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**TDC/EED  
TRADE DEVELOPMENT CENTER PROGRAM  
EXPORT ENTERPRISE DEVELOPMENT  
PROJECT**

**TRADE IMPORTER-EXPORTER SYSTEM**

**Prepared For:  
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## TIES 1.0 USER'S GUIDE

### I. INTRODUCTION

The Trade Importer-Exporter System is a set of databases for organizing and monitoring TDC's export promotion efforts. Version 1.0 is an interim edition designed for immediate use with TDC's currently limited computer hardware. It is written for PCTOOLS Desktop, a compact software package which includes basic database functions along with word processing and desk organization.

### II. PCTOOLS DESKTOP

On most TDC machines, PCTOOLS Desktop can be entered at any time by pressing <Ctrl> <Space>. Desktop "pops up" on top of whatever work you are doing. While in Desktop you continue to have a sort of windows environment in which you can open several word processing and database files at the same time. When you exit, you are returned to your previous work where you started. This is called Time Share Resident (TSR) mode. You can find your way around Desktop with either the keyboard or a mouse, and the F1 key makes help available at all times.

The exception is Howaida's machine which runs Ventura. Because Ventura objects to TSR, this machine is set to enter Desktop by going to the C: prompt and typing DESK. If Ventura is not going to be used, you can make Desktop TSR by going to the C: prompt and typing SET\_DESK, and then resetting the machine (turning it off and back on). If later you wish to return to the original settings without Desktop TSR, type SET\_VP and reset the machine.

The Desktop Menu shows Notepads, Outlines, Databases, Appointment scheduler, Telecommunications, Macro editor, Clip Board, Calculators, Utilities, and Exit. Each command can be executed by pressing its key letter -- N,O,D,A,T,M,B(board),C,U,X -- or by highlighting it with the arrow keys. You can exit any program by pressing <esc>.

"Notepads" is a fine elementary word processor which includes spell check, search, and an editing clipboard.

The "Outlines" editor enables you to collapse sub-categories under headlines. Some people call this a "thought processor".

"Databases" are great for storing organized data such as addresses, accounts, bibliography, and our TDC files.

The "appointment scheduler" provides you with a TO DO list, calendar, and daily schedule. It allows attaching a memo to each entry and will even sound an alarm to remind you of your appointment. Press the TAB key (or Shift-TAB) to switch among sections of the screen. Press M for "Make" to finalize each appointment. You can enter the appointment schedule directly at any time by pressing <ctrlA >

"Telecommunications" stores phone numbers and dials. We won't need that.

The "macro editor" enables you to define shortcut keys. I have used this to define <ctrlT> as the entry key for the TIES system. If you press <ctrlT>, Desktop will pop up, display TIES help, and present you with a menu of databases.

The "Clip Board" (B) is used for passing information between programs or positions. You will use it most often for moving blocks of text in Notepad. Use <altE> (edit) M (mark), then move the end of the block and press <altE> C (copy) or T (cuT). Then move the cursor to the point where you want the text and press <altE> P (paste).

There are three "calculators". I recommend the first one -- the algebraic calculator. Just use the numbers and +,-,/,\* signs on the keyboard.

Desktop "Utilities" enable you to change the colors of the system menus.

With that brief introduction, I leave you to learn your way around Desktop by braille. Remember F1 always gives help.

### III. TIES

The Trade Importer-Exporter System consists of six databases:

- \* ADDRESS: Addresses, except for buyers & exporters.
- \* BASELINE: Summary of baseline survey information.
- \* BUYER: Addresses of buyers.
- \* CONTACTS: Account Executive contacts with exporters/buyers.
- \* EXPORTER: Addresses of exporters.
- \* MEET: Meetings arranged between exporters and buyers, and orders placed.

#### A. Address Databases: Address, Buyer and Exporter

Three databases -- address, buyer and exporter -- are lists of addresses. The only difference is that the exporter database does not have spaces for zipcode and country, since exporters are assumed to be in Egypt. To use a database, place the cursor over the name and press enter. At the top of the screen is a menu and the line at the bottom indicates the meaning of the variable function keys. F1 is always "help" and F10 is "menu", which enables you to use the arrow keys and enter to select from the menu across the top of the screen.

In addition to the address, the screen shows telephone number, fax, products, brand, and allows two lines for comments. An important field is CODES. Here you can enter any capitalized three letter codes you like, separated by commas. For example, I invented the code BAS to mean "included in the baseline survey." Then I can easily search the exporter database for BAS and obtain the list of firms interviewed. Similarly, you might use the code

PLN to mean that a firm plan has been negotiated. You can invent any codes you wish as long as you don't duplicate. Whenever you change an entry, always finish by placing the cursor at LAST EDIT and pressing <ctrlD>. This will write the current date into that field.

To change to address format, press <altF>LLABEL<enter> (load label format). The screen immediately changes to address only. You return the screen to normal by typing <altF>L and the name of the database (address, exporter, buyer) followed by <enter>. To print a list of labels, first select those that you want to print by using <altE>R (edit, select record) or <altE>L to select all records. Then, type <altF>P <enter><enter><enter> to print selected records. The print file is in c:\pctools\tdc and has the same name as the database with .PRT on the end (e.g. address.prt). If an old file exists with this name, desktop will ask you to confirm that you want to write over it. You can bring this file into either PFS Writer or Word Perfect to adjust and print it.

## **B. Baseline**

The baseline database keeps a summary of the baseline survey easily accessible. It is important to remember that these data are confidential, for use within the office only. They are not to be divulged outside the office. There are three parts to each entry: (1) basic data from the questionnaire including annual sales, exports and export potential, (2) interviewers ratings of export experience etc., and (3) a verbal summary of the interview.

## **C. Contacts**

The Contacts database is designed for Account Executives to record contacts with exporters and buyers. Recording contacts daily will make preparing quarterly reports easy.

The database consists of two parts: summary data and narrative text. First enter basic identification: promoter, date, sector, firm, and contact. Remember that <ctrlD> will insert the date. Then enter the time devoted to the contact and preparation time (in hours).

It is easiest to enter the narrative next. Press PgDn to reach this section. It is divided into Successes, Difficulties and Plans. Under successes, summarize accomplishments. Then, note any difficulties that arose, and list your plans for your next contact. Always end each contact by agreeing on the next meeting and what will be prepared for it. Your plan should be a list of dates and what will be accomplished by each date.

Return to the top of the record and summarize your contact in terms of the outputs and tasks that were being implemented. For client exporters, this will correspond with the firm plans to be negotiated. (Indeed, negotiating the firm plan will be summarized in such contact records.) Rate the gain (accomplishment) achieved from 1 to 5, where 1=poor, 2=some, 3=average, 4=good, and 5=excellent. Also, mark "Y" for yes next to any task that is "Done". Finally, rate "overall gain" (1-5) to summarize the interaction as a whole. (Contact number can be filled in by the computer later.)

## D. Meet

The MEET Database records meetings arranged between exporter clients and targeted potential buyers. These are the TIES the system is designed to encourage.

The top portion of the screen is identification information, including telephone numbers for your convenience. Noteworthy are the spaces for TYPE of exporter, buyer, deal and meeting. These are codes that TDC will agree upon. For example, meetings could be at exhibits, EXH, on exporter marketing trips, EXP, on buyer visits, BUY, etc.

Next are two brief questionnaires for following up after each meeting with both the buyer and exporter. This can be done over the phone or face to face. Request an overall rating (1-5), what went well, what difficulties arose, a rating of the probability of a deal (1-5) and advice for next time. Always follow up afterwards, even if you were at the meeting.

The bottom line is any orders coming out of the meetings. If no orders, record why. I have only allowed space for four orders because this is only an interim system and I expect Version 2.0 to be installed in a couple of months. The field labelled REF (reference) for each order is to enter the ID number of the Letter of Credit or some similar document as verification that the order was actually accomplished. Again, follow up after each order and fill in the lines for comments by buyer and exporter.

Well, that's my introduction to TIES. Familiarize yourself with the system and let me know how it works. Be ready to give your feedback to the MIS consultant who will develop Version 2.0 incorporated into the overall office management information system. I will also be available through the Chemonics Home Office to make necessary changes in the Version 1.0 program. [REDACTED]

[REDACTED] Have fun!