updated Date:** Shows the date the note has been updated. If note has not been updated, the field displays the same content as Created Date field. You cannot change the content of this field.
- **Form and Tab fields:** Show the names of the window and the tab the note refers to. You cannot change the content of this field.
- **Notes:** Text field in which you type the content of your note.
- **Type (in spreadsheet view only, in form view these are Problem, Question and Suggestion radio buttons):** Select the category in which your note falls into from the drop-down list.
- **ID (in spreadsheet view only):** You cannot change the content of this field.

THE USER NOTES POP-UP WINDOW HAS THE FOLLOWING BUTTONS:

- Problem, Question and Suggestion radio buttons (in form view only, in spreadsheet view these are choices in the Type field drop-down list): Select the category in which your note falls into. The default option is Problems.
- Previous: Saves the current note and moves to the previous one.
- Next: Saves the current record and moves to next record.
- Cancel: Clears the form.
- Close: Saves the current record and closes the form.
- View (standard MCS window button): Toggles the window between form and spreadsheet view.
- Reports (standard MCS window button): Creates User Notes report.
- The User Notes button bar has also a status indicator showing the total number of notes when you view the notes or displaying “Adding new record” message when you add a new note.



1. If the window you want to add a note about is not currently the active one, make it active. (Select that window from the Window drop-down menu list)
2. Press F12. The User Notes window pops up.
3. Type the text of your note. Try to be as much specific as you can. If reporting a bug, describe exactly how it happened. General comments are usually of very little value.
4. From the Problem/Question/Suggestion radio buttons select the one that best describes the content of your note.
5. Click one of the following buttons:
 - * Close if you have finished working notes.
 - * Next to write another note. Click the Note field and go to step 3.
 - * Previous or View if you want to view or update the notes.

To update an existing note:



1. Press F12. The User Notes window pops up.
2. Click View. The list of user notes appears in spreadsheet view.
3. Select the note you want to update.
4. Click View. The list of user notes appears in form view.
5. Click the Note field and update the record
6. Click one of the following buttons:
 - 6.1. Close if you have finished working notes.
 - 6.2. Previous, Next or View if you want to continue working with notes.

Chapter 7

THE MCS SHORTCUT KEYS



MCS supports the general Windows shortcut conventions like *Alt + underlined letter* to open a menu item, *Alt + F4* to exit, etc.. Also, there is a MCS specific set of shortcut keys and they are described in this chapter.



Enter	When on a cell, moves the focus (i.e. the highlight) to the next control (i.e. to the next object in a form or spreadsheet)
Tab	Moves the focus (i.e. the highlight) to the next control (i.e. to the next object in a form or spreadsheet)
Shift + Tab	Moves the focus to the previous control
F1	The MCS Help is context-sensitive. The Help screen displayed is about what the current focus is on.
F2	Clears the content of the current control
F3	Enters the current date (in date type cells) or time (in time type cells) when the cell is in Edit mode
F4	Opens the drop-down list of the Go To Menu option box (in the Hot Key window); Pops up a calendar (in date type cells) or a clock (in time type cells) window. The calendar and the date windows serve to enter dates and time in a cell without typing. To enter a date, select the date and click OK; to enter time, drag the clock hands with the mouse pointer to the desired and click OK.
F5	Displays some information on the record history – who and when has created the record and who and when its most recent modification was made. For the type of records where

Country and GIS Code fields are available, Country and GIS Code cell are shown, too.

F6	Toggles cell mode (View/Edit) in spreadsheets
F7	Moves focus to the previous tab
F8	Moves focus to the next tab
F9	Brings the Hot Key window.
F10	Spared for future versions of MCS
F12	Pops up the User Notes window
Ctrl+T	Inserts current date and time in Note-type fields (text fields allowing for input of more than one row)
Alt + F11	Toggles between standard tab stop mode and user-defined tab stop mode. When in user-defined tab stop mode, this is indicated in the window header.
Ctrl + Sift + F11	Toggles the custom tab stop defining regime on/off. This feature allows you to navigate with the Tab (Shift+Tab) key directly between the cells you work with in the order you need without having to go through all cells in a form. When you have your own custom tab stops defined, every pressing of the Tab key shifts the focus to the next control you have specified in the order you have defined.

To define your own tab order:



Select the tab you want to define a custom tab order for.

Press Ctrl + Sift + F11.

Click the cell you will want to start from next time you open the tab.

Press the [`] button (Single Opening Quote button)

Click the next cell.

Repeat steps 4-5 for every control you want to be a Tab stop. The rest of the controls will be skipped in user-defined tab stop mode. Be sure to select the controls in the order in which you intend to work.

When finished, Press Ctrl + Sift + F11 again.

GLOSSARY

Following are explanations of some of the technical terms used to describe the MCS working windows. For detailed explanation of the MCS working windows **refer to** The MCS Working Windows chapter (page 15).

Criteria State

The criteria state is the initial state of every data manipulation window when opened from the Hot Key menu. In criteria state all cells are empty and the program waits for your search criteria. To see any records in a data manipulation window you have to specify your search criteria in the header and/or the Filter combo box.

Dump Reports

Dump reports are reports that display all currently available data in the active window. Dump reports are activated within the relevant MCS windows (see below) by choosing the Print command from the File or by pressing Ctrl+P. The actual contents of a dump report depends on which tab is active when you activate the report and on the filter applied in the working windows Button Bar Filter combo box. When activated from the Matches tab, dump reports return data on all records that are currently displayed in the Matches tab grid, which means that the current Filter combo box settings that have been applied to the Matches tab grid are applied to the dump report, too. If you activate a dump report from within the Contact Log tab, the Contact Log dump report is displayed for the current contact. Following is a list of the MCS dump reports and the windows from which they can be activated.

Subscription Dump - Subscriptions window (Matches tab);

Subscriber Dump - Subscriptions window (Matches tab);

Companies Dump - Companies window (Matches tab);
 Contacts Dump - Contacts window (Matches tab);
 Property Dump - Property Maintenance window (Matches tab);
 Payments Dump - Payments window (activated by the Payments button in the Orders, Products and Publications tabs);
 Trades Dump - Trades window (Matches tab);
 Contact Log Dump - the Contact Log tab of the following windows: Contacts window, Companies window, Subscriptions window and Trades window

Form View

Form View is a view mode in which you can view only one record at a time as opposed to Spreadsheet (Grid) View.

Look-up Button

The Look-up button (the button that has elyipsis on it [...]) on the right of some cells lets you implement searches for the contents of that field in order to display the right information for that cell. Clicking the Look-up button brings out the Look Up window for that particular field. Main Data Area/Header

The main data area or the "header" of a data manipulation window is the upper area of the window (the area above the tabs). It displays the main data for the current record. The content of the header remains the same when you switch the tabs.

Main Data Area/Header

The main data area or the "header" of a data manipulation window is the upper area of the window (the area above the tabs). It displays the main data for the current record. The content of the header remains the same when you switch the tabs.

Primary Product

When a new publication is created, a new product containing only this publication is created automatically. This product is called the "primary product" for this publication. Other publications cannot be added to primary products.

Spreadsheet (Grid) View

Spreadsheet (Grid) View is a view mode in which you can view several records at a time in Spreadsheet (Grid) format as opposed to Form View.

Status Bar

The Status Bar (at the bottom of the MCS working windows) gives you information that is relevant to the active window. The left-hand side of the Status bar gives you a clue of the action that is most appropriate for the moment. The middle part displays some quantitative information about the number of characters in the active database

cell. The right-hand side gives you the current date, day of the week and time. The Status Bar gives you information that is relevant to the active window. The left-hand side of the Status bar gives you a clue of the action that is most appropriate for the moment. The middle part displays some quantitative information about the number of characters in the active database. The right-hand side gives you the current date, day of the week and time.

Subrecord

A record (line) in the tab area when viewed in spreadsheet (grid) format.

Tab Area

The Tab Area is the area of an MCS working window that is displayed beneath the header. It contains information on the current record displayed in the header. When you switch the tabs, the content of the header remains the same. In most tabs, data can be displayed in two alternative views - spreadsheet (grid) view and form view. The view mode is toggled by the View button.

Tab Area Button Bar

At the bottom of the tab area there are several buttons relevant to the displayed tab. Generally these are New, Previous, Next and View. The Previous and the Next buttons are used to browse to the previous and the next records. The View button toggles the record between spreadsheet and form views. The Report button is used to generate a report. The tab area buttons vary from tab to tab.

Working Window's Button Bar

The working window's Button Bar is right below the tab buttons. Typically it has the Clear, Previous, Next and Find buttons on the left and the Reports and Close buttons on the right. The Filter combo box and the small Create/Edit filter button (marked with ellipsis dots - [...]) are in the middle. The Previous and Next buttons display the previous and the next record of the main data. The Clear button clears the working window from any records and the Find button implements the search specified by the criterion in the Filter combo box. The Create/Edit button is used when the search criteria you want to apply are not available in the Filter combo box. The Reports button takes you to the Reports Selection window. The Close button closes the window.

Appendix

The following table contains information about the current report groups and the reports assigned to them:

ID	Group	Name	Information
2	Available Data	Metros	Returns the list of metropolitan areas.
3	Available Data	Regions	Lists US geographical regions and the ID numbers assigned to them in the MCS database.
5	Available Data	Sub-Markets	Returns the list of real estate sub-markets and the metros they belong to.
7	Available Data	Cities	Returns the list of cities in the MCS database sorted by ID # and the counties they belong to.
9	Available Data	Counties	Lists US counties.
11	Available Data	States	Lists US states sorted by their MCS database ID #, together with their abbreviations and the region they belong to.
12	Available Data	ZipCodes	Lists US zip codes and the states they belonged to sorted by MCS zip code ID #.
13	Available Data	Countries	Returns a list of abbreviations used for the countries in the MCS database.
17	Available Data	Contact Types Available	Lists the available contact types and their ID #'s.
18	Available Data	Contact Log Follow Up Types	Returns a list of the available follow-up instructions sorted by ID #.
19	Available Data	Contact Methods	Returns a list of the available contact methods sorted by ID #.
20	Available Data	Carriers Available	Returns a list of the available message carriers sorted by their ID #.
21	Available Data	Order Source Meds	Returns a list of the available order source mediums sorted by their MCS database ID #.
22	Available Data	Report Groups	Returns the content of the Report Groups combo box in the Report Selection screen (a list of the available report groups defined in the Report Maintenance screen sorted by their MCS database ID #).
23	Available Data	Product Statuses	Returns a list of the available product statuses sorted by their MCS database ID #.
24	Available Data	Contact Log Regarding	Returns a list of the available contact log regardings sorted by their MCS database ID #.
25	Available Data	Contribution Methods	Lists the available communication media available for contribution purposes.
26	Available Data	Fulfillment Statuses	Returns the list of the available fulfillment statuses and their ID #'s.
27	Available Data	Company SU Types Available	Returns the descriptions of the company share/units types available sorted by their company share unit type ID's.
28	Available Data	Document File Extensions	Returns the list of the document file extension together with the file type names as used by the Document Manager.
29	Available Data	Company Sub Types Available	Returns descriptions of the company sub-types with their sub-type codes, sorted by MCS database ID #.
30	Available Data	Contact Source Meds Available	Returns the list of the available contact source mediums together with descriptions of their contact types, arranged by their contact source mediums ID #'s.
31	Available Data	Frequency Available	Returns publications frequencies with their frequency names' abbreviations (e.g. <i>Mo.</i> for <i>Monthly</i>), sorted by frequency ID #'s.

ID	Group	Name	Information
32	Available Data	Group Form Relation	Lists the report group names and the forms to which they are linked.
33	Available Data	Contact Status Available	Lists the contact status ID #'s, status names and contact type descriptions.
34	Available Data	Company Types	Lists the company types with their type codes, company type ID's and information whether the type is traded by LF.
35	Available Data	Contact Lead Source Available	Returns the contact lead source description names with the contact types sorted by lead source ID #'s.
36	Available Data	Contact Lead Types Available	Returns the contact lead types description names with the contact types sorted by lead type ID #'s.
37	Available Data	Order Statuses Available	Returns the names of the order statuses with information whether a status subjects to fulfillment.
38	Available Data	Property Types Available	Lists property types and property subtypes with their codes and descriptions sorted by MSC database ID #'s.
39	Available Data	Payment Methods	Lists the available payment methods with GL distribution description.
40	Available Data	Carrier Delivery Opt Available	Lists the delivery options for each carrier with information about their terms as to delivery time, minimum and maximum weights and prices.
41	Available Data	Survey An Types Available	Lists information about the relation of the survey analysis types to MCS database tables and fields.
42	Available Data	Company Bid & Ask Types Available	Returns the bid and ask type names and the type bids.
43	Available Data	Company Offer Status Available	Lists offer status names.
44	Available Data	Company Share Status Type Available	Returns the company share status type names sorted by their share status type ID's.
47	Company (REIT & REL)	Companies Dump	Returns the contents of the header, company branches and contact log tabs of the Companies screen for every record listed in the Matches tab.
45	Contacts	Contact Log Dump	Returns the information on the current contact in the Contact Log screen. Gives you an option to choose whether to include the notes about the contact in the report.
53	Contacts	Contact Dump	Returns the contents of the header, company and personal tabs of the Contacts screen, for every record listed in the Matches tab.
54	Contacts	Contact Labels	Prints address labels for the contacts that matches the search criteria specified in Publications Filter pop-up window.
48	Properties	Property Owned By REIT	Lists all properties owned by the specified (in the Properties Owned by REIT filter dialog box) REIT with their locations, types, dates built, GLA's, NLA's, acquiring dates and prices, # of units and % of ownership.
51	Properties	Transaction Entry	Returns the transactions entry specified in the Report Options pop-up window (this window gives you the options to specify a property by its name and/or creation date).
52	Properties	Property Dump	"Dumps" the contents of all tabs of the Property Maintenance screen for every record listed in the Matches tab.
62	Properties	Bulk Dial Report	Generates a report for bulk dialing purposes for every record listed in the Matches tab of the Property Maintenance screen.
16	Subscriber	Publication Fulfillment List	Returns the fulfillment log records for every order, recipient or product specified in the Publications Filter pop-up window.
46	Subscriber	Sub Detail	Returns detailed information about subscribers.
50	Subscriber	Subscriber Dump	"Dumps" subscriber information contained in the Orders, Products and Publication tabs of the Subscriptions screens.
55	Subscriber	Payment Dump	"Dumps" payment information for the current subscriber, branch or a company.
56	Subscriber	Subscription Summary Report	Reports sales for a given salesperson. In the Subscription Summary pop-up filter, right-click the date fields to enter the appropriate date and select a salesman from the drop-down list. The paid amounts are summarized by according to the value of the Order Date field in the Orders tab of the Subscriptions screen.
57	Subscriber	Payment Reconciliation Report	Shows how a total amount paid is allocated to multiple orders and publications. Use right click in the fields of the Payment Reconciliation pop-up filter to enter dates easily.
58	Subscriber	Credit Card Payments	Lists credit card payments for a given period, credit card type, credit card code, and/or by a salesperson. Enter the appropriate data in the Credit Card Payments pop-up filter.
49	Trades	Trades Dump	"Dumps" information from the Trades screen by giving you the options to output the holdings information, the offers information or both.
59	Trades	Trades Matches	"Dumps" the current contents of the Matches tab grid of the Trades screen.

ID	Group	Name	Information
60	Trades	Holdings	"Dumps" holdings information from the Trades screen for every record listed in the Matches tab.
61	Trades	Offers	"Dumps" offers information from the Trades screen for every record listed in the Matches tab.
15	User Notes	User Notes	Brings forward the User Notes pop-up window to let you specify which notes to include in the report.

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