



fssMacroSuite

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fssMacroSuite

User Guide

by Roger Ellis

fssMacroSuite

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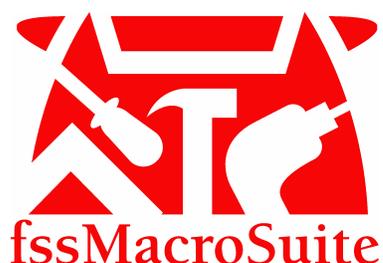
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1 Introduction

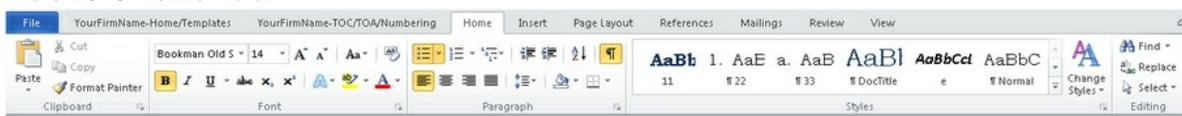


Welcome to the fssMacroSuite program. The fssMacroSuite ribbon was designed to add some essential tools to the standard Word Ribbon. Some of the tools are buttons that execute recorded keystrokes called **macros**. Most of our buttons fire a much more serious set of vba code routines and the term macro is a bit of a misnomer. The fssMacroSuite ribbon reorganizes Ribbon buttons and adds new Groups and Buttons in order to give the user a full **suite** of productivity macros.

The goal is to amplify what is on the Word ribbon and make it simpler without having to learn a totally new interface.

The **fssMacroSuite-Home/Templates Tab** (which can be renamed to reflect your firm name) is designed as a replacement for the standard Word 2007/2010 **Home Tab**. We do not remove the standard **Home Tab**, it occurs as the third tab in the ribbon interface. However, you will find just about every group of commands on the **fssMacroSuite Home/Templates Tab** plus the **QuickDocs** buttons, the **Template Selection** and the **Utilities** groups.

Word 2010 **Home Tab**:



fssMacroSuite-Home/Templates Tab:



As you can see from the two images, both tabs contain

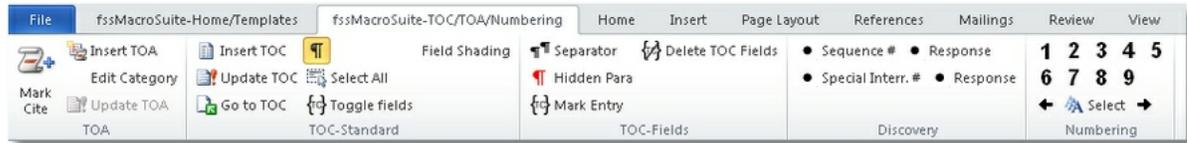
Font, Paragraph, Styles, Editing, Clipboard

but the **fssMacroSuite-Home/Templates tab** adds **QuickDocs, Template Selection, Insert, Utilities**

Many office users constantly have to create letters, fax covers, memos or other standard documents. The **QuickDocs** Group gives each office user the ability to define the "hot" three quick documents that they need. The label and the template are definable.

With the **Template Selection** tab, you can easily design a folder structure to hold your firm's templates. You have three definable categories (by default they are named: Office, Dept., Misc.) and you can create an unlimited number of choices and templates to go in those categories. **You do not need to hire an expert to do this. All you need to do is create a folder and save a template in that folder.**

The second tab of the fssMacroSuite contains tools for working with Tables of Authorities (TOA), Table of Contents, Discovery and Paragraph Numbering.

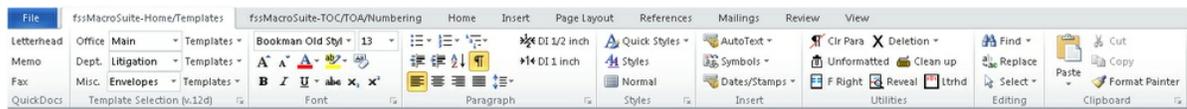


The function of these tools will be explained later in this documentation.

So, again, welcome to the fssMacroSuite with the tools to make your use of the new Ribbon interface more efficient and productive.

Roger Ellis
President
Fee Simple Software

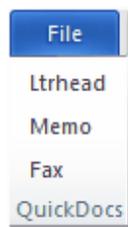
2 Tab - fssMacroSuite - Home/Templates Tab



The purpose of the fssMacroSuite - Home/Templates tab was discussed in the [Introduction](#).

Each Group on this tab is explained below:

2.1 Group - QuickDocs



You may set the QuickDocs buttons to any template that you wish. fssMacroSuite ships with three custom templates that provide a connection to your Outlook Address Lists and to your [LetterHead List](#)

You select the "From" person from the Letterhead List and the "To" person from your Outlook Address List contacts. If you do not have the practice of filling in addresses, phone and fax numbers for your contacts, it would be to your advantage to do so.

Each of the templates has a "Userform" that has been designed to have a consistent look and layout.

IMPORTANT NOTE: Using Outlook is purely optional. You may enter the data manually.

2.1.1 Letterhead

The letterhead template accepts manual input or it can read addresses from Outlook.

1. Outlook does not have to be running for the template to work.
2. In the QuickDocs group, click the button that has been set to your letterhead, normally the "Ltrhead" button.
3. For keyboard centric users, tab through the data entry fields and shift-tab to back up. Use the space bar to fire command buttons. Some command buttons are not in the tab sequence, particularly the "Make Default.." buttons, so you must use the mouse to click them.
4. Complete the dialog box shown below:

2.1.1.1 The "From" section

The from choice box (hereinafter called a "combo box") allows you to pick one of your staff or attorneys for the letterhead. Notice the **"Make this the Default "From" choice"** button. When you first use this template, you may set the selected attorney or staff person as the default choice that is set every time that you run the template.

You do not have to set a Default if you do not wish to. If you enter a few characters of the last name of

the desired "From" person, the combo box will hunt for the first match to those letters.

The list of staff/attorneys is derived from the [Letterhead list](#).

2.1.1.2 The "Use Outlook" Section

This section requires that you pick an Outlook address list (list of contacts). You may use your Contacts list or use a shared List. If the list appears in your Outlook screen as a choice, then it should appear in the combo box as a choice.

You can set a default contact list by clicking on the **"Make this the Default Contact List"** button after you have selected a valid list.

Enter a few characters of the last name of your contact to filter the list:

Tab from the selected name and use your thumb to hit the space bar to confirm the "Use this Contact/Recipient" button or use the mouse.

2.1.1.3 The "To (Recipient)" Section

Once you have selected your contact or manually jumped to the "To" section, you must select a Title (Mr., Mrs., Miss etc.). As with all combo boxes, you may type a few characters and the tab out to select the value.

The name of the "To" recipient will be combined into a Greeting based on your designated Greeting Style:

The first time that you fill in one of the templates, please set a default Greeting Style.

Note that if you manually enter an address or any multi-line data, use Shift-Enter.

2.1.1.4 The "Letterhead Specific" Section

Select a choice from the Via combo box if necessary

Fill in some Re: content

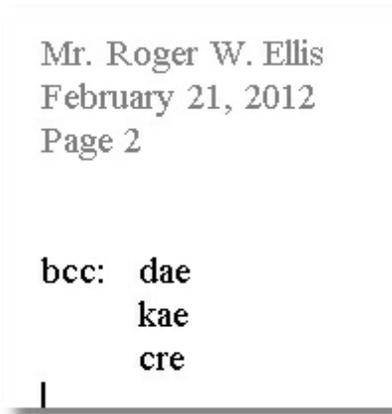
Select a Closing

Note that the preferred closing that was set in the Letterhead List is used. When you select the "From" person the closing that you filled in for that "From" person is used. You may type in any preferred closing that you wish if you want to override.

Fill in Enclosure or Enclosures if warranted.

Enter cc and bcc content.

If you enter bcc content, a page break will be added and the bcc data will be listed on the second page.



2.1.2 Memo

Memorandum (Select the "From" staff member then fill in the Recipient or lookup the Recipient in Outlook)

From: Make this the Default "From" choice

Use Outlook Option:

To (recipient): Title Jump First Middle Last Suffix

Greeting style: Make this the Default Greeting Style

Greeting:

Name:

Company/Firm:

Business Title:

Address: Use Shift+Enter to create a line break for multi-line addresses and City ST and Zip lines

Memorandum Specific

Re:

CC: Use Shift+Enter to enter multiple cc's

2.1.2.1 The "Memorandum Specific" Section

The Memorandum Specific section only has two data entry fields: RE: and CC:

Once you fill in a "Regarding" RE: phrase and then any (optional) CC: information the template will open and let you type in your Memo content.

2.1.3 Fax Cover

Fax Cover Sheet (Select the "From" staff member then fill in the Recipient or lookup the Recipient in Outlook)

From:

Use Outlook Option:

To (recipient): Title First Middle Last Suffix

Greeting style:

Greeting:

Name: Business Title:

Company/Firm:

Address: Use Shift+Enter to create a line break for multi-line addresses and City ST and Zip lines

Fax Specific

Fax Number: Office Phone No.:

No. Pages: Client Matter No.:

Re:

Comments: Use Shift+Enter to create multiple lines if needed

If problems, call: at:

2.1.3.1 The "Fax Specific" Section

Fax Specific

Fax Number: Office Phone No.:

No. Pages: Client Matter No.:

Re:

Comments: Use Shift+Enter to create multiple lines if needed

If problems, call: at:

If you use the **Outlook Option** and the contact that you selected had a fax number and office phone number filled in, they will automatically be placed in the Fax Number and Office Phone No. fields. Fill in the rest of the fields

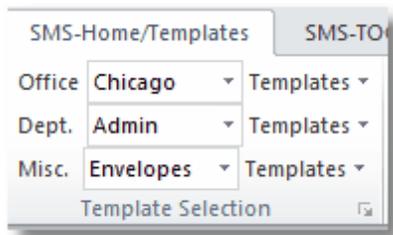
If you did not select a contact with the Outlook Option, then fill in each field manually.

2.2 Group - Template Selection

What is a template? A template is a Word document that is saved with a .dotx or a macro-enabled template with a .dotm suffix. You may take any Word document and save it as a template by using save as and selecting the .dot? suffix. Typically you would prepare the document to be clean of any edits, so that you have a shell to fill in with file specific information. You can then use the same template over and over as the beginning point of document creation. Most large firms have developed a large number of templates for their practice. The beauty of a template is that you never change the original (unless you intend to edit it) because when you select a template it creates a new copy of itself.

fssMacroSuite provides three specialized templates that are "macro-enabled". Those templates utilize pop-up forms (called UserForms in Word terminology) to elicit information that can then be placed into the new document that is being created. The Userform that we provide for LetterHead for instance, inserts the name of the person that the letter is from into multiple locations in the letterhead itself and at the signature area. That is one of the reasons for using specialized templates. They can save a lot of time. Over the course of a day, or a week, the amount of time saved by using a template adds up and justifies the cost of creating the template.

2.2.1 Choose a Category



There are three storage Categories for templates to help you classify your templates. You may name the three categories to any name that you wish. The only caveat is to keep the names fairly short to conserve space on the Ribbon. The standard install uses:

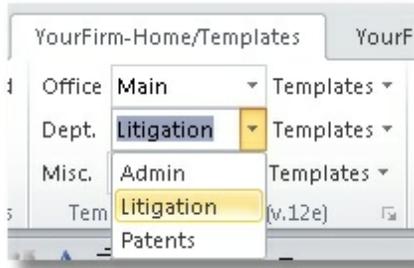
Office - If your firm has multiple offices, use this to differentiate office specific templates.

Dept - Store practice area or departmental (admin, accounting) templates here

Misc. - The catch all. Typically categories like Envelopes, Labels etc.

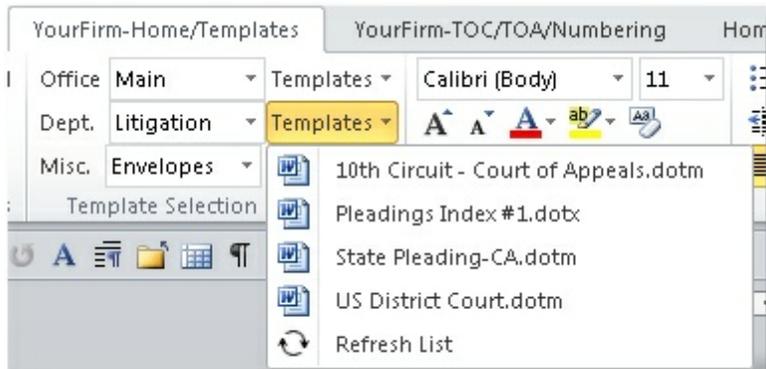
Check with your IT department if you wish to add sub-categories in each of the three main categories. There is no practical limit on how many sub-categories or templates that you may have.

2.2.2 Choose a Sub-category

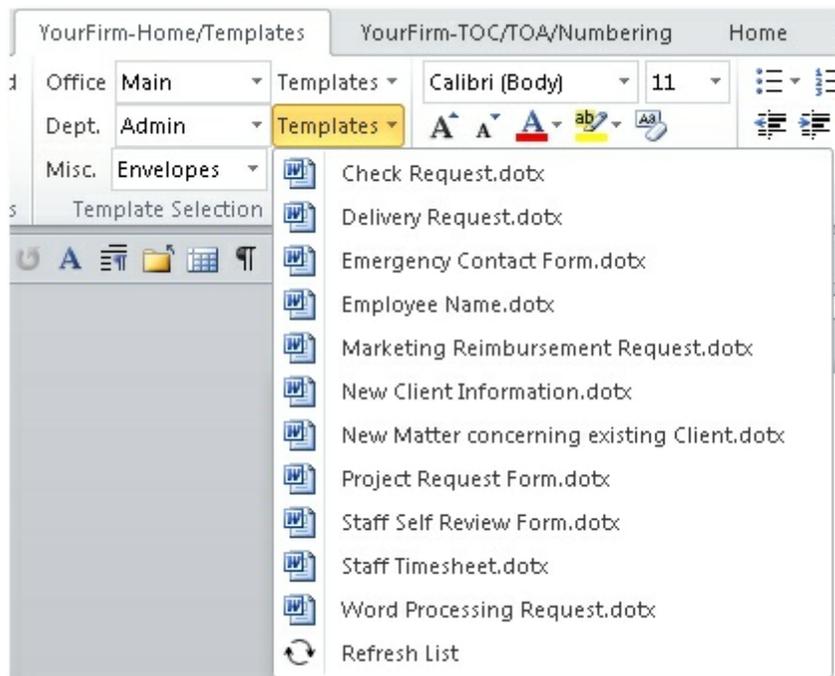


As you can see from the image above, there are three sub-categories under the Dept. category in our Demo configuration. Each computer station can be configured to have a "default" sub-category in each of the three categories. See the [User Configuration](#) topic for information about how to set the default sub-categories.

2.2.3 Choose a Template

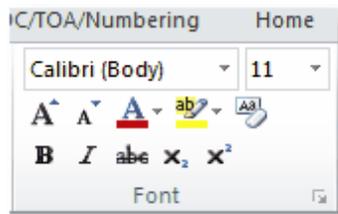


Once you have selected your sub-category, click on the Templates drop-down menu to see available templates. The above image shows our Demo Dept.- Litigation Templates.



The above image shows our Demo Dept. - Admin Templates

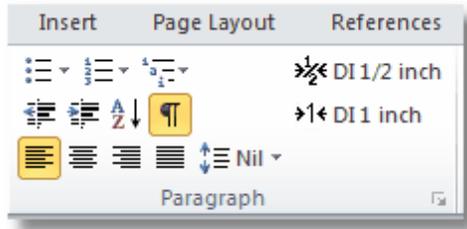
2.3 Group - Font



The font group duplicates the regular Home tab's font group and includes:

- Grow Font
- Shrink Font
- Font Color
- Text Highlight Color
- Clear Formatting
- Bold
- Italic
- Strikethrough
- Subscript
- Superscript

2.4 Group - Paragraph



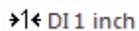
The Paragraph group duplicates the regular Home tab's paragraph group (plus two double indent buttons described below) and includes

- Bullets
- Numbering
- Multilevel List
- Decrease Indent
- Increase Indent
- Sort
- Show/Hide
- Left Justification
- Center Justification
- Right Justification
- Full Justification
- DI ½ inch
(Double-Indent, ½ inch)
- DI 1 inch
(Double-Indent, 1 inch)

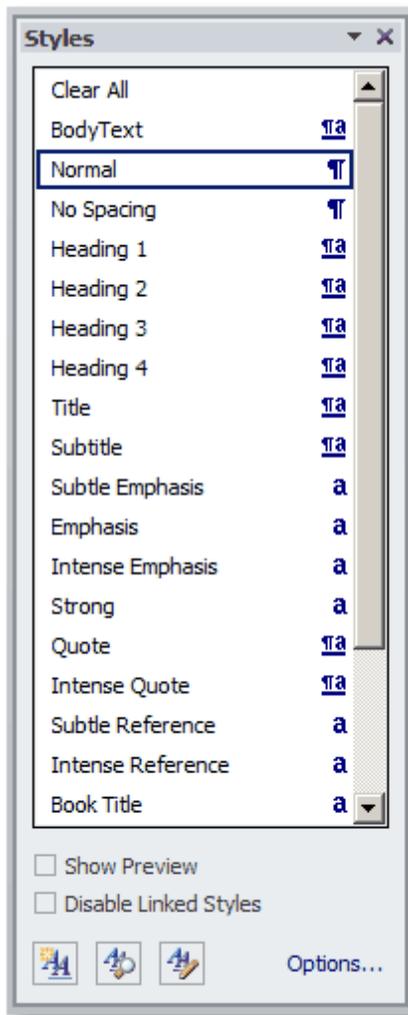
2.4.1 Direct Formatting 1/2 and 1 Inch indents



This button applies double indent (direct formatting) on the current paragraph with 1/2 inch left and right indents



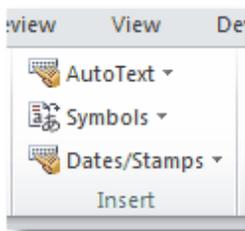
This button applies double indent (direct formatting) on the current paragraph with 1 inch left and right indents



2.5.3 Normal

Normal: Applies the Normal style at the insertion point

2.6 Group - Insert



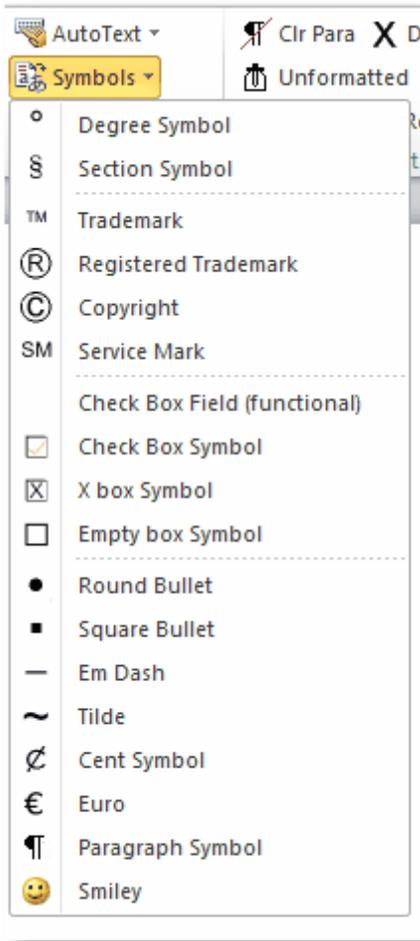
The Insert Group is a special fssMacroSuite group. Each button is described below:

2.6.1 AutoText



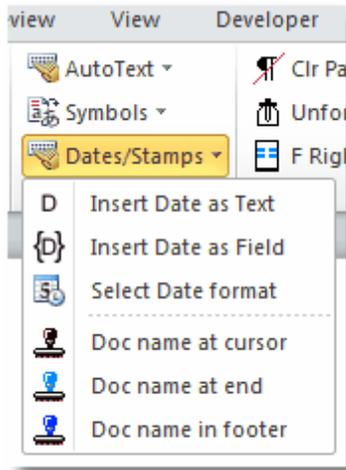
This button produces a quick list of any autotext entries that you may have saved.

2.6.2 Symbols



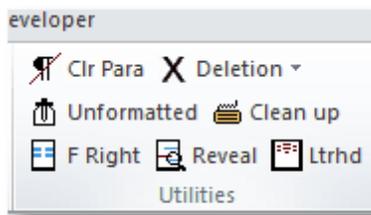
This dropdown menu provides some commonly used symbols. If you have ever tried to find an x'ed box symbol, you will appreciate the convenience.

2.6.3 Date/Stamps



These Dates/Stamps selections give you a convenient way to insert dates and the name of your current document.

2.7 Group - Utilities



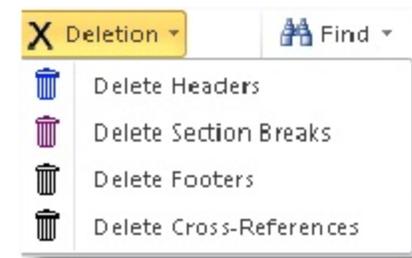
1. Utilities Group

2.7.1 Clr Para



This button removes paragraph formatting in the current paragraph

2.7.2 Deletion



The choices in this drop-down menu allow you to

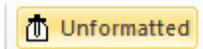
Delete headers

Delete Section breaks

Delete footers

Delete cross-references

2.7.3 Unformatted



This button allow you to paste text that is in the clipboard into the document without any formatting

2.7.4 Clean up



Important: Save the document before using the tool. The button copies the current document and pastes the text into a new document without any formatting. The macro closes the document without saving the current changes.

2.7.5 F Right



WordPerfect veterans will miss the flush right option. With Word you must set a Right Tab. This button offers a quick and dirty way to get the same effect as a WordPerfect flush right by creating a hidden two cell table and setting the alignment of the second table cell to be right aligned. The cursor will be positioned into the second cell for your data entry.



You may decide to have left aligned text and right aligned text on the same line.

Turn on Table Gridlines to see the table structure and to place your cursor in the correct cell.



The end result with table gridlines turned off:



2.7.6 Reveal



This button checks to see if the current document contains tracked changes.

2.7.7 Ltrhd



The Ltrhd button is a special button that can be used in conjunction with the fssMacroSuite provided Letterhead/Memo/Fax Cover Sheet templates. It will allow you change the attorney that is inserted in the "from" sections of those forms to a different attorney.

Perhaps you a form that you had finished but you selected the wrong "from" attorney or staff person. Click this button and you will see this special userform:



When you click on the drop-down arrow on the right of the combo box it will expand to show more choices or simple type some the characters of the last name of the staff person that you wish to choose.



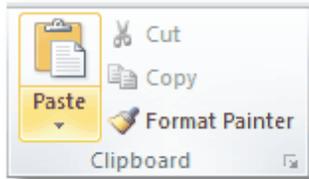
Select a different attorney or staff person and the name and other values associated with that name will be copied into the document.

2.8 Group - Editing



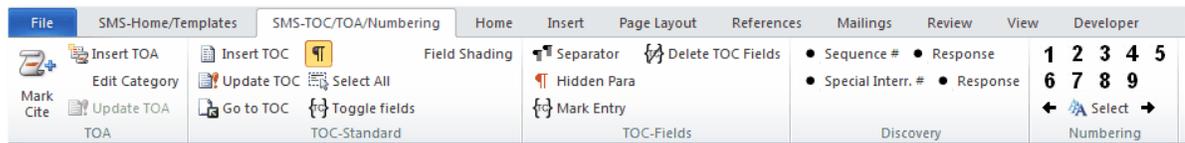
This Group duplicates the functionality of the standard Word Home Tab's Editing Group of buttons and menus.

2.9 Group - Clipboard



This Group duplicates the functionality of the standard Word Home Tab's Clipboard Group of buttons and menus.

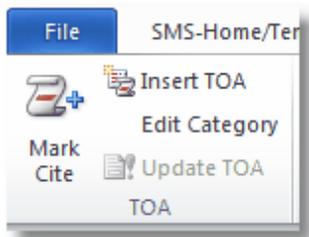
3 Tab - fssMacroSuite - TOC/TOA/Numbering



This fssMacroSuite Tab contains groups of controls to help deal with Tables of Authorities/Table of Contents/Discovery and Numbering.

Each group is discussed below:

3.1 Group - TOA

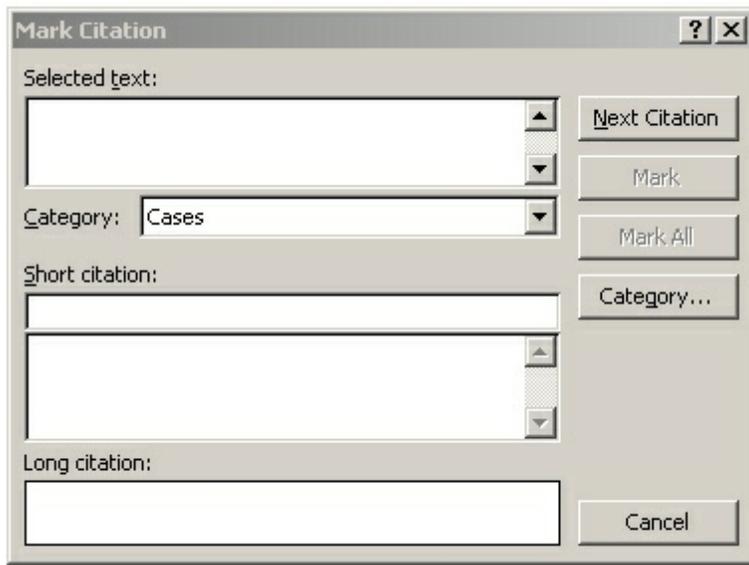


Word has special tools for Tables of Authorities. This group consolidates them for easy access.

3.1.1 Mark Cite



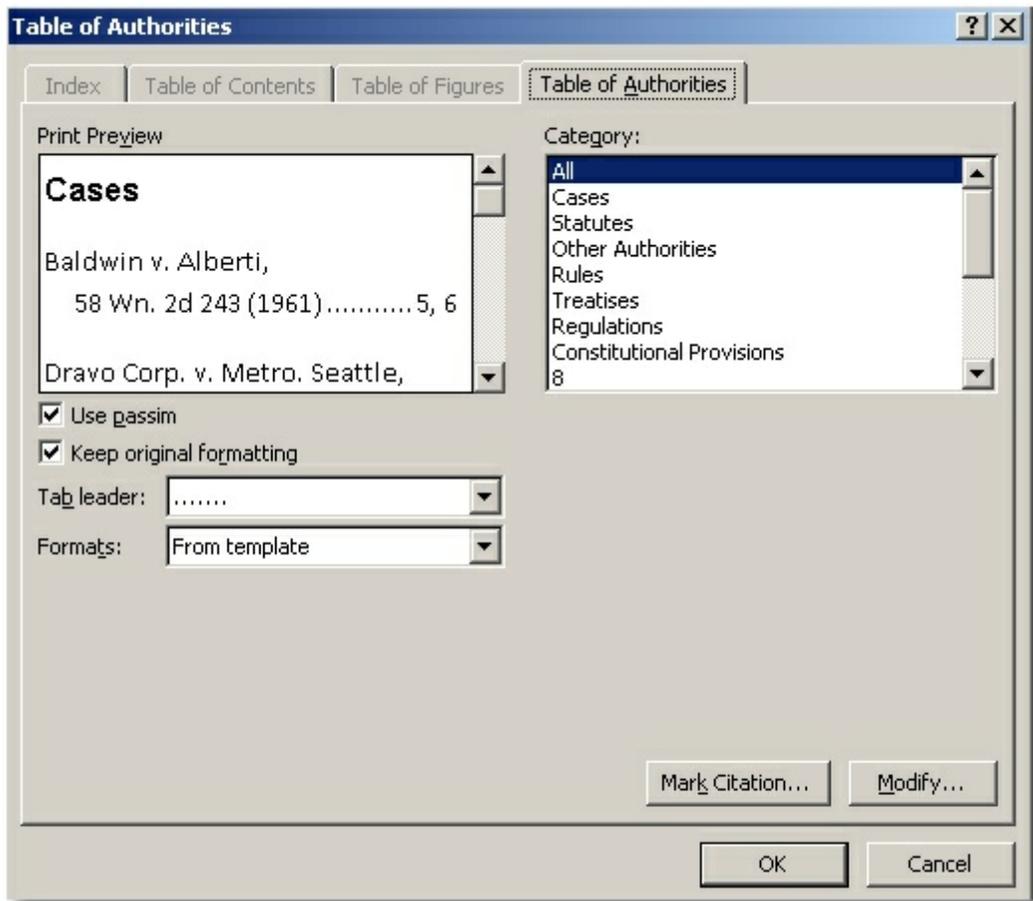
Mark Cite: Displays the Mark Cite dialog.



3.1.2 Insert TOA



Insert ToA: Displays the Insert ToA dialog



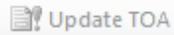
3.1.3 Edit Category

Edit Category

Edit Category: Displays the Edit Category dialog..

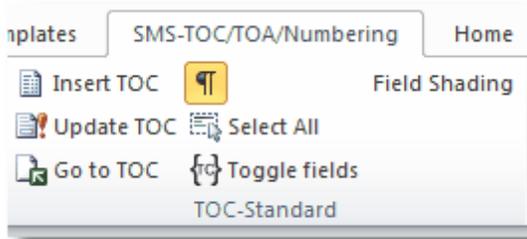


3.1.4 Update TOA



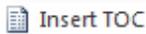
Update ToA: Updates the ToA field

3.2 Group - TOC-Standard

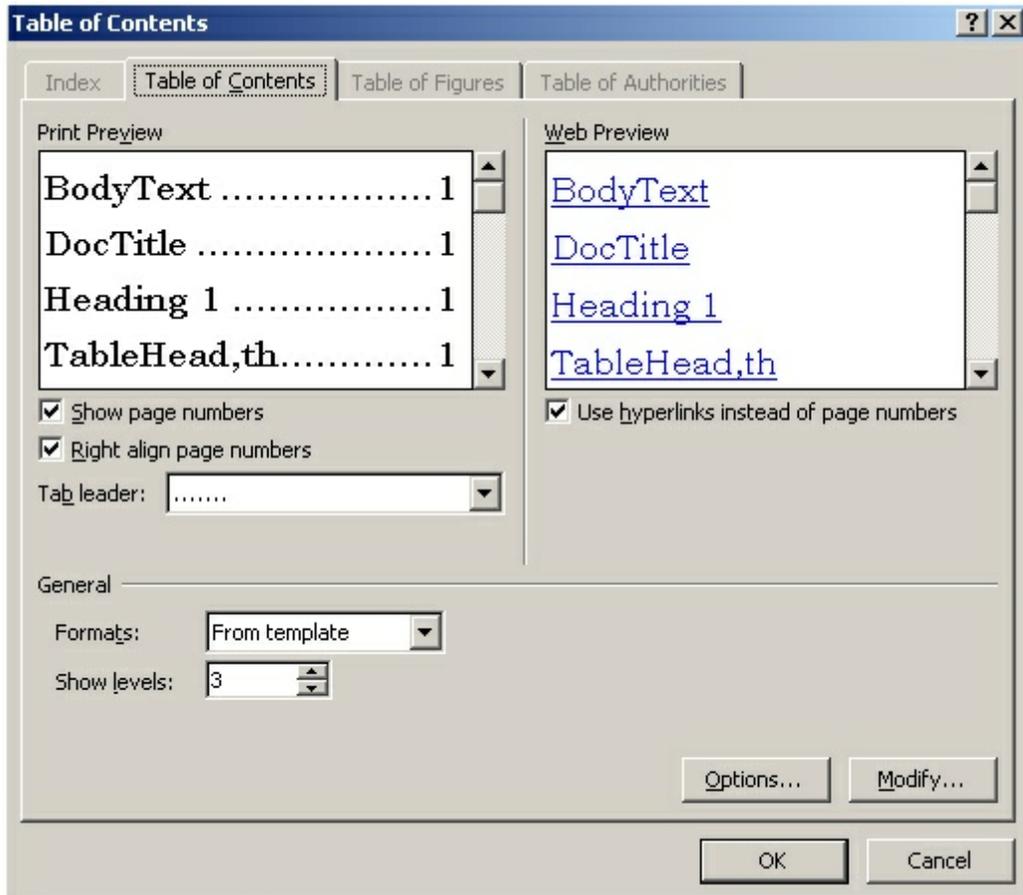


This group consolidates several buttons that are useful for working with Table of Contents creation.

3.2.1 Insert TOC



Insert ToC: Displays the Table of Contents definition dialog as shown below:

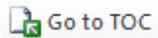


3.2.2 Update TOC



Update ToC: Updates the Table of Contents field are changes are made to a document. You might delete a page or reorder some text that would make it necessary to rebuild the Table of Contents.

3.2.3 Go to TOC



Go to ToC: Go to the Table of Contents page. This is an fssMacroSuite addition.

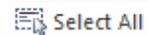
3.2.4 Show Hide Formatting Marks



This duplicates the same button that appears on the fssMacroSuite's Paragraph Group and the Standard Word Ribbon's Paragraph Group.

This is a toggle on/off button that when toggled on reveals paragraph marks and other formatting indicators.

3.2.5 Select All



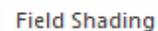
Select All: This is a button that is used to select all content. The hot key for this is Control-A. To end the selection: click anywhere in the white space of the document.

3.2.6 Toggle Fields



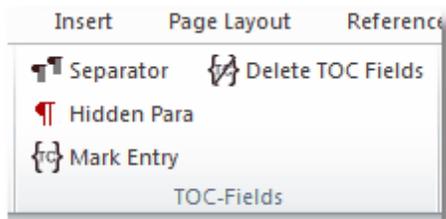
Toggle fields: Toggles the display of field codes e.g., "{PAGE}" and field results, e.g., "-1-".

3.2.7 Field Shading



Field Shading: If your document has field codes embedded in it, this will turn on shading around all field codes.

3.3 Group - TOC-Fields



This Group consolidates several tools for working with Tables of Content.

3.3.1 Separator



Separator: Insert Style Separator (Ctrl+Alt+Enter)

3.3.2 Hidden Para



Hidden Para: Insert paragraph mark with “Hidden” character formatting and the color red applied. Used for compatibility with firms using this method to mark Table of Contents entries with run-in headings.

3.3.3 Mark Entry



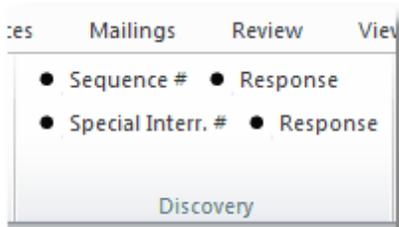
Mark Entry: Mark Table of Contents Entry; mark text with TC fields; allows user to specify ToC levels.

3.3.4 Delete TOC Fields



Delete ToC Fields: Delete all TC marked entry fields from document.

3.4 Group - Discovery



Inserts sequence fields used to number interrogatories, requests and responses. See descriptions for each button below:

3.4.1 Sequence

- Sequence #

Inserts: REQUEST NO. 1

The number is a field code that increments up by one on each insert.

3.4.2 Response (Sequence #)

- Response

Inserts: RESPONSE TO REQUEST NO. 1

The number is a field code that increments up by one on each insert.

3.4.3 Special Interr.

- Special Interr. #

Inserts: SPECIAL INTERROGATORY NO. 1

The number is a field code that increments up by one on each insert.

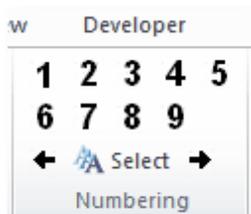
3.4.4 Response (Special Interr. #)

- Response

Inserts: RESPONSE TO SPECIAL INTERROGATORY NO. 1

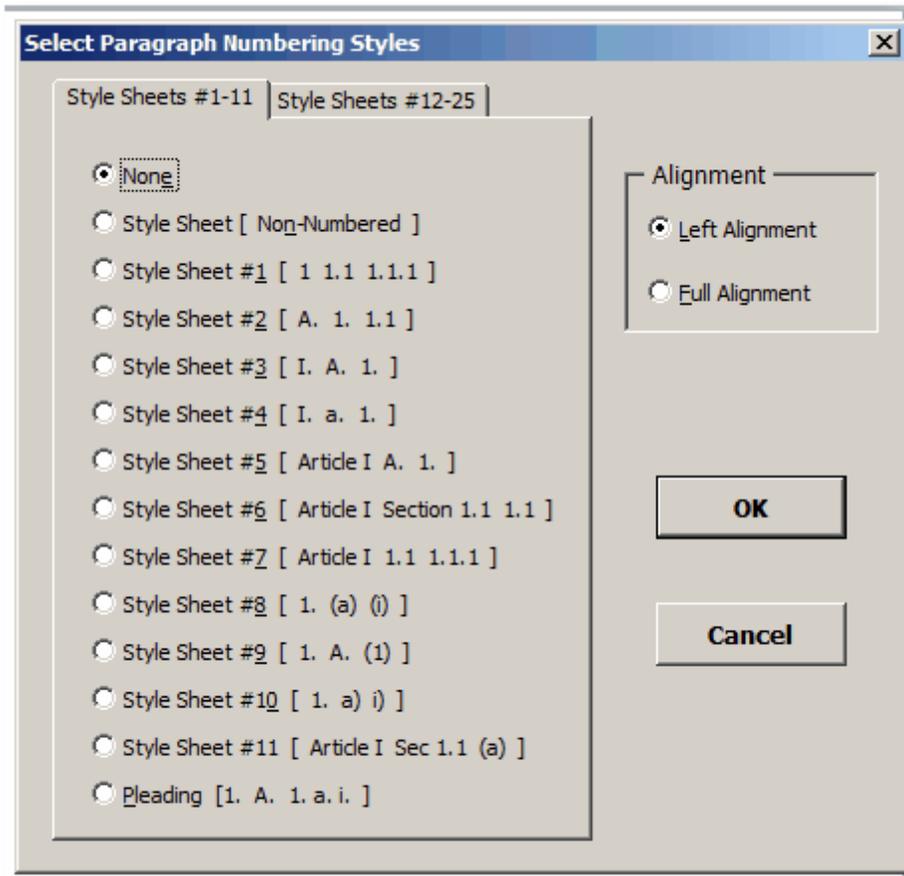
The number is a field code that increments up by one on each insert.

3.5 Group- Numbering

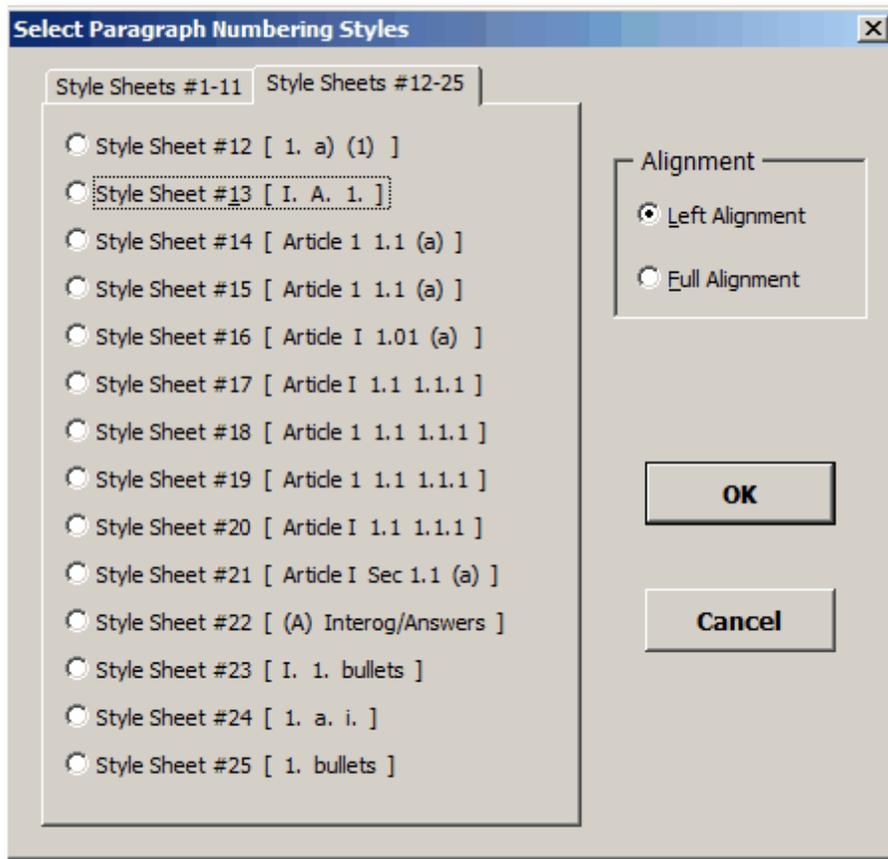


fssMacroSuite ships with 25 predefined numbering schemes. Click on the word Select to open the numbering dialog.

3.5.1 Numbering Dialog Page 1



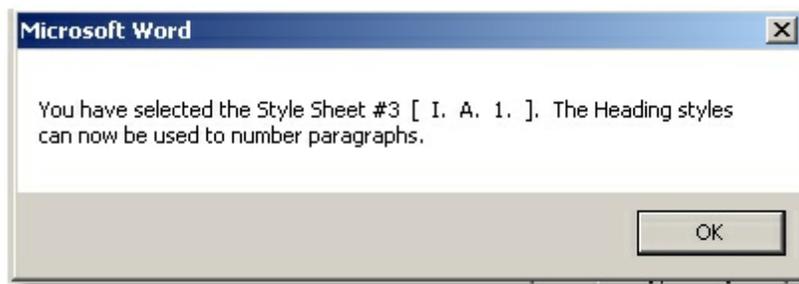
3.5.2 Numbering Dialog Page 2



3.5.3 Numbering Dialog Instructions

Click to select a numbering scheme, e.g., Style Sheet #3.

Word confirms your selection.

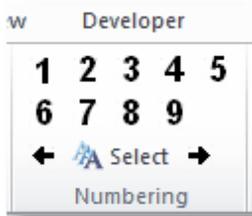


Heading styles 1-9 are now formatted with the selected numbering scheme.

3.5.3.1 Applying Heading Styles

After selecting a numbering scheme, apply the heading styles using any of the following methods:

In the Numbering group, click a level number.

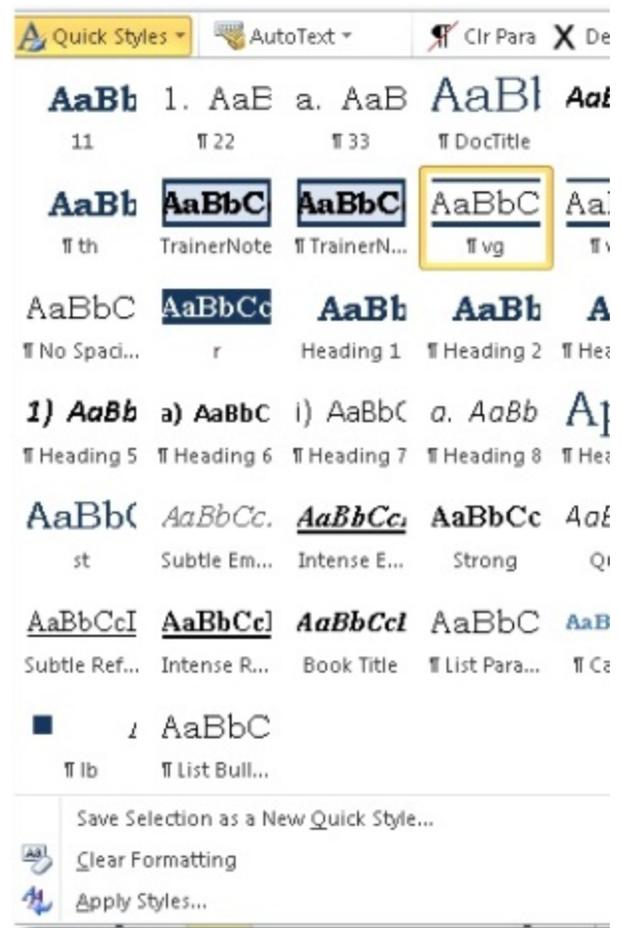


Or use these keystrokes:

Heading 1	Ctrl+Alt+1
Heading 2	Ctrl+Alt+2
Heading 3	Ctrl+Alt+3
Heading 4	Ctrl+Alt+4
Heading 5	Ctrl+Alt+5
Heading 6	Ctrl+Alt+6
Heading 7	Ctrl+Alt+7
Heading 8	Ctrl+Alt+8
Heading 9	Ctrl+Alt+9

Note: Word includes the Ctrl+Alt+ for Heading Styles 1 to 3. fssMacroSuite added the extra keystroke mappings for 4-9.

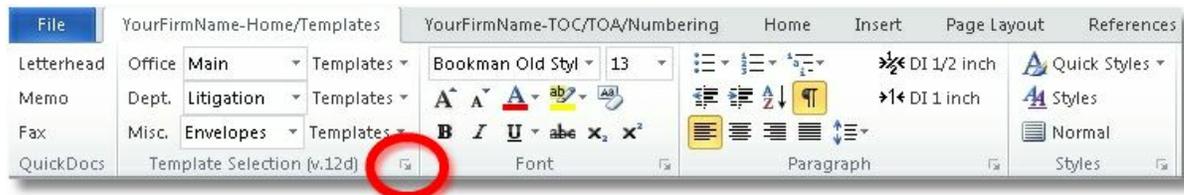
or from the Styles group, click the Quick Styles icon, then click a heading.



Click Styles, then click a heading in the Styles pane.

4 User Configuration

Start Microsoft Word 2007/2010. In the Template Selection group, click the dialog launcher icon:



4.1 Setting Paths and Default choices

The following configuration dialog displays

Configure the fssMacroSuite Template Folder Path and Default Template Categories

First time setup: You must first use the browse button to browse to the templates "parent" folder. If you do not know the location of your templates "parent folder" ask someone in your support staff.

Templates path:

Label your category folders then select the "Default" folders for your category folders. The three folders must be named "Location", "Department", and "Misc" but can be labeled as needed.

"Location" folder Label:

"Department" folder Label:

"Miscellaneous" folder label:

You must click on the "Refresh" button to see choices for the Default Attorney.

Default Attorney for Letterhead Templates:

Label each Quickdoc on the left and then browse and select the Quickdoc template.

Quickdocs Label 1:

Quickdocs Label 2:

Quickdocs Label 3:

Finally change the name of your SMS Home Template tab and TOC/TOA tabs if you wish.

Your name for the Home/Templates Tab:

Your name for the Table of Contents/Table of Authorities/Numbering Tab:

Be sure to hit "Save Configuration Settings" and then "Close". Validate Security is rarely used.

Under **Template path**, click the Browse button and select the Macro Suite top level folder.

Note: You can add or rename the folders under the **Department**, **Location**, and **Miscellaneous** folders

Under **Default folder for the Department Templates**, select the appropriate folder, e.g., Admin.

Under **Default folder for Location templates**, select the appropriate folder, e.g., Main. You may wish to rename the "Main" folder to the name of the city of your primary office.

Under **Default folder the Miscellaneous Templates**, select the appropriate folder, e.g., Misc.

Under **Default Attorney for Letterhead Templates**, select an attorney specific to that particular user.

Optional: You may change the first tab in the ribbon to display the firm name instead of Macro Suite-Home/Templates:

Under "**Your name for the Home/Templates Tab**" enter the [Firm Abbreviation] in front of the word "Templates."

Under “**Your name for the Table of Contents/Table of Authorities/Numbering Tab**” enter the [Firm Abbreviation] in front of the phrase “TOC/ToA/Numbering.”

Browse to the **Quick Docs** section. Select and Label each Quick Doc in turn. Short labels are recommended since the label can take up a lot of Ribbon space.

Click “Save Configuration Settings.”

Click Close.

Exit and restart Word.

4.1.1 Settings stored in INI files

Note: If your firm uses Roaming Profiles, where more than one user can log on to a computer and get their own settings applied, then each user will have their fssMacroSuite settings preserved. The values that you set in the configuration dialog are **automatically** stored in ini files in these locations, depending on your version of Windows:

Windows 7	Word 2007	C:\Users\ YourUserName \AppData\Roaming\fssMacroSuite\
	Word 2010	C:\Users\ YourUserName \AppData\Roaming\fssMacroSuite\
Windows XP	Word 2007	C:\Documents and Settings\ yourusername \Application Data\fssMacroSuite
	Word 2010	C:\Documents and Settings\ yourusername \Application Data\fssMacroSuite

The ini files are named fssMS_Local.ini and fssMS_Global.ini. In testing, ini files were faster than registry entries, so they were utilized.

fssMS_Global.ini contains settings that are typically consistent from station to station in a network.

```
[config]
StartFolder=C:\Program files\fssMacroSuite\fssMacroSuite_Demo\
Dept_Default=Litigation
Loc_Default=Main
Misc_Default=Envelopes
Home_Tab_Default=YourFirmName-Home/Templates
TOC_Tab_Default=YourFirmName-TOC/TOA/Numbering
Location_Label=Office
Dept_Label=Dept.
Misc_Label=Misc.
```

fssMS_Local.ini contains settings that can be variable by user, such as who

```
[Attorney]
Key=Cheatham, Will I.
One=Cheatham, Will I.
Two=Will I. Cheatham
Three=Insincerely
Four=WICheatham@dch-law.com
Five=(212) 444-3335
Six=WIC
```

```

Seven=Attorney-at-law
Eight=Will Cheatham
[QuickDocs]
QDLabel1=Letterhead
QuickLetterhead=fssMS_Demo_Letterhead_12d.dotm
QDLabel2=Memo
QuickMemo=fssMS_Demo_Memo_12d.dotm
QDLabel3=Fax
QuickFax=fssMs_Demo_Fax_Cover_12d.dotm

```

4.2 Letterhead List

fssMacroSuite provides templates that connect with Outlook to provide "To" data. The Letterhead List is a Word document that contains a table of staff names for the "From" data. Typically the letterhead list will be populated with all firm attorneys. Some firms also include the firm's staff members. To do this, they use column Eight and put in the staff member's name and a soft return (Shift - Enter) followed by the staff member's title.

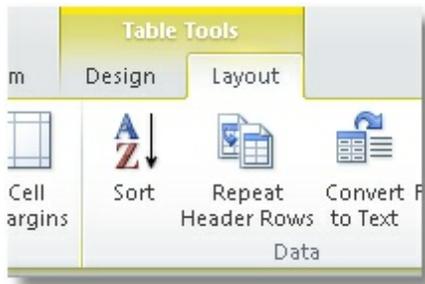
To update staff names in the letterhead list, please follow these steps:

1. Open: C:\Program Files\fssMacroSuite\Letterhead_List\fssMacroSuite_Letterhead_list.docx

fssMacroSuite-Staff Letterhead Listing

bkmFrom_One1 to bkmFrom_One4	bkmFrom_Two1 to bkmFrom_Two4	bkmFrom_Three1 to bkmFrom_Three4	bkmFrom_Four1 to bkmFrom_Four4	bkmFrom_Five1 to bkmFrom_Five4	bkmFrom_Six1 to bkmFrom_Six4	bkmFrom_Seven1 to bkmFrom_Seven4	bkmFrom_Eight1 to bkmFrom_Eight4	bkmFrom_Nine1 to bkmFrom_Nine4	bkmFrom_Ten1 to bkmFrom_Ten4
Last,First Mandatory	Signature Mandatory	Closing Mandatory	Email Mandatory	Direct Dial Phone Mandatory	Initials Mandatory	Title Optional	Letterhead Name Optional	Optional	Optional
Cheatham, Will I.	Will I. Cheatham	Insincerely	WICheatham@dch-law.com	(212) 444-3335	WIC	Attorney-at-law	Will Cheatham		
Dewey, John R.	John Dewey	Sincerely	JRDewey@dch-law.com	(212) 444-3334	JRD	Attorney-at-law	John R. Dewey		
Howe, Andy K.	Andy Howe	Warmly	AKHowe@dch-law.com	(212) 444-3336	AKH	Attorney-at-law	Andy K. Howe		

2. Input the names, titles, and preferred letter closings. You should consult with your fssMacroSuite contact about the use of the columns. Those fields marked "mandatory" must be used as directed in order to work with the associated Letterhead/Memo/Fax templates.
3. Use the Sort tool on the first column in the table to sort by Last Name, First Name. Note: The sort button only appears when you are in a table. It appears in the Table Tools tab as shown below.



4. Save and close fssMacroSuite_Letterhead_list.docx.

