NEWFAX 3.1

Operating Manual

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NEWFAX 3.1 for WINFAX 3! This latest version of NEWFAX.DOT, the "real world" fax cover sheet template and macro, is not only updated for the latest version, 3.0, of WINFAX, but also has many improvements that work with WINFAX 2.0 and even without any WINFAX version.

Version 3.1 is a minor upgrade. It integrates NEWFAX with NEWLTR 1.0, a companion macro that uses data in NEWFAX's NEWFAX.INI file to insert names and addresses in letters. NEWFAX 3.1 also incorporates NEWLTR's improved handling of duplicate name entries. Registered users of NEWFAX 3.0 are receiving a free upgrade to version 3.1.

NEWFAX is a Word for Windows document template with an "Autonew" macro. To use it, you (1) copy NEWFAX.DOT to the directory where your WinWord template (*.DOT) files are stored, then (2) open a document based on the template (in the "File" menu, select "New," then select NEWFAX in the list under "Use Template."). The macro will run automatically.

The manual for the original NEWFAX asked (rhetorically), "Why not just use the [fax cover sheet] template included in WinWord?" The answer was that the realities of modern-day faxing require a template with "fixed" information about the sender and "variable" info about the recipient.

The original NEWFAX did just that.

NEWFAX 2.0 did it better!

NEWFAX 3.1 does more!

Here are some of the improvements in this latest version:

For WINFAX 3 users:

Even better integration with WINFAX. The macro feeds WINFAX not only name and fax number, as it did with WINFAX 2, but also Company and File Number (which comes through as "Billing Code" in WINFAX 3).

Delayed send. NEWFAX 3 allows you to feed WINFAX 3 the time and date when you want the fax sent.

Selectable fax resolution. NEWFAX 3 lets you instruct WINFAX 3 to send your

fax at normal or high resolution.

For ALL users:

Long messages. NEWFAX 3 gives you the option to type as long a message as you want! NEWFAX 2 limited you to a message about 40 words long. Anything longer, you had to quit the macro, type in the message, then send the fax "manually" by selecting WINFAX as the printer and printing.

Multiple Document Attach. You can attach more than one document to your cover sheet with NEWFAX 3.

Reusable Cover Sheets. After you've assembled your cover sheet and document(s) and sent them (or saved them), you can "erase" the information from the cover sheet and send the same "package" to another recipient. No need to generate a new cover sheet and re-assemble! You can save the cover sheet message or make a new one.

Let's look at the details:

1. The Opening Dialogs.

These are unchanged from NEWFAX 2. Here are the dialog boxes.

The first thing the macro does is check to see if WINFAX is loaded and running on your computer. If it finds WINFAX, it goes directly to the fax information dialog. If not, you get this:

 Let's deal with the second and third choices first. "Continue without WINFAX" is obvious enough. "Suppress this message" stores a global variable in the "private" INI file used by NEWFAX (NEWFAX.INI), and you never see this box (or the next one below) again.

(Well, tell a lie. The macro keeps checking for WINFAX each time you use it. If you install it later and have it running, the macro will automatically reset the global variable so it can integrate with WINFAX. And if some time after that you don't have WINFAX up and running, you'll get this box again, because the variable was reset. Not to worry).

But suppose you select "Load WINFAX now." Because nothing is certain in the wonderful world of computers, you get this dialog box:

 If WINFAX is installed but not running, you'll see it start as an icon near the bottom of the screen. One of WINFAX's few idiosyncrasies is that it doesn't automatically return focus to the calling macro, even if you ask it to. That's why the dialog box asks **you** to restore focus. Just click anywhere in the WinWord window and back it comes. You may notice the WinWord window title bar flashing. That's WinWord's signal that it needs to have back the focus.

If WINFAX isn't installed, you get the "cannot find or run the application" message box. Click OK and go on to the next macro dialog box. If you **thought** you had WINFAX, check whether it's really installed and ready to run. If you don't want to go through this little process every time you use NEW-

FAX.DOT, just click the "Suppress this message" choice next time you see the first dialog box.

Now for some familiar territory.

2. Cover Sheet Information.

If WINFAX is loaded, the first dialog box you see is the one below.

There's one change from NEWFAX 2 (well, two, the box is more compact). But the big one is the "Long Message" check box in the lower right corner. More about that in a minute.

Here's what the buttons and boxes do:

`Make£Cover£Sheet~ button. To just make a cover sheet, fill in whatever entries you like (even none!) and click "Make Cover Sheet." Done.

`Use£List£Manager~ button. To retrieve an addressee you stored in NEWFAX.INI, click "Use List Manager."[1] You get the list manager dialog box. It's covered in detail below.

`Add£Above£Entry£to£List~ button. To store addressee data in NEWFAX.INI, first enter it, then click "Add Above Entry to List." You have to enter *something* in each of five boxes, First Name, Last Name, Company, Phone and Fax. The "something" can be a single space, if you want to leave an item blank. If you try to store data without completing all five data fields, you get a message box reminding you about this requirement.

If you try to store data that matches an already-stored item in the First Name **and** Last Name **and** ID fields[2], you'll see another new feature of version 3.1. Here's what happens:

 First, you get this dialog box:

If you respond "No", then you get the following dialog:

 When you click the "OK" button, you are returned to the "Name and Address" entry screen where you can enter a new ID to save a duplicate listing.

But suppose you clicked "Yes" to the overwrite warning? What happens next depends on how the entry came to be in the "Name and Address" opening dialog. In other words, is it a newly typed entry, or was it imported from the NEWFAX.INI database with the "Use Selection" button in the List Manager?

If yours is a newly typed entry, it simply replaces the entry that was shown in the "Overwrite Warning" box, without further ado. Any phone or fax data attached to the "old" entry is overwritten with address data from the new one, and if you didn't type any, then the new entry won't have any. Any address data in the "old" entry that was put there by NEWLTR is also gone.

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[1] Don't expect to see the "Use List Manager" button until you have something to list! If NEWFAX.INI doesn't have any stored addressees yet, there's no list to manage. No list, no button. Just a blank where it will be after you put something in the list.

[2] Matching phone and fax numbers aren't a problem, so if you start sending regular faxes to a second person at the same company who has the same fax number, just call up the first person's data, change the name, and click "Add Above Entry to List." If you need to change existing data in the First Name or Last Name fields, use the Edit List button in the list manager dialog box. See below.

But if your entry was <u>imported</u> <u>from</u> <u>the</u> <u>List</u> <u>Manager</u>, the situation is a little more complex. Along with the name, fax and 'phone numbers, you imported ***any address data that NEWLTR might have stored for that name***.

So if you clicked "Yes" in the Overwrite Warning dialog, the question now is this: You can change the company, 'phone and fax data right in the "Information for Cover Sheet" dialog box, but ***what about the NEWLTR data***? Do you want your new entry, which is going to overwrite the "old" one stored under the same name, to keep the same address data that NEWLTR had added to the "old" entry? To make sure, you get the next dialog box:

If you select "Yes", the new fax information overwrites the "old", but the address information from NEWLTR is tacked on, so your database entry is the same except for the new fax data.

µ §But if you say "No", you get the following instruction box:

`Clear£Form~ button. "Clear Form" means what it says. If you don't like what you've filled in, click it and start over.

Title box. The Title box, new in version 3.1, is optional. If you're using NEWLTR 1.0 (available in the same forum as NEWFAX), and you entered a title (Mr., Ms., Hon.) for a particular name, the same title will show up in the Title box. But even if there is an entry in the Title box, it won't show up in your cover sheet unless you click the "Check to use" box just to the left of the Title box. If you make a new entry that includes a title and click the "<u>A</u>dd Above Entry to List" button, the title entry will be saved to NEWFAX.INI whether or not the "Check to use" box is checked.

File No. box. The "File No." also is optional. If you use this kind of data in your faxes, well and good. If not, no problem, but you'll probably want to delete the bookmark for the file number in the template's cover sheet text. If you do use this field, its contents will be recorded with the other data in a stored entry. If you use WINFAX 3, this data item will be poked to WINFAX as "Billing Code."

If you get past these little hurdles and store a new addressee, NEWFAX makes sure it goes in proper alphabetical order in NEWFAX.INI.

Page Count area. The "page count" is automatic, just like it says. After you make the cover sheet and decide whether you want to append a document to be faxed, NEWFAX counts the pages, checks its result with you, and plugs the page count into the cover sheet if you agree with its number. If you don't want auto-insertion, just check the "Don't auto-insert" box. Couldn't be simpler.

Message box and area.[1] The default "Message" is "See document attached." You can type a

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[1] You won't see the **Message** box and area if you've (1) finished a cover sheet, then

different message. The only limitation is that a WinWord macro text box only holds 255 characters, which works out to about 40 typical words. If you type a long message in the box, after a while you'll see that nothing is being entered even though you're still typing. But now you CAN use a long message! See page 5!

NEWFAX 2 made you exit the macro if you had a more-than-40-word message. NEWFAX 3 has made a quantum leap forward! Here's how it works:

µ §Notice the "F-A-X" icons in the WinWord Toolbar? They're the key to using long messages with the macro. Here's what the Toolbar looks like:

If you click the "Make Cover Sheet" button with the "Long Message" box checked, here's what happens: First, your name, company, phone and fax number data are entered on the cover sheet and then stored in NEWFAX.INI. Second, the macro stops execution with the message box below on-screen:

 Click on "OK" and start typing the message. The cursor is just where it needs to be. When the message is done, click on any of the letters "F-A-X" in the Toolbar. The macro restarts, picks the stored data out of NEWFAX.INI, and continues as normal. The stopping and starting is transparent to the user.

3. The List Manager.

 This dialog box lists your stored fax addressees, just as in the prior versions of NEWFAX. The buttons are so self-explanatory that there's nothing to add. Well, maybe one thing. The "Edit List" button opens NEWFAX.INI for editing as a WinWord document, puts up a message box with some useful advice, and ends the macro. Use this feature to change information in a stored listing. But be sure to read the message box that comes up when you select "Edit List."

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(2) selected the "Re-Use" function with the "Keep Message" option checked in the closing dialog box (see page 14). Reason: You don't need the message entry functions if you're keeping the "old" message!

4. Appending a Document.

In the instruction sheet for the original NEWFAX, I called this a neat feature. Still think so. After all, if you're doing a cover sheet, you're probably going to cover something with it. And most likely that thing is a WinWord document you just finished. So why not let NEWFAX put 'em together?

 If you click "yes" in the dialog box, here's what happens (just like the box says!): The macro brings up WinWord's "File" dialog box to let you select the file to be added. Then it finds the document you selected, puts a section break at its start, copies it to the clipboard, deletes the section break and pastes it at the end of the newly-minted fax cover sheet. WinWord saves the document's headers and footers intact, and starts page numbering in the new section at "1," so the cover sheet doesn't upset the numbers or format of the appended document's headers/footers.

You can change your mind about appending a document, even after clicking "Yes." Just select "Cancel" in WinWord's "File" dialog. The macro continues with the next step.

NEW FEATURE!! After appending a document, NEWFAX 3 gives you the following message:

Completely self-explanatory. If you select "Yes," the document append process is repeated.

5. Down for the Count.

If you didn't append a document to your completed cover sheet, the page count is (obviously) "1." Unless you checked the "Don't auto-insert" box, a "1" goes into the cover sheet.

If you appended something, and left the "Don't auto-insert" box unchecked, you now get this dialog box:

If you have a five-page document and a one page cover sheet, and the box says it has a cover sheet and <u>four</u> pages, guaranteed your fax document isn't going to come out quite the way you thought it would. Most times the reason is another WinWord quirk. Here's a little example from the Markel office:

Our firm uses a nice fancy cover sheet with 10-point Times New Roman as the default font in the Normal style. Suppose NEWFAX pastes on a five-page memo done in 12-point Courier to go out as a fax. What happens is that the font *type* is preserved, but the font *size* of anything in the memo's Normal style defaults to the font size in the ***cover sheet's*** Normal style. So all of a sudden the ***memo*** text is ***10***-point Courier, not 12-point. Plays havoc with your carefully orchestrated page breaks.

(The original memo isn't affected, of course. Just the pasted copy. The cure was to change the cover sheet's Normal style to 12-point Courier, then manually go through the sheet and change all the former 10-point Times New Roman, which just turned into 12-point Courier when the cover sheet's Normal style was changed, back to 10-point Roman. At least it only had to be done once).

Don't worry about this too much. This kind of thing doesn't happen very often. Only if you get into fancy cover sheets are you likely to have the problem. And you won't have it at all if you use one font and size consistently as your Normal style for WinWord documents.

But I digress. If the page count isn't what you expected, you should select "Cancel." This jumps you to the final dialog box (see page 14). You can end the macro and examine the cover sheet/document combination to see why the page count is different. (You can also save the combination, or delete it and start over, or "re-use" it to send to someone else).

6. Just the Fax, now.

Here's where the macro parts company with you guys who aren't using WINFAX. You really oughtta give it a try, it's a great program and very easy to use. And no, I don't have any connection with Delrina, except as a satisfied user.

Anyway, if you're not using WINFAX, you now jump to the final dialog box. See page 11. NEWFAX has done all it can for you. You have a cover sheet, with or without the document attached. Print it and fax it. Or whatever.

(Pssst.!   WINFAX users over here!)

The next dialog box looks like this:

Not much doubt what to do here, eh?

If you click "No," you go right to the last dialog box in the sequence (see page 14).

If you click "Yes," you see this message box (the fax number is mine):

 WINFAX 3 users: You won't see the "SELECTING 'NO' SENDS FAX NOW" line. Clicking "No" jumps past the "Dialing Sequence" box discussed on pages 11 and 12, and goes to the "When To Send Fax" box at the top of page 13.

WINFAX 2 users: Clicking "No" SENDS FAX NOW. Just like it says.

Note that the macro has put in the "dial 1 first" because it found an area code in the fax number that was used. You **don't** have to store the "1" in the fax number data field, because the macro will find the area code and do it for you. The macro also knows the difference between a U.S./Canada area code and the "011" international dialing code.

But let's say you clicked "Yes" because you need to use a credit card number, or you need to dial "9" first. The following dialog box comes up. First the WINFAX 2 version:

If you're using WINFAX 3, the bottom of the dialog box looks like this:

Here's how this somewhat complex dialog box works:

The list box at the top *always* shows the file number and fax number as the last two entries. (If your cover sheet doesn't have one or both of these items of data, the entries show as "<no file number>" or "<no fax number>" (or both)).

Here's why this is important. If you got as far as this dialog box, you already told NEWFAX that you needed to do something special like add a "dial 9 first." "OK," says NEWFAX, "but in that case I have no idea what your final dial string is going to look like. So I'll give you a blank dial sequence, and *you* fill in *exactly* what you want me to dial, and I'll dial it and send the fax."

Now the fax number is obviously a *sine qua non* (Ah! Finally got to use some of that law school Latin!) of a usable dial string. If you just put "9" and, say, a billing code in as the dial sequence, your fax isn't going to go anywhere.

Look at the dialog box again. Your dial sequence appears in the long double-lined box just below where it says (what else?) "DIAL SEQUENCE." Pay attention now. **WYSITBIWYD**. That isn't Welsh. It means **W**hat **Y**ou **S**ee **I**n **T**hat **B**ox **I**s **W**hat **Y**ou **D**ial. Neither more nor less. Before you click "SEND FAX," check out the DIAL SEQUENCE box. Make sure it's right.

If you're using WINFAX 3, the "SEND FAX" button is replaced by two buttons, "SEND FAX NOW" and "Send Fax Later." Self-explanatory.

OK, let's look at the rest of this dialog box. Just below the list box at the top are three buttons, "Delete," "Store" and "Build." All relate to entries in the list box.

"Delete" deletes whatever entry is selected when you click the button. You can't delete the fax number or the file number (or the "<no . . . number>" substitutes).

"Store" allows you to add an entry to the list box. See the short, blank box just after the "Store" button? The one that says "{Enter new item}" underneath? Put something in the box and click "Store." Presto! It's added to the list. And the macro puts it in proper sequence, too. Easy!

"Build" is what you do to copy a selected entry from the list box down to the "DIAL SEQUENCE" box. Select an entry and click "Build." Select the next one, click "Build" again. You'll see the string being constructed. DON'T FORGET TO GET THE FAX NUMBER IN THERE TOO.

What if you "Build" something wrong, or extra, into the "DIAL SEQUENCE" box by accident? No problem. You can edit the "DIAL SEQUENCE" text directly. In fact, if you wanted, you could just click the "DIAL SEQUENCE" box and type in your whole dial string (INCLUDING THE FAX NUMBER!! --OK, OK, Markel, we got the idea, enough about the fax number) directly, then send the fax. But you'd miss the fun of "Build"ing the sequence from your stored item list.

The remaining button is "Cancel." This jumps you to the final dialog box (see page 14). You can save the fax, or delete it, or re-use it to send to someone else, or just end the macro and send it manually.

This is as good a time as any to mention that the macro does some error-checking on fax numbers, as well as addressee and company names. WINFAX has limits on how long a string it will accept (41 characters in the name, 42 in the company name and 46 in the fax number). If either <u>name</u> is longer, the characters beyond the maximum are just lopped off when the fax goes to WINFAX. (The cover sheet isn't affected, just the data sent to WINFAX. No problem here). But the fax <u>number</u> is a different proposition. Sending WINFAX a truncated number would be risky. So if the fax number exceeds 46 characters, the macro generates an error message and drops back to the dialog box on page 11 to let you re-do the fax number.

7. Timing is Everything.

If you're using WINFAX 3, the next dialog box you see looks like this:

**WINFAX 3
ONLY**

The current time and date are the defaults. You can reset them to another time and date. Click the "OK" button without changing time or date to send your fax now. Click "Go Back" to go to the "Dialing Sequence" dialog box discussed on pages 11 and 12.

8. Make Your Resolution

 You WINFAX 3 users have one more choice to make. Here's the dialog box:

**WINFAX 3
ONLY**

9. Sending the Fax.

Now NEWFAX puts WINFAX to work. The macro changes your Print Setup to "WINFAX," automatically finds the comm port that WINFAX is set to use, and "prints" your document to the "WINFAX printer." Then it restores your original Print Setup.

You'll see WINFAX's progress report as your macro is transmitted automatically (assuming you've set WINFAX to "Display call progress.")

Under the progress report, you'll see NEWFAX's final dialog box, which looks like this:

 "Save," "Delete" and "End" are explained right in the box. "Re-Enter" is another really neat new feature of NEWFAX 3. Here's how it works:

Click "Re-Enter" and the macro jumps back to the cover sheet, <u>deletes</u> all the data it inserted, and re-presents the "Information for Cover Sheet" dialog box so you can send the identical fax to someone else. If you want to preserve the message, check the "Keep MESSAGE, re-enter OTHER fax data" box before clicking on "Re-Enter."

After you "Re-Enter" the new addressee data, the macro goes to the " Does Fax Number Need Prefix/Suffix?" message box (see page 8) to let you add a "dial 9 first" or other modification to the fax number. If you're using WINFAX 3, you then get the "When To Send Fax?" dialog box (see page 13); you don't get the "Select Fax Resolution" dialog as the macro assumes that you want to use a constant resolution in sending multiple copies of the same fax.

End of the instructions.

10. Registration.

The registration fee for NEWFAX 3.1 is $19. <u>Registered</u> <u>users</u> <u>of</u> <u>NEWFAX</u> <u>2</u>: If you registered before January 15, 1993, your upgrade is $2, which covers the cost of the new disk and postage. I have a database of registered users, so just check the appropriate line on the registration form.

As before, registered users get a disk with the macro unencrypted and fully commented, without the nag screens of course. Still a good deal, especially with the new features and WINFAX 3 enhancements.

Special limited time offer! Elsewhere in the Word for Windows library, you will find NEWLTR.ZIP, a template for letters that adds address info to the NEWFAX.INI file and lets you create addresses for your letters the same way that NEWFAX does for faxes. Try it! Until June 1, 1993, you can register NEWFAX 3.1 and NEWLTR 1.0 together for $26. This is a $3 saving over the separate registrations of $19 for NEWFAX and $10 for NEWLTR.

The last page is a registration form.

Keep On Faxin'!

Appendix A

Format and Layout of Fax Cover Sheet

The cover sheet included with NEWFAX 3.1 is just a sample. You can use any cover sheet you like.

NEWFAX 3.1 uses eight bookmarks. They are:

       ToFirstName   ToFax

       ToLastName   FileNo

       ToCompany   Message

       ToPhone   NumberPages

(There is now a ninth bookmark, EndMsg, which the macro inserts automatically to mark the end of a "long message." Its purpose is to mark the end of the message when you use the "Re-Enter" button in the final dialog box without checking the "Keep MESSAGE ..." box. You never see this bookmark, because the macro deletes it when it deletes the long message).

The only thing to note is that ToFirstName and ToLastName appear on the same line separated by a single space. Obvious enough, right?

You can make up your own cover sheet in any format you like. Just put these bookmarks in the appropriate locations, and NEWFAX 3.1 will work just as well as it does with the sample.

If you create a new cover sheet template from scratch, and have registered NEWFAX, here's what you do: After the template text is done, click on "Tools," then "Macro," select "Template Macros" if not already selected, then type "Autonew" in the "Macro Name" box that opens. Then click the "Edit" button to open a "blank" macro that has only the "SubMAIN" and "End Sub" lines. Now open the NEWFAX 3.1 original template, click on "Tools" then "Macro" (and if necessary, "Template Macros") again, and click on "Autonew," then "Edit." This opens the Autonew macro attached to the NEWFAX sample cover sheet. Press the F8 key five times to select the entire macro text, hit Ctrl-Ins to copy it to the clipboard, switch windows back to your new template's "blank" Autonew, hit the F8 key five times again to select both the "Sub MAIN" and "End Sub" lines, then Shift-Ins to paste the entire NEWFAX 3.1 macro text into your new template's Autonew. Finally, select File SaveAll and answer "Yes" to both save questions.

If you're using the unregistered version, you can still edit the sample cover sheet, or make a second copy and edit that.

NEWFAX 3.1 Registration Form

To: Robinson Markel
        53 Wall Street, Sixth Floor
        New York, New York 10005-2815

__ I'm enclosing $19 to register my copy of NEWFAX.DOT, version 3.1. Please send me a disk with the template macro in unencrypted and commented form. My name and address are below:

-OR-

__I registered Version 2 of NEWFAX.DOT before January 13, 1993. I'm enclosing $2 for the upgrade.

-OR-

__I want to register NEWFAX 3.1 <u>and</u> NEWLTR 1.0 at the special pre-June 1 combined registration fee. I'm enclosing $26. Please send me both templates with unencrypted macros on disk.

Name:

Company (if applicable):

Address:

City:

State:

ZIP:

Comments/Suggestions: