Works: Merge

Mail Merging for the Newton OS

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1 Welcome and Registration

1.1   About Works: Merge

Welcome to Works: Merge, an enhancement that adds mail merging to NewtWorks. Mail merges make it easy to create bulk mailings, form letters, and more!

Included in this archive are the following packages:

•WorksMerge.pkg
 This is the software package that you need to install on
 your Newton

•WorksMerge.pdf
 This is the users' manual for Works: Merge.

•WorksMerge.txt
 This is a text only format of the users' manual. If at all possible, use
 the pdf version of the manual as it has layout and graphics that cannot
 be included in the text version. The pdf version of the manual is
 viewed using Adobe® Acrobat Reader®. This can be obtained free of
 charge at www.adobe.com.

•SAStuff.txt
 A list of all of the software available from Stand Alone Inc.

•SAreg.pkg
 If there isn't a registration option under the ℹ button, install this
 package to register your software.

1.2   System Requirements

Works: Merge requires Newton OS 2.1, and a Message Pad 2000, Message Pad 2100, or eMate.

1.3   Registering Works: Merge

The Works: Merge Demo will work for a 30 day trial period. At the end of the 30 Days, it will stop working. To avert this tragedy, you will need to get in touch with Stand Alone to register your software. You can register with us by several different methods.

You will need to include the following information, no matter how you choose to register. Most importantly, you need to include your name EXACTLY as it is entered in your Newton, including spaces. We use this to generate your password, so it must be precise. You will need to specify which programs you wish to register, and include payment for each of them. We accept Visa, Mastercard, and American Express. If you are using normal mail, you can send us a check as well. Make sure to include your card number, the expiration date, and what type of card you are using. You also need to give us a way to get in touch with you. Email is the preferred way, followed by your address and phone number. An Email address is not strictly necessary, but it will result in much faster service.

For instant gratification, register by phone, and pay using Visa or Mastercard. To do so, call (773) 477-2492 and we will give you a password right over the phone.

Alternatively, you can send us a check to the address below.

You can also Email us one of several ways. The application has a Register section under the [i] button. Tap on that to open up a registration slip. If you fill out that slip, and have an Email client on your Newton, it will automatically Email us and we will send you a registration code. You could also just Email us the relevant information from your Newton or a desktop machine, and we'll send you a code. If you are registering through Compuserve, use, GO SWREG.

Once you register, you will receive a password from us. You can install this password one of two ways. There is an option to Enter Password under the [i] menu. Tap on it to bring up a screen that has a space to enter the password. Alternatively, just install the SA Register package enclosed in the Works: Merge archive. Select "Works: Merge" from the pop-up menu at the top, and enter the password. You should get a message confirming the password. Afterwards, you may remove the SAS Register application from you Newton.

1.4   Contacting Stand Alone Inc.
There are several ways to get in touch with us here at Stand Alone, Inc. Email is the preferred form of communication, but whatever works for you is fine. If you have any questions, comments, suggestions or compliments, please don't hesitate to contact us through any of the methods listed below.

1.4.1   Business Hours
Stand Alone is open from 9 AM to 9 PM Monday to Friday, and 10 AM to 4 PM Saturday and Sunday. These times are CST and GMT -5.

1.4.2   Email:
        internet: info@standalone.com
        AOL: Std Alone
        CompuServe: 76342,3057

1.4.3   Phone:
        Voice: (773) 477-2492
        Fax: (773) 477-2579

1.4.4   Regular Mail:
        Stand Alone
        3171 N. Hudson, Suite 1
        Chicago, IL, 60657, USA

1.4.5   World Wide Web:
        http://www.standalone.com

1.5   Reporting Bugs

If you find a bug in our software, it would be helpful if you reported the bug to us. To report a bug, please Email us with Bug Report Request in the subject line.   In the Email, include the following information:

- What type of Newton you are using (i.e. MP 2000)
- The version number of the system software (i.e. Newton OS 2.1)
- The software name and version number (i.e. Works: Merge 1.03)
- The error number
- A brief description of how we can recreate the error
- Your name and Email address so we can contact you when the bug is fixed

When reporting bugs, it is best to Email us, rather than calling, so that the pro-gramers have a written record of the information they need to solve the problem. As soon as we receive your Email, the programer will examine the problem, and fix it.. Because our programers are busy creating software, it can take a while for them to reply, but they will release a new version of the software that fixes the bug as soon as they can.

1.6   Version History

Version	Date	Notes
1.0	January 5, 1998	First public release

2 Installation

The first thing that you need to do to get your software up and running is to install it on your Newton. To do this, you need to have Newton Backup Utility, or Newton Connection Utilities, set up to talk to your Newton. If you have problems with this part of the installation, please contact consult the documentation that came with your Newton. Once Newton Backup Utility is set up, just follow the steps listed below to for each of the packages you wish to install.

1. Open the Newton Backup Utility , or Newton Connection Utilities

on your Desktop machine.

2. On your Newton, go to the Extras Drawer and tap the Connection icon

.

3. Once the Newton Backup Utility has loaded on your desktop machine, make sure your cables are connected and tap the Connect button on your Newton.

4. For each of the packages you wish to install, do the following:

   • Tap the Install Package button in the Newton Backup

   Utility

   • Go to the folder where your packages are, and select the desired package.

   • Click on the "Install" button

3 Using Works: Merge

Works: Merge gives you an easy way to do mail merges on your Newton. You can use it for bulk mailings, form letters, and more. It gives you a selection of choices that draw information from your Names file to personalize each document in the mail merge.
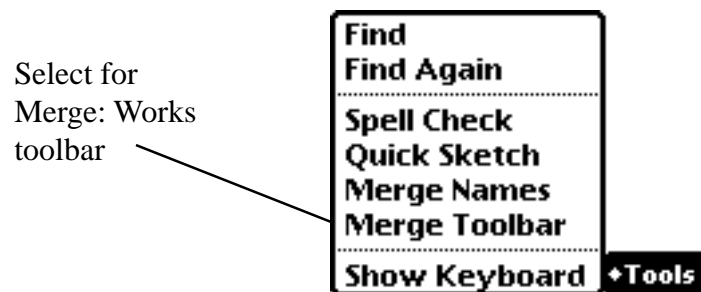
3.1   Creating Your Document

The first thing that you need to do to use Works: Merge is create a document in NewtWorks.
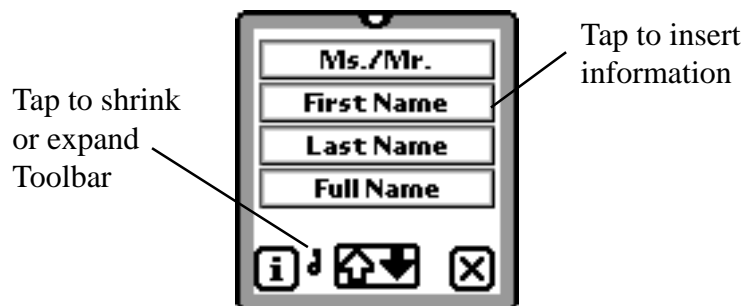
3.1.1   Standard Text

When preparing a document for a mail merge, there are two separate parts. The first part is the section of the document where the text is the same for every letter. This section is just like normal text in NewtWorks.

3.1.2   Personalized Text

The second part of a Works: Merge document is the section that is personalized for each letter. This part is created using the Works: Merge toolbars, which are found by tapping the Tools Button in NewtWorks.

Select for
Merge: Works
toolbar

Find
Find Again
···········
Spell Check
Quick Sketch
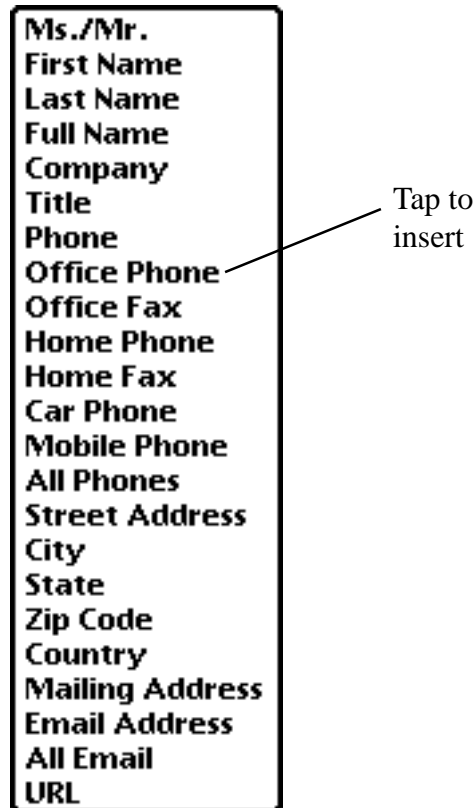Merge Names
Merge Toolbar
···········
Show Keyboard ◆Tools

The Works: Merge toolbar gives you a list of choices for personalized information in a floating window. The large version of the Toolbar gives you a list of buttons. Use the scroll arrows at the bottom of the floating window to scroll through the list of options.

Tap to shrink
or expand
Toolbar

Ms./Mr.
First Name
Last Name
Full Name

Tap to insert
information

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The switch to the left of the scroll arrows shrinks the window to its small size.

In the small version of the Toolbar, tap the Insert button for a list of all available options. To insert an option, select it from the picker.

Ms./Mr.
First Name
Last Name
Full Name
Company
Title
Phone
Office Phone
Office Fax
Home Phone
Home Fax
Car Phone
Mobile Phone
All Phones
Street Address
City
State
Zip Code
Country
Mailing Address
Email Address
All Email
URL

Tap to insert

Any options selected from either Toolbar will be placed at the text cursor. Make sure to include any punctuation, such as commas or spaces, between the inserted options.

3.1.3   Important Information About Inserted Options
All inserted options have double brackets {{ }} around them. These brackets must be in place for Works: Merge to perform a mail merge. Do not remove these brackets.
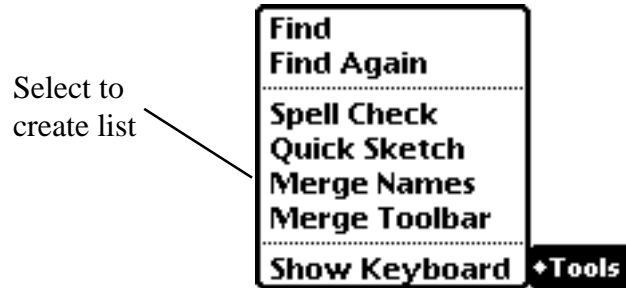
3.1.4   A Document Ready for Merging
The following document is ready for merging.
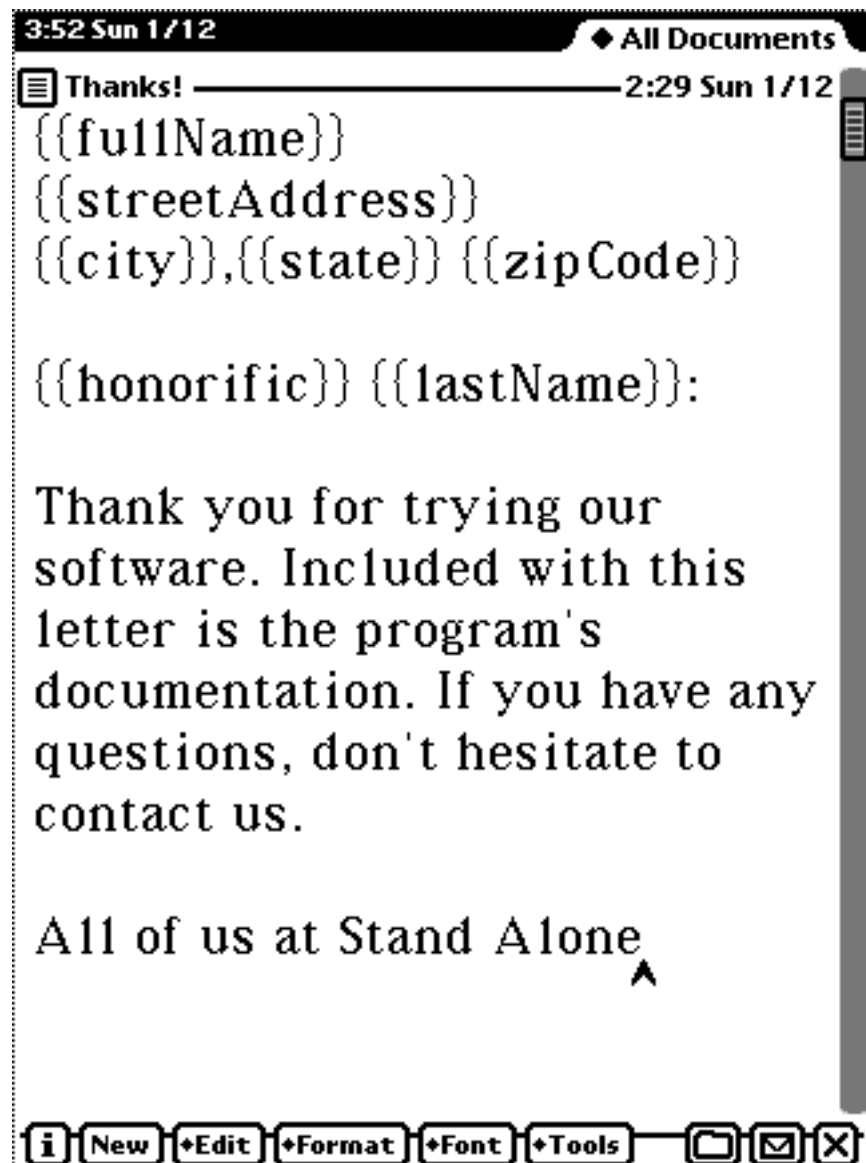
3.2   Creating The list of Recipients

Once a document it ready to be merged, you need to create the list of recipients. To create the list, go to the Tools button in NewtWorks, and select Merge Names.
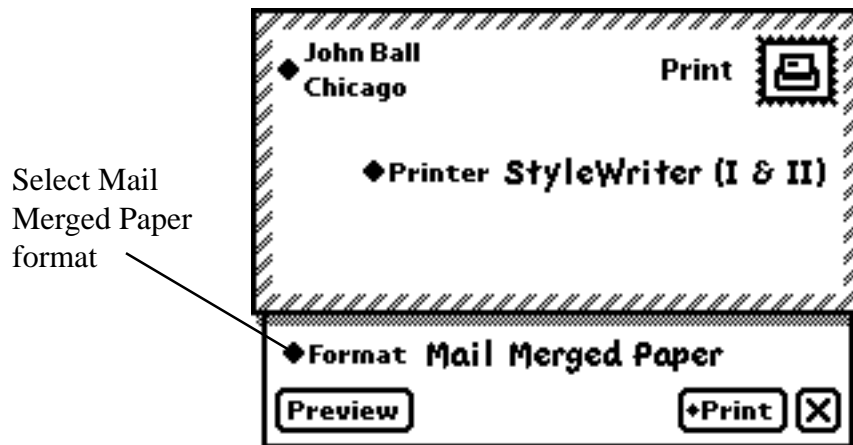
Select to
create list

Merge Names brings up your Names file. To include a person in the mail merge, check off the box next to their name.
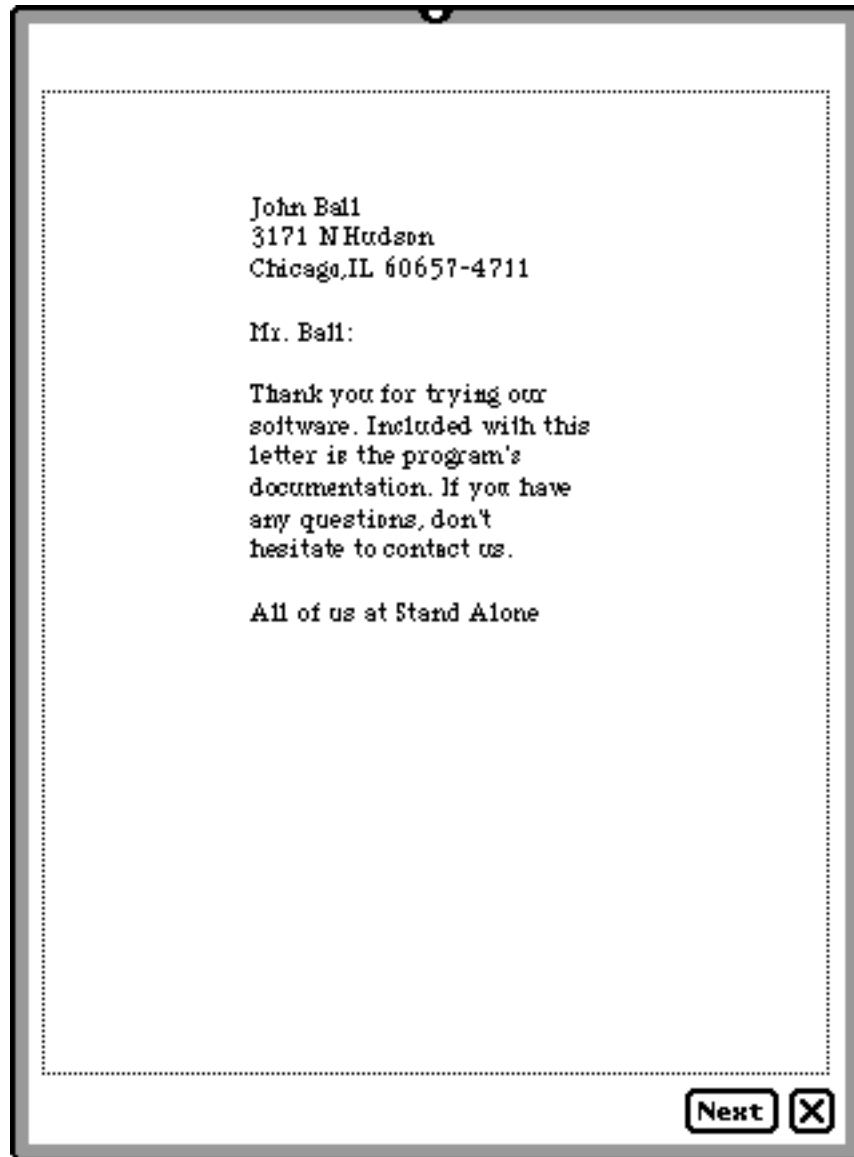
Check to
include in
list
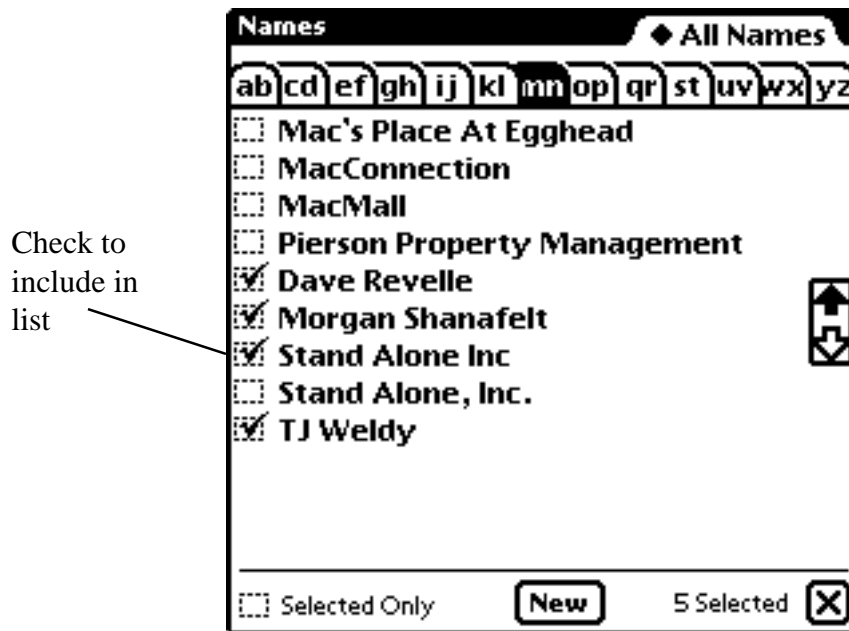
3.3   Printing the List

The last step of using Works: Merge is to print out you merged document. Works: Merge supports printing and faxing, but not email. Select Print Document under the Action menu to print. The standard printing slip appears, but you have a new selection in the Format picker. To print the merged document, select Mail Merged Paper from the Format picker.

Select Mail Merged Paper format

Once you've selected the Mail Merged Paper format, you can preview what will be printed by tapping the Preview button. The preview shows you how each letter will look with the information inserted. Tap the Next button at the bottom of the screen to search through all the letters in the mail merge.

John Ball
3171 N Hudson
Chicago, IL 60657-4711

Mr. Ball:

Thank you for trying our
software. Included with this
letter is the program's
documentation. If you have
any questions, don't
hesitate to contact us.

All of us at Stand Alone

Next ☒

When you're satisfied with how the letters look, close the preview window, and tap the Print button on the printing slip to finish printing.

To Fax a merged document, select Fax under the Action Menu. Set the Format to Mail Merged Paper, and finish you fax as normal. All of the personalized letters in the mail merge are sent to the recipient of the fax.