

Visendo Serial Fax Add-In for Microsoft Word

FAQ Version 1.0.1 : Revision 12.01.2011

Find out:

- ✓ Who is Visendo
- ✓ What is the Visendo Fax Server
- ✓ What is the Visendo Serial Fax Add-In for Microsoft Word



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Who is Visendo?

We are an **Independent Software Vendor and Microsoft Gold Technology Partner** specialized in Internet and Communication technologies. We have always been one of the top 3 companies on the markets we entered. We were one of the first three Microsoft gold partners in e-commerce on the German market: this is the highest level for a Microsoft partner. Hence, you, as a potential customer, have this guarantee of our top quality for your projects.

What is the Visendo Fax Server?

With the Visendo Fax Server you can send documents as faxes from every application. You receive incoming faxes per e-mail.

What is the Visendo Serial Fax Add-In for Microsoft Word?

With the Visendo Serial Fax Add-In you can use the mail merge function of Microsoft Word to send a serial fax to multiple receivers.

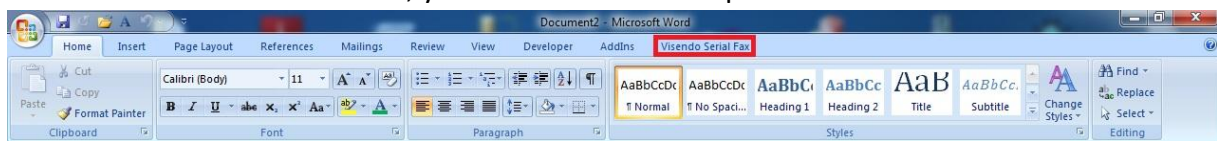
The Microsoft Word mail merge is an easy way to send a personalized document to multiple receivers. You can use a data source (Excel-list, database etc.) in order to personalize certain fields (e.g. address, name) for the different receivers. With the Visendo Serial Fax Add-In you can send the result of a Microsoft Word mail merge directly as a serial fax over the Visendo Fax Server.

Prerequisites

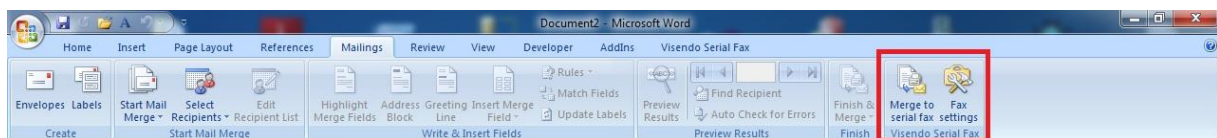
- Microsoft Word 07 or Microsoft Word 10 must be installed
- You must be able to send Microsoft Word documents as faxes via a Visendo Fax Server. I.e., either the [Visendo Fax Printer](#) must be installed on the machine, or the Visendo Fax web service from the [Visendo Fax SDK](#) package must be installed and configured. For further information, please consult the corresponding documentation.

Installation

Download the installation packet from our [download site](#). When you restart Microsoft Word after the successful installation, you see the new menu point “Visendo Serial Fax”.



Also, under the menu item „mailings“, a new tab „Visendo Serial Fax“ was added.



Please note: If an older version of the Visendo Serial Fax Add-In for Microsoft Word is already installed on your machine, you have to deinstall it first. For further information see the Microsoft Word Help under “Add-In”.

Fax Server Settings

Make sure that sending faxes over the Visendo Fax Server works from the current machine. At “Fax settings” you can set how fax jobs are sent to the Visendo Fax Server. There are two basic ways:

a) TCP

This is the normal Visendo FaxPrinter Client that you also use to send faxes as usual over the print function. If you have already sent faxes over the Visendo Fax Server from this machine, the settings will be read automatically from the Visendo FaxPrinter configuration and will be saved again there.

You can configure:

- **E-Mail:** The e-mail address that is registered for the current user at the Visendo Fax Server.
- **Retries:** Number of retries in case of a failure to deliver the fax

- **Sending time:** If you do not want the faxes to be sent at once, you can here specify a later point in time.
- **Authentication:** If the Visendo Fax Server requires authentication (i.e. in the Visendo Fax Server administrator console, under Services-Sender in the tab Sender the box “allow anonymous client access” is not set – cf. Visendo Fax Server documentation), you can here provide user name and password. Usually, these are your current Windows login data.
- **Server name:** Name or IP-address of the machine on which the Visendo Fax Server is running.
- **Port:** The client-port on which the Visendo Fax Server is listening (standard is 1111).
- **Temp directory:** The temporary directory that the Visendo Fax Printer uses for the conversion of the fax file. If you make no entry here, the current user’s standard temp folder is used.

b) Fax Web service

Enter here the address for the webservice. For further information on installing and configuring the web service see the [Visendo Fax SDK](#) documentation.

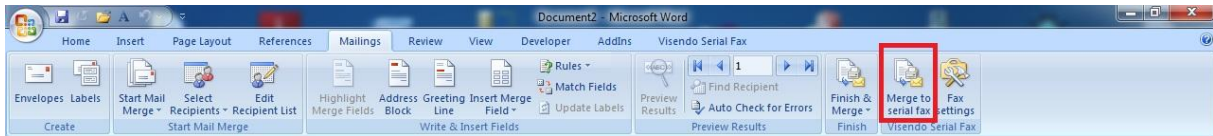
The screenshot shows the 'Fax Server Settings' dialog box. It is divided into several sections:

- General Settings:**
 - Fax settings:** E-Mail: josefh@ppedv.de, Retries: 1, Sending time: 1/12/2011 1:42:54 PM.
 - Authentication:** Authentication required, User name: [empty], Password: [empty].
- Service settings:**
 - TCP Settings:** Server name: 192.168.255.54, Port: 1112.
 - Webservice Settings:** Service address: http://localhost:810/FaxClient.
- Temp directory:** C:\Users\jh1\AppData\Local\Temp\

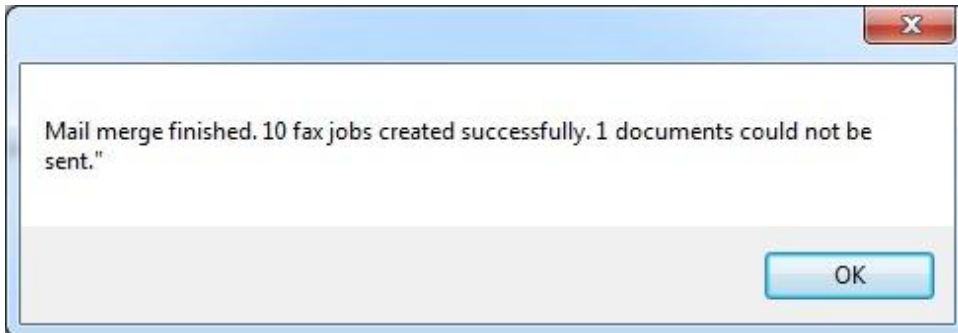
At the bottom, there are radio buttons for 'TCP' and 'Webservice', with 'Webservice' selected. 'Cancel' and 'OK' buttons are located at the bottom right.

Quick Start

To send a serial fax, start a Microsoft Word mail merge as usual. The only difference is that you finish the merge not with the button “Finish & Merge” from the “Finish”-tab, but with the button “Merge to serial fax” from the “Visendo Serial Fax”-tab.



The documents are then merged and sent as jobs to the Visendo Fax Server. Depending on your number of recipients, this can take some minutes. At the end, you are presented with a short overview of the number of successfully created fax jobs and failures. The reason for a failed fax job generation is usually a missing fax number in the receiver list.



Please note that the successful creation of a fax job does not yet mean that the fax was successfully sent to the receiver. Usually (depending on your Visendo Fax Server settings) you are notified by the Visendo Fax Server per e-mail after the actual fax has been sent (or could not be sent).

In the following, you find a more detailed step-by-step instruction:

Detailed example

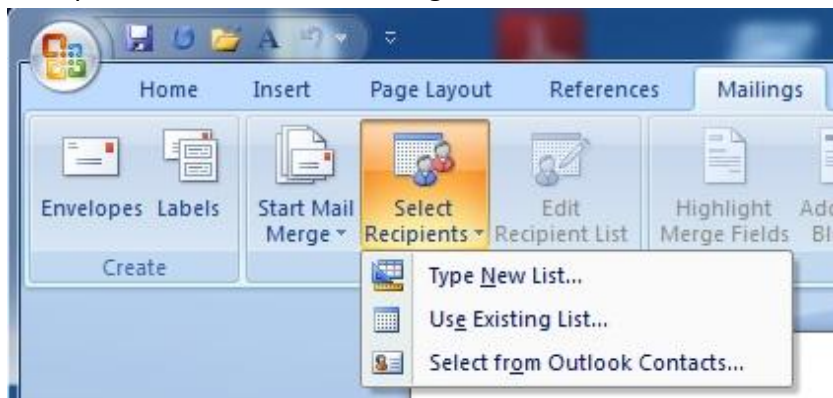
1. Prepare Data Source

Your data source must contain a column with the receiver fax numbers. In this example, we use a simple Excel-Table. The column names are provided in the first row. When you choose a column name containing the word "fax", this column is chosen automatically as the fax number column. You can always review and change this automatic choice later ([see below](#)).

	A	B	C	D	E
1	name	tel.	fax	address	title
2	Hans Meier	11	111	Badstr. 13, 84376 Gornberg	Mr
3	Josef Huber	22		Elisenstr. 4, 89766 Bregen	Mr
4	Franz Ferdinand	33	333	Domplatz 15, 87776 Passau	Dr
5	Götz George	44	444	Regensburg	Mr
6	Thomas Gottsch	55	555	Köln	Mr
7	The Grinch	66		Braunau	Mr
8	Mary Poppins	77	777	Salzburg	Miss
9	Shary Bobbins	88	888	Frankfurt	Mrs
10	Homer Simpson	99	999	Dummeldorf	Mr
11	Matt Groening	110	1110	Tuntenhausen	Professor
12	Bender	220	2220	Gern	Mr
13	Fry	330	3330	Berlin	Mr

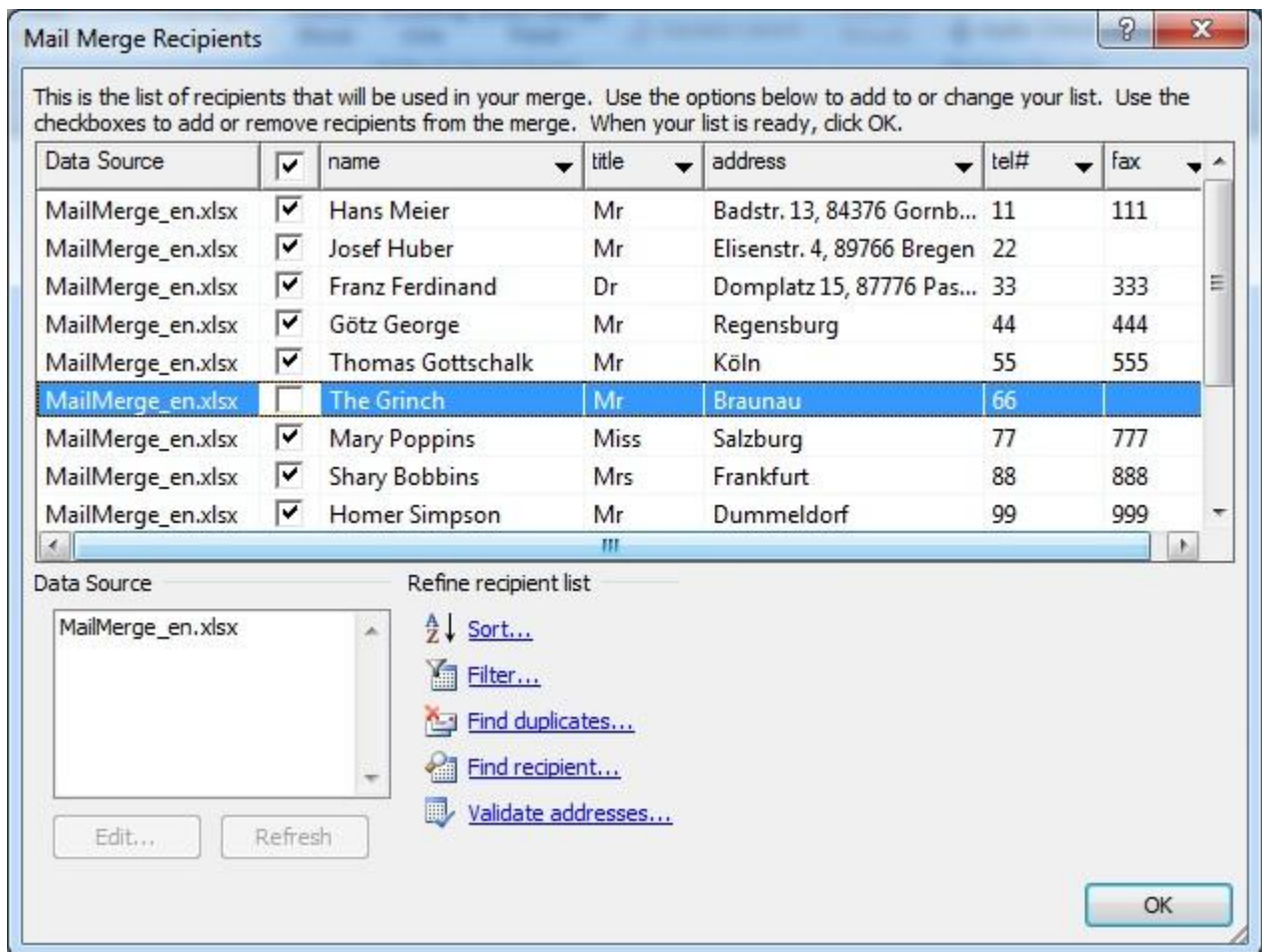
2. Select Recipients

Start Microsoft Word and choose your data source under „Mailings-Select Recipients“. In our example, we choose „Use Existing List“ in order to select the Excel file.



3. Edit Recipient List

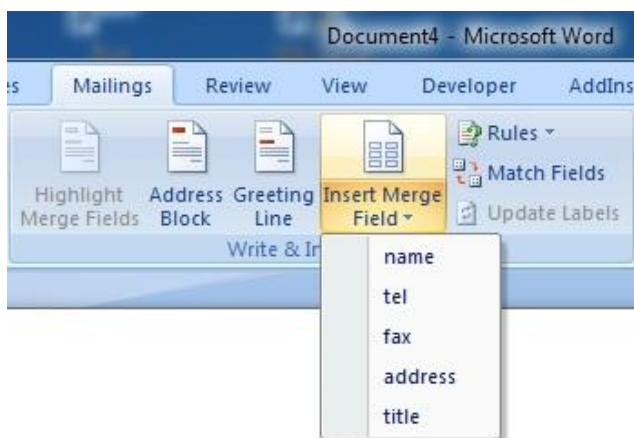
With the button „Edit Recipient List“ you can review the list and exclude certain receivers.



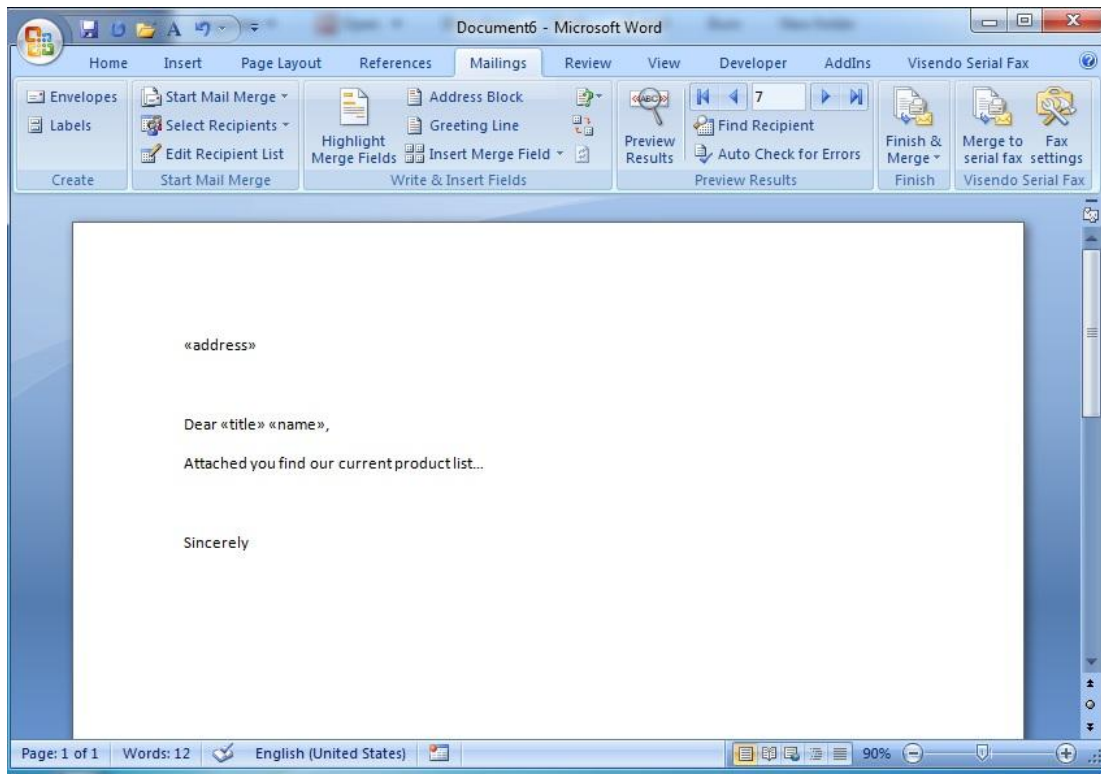
4. Create Merge Document

Now create your merge document. The Microsoft Word mail merge function offers extensive possibilities. Please consult the Microsoft Word Help for further instructions.

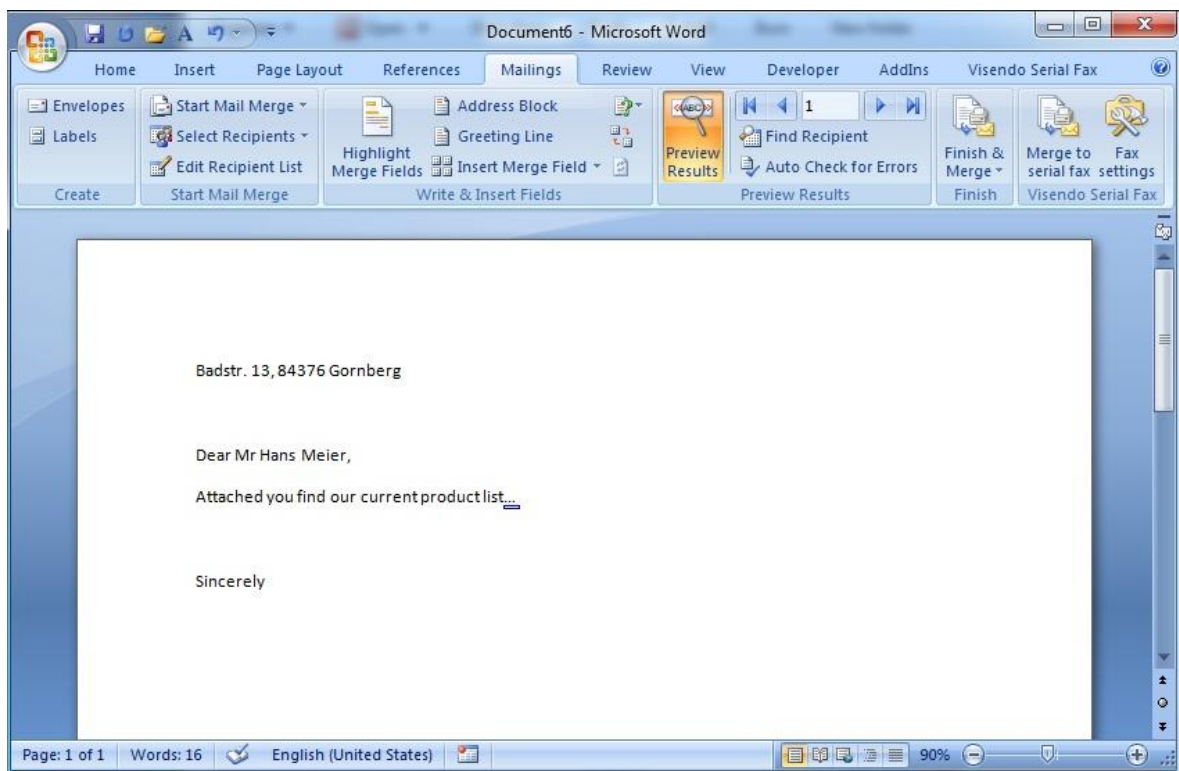
In our example, we merely insert address, title and name:



Here is the finished main document of our mail merge:



With the „Preview Results“ button you can preview the merged documents. Here is document number 1 from our example mail merge:



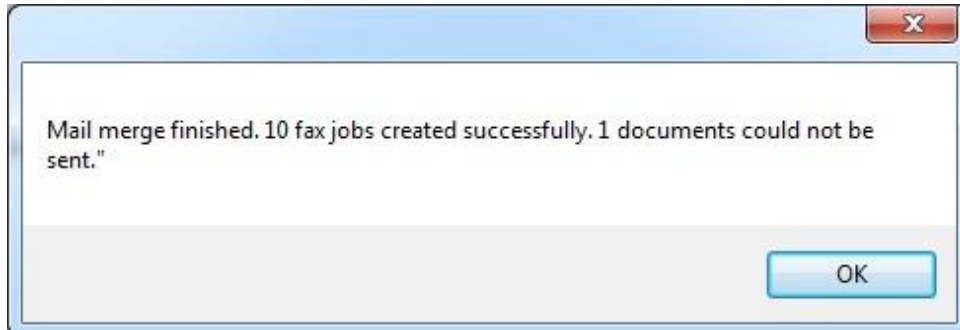
5. Visendo Fax Server Settings

With a click on „Fax Settings“ you can review or set how the fax jobs will be delivered to the Visendo Fax Server. For details see chapter [Fax Server Settings](#).

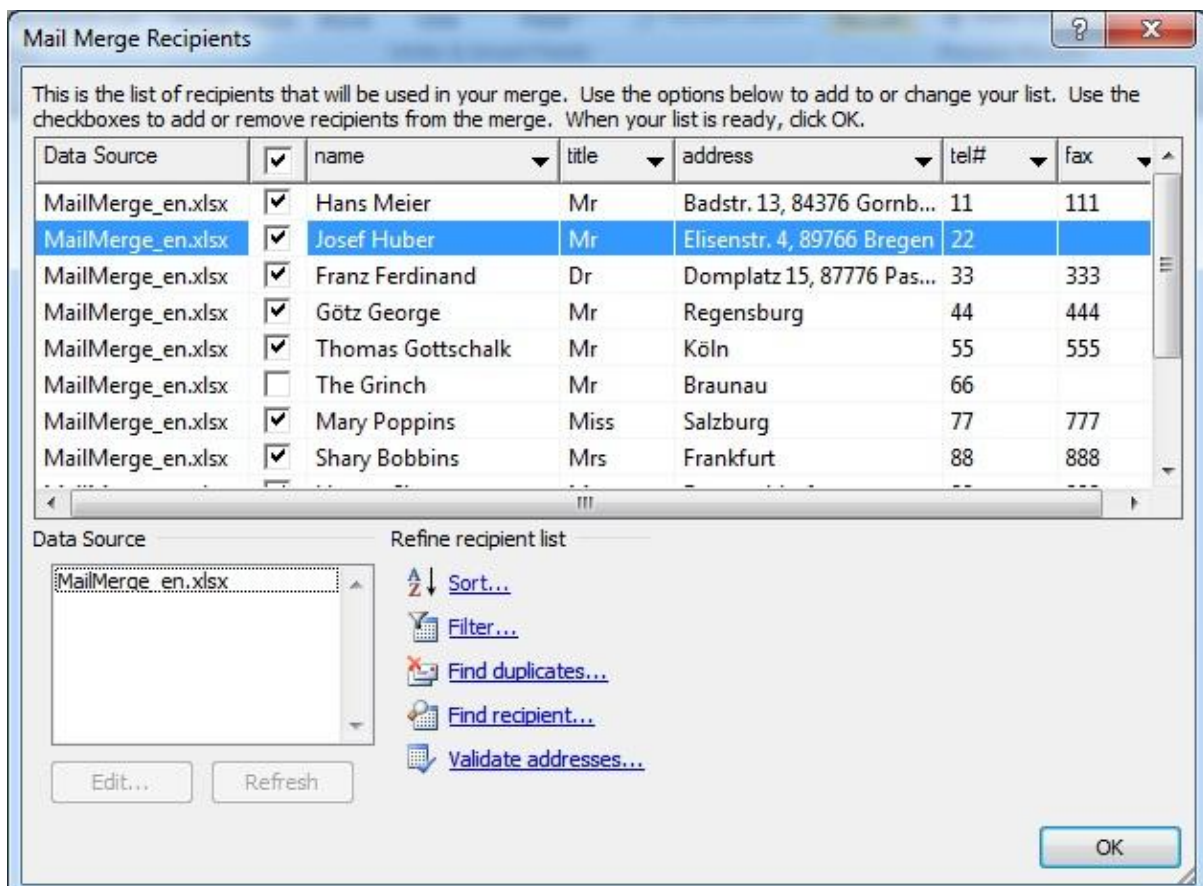
6. Send the Serial Fax

Now you can send the serial fax with a click on „Merge to serial fax“. Depending on the number of your recipients, this may take some minutes.

In the end, you receive a message on the number of successfully created and failed fax jobs.



In our example, no fax job could be created for the 2nd entry of the recipient list, because no fax number is provided:

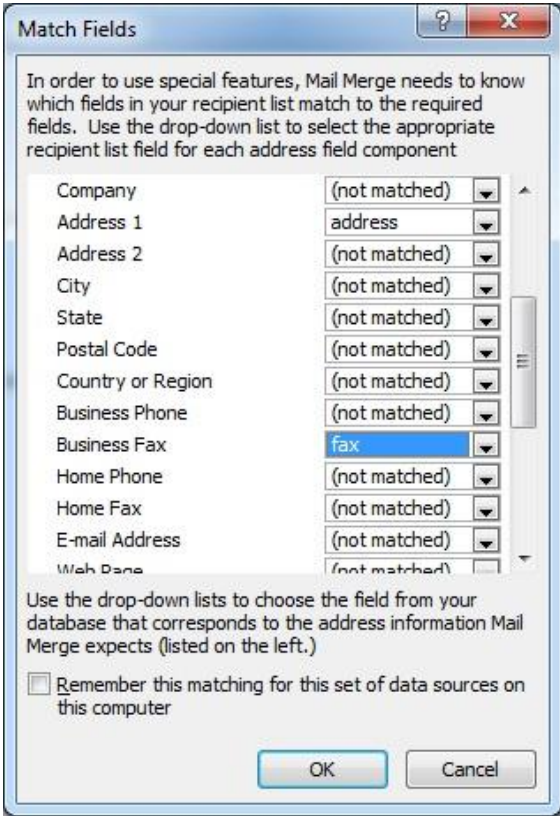
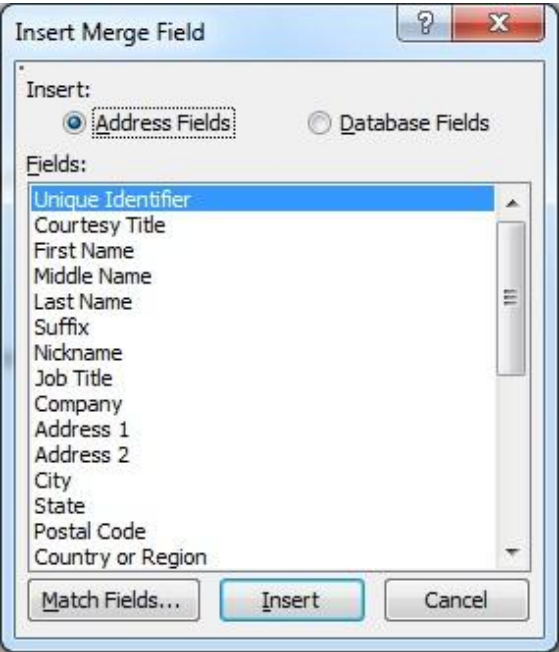


Please note that the successful creation of a fax job does not yet mean that the fax was successfully sent to the receiver. Usually (depending on your Visendo Fax Server settings) you are notified by the Visendo Fax Server per e-mail after the actual fax has been sent (or could not be sent).

How are the fax numbers selected

In order to be able to read the fax numbers from the data source, the Visendo Serial Fax Add-In needs to find a column in the data source that can be matched with the predefined Microsoft Word address field "Business Fax" or "Home Fax". Microsoft Word attempts to match this column automatically according to the title of the column.

With the button „Insert Merge Field – Match Fields“ you can review and change how fields from your data source are matched to predefine Microsoft Word address fields.



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Blog: <http://www.blog.visendo.com>

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