Word Personal Information Manager '95

32-bit Version
©1996 By Andrew M. Freeman <ASP>
AMF

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World Wide Web: http://www.execpc.com/~amfsoft/index.html

WINDOWS Magazine SUPERIOR SHAREWARE, Nov. 1994
PC World Top Program, May 1996

- New Interface—Easier to Use
- Works with WinFax 7.0, Word 7.0, and Windows 95
- Does Fax Merges.
- Will work on networks.
- Support for multiple phone numbers.
- Creates WinCIM® e-mail.
- Does Mail Merge.
- Reporting Feature Enhanced and More Efficient.
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For installation purposes, please have all files that came together in the same folder. This folder can later be deleted.

Please read the entire document before proceeding.

If the automatic installation failed, please see manual installation instructions near the end of this document. Uninstall Directions Appear At The End of this Document.

Program Manual and Installation Guide

To run the PIM:

Click the button on the toolbar, or run the macro from Tools, Macro, select the macro, WWPersonalInformationManager, and click run.

WWPersonalInformationManager: (P.I.M.)

Finally, a Personal Information Manager comes to Word, allowing all users to have their own address book and telephone directory. Now, rid yourself of that slow Address Book that Microsoft gave you—and harness the real power of Word and your contacts.

When you first start the PIM, you will be prompted for directories in which to store the data files. Enter the full path and directory that has already been created. Enter it like the following: C:\DATA\BUSINESS with no extra spaces or carriage returns. Invalid data will cause errors.

If an incorrect path is entered, the PIM will act strangely, and the next time you run the PIM you will be prompted for another path.

Two settings files will be maintained in the directories you specify- one in each directory. The settings include all the settings that you select in Setup.

Dial Home #: Dials the phone number of the highlighted person, if a number has been entered. Your modem should be on.

Dial Work #: Dials the secondary or work number of the selected entry.

Information and Business Letters... Shows ALL information on the highlighted person, and allows you to **Insert** that information as part of a business letter. **Insert Full Data** inserts all data as specified in Setup.

Create Report: Creates an alphabetic, full color report of ALL persons in the database, as specified in Setup.

New: Allows the user to add more people/businesses to his/her PIM. Checking **Just a Company; No Name Needed** will NOT read Title, First Name, Last Name, and Occupational Status. Instead, the company name will be used as its "name." It is not necessary for you to enter a salutation, but if you would like a customized salutation for the particular entry enter one. If not, the default you specify in Setup will be used. Class simply means Business, Friend, Personal, etc., so that you know who you are dealing with.

Delete: Deletes the selected person, and his/her information.

Edit: Allows the modification of person/company information.

Envelopes and Labels: Adds the highlighted person's address information. Note that if no address information is supplied, just the name will appear on the envelope. The envelope will be added to the document, unless otherwise specified during setup. To insert a label, choose Use Word's Envelope Dialog during Setup, and simply click on the Labels Tab.

Setup: Allows the user to setup the P.I.M. to suit his/her needs.

COM port: select the COM port for use. Your modem is connected to your COM port.

Default salutation: a greeting, i.e. Dear, that the user may choose him/herself or leave blank.

Report style**:** Full reports style include everything, Brief report style reports name/address and other pertinent information.

Pulse or Tone and dialing prefix settings are used automatically and are dialed each time the phone is dialed with either the Dial # buttons or the Phone Dialer.

The Default Cardfile and Default Calendar File boxes allow you to enter the full path and filename of the Cardfile or Calendar file you wish to load every time you run them from WW PIM.

Tab before salutation determines whether the salutation will be flush against the left side, or indented.

Return to Word after faxing will allow the fax to be processed, and quick returning to your active Word document. This eliminates many extra clicks and saves time.

Log will log all calls' times and phone numbers to PHONELOG.DOC in your WINWORD directory. If it is not there, no log will be recorded.

Data File Directory specifies where the data file for the current address book will be stored. If this is changed, it must be a path that already exists. All data files must be moved to the new directory. Data files all have the .ini extension and have the filename xPIM.INI where x is a letter of the alphabet. WWPIM.INI must also be moved to the new directory.

Fast PIM: allows the exiting of the PIM after such actions as dialing the phone or inserting data, as well as faxing.

WinCIM settings: Allow the user to specify a Closing, such as Sincerely or Regards, and the name to use such as Andy Freeman @ 74250.1700@compuseve.com.

Phone Dialer: Just press the numbers on the keypad, and choose Send/Dial to dial the phone. The numbers you press will be on the top of the dialog. Clear All clears the number you have entered. << Back deletes the last number entered.

Note that the comma key "," is used for pauses, and that the * key is used just like the * key found on real telephones.

* As long as Num Lock is active, the numeric keypad can be used to dial the phone.

VMail Dialer: Just key in the number, the appropriate waiting times and hit send. Works just like the normal Phone Dialer. 1s = 1 second delay, 2s = 2 second delay. Note that times may be different on different modems.

Cardfile: Launches the Cardfile Program. The default is Cardfile.exe and it must be in your WINDOWS directory. See the description of setup above.

Calendar: Launches the Calendar Program. The default is Calendar.exe and it must be in your WINDOWS directory. See the description of setup above.

Windows' Clock: Launches Windows' Clock Program. Clock.exe must be in your WINDOWS directory.

Windows' Calculator: Launches Windows' Calculator Program. Calc.exe must be in your WINDOWS directory.

Done: Ends the program.

About: Shows the about box.

The Virtual Rolodex:
Directions: To access an "address book", simply click ONCE on the option button of the letter of the entry you desire to look up. All entries will be stored alphabetically according to the first letter of their last name, or if a company, by the first letter of the company name. Double Clicking will execute the function of the highlighted button.

Fax: Used only with Delrina WinFax Pro 7.0 (for Windows 95), this feature will fax the current document to the currently selected person/business. To cancel the fax, choose cancel from the Fax Initialization Screen. Only the recipient and fax number are sent to WinFax. WinFax is left running. **Be sure that WinFax is properly configured to fax immediately.**

(Fax) Merge: This feature will allow you to use the currently open document as a base letter in which separate addresses and salutations will be inserted. A closing such as Sincerely, Andrew, will be inserted if you fill in the input box requesting the information. For each entry containing a fax number, a document will be faxed via WinFax with its own address, salutation and closing. The currently accessed address book will be used for the fax merge.

Import Data: This function will allow importation of records into Wordware PIM. Any database may be used as long as it conforms to ODBC standards, or has a filter which can be used to import the database. A few rules: 1) The database MUST have a First Name, Last Name, and Company field as well as an Address Field. Even if they are empty columns, they must be part of the database. 2) If the Last Name field is empty, the company name will be used. 3) Entries' data with the same name will be overwritten.

1) Ensure that your database conforms to the format above and that you have the proper drivers/filters installed.
2) Start Wordware PIM. Press the Import Data via ODBC and Filters button.
3) Select a source database file.
4) Confirm the type of data file. Note that usually, the first selection in the dialog is the correct type.
5) Answer the questions about the fields.
6) Choose how you would like the salutation to be entered, if any. All entries will then have a personal salutation.
7) Wait until completed. On slower machines this could take a while.

**ODBC drivers can be installed using Word's setup, or Excel's setup.
NOTE: On occasion, owners of Access may experience problems importing their databases. If repeated errors occur, simply export your Access database as some other format or as text, and then try again to import into the PIM.

Export Data: Will export data from a single or both address books into character-delimited text. You may choose the standard tab-delimited text, or enter a character of your own choosing. Delimited means that the character you designate will be placed between data such as the entry's title, first name, etc. Programs like Microsoft's Excel 5.0 will be able to use these text files for advanced data manipulation.

Mail Merge: Although not an advanced Mail Merge, this feature will allow you to use the currently open document as a base letter in which separate addresses and salutations will be inserted. A closing such as Sincerely, Andrew, will be inserted if you fill in the input box requesting the information. One document will be created with page breaks between each entry. The currently accessed address book will be used for the mail merge. For advanced mail merge, export the data and use the database as your source for the mail merge.

Set Alarm: Click on this button and an alarm dialog box will come up. Enter the time, message, and select a .wav (wave) file or the default beep. The alarm will come up at the specified time, unless Wordware PIM is active, or Windows is busy.

Search: Choose the fields you wish to search in, or click the All fields button. Then select whether to search in the primary phonebook, or BOTH phonebooks. Enter a text or number string to search for, and Wordware PIM will return all entries with such a string. You can optionally have this data inserted into your document. You can also create a Mail Merge for each found entry by pressing the Mail Merge button, or you can do a Fax Merge by pressing the Fax Merge button.

Reset Modem: Allows the user to enter an initialization string or reset the modem, if necessary. This should take about 15 seconds.

Create WinCIM Mail: Will allow the user to create mail using CompuServe's WinCIM® program and will optionally send the text of the current document. The user must select the address of the person to he wishes to send mail. Using WinCIM 2.0.x, be sure to have it running before you start the PIM.
- WinCIM needs to be running
- The connect dialog box should *not* be showing.

Custom Insert: This feature will allow the user to insert specific information. Use the text box below the listboxes to add your own words. List box selections will be remembered for the next time to save time.

Tips: Use the Memo field to store e-mail addresses, notes, and alternate phone numbers. Use the first address line for ATTN and other mail calls. Use the third address line for countries, postal codes, etc.

Keeping a Christmas List? Keeping a Holiday Party List? Put a special keyword in the Memo box, and when you need the information, use the search feature for that keyword. Then select the create letters for each button found entry. It's as easy as that.

Like the software? Hate those nag screens?

Registration is important to the shareware market. Your investment of $15 will encourage AMF to continue producing quality Word for Windows add-ons and utilities. Please, if you use this macro/program, Wordware Personal Information Manager, register $15.00 to:
(Foreign Orders (Out of the U.S.A.) Register On-Line CompuServe: See Below.)

Andrew M. Freeman
AMF
P.O. Box 189
Holbrook, N.Y. 11741-0189
USA

OR register On-Line CompuServe: GO SWREG, and search for PIMW6 (By Key Word), ID# 2840, or Andrew Freeman (By Author).

UPON REGISTRATION, you will receive a special registration number and the correct push button to press on that registration screen that pops up when you first run the macro. This number will be sent to you via CompuServe e-mail, or by ground mail (depending on which on-line service you registered). When you receive the number and push button, enter the number where it says the number, click ONCE on the correct push button. A dialog box will come up that says: "Thank You For Registering." The registration dialog WILL NEVER come up again.
Also included is 6 months unlimited e-mail support.
Additionally, you will receive at least <u>one free upgrade</u>.

Need a Disk? please include $5 more (US check or money order drawn on US banks in US dollars) to the above address, indicating that you want a 3.5" Disk for the newest PIM. This would make a total of $20 (US).

To receive the upgrade registration code send us e-mail or ground mail.

SITE LICENSES AND BULK DISCOUNT RATES ARE AVAILABLE!

Do you or your company require a specific Word solution?
Contact Andrew Freeman at CIS: 74250,1700 or
Internet: 74250,1700@compuserve.com or
by ground mail at the address above.

Leave your comments/suggestions/problems/ideas by e-mail:
CompuServe Mail: 74250,1700
Internet: 74250.1700@compuserve.com

Manual Installation Instructions:

You may manually copy the macro and toolbar using Word's Organizer. To start the organizer, select Tools, Macro from the menu above and click the Organizer button.

Looking for a German version of Wordware PIM?

If you would like to receive the **German Version, version 4.0d DB+,** of this program, please contact Wolfgang S. Krause:

Wolfgang S. Krause
Neuenhausstraße 54 • 40699 Erkrath
GERMANY
CIS: 100273,2601
Internet: 100273.2601@compuserve.com

**BUGS? Please report them to Andrew M. Freeman: 74250,1700
(or Internet: 74250.1700@compuserve.com).**

Try This Fine Program Available for Evaluation in CompuServe's MSWORD forum (See PRODLST.DOC for more):

Wordware '95 for Word 7.0 for Windows 95: The hottest collection of over 60 macros and templates. Everything from copying a file, to managing your projects to managing your business contacts. A full-fledged Personal Information Manager is included as well as a full-function CD Player. Wordware greatly enhances Word's native capabilities. Wordware has a Multimedia Player which will play all multimedia files, a quick command line, Windows Exiting Functions,

Lock Word, Close All Files and Exit, Print Summary Information, Chicago-Like Windows Titlers, WinFax Macros, and many, many others- all in one compact package. Wordware '95 adds greater productivity and makes using Wordware easy. Ziff Davis Interactive calls Wordware "an intriguing set of macros for MS Word... which add workday productivity..." $39.95/ $24.95 upgrade. Included in September/October 1994 CompuServe CD and PC Novice, February 1996. **PAY JUST 67¢ (CENTS) per macro <u>(INCLUDED IS THIS P.I.M. '95).</u> You can pay $15 for this Personal Information Manager alone or JUST 67¢ with Wordware '95!**

Legal Information:

** Please Note: THIS SOFTWARE AND THE ACCOMPANYING FILES ARE SOLD "AS IS" AND WITHOUT WARRANTIES AS TO PERFORMANCE OF MERCHANTABILITY OR ANY OTHER WARRANTIES WHETHER EXPRESSED OR IMPLIED. Because of the various hardware and software environments into which WWPersonalInformationManager (All Versions) and WWPIMAlarmer may be put, NO WARRANTY OF FITNESS FOR A PARTICULAR PURPOSE IS OFFERED. Good data processing procedure dictates that any program be thoroughly tested with non-critical data before relying on it. The user must assume the entire risk of using the program.

Please, feel free to pass an evaluation copy of this program on to a friend, colleague, office manager, or any other interested Word User. Do not charge other than for distribution costs.

The User is allowed to evaluate Wordware PIM for a 21 day trial period. After that period has expired, the user must register the Shareware, or delete all macros, templates, and documentation from his/her system. Failure to do so is a violation of international copyright law and may constitute Software Piracy.

Uninstall?

To Uninstall Wordware PIM, simply follow the 12 easy steps below:

1) From the menu, select Tools | Macro.
2) Then click on the button that says Organizer.
3) Click the Macros tab.
4) Scroll down the list that contains your global, NORMAL template.

5) Select the AutoOpen, WWPersonalInformationManager, WWPIMAlarmer, and WWAlarm macros and press delete. Please be careful with this function.
6) Click the toolbars tab. Delete the PIM toolbar.
7) Close Organizer.
8) Save all changes.
9) Delete all documentation from the directory which contains Wordware PIM.
10) Delete the files from your PIM's Business and Personal Directories. These files are created when data is added to the PIM. These directories are usually C:\WINDOWS and C:\WINWORD. The files have the form of ?PIM.INI where ? represents a letter of the alphabet.
11) Delete PHONELOG.DOC from your WinWord directory.

That should do it. Don't worry if some of the files mentioned are not there; perhaps they were never installed.

12) Also, please send an e-mail message to Andrew M. Freeman CIS: 74250,1700 or Internet: 74250.1700@compuserve.com (or by ground mail) describing what you did not like about Wordware. Even if you think Wordware "stinks" let me know, I'd be happy to hear your suggestions.