

# *WordPhoneBook*

R E L E A S E 2 . 1

## Documentation



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## I Disclaimer - Agreement

Users of **Word PhoneBook** must accept this disclaimer of warranty: “**Word PhoneBook** is supplied as is. The author disclaims all warranties, expressed or implied, including, without limitation, the warranties of merchantability and of fitness for any purpose. The author assumes no liability for damages, direct or consequential, which may result from the use of **Word PhoneBook**”.

**Word PhoneBook** is a “shareware program” and is provided at no charge to the user for evaluation. Feel free to share it with your friends, but please do not give it away altered or as part of another system. The essence of “user-supported” software is to provide personal computer users with quality software without high prices, and yet to provide incentive for programmers to continue to develop new products. If you find this program useful and find that you are using **Word PhoneBook** and continue to use it after the 30 day trial period, you must make a registration payment to Manuel Oñate. The registration fee will license one copy for use on any one computer at any one time. You must treat this software just like a book. An example is that this software may be used by any number of people and may be freely moved from one computer location to another, so long as there is no possibility of it being used at one location while it's being used at another. Just as a book cannot be read by two different persons at the same time.

Commercial users of **Word PhoneBook** must register and pay for their copies of the program within 30 days of first use or their license is withdrawn. Site-License arrangements may be made by contacting Manuel Oñate.

Anyone distributing **Word PhoneBook** for any kind of remuneration must first contact Manuel Oñate at the address below for authorization. This authorization will be automatically granted to distributors recognized by the (ASP) as adhering to its guidelines for shareware distributors, and such distributors may begin offering **Word PhoneBook** immediately (However Manuel Oñate must still be advised so that the distributor can be kept up-to-date with the latest version of **Word PhoneBook**).

You are encouraged to pass a copy of **Word PhoneBook** along to your friends for evaluation. Please encourage them to register their copy if they find that they can use it.

Manuel Oñate  
P. de la Habana, 134  
28036 Madrid  
Spain

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## II Ombudsman Statement

*This program is produced by a member of the Association of Shareware Professionals (ASP). ASP wants to make sure that the shareware principle works for you. If you are unable to resolve a shareware-related problem with an ASP member by contacting the member directly, ASP may be able to help. The ASP Ombudsman can help you resolve a dispute or problem with an ASP member, but does not provide technical support for members' products. Please write to the ASP Ombudsman at 545 Grover Road, Muskegon, MI 49442-9427 USA, FAX 616-788-2765 or send a CompuServe message via CompuServe Mail to ASP Ombudsman 70007,3536.*

## III Introduction

Ever since I began working with Microsoft Word I wanted to have a small database of names and addresses I could use to paste the name, address, and fax number of the person I was writing a letter or fax to. I have been trying a number of PIM programs that promised to 'integrate' with Microsoft Word, collections of macros, etc. But nothing really suited my needs. I wanted something 'fast and simple'. That's why I started developing a dialog box macro for Microsoft Word 6.0.

The result was **Word PhoneBook** 1.0 a macro that facilitated the process of writing letters, faxes and envelopes. It consisted of a database of names, companies, addresses and fax numbers that could be used to browse for the recipient's name and insert his/her associated data into any document in the place you had defined.

The macro worked perfectly. I have used it for nearly a year, and shared it with others as well. The problem it had (apart from being slow) was that the database was very limited. Working with more than a few dozen of names was nearly impossible. This limitation was inherent to using Word macro language Word Basic, that only can deal with ASCII sequential files, and it is basically an interpreted language.

To solve this problem and to speed up the whole program I have written **Word PhoneBook** 2.0. It is a Word Add-In rather than a macro, meaning that it has been written in a compiled language (Delphi) in such a way that it is integrated with Microsoft Word.

**Word PhoneBook** is shareware. This means that you can test it before you buy it! Or, to put it in other words, that you only buy it when you know you like it. To register please refer to the Registration section on this document.

## IV Installation

### a **Word PhoneBook files**

You should have received the following files in your distribution diskette or compressed archive:

|  |  |
|--|--|
| PONEBOOK.DOC   | A Microsoft Word 6.0 document containing the documentation to the software. You are reading it, so, at least, that one file was included in the diskette or archive. |
| PHONEBOOK.WLL  | The <b>Word PhoneBook</b> package, in the form of a Microsoft Word 6.0 Add-In.   |
| FILE_ID.DIZ<br>READ_ME.1ST, READ_ME.BAT, VE<br>NDINFO.DIZ, VENDOR.DOC,<br>VENDOR.TXT | Standard shareware identification files and readme files. You may safely delete all those files after you have installed the software.                               |
| CATALOG.WRI  | A short catalog of other program available from the author.  |

Any other file you may find is not from me, you can delete it right away.

To run **Word PhoneBook** you only need the file PHONEBOOK.WLL. You can safely delete the rest of the files (after you have carefully reviewed them!).

The program creates two additional files on your system:

|              |  |
|--------------|--|
| PHONBOOK.DAT | Located in the same subdirectory as PHONBOOK.WLL. It contains the database. It is created right after the first use of the program.            |
| PHONBOOK.INI | Located in your windows directory (usually c:\windows). Created after registration of the software. It contains your registration information. |

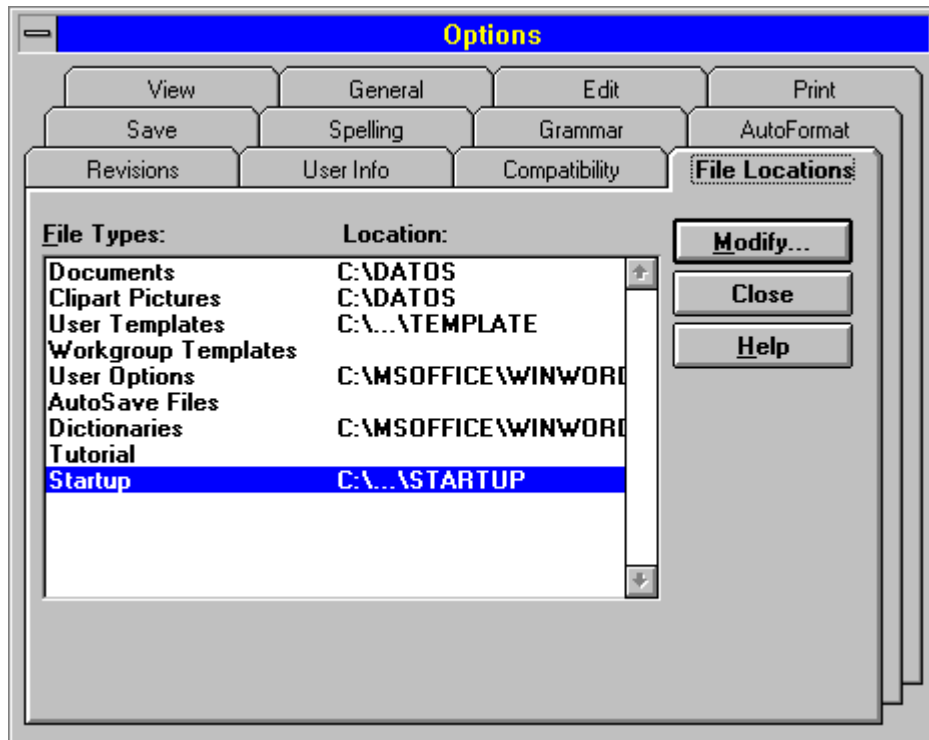
**IMPORTANT:** You will need Microsoft Word 6.0 to run this software. A version compatible with Word 7.0 will be released shortly.

To install **Word PhoneBook** in your system:

### b Installing the software

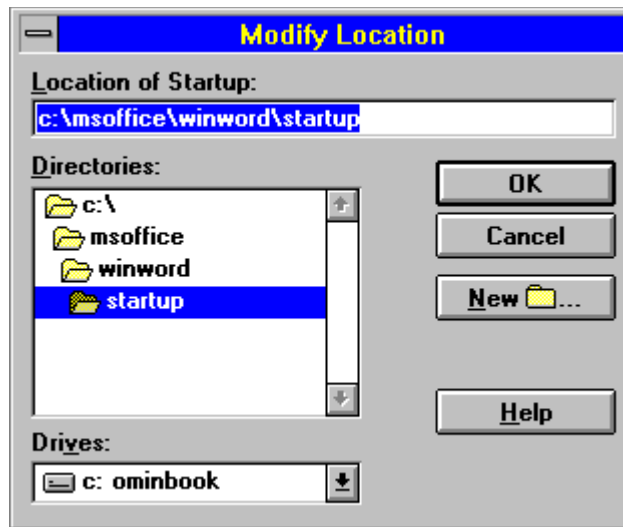
1. Start Word and select File Locations from the Tools Options dialog box to find out where your StartUp directory is located (it will probably be a subdirectory of your Word directory).

Figure 1-Options dialog box



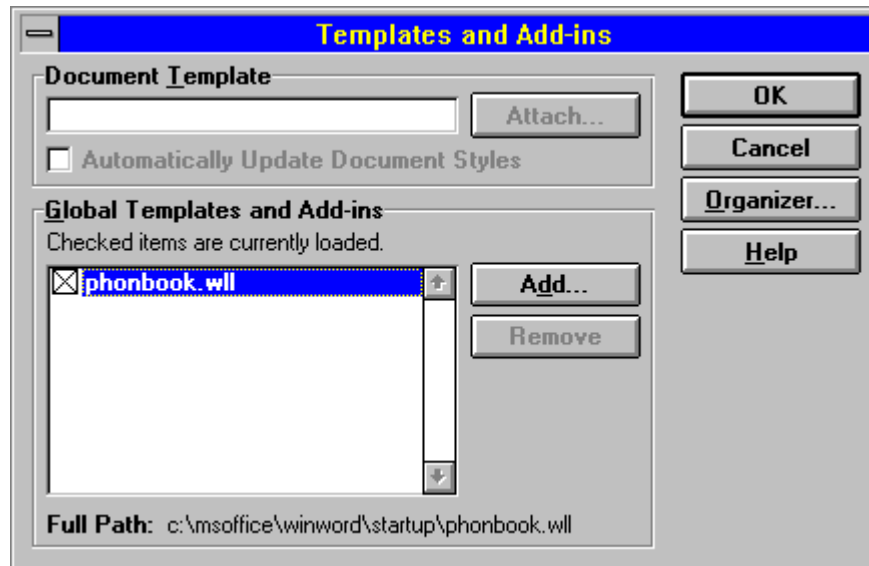
1. If you do not have a StartUp Directory create it now, select StartUp and press Modify. You will get a dialog like the one is represented below:

Figure 2-Modify Location dialog box



1. Copy the file PHONEBOOK.WLL to your StartUp directory (you can use File Manager to do it).
2. Close Word and restart it.
3. Select Templates from the File menu. You should see PHONEBOOK.WLL in the Global Templates and Add-Ins listbox. Otherwise check that you have successfully copied the PHONEBOOK.WLL file to your StartUp directory.

Figure 3-Templates and Add-ins dialog box



1. A new button like the one represented below should have been inserted in your Standard toolbar. If it has not appear that means that the Standard toolbar is not selected. To select it right click on any toolbar and select "Standard" on the context menu that will appear.

**Figure 4-Toolbar button**



### **c Modifying your templates**

**Word PhoneBook** works by replacing certain “variables” in your document with the data obtained from the database.

You should manually edit your templates inserting the following variables in the correct places:

In letter or envelopes templates:

<Header>      The name, company, title and address of the recipient as it appears on the Letter section of the **Word PhoneBook** dialog box.

In fax or memos templates:

<Name>        The name of the recipient. If the Use Treatment checkbox is checked out the name would be preceded by the treatment.

<Company>    The name of the company of the recipient if the Use Company checkbox in the fax section is checked out. If not the variable will not be used.

<Title>        The title of the recipient if the Use Title checkbox in the fax section is checked out. If not the variable will not be used.

<Number>      The fax number of the recipient.

An example of a Fax template is represented below:

**Figure 5-Example of a fax template**

### **Fax Message**

---

|                  |                     |       |
|------------------|---------------------|-------|
| Name:            | <Name>              | Date: |
| Company:         | <Company>           |       |
| Title:           | <Title>             |       |
| Fax Number:      | <Number>            |       |
| From:            | <b>Manuel Oñate</b> |       |
| Number of Pages: |                     |       |

### **d Uninstalling Word PhoneBook**

To uninstall the program first exit from Word. Then you should delete all the files included in your distribution disk, if you have not already done so with those that are not necessary, and the two files that are created by the program. Refer to the section “Word PhoneBook files” to know the location of the files. The next time you run Windows the **Word PhoneBook** button will not appear in your Standard toolbar.



# VUsing Word PhoneBook

## a Main Window

**Word PhoneBook** consist of a main window in which you introduce and manage the database, select the recipient of your document and lets you insert the data of the recipient of your document.

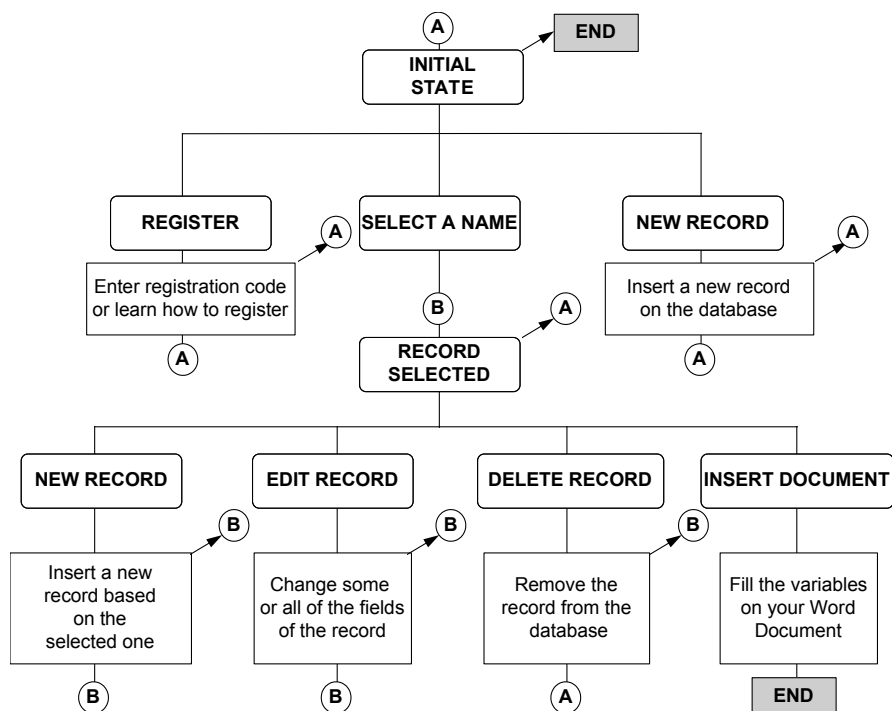
Figure 6-Word PhoneBook Window

The screenshot shows the 'Word PhoneBook - 2.0' application window. It features a blue title bar and a grey background. The window is organized into three main sections: 'General', 'Letter or Envelope', and 'Fax and Telephone'.  
1. **General Section:** Contains four text input fields labeled 'Name:', 'Company:', 'Title:', and 'Treatment:'. To the right of these fields are four buttons: 'New Record', 'Edit Record', 'Delete Record', and 'Insert Document'. A 'Cancel' button is located in a separate box on the right side of this section.  
2. **Letter or Envelope Section:** Contains three text input fields for 'Address 1:', 'Address 2:', and 'Address 3:'. Below these are two groups of radio buttons. The first group is labeled 'First Item' and has 'Name' (selected) and 'Company' options. The second group has three checkboxes: 'Use Company', 'Use Title', and 'Use Treatment'.  
3. **Fax and Telephone Section:** Contains two text input fields for 'Fax #' and 'Phone #'. Below these are three checkboxes: 'Use Company', 'Use Title', and 'Use Treatment'.  
4. **Status Bar:** At the bottom, it displays the text 'Please select a Name or press 'New Record'' on the left and 'Registered to Manuel Onate' on the right.

## b Execution Flow

Below is represented the execution flow of the program. The little arrows show what happens when you press the “Cancel” button.

Figure 7-Word PhoneBook Execution Flow



### c Inserting Records

In the Initial State press the “Insert Record” button. The edit fields will be enabled to let you enter the information of the new person. Fill all the fields and press the “Ok” button.

If you would like to have your records ordered by last name, enter them as LastName, FirstName. **Word PhoneBook** will convert it to FirstName LastName when substituting the variables.

If you would like to insert a record based on another one already in the database (for example if you have two contacts on the same company), first select the record on which you will base the new one and then press the “Insert Record” button. The fields will be already filled. Make the necessary changes and press the “Ok” button.

Remember than in either case the new Name should be unique. If you would like to have two records attached to the same person, you can use a identificative label after the name. The label should be separated from the name by an space and the open bracket (“[”) character. For example:

Doe, John [Home]  
Doe, John [Acme]

### d Formatting the variables

The formatting of the variables inserted in your document depends on the items selected in the “Letter or Envelope” and “Fax and Telephone” sections of the main window.

The six checkboxes allow you to insert or not the Company, Title and Treatment of the person. For example, you can choose to use the treatment in letters and envelopes only. In my case I only use the treatment in letters, but not in faxes when writing to my colleagues.

The radio buttons in the “Letter and Envelope” section let you select whether you want the header to begin with the name of the recipient or the company in which the recipient works for.

**e     Deleting Records**

Select the record you want to delete, press the “Delete Record” button and press “Ok” on the confirmation message box.

**f     Editing Records**

Select the record you want to edit, make all the changes you wish and press “Ok”. You can insert the record immediately afterwards.

**g     Inserting Records on your documents**

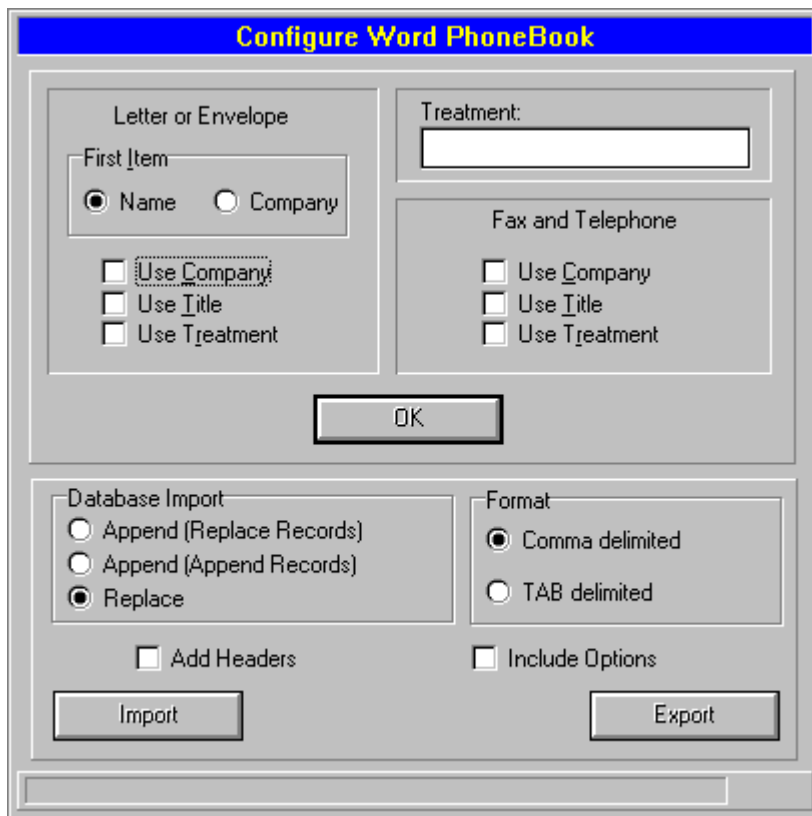
In Word create a new document based on the template of the kind of document you want. Press the **Word PhoneBook** button. Select the record you want to insert or create a new one and press the “Insert Document” button.

## VIConfiguring Word PhoneBook

**NOTE: THIS SECTION ONLY APPLIES TO REGISTERED VERSIONS OF WORD PHONEBOOK**

When you register **Word PhoneBook** the Insert button caption changes to Configure while the program is in the initial state. Clicking the button brings up the configuration dialog as shown below:

**Figure 8-Word PhoneBook Configuration Dialog**



## a Procedures

The dialog serves three purposes:

- **Setting default values for new records inserted on the main window and records imported without options.** In the case of manually inserted records you can, of course, override the default values of the options when filling the other fields. In the case of records imported to the database you would need to manually edit them after the import process should you require to change the default values for the options.
- **Importing records:** Clicking on the import button will open a File Open dialog so that you can select a text file containing the records you want to import.
- **Exporting records:** Clicking on the export button will open a File Save dialog so that you can select a text file to receive the records of your database. You may edit the resulting file in any editor (you may even open them with Word).

## b Import Options

The three import options and their meaning are best explained with an example:

Suppose your database and the import file are as follows:

| Existing Database | Import File    |
|-------------------|----------------|
| Oñate, Manuel     | Oñate, Manuel  |
| Doe, John         | Smith, William |

The resulting database would be:

| Append (replace records) | Append (Append records)             | Replace        |
|--------------------------|-------------------------------------|----------------|
| Doe, John                | Doe, John                           | Oñate, Manuel  |
| Oñate, Manuel            | Oñate, Manuel                       | Smith, William |
| Smith, William           | Oñate, Manuel [*]<br>Smith, William |                |

In other words: The first option appends the imported records to the database replacing existing records with new ones when there is a new record with the same name as an old one, while the second option will also append new records with the same name, only that those records appended will be marked as 'new'. Finally the third option will replace the existing database with the new one.

It is highly recommended that you always export your existing database prior to performing an import operation. Thus you will not lose any information should the import file have any error.

## c Format of the import/export files

The formatting of the import or export file is determined by the remaining options of the dialog.

- **Comma delimited:** Each record is separated by a carriage return and each field is separated by a comma. String fields are surrounded by quotes. For example:

“Oñate, Manuel”,”Paseo de la Habana, 134”,”28036 Madrid”, ...

- **TAB delimited:** Each record is separated by a carriage return and each field is separated by a TAB. For example:

Oñate, Manuel    Paseo de la Habana, 134    28036 Madrid    ...

- **Add Headers:** If checked when importing the first line of the import file will be discarded (assuming it only contains the names of the fields). If checked when exporting, the first line of the resulting file will contain the names of the different fields used by **Word PhoneBook**.
- **Include Options:** If checked, the last field of the records in the import/export field will contain the value of the options to be used by each record. Please see below for an explanation of the options value.

It is recommended that you export your existing database to a text file and use the resulting file as a template for inserting new records. That way you will be sure of the correct order of the fields and the options value (see below).

### **d The options value**

The last field of the import/export field is the options value, which is obtained adding up the different options selected in each record as seen below:

| Value | Section            | Option             |
|-------|--------------------|--------------------|
| 0     | Letter or Envelope | First Item Name    |
| 1     | Letter or Envelope | First Item Company |
| 2     | Letter or Envelope | Use Company        |
| 4     | Letter or Envelope | Use Title          |
| 8     | Letter or Envelope | Use Treatment      |
| 16    | Fax and Telephone  | Use Company        |
| 32    | Fax and Telephone  | Use Title          |
| 64    | Fax and Telephone  | Use Treatment      |

For example an option value of 31 would mean First Item Company, use company, title and treatment on letters and envelopes and use only company on faxes since  $31 = 1 + 2 + 4 + 8 + 16$ .

### **e Order of fields**

The fields should be in the following order (note that this order is the same as the one in the main window of **Word PhoneBook**):

Name  
Company  
Title  
Treatment  
Address1  
Address2  
Address3  
Fax  
Phone  
Options

Note also that any record that lacks any of the fields will not be imported, instead an error count will be displayed in the status panel of the Configuration Dialog.

## **VII Registering Word PhoneBook**

### **a Definition of Shareware**

Shareware distribution gives users a chance to try software before buying it. If you try a Shareware program and continue using it, you are expected to register. Individual programs differ on details --

some request registration while others require it, some specify a maximum trial period. With registration, you get anything from the simple right to continue using the software to an updated program with printed manual.

Copyright laws apply to both Shareware and commercial software, and the copyright holder retains all rights, with a few specific exceptions as stated below. Shareware authors are accomplished programmers, just like commercial authors, and the programs are of comparable quality. (In both cases, there are good programs and bad ones!) The main difference is in the method of distribution. The author specifically grants the right to copy and distribute the software, either to all and sundry or to a specific group. For example, some authors require written permission before a commercial disk vendor may copy their Shareware.

Shareware is a distribution method, not a type of software. You should find software that suits your needs and pocketbook, whether it's commercial or Shareware. The Shareware system makes fitting your needs easier, because you can try before you buy. And because the overhead is low, prices are low also. Shareware has the ultimate money-back guarantee -- if you don't use the product, you don't pay for it.

### **b Benefits of Registering**

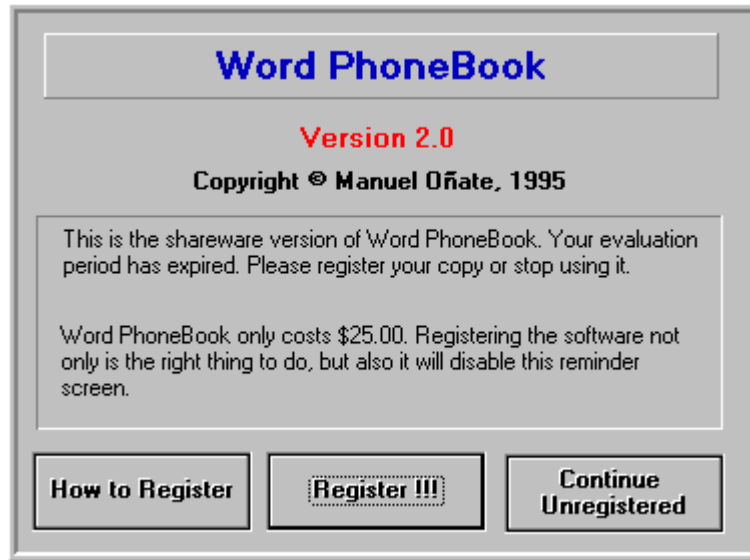
**Word PhoneBook** is shareware. That means that you are given the opportunity to try the software before buying it. If you like **Word PhoneBook** and you are using it you should register. The registered version of **Word PhoneBook** only has two differences with the shareware version:

- The main dialog of **Word PhoneBook** shows your name, instead of UNREGISTERED.
- No shareware reminder screens will appear after registration.
- The configuration dialog will be enabled, letting you configure the default values of new records and import and export your database of names and addresses.

Also note that registered users of this version of **Word PhoneBook** will become registered users of any new version of **Word PhoneBook** I may release in the future.

When the evaluation period has expired a shareware reminder screen will appear, just before inserting the data into your document.

**Figure 9-Word PhoneBook Shareware Reminder Screen**



Initially it will let you select the “Continue Unregistered” button immediately, after ten days you will have to wait 5 seconds before continuing, and every ten days afterwards you will have to wait for 5 more seconds up to a maximum of 90 seconds.

### **c      How to Register**

If you continue to use **Word PhoneBook** after the 30 day evaluation period you should register it. The cost of **Word PhoneBook** is just US\$ 25.00.

#### **CompuServe**

Registration is EASY! In CompuServe GO SWREG. Select program ID #8528. Fill all the appropriate fields and you are done. You will receive your registration code shortly.

#### **NorthStar**

If you don't have access to CompuServe, prefer the convenience of a 800 number, or require the program or the registration key to be sent by mail you should contact NorthStar Solutions.

Voice: 1-800-699-6395 (10:00 am - 10:00 pm Eastern Standard Time - From the US only)  
1-803-699-6395 (10:00 am - 10:00 pm Eastern Standard Time)  
Fax : 1-803-699-5465 (Available 24 hours. International and business orders encouraged)  
E-Mail: America Online: STARMAIL  
CompuServe: 71561,2751  
Internet: STARMAIL@AOL.COM

You may also register with a check or money order. Make them payable to NorthStar Solutions and send them to:

P.O. Box 25262  
Columbia, SC 29224

If you require the registration code or the program to be sent to you by mail, please note the S&H costs:

Registration code by mail: US\$ 2.00

Last version by mail: US\$ 5.00 (you will receive the code by mail also at no extra cost)

If you want to receive the latest version, please make sure you indicate in your order that you have Version 2.1 for Microsoft Windows 3.1 (in case there is no later version and you can save US\$ 3.00). Also indicate your drive type: 5.25 or 3.5 inch.

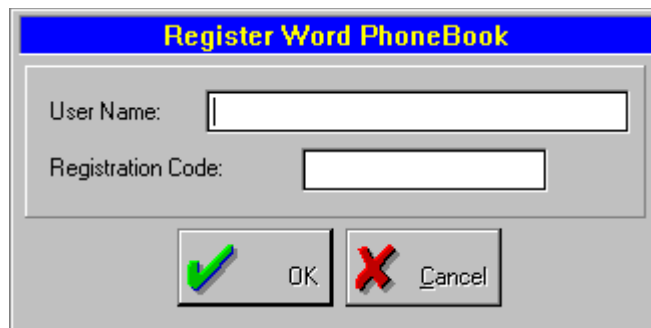
Please note that in order to correctly produce a Registration Code you should provide an User Name with only English characters (for example my own name Manuel Oñate should be converted to Manuel Onate). This is to ensure that I do not lose those non-english characters through the registration process.

You may also contact me should you need further information regarding this program. My CompuServe ID is 70630,1552. If you would like to obtain a site-license please contact me directly.

After registration you will receive the CODE needed to register the program by e-mail.

In the Initial State press the button "Register. The shareware reminder screen will appear. Press the "Register!!!" button and a new dialog will appear:

**Figure 10- Registration dialog**



You should fill both fields: User Name and Registration Code EXACTLY as they appear on the above mentioned registration form message.

You will see that the status bar of the main window changes to reflect your registration. Also the reminder screens will disappear after registration.

## **VIII The future of Word PhoneBook**

If I get enough registered users I will release new versions of **Word PhoneBook**. My plans for future versions are as follows:

- Phone Dialer
- Fax Sending
- E-Mail sending

And of course I will try to incorporate as many suggestions as I can.



## IX Contacting the Author

The preferred method for contacting me is using my CompuServe account:

Manuel Onate  
CIS ID: 70630,1552

If you don't have access to CompuServe but to other on-line service you can still contact me. Please check with your on-line service for information on reaching CompuServe. For example from the Internet you would use:

70630.1552@compuserve.com

You can contact me by snail mail, but it will take much, much longer. The address at this moment is the following:

Manuel Oñate  
P. de la Habana, 134  
28036 Madrid (Spain)

## X Getting Support

Sorry but I can't guarantee I will be able to provide support to non-registered users.

Registered users can contact me as described above. Please keep in mind that this is, and probably will be for a very long time, a one person business. I will answer you in less than a week during normal working time. During my well deserved holidays it could take a bit longer.

Please. Don't try to contact my distributors for support. They are simply distributors and have no access to the source code, nor they have the expertise in the program to help you.

I will be very happy to receive feedback of users of **Word PhoneBook**. If you think there is an improvement to the program, please share your ideas with me. If you have found a bug, please report it to me.

Enjoy the program!

Manuel Oñate  
March 1996