

eMerge

Using eMerge

Version 1.0 for Mac OS

Using eMerge

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Version 1.0
First Edition

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Introduction

eMerge is a simple, desktop application that lets you personalize form letters and send them to people on the Internet. You can use our built-in tools to create lists of names and e-mail addresses, or import all the information you need from your existing databases.

- Create direct mail advertising campaigns.
- Customize your product announcements.
- Move your billing system online.
- Make everyone on your mailing list feel that they aren't.

What's in this guide

[*Installing eMerge \(Chapter 2\)*](#) describes the hardware and software you need to install and run eMerge. It also describes how to choose the best method of mail delivery for your particular circumstance.

[*Leon's first campaign \(Chapter 3\)*](#) describes the steps you must follow to create and execute a typical eMerge campaign. It follows the example of Leon Gall's first campaign for CD-Rome, an online service that allows people to order their favorite music from the CDs cataloged on the CD-Rome website.

[*Writing better form letters \(Chapter 4\)*](#) describes how to use variables to customize the messages you send using eMerge and make your letters more personal, more informative, and ultimately more useful to you and your customers.

[Managing your mailing lists \(Chapter 5\)](#) describes how to use eMerge to build and maintain your mailing lists. It shows you how to export your lists, import information from other applications, and dredge through files and folders for Internet addresses. It also describes some simple tools that make it easier to use your lists.

[Trouble shooting \(Chapter 6\)](#) describes the error messages and other problems you might encounter when using eMerge. It also tells you how to contact Galleon Software's Technical Support department.

[eMerge license agreement \(Appendix A\)](#) is mostly just common sense: Don't give copies of our software away, and we'll give you the best service we can. But you can read the rest, if you want.

Symbols and conventions

As you read through this manual, there are just a few symbols and conventions you should be aware of.

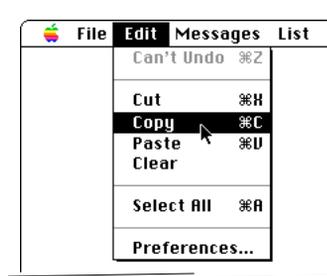


Warning: These messages provide information that helps you prevent such serious things as interruptions in service or loss of data. You should watch out for these warnings and make sure you understand them.

Note: These messages provide information important to the smooth running of eMerge.

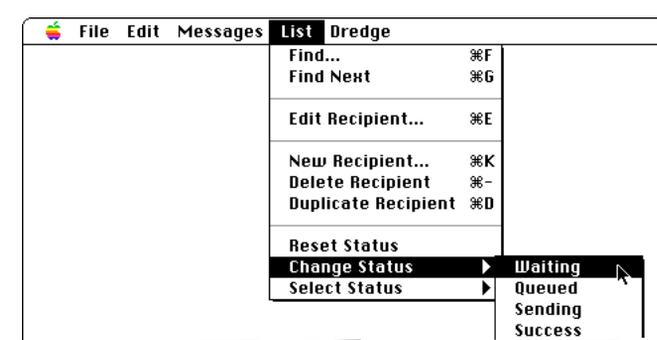
Choosing menu commands

To describe the menu commands you have to choose, we've adopted the following convention. Suppose, for example, you want to copy something to the clipboard. As you probably know, first you must click on Edit in the menu bar, and then choose Copy from the Edit menu.



In this guide, we say: From the menu bar, choose Edit → Copy.

To describe hierarchical menu commands, we simply extend the form. For example, you might want to change the status of a message to Waiting.



In this guide, we say: Choose List → Change Status → Waiting.

Contacting Galleon Software

The best way of getting in touch with us is through our site on the WorldWideWeb at www.galleon.com, but here are some of our more popular e-mail addresses:

Sales and Marketing: sales@galleon.com

Technical Support: support@galleon.com

General inquiries: info@galleon.com

You can reach us by fax at:

416-955-0696

Or you can send us a letter the old-fashioned way:

Galleon Software
366 Adelaide Street East—Suite 327
Toronto, Ontario, Canada
M5A 3X9

However you reach us, we'll do our best to get back to you before the end of the business day. If you would like us to give you a call, please include your phone number in your message and the best times to contact you.

Installing eMerge

This chapter describes the hardware and software you need to install and run eMerge. It also describes how to choose the best method of mail delivery for your particular circumstance.

What you need

To run eMerge you need the following things:

- a Macintosh-compatible computer with at least 4 MB of RAM and running System 7.0, or later

eMerge does not run on the Macintosh Plus, SE, SE/30, Classic, or the PowerBook 100.

- Thread Manager

Thread Manager is built into System 7.5, and later. If you are running an earlier system, you must install Thread Manager following the instructions in [“Installing Thread Manager” on page 18](#). We’ve included a copy of Thread Manager in the eMerge folder.

- MacTCP or Open Transport
- an IP connection to the Internet

eMerge supports modem or direct network connections. It does not support indirect Internet access through such online services as America Online or CompuServe.

Installing eMerge



Unlock eMerge 1.0



eMerge.sea



eMerge

The procedure for installing eMerge depends on how you received the application.

If you downloaded eMerge from Galleon Software's website or from another online service, then you received a password-protected archive, like the archive on the left. To install eMerge from a password-protected archive, follow the procedure below.

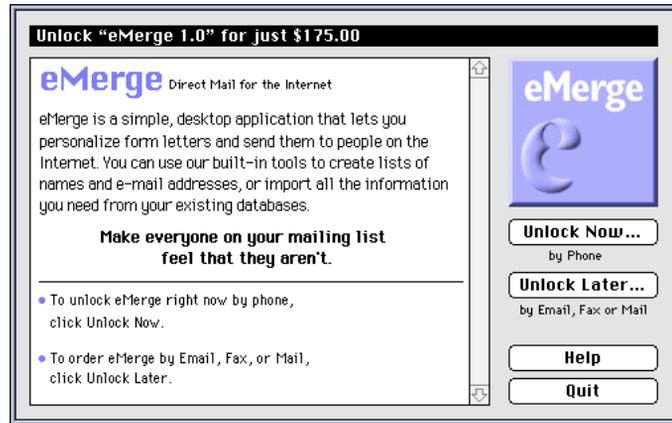
If you purchased eMerge on a diskette, or if you are trying out the demo version of eMerge, then you received a self-extracting archive. To install eMerge from a self-extracting archive, follow the procedure in [“Installing eMerge from a self-extracting archive” on page 14.](#)

If you received eMerge on a compact disc, follow the procedure in [“Installing eMerge from CD” on page 16.](#)

Installing eMerge from a password-protected archive

If you downloaded eMerge from Galleon Software's website or from another online service, then you received a password-protected archive. To install eMerge from a password-protected archive, follow these steps.

- 1) Double-click on the password-protected archive.



When you start this application it generates a unique control number, and you must enter the matching password to unlock the archive.

- 2) Choose the unlocking method that best suits your needs and follow the instructions as they appear.

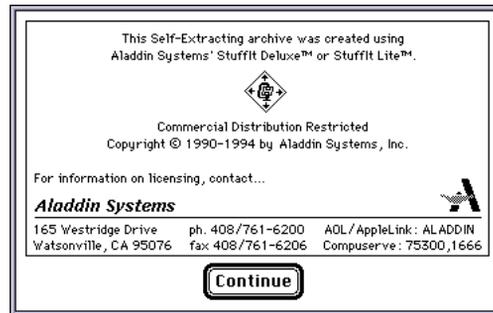
Unlock Now allows you to purchase the password with a credit card over the phone and unlock the archive right away.

Unlock Later allows you to purchase the password with a credit card or a check by e-mail, fax, or regular mail. When the password is mailed back to you, start the application again and enter the password.

When you enter the password, the archive application creates a self-extracting archive.



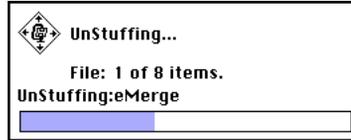
3) Double-click on the self-extracting archive.



4) Click Continue.



- 5) Choose where you want to save the eMerge application folder and click Save.



This display tracks the progress of the installation. When the installation is complete, the following message appears.



- 6) Click Quit.

At this point you've successfully installed the eMerge application.

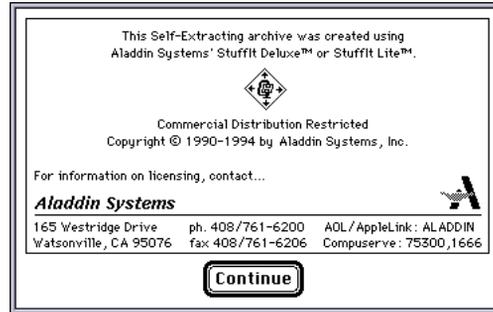
If your computer is running System 7.5 or later, you can skip to [“Configuring message delivery” on page 20](#). If you are running an earlier system, you must install Thread Manager following the instructions in [“Installing Thread Manager” on page 18](#).

Installing eMerge from a self-extracting archive

If you purchased eMerge on a diskette, or if you are trying out the demo version of eMerge, then you received a self-extracting archive. To install eMerge from a self-extracting archive, follow these steps.



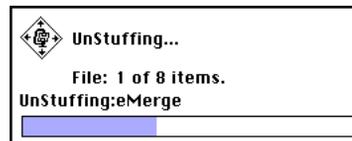
- 1) Double-click on the self-extracting archive.



- 2) Click Continue.



- 3) Choose where you want to save the eMerge application folder and click Save.



This display tracks the progress of the installation. When the installation is complete, the following message appears.



4) Click Quit.

At this point you've successfully installed the eMerge application.

If your computer is running System 7.5 or later, you can skip to [“Configuring message delivery” on page 20](#). If you are running an earlier system, you must install Thread Manager following the instructions in [“Installing Thread Manager” on page 18](#).

Installing eMerge from CD

The eMerge CD is roomy enough to include three different versions of eMerge, and roomy enough that we don't have to compress anything into an archive. This means that you just have to choose the version you want and copy its folder to your hard disk. The folder you choose depends on the type of computer you're using.

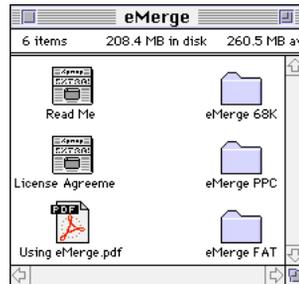
eMerge PPC contains a version of eMerge that is optimized to run on Power Macintoshes or Macintosh-compatible computers with a Power PC processor. This version does not run on older Macintoshes.

eMerge 68K contains a version optimized to run on older Macintoshes. This version runs on Power Macintoshes, but it runs more slowly than the version contained in eMerge PPC.

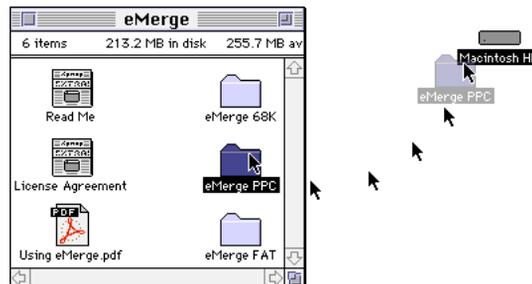
eMerge *FAT* contains a version of eMerge that runs optimally on any kind of Macintosh computers. When you run it on a Power Macintosh, it uses Power PC code; when you run it on an older Macintosh, it uses 68000 code. Choose this version, if you might run your copy of eMerge on different computers.

Note: The eMerge we distribute in archive format is the “FAT” version of the application.

- 1) Insert the eMerge CD.



- 2) Choose the version of eMerge that best suits your needs and copy its folder to your hard disk.



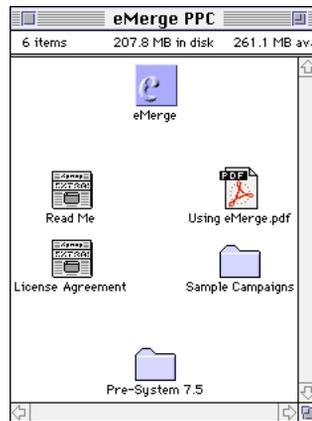
With this you've successfully installed the eMerge application.

If your computer is running System 7.5 or later, you can skip to [“Configuring message delivery” on page 20](#). If you are running an earlier system, you must install Thread Manager following the instructions below.

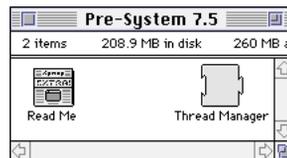
Installing Thread Manager

eMerge cannot run without the Macintosh Thread Manager. Thread Manager is built into System 7.5 and later. If you are running an earlier system, you must install Thread Manager by following these steps.

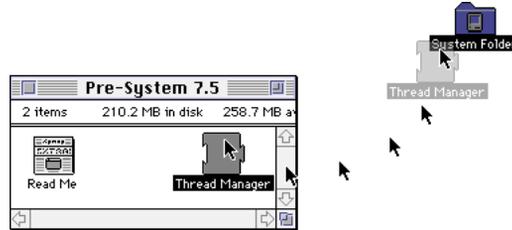
- 1) Open the eMerge folder you just installed.



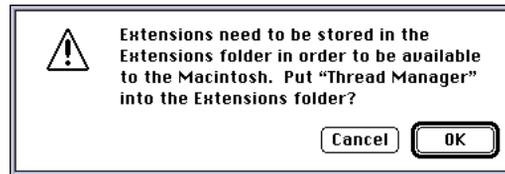
- 2) Open the folder named Pre-System 7.5.



- 3) Drag-and-drop the extension named Thread Manager onto your System Folder.



The Finder recognizes extensions as one those files that have special places in the System folder.



- 4) Click OK.

The Finder automatically places Thread Manager in your Extensions Folder. (For more information on system extensions, refer to the manual that came with your computer.)

Connecting to the Internet

Your computer may be connected to the Internet through your Local Area Network, or you might connect over the phone using a modem and point-to-point protocol (PPP). Whatever the case, eMerge uses the connection to the Internet you already have in place. When you start sending messages from eMerge, the application connects automatically. There is nothing else for you to install.

If you are not connected to the Internet, contact a local Internet service provider for assistance. Their Technical Support department can help you configure your computer to connect to the Internet.

Note: eMerge only supports direct IP access to the Internet. It does not support indirect Internet access through such online services as America Online or CompuServe. If you are unsure of the type of Internet service you have, contact your Internet service provider.

Configuring message delivery

eMerge comes largely preconfigured. The only fine tuning you may have to do concerns the way eMerge delivers messages. By default, eMerge delivers its messages directly to each recipient's mail server. If your computer is protected by an Internet firewall, however, you will likely encounter problems with direct delivery.

To avoid these problems, eMerge offers three delivery options. To choose the option that is best for you follow these steps.

- 1) From the menu bar, select Edit → Preferences.
- 2) Click the Application tab.
- 3) Under SMTP Options, choose the Send Messages option that best suits your needs.

Direct Only: eMerge attempts to send its messages directly to each recipient's mail server. The benefits of this method are that you are not charged for e-mail sent directly to mail servers and many servers can tell you immediately whether or not the message was sent successfully. On the other hand, direct connections can be slow, and if they fail, you have to try again manually. **Note:** You cannot use this method if your computer is protected by an Internet firewall.

Mail Server Only: eMerge directs all messages through your mail server. This is the method you must choose if your computer is protected by an Internet firewall. The other benefit of this method is that the delivery of all your messages may take less time, since you are letting your mail server do all the hard work of connecting to each recipient's mail server. On the other hand, mail may actually take longer to get to the recipients, and you may have to wait for as long as two days before your mail server informs you of undeliverable messages.

Direct → Mail Server: You get the best of both worlds. eMerge first tries to send each message directly to the recipient's mail server. If it fails, it sends the message through your mail server. You cannot use this method if your computer is protected by an Internet firewall, except, of course, to send messages to people on your side of the firewall.

- 4) If necessary, for Mail Server, enter the address of your mail server. You need to do this if you chose either the Mail Server Only option or the Direct → Mail Server in [step 3](#).

Registering eMerge

As a registered purchaser of eMerge, you are entitled to free technical support and free upgrades to the current version of the application. We will also inform you of new versions of the application as they are released.

If you purchased eMerge from our online fulfillment center, then you were automatically registered as the original purchaser of the software. There is nothing more you have to do.

If you received eMerge on disk, then to be registered as the original purchaser of the software, you must send the registration form that accompanied the Software to Galleon Software, or register online through our website at www.galleon.com.

Upgrading eMerge

Although we've tried our darnedest to make eMerge as problem free as possible, we won't pretend it's perfect. But we will promise to periodically release upgrades to fix the problems with the current version that do come to light.

You can download upgrades from our website at www.galleon.com. These upgrades take the form of small applications which patch your original copy of eMerge. To perform the upgrade, follow the instructions that come with the upgrade application.

When we're not fixing the current version, we're working on making the next version of eMerge even better. Registered purchasers of eMerge are entitled to discounts on future versions of the product. Visit our website to learn about the most recent developments, or wait, and we'll send an announcement to you—and everyone else on our mailing list!

Leon's first campaign

Leon Gall runs a service on the Internet he calls CD-Rome. Customers browse through his site on the World Wide Web and order their favorite music from the CDs in his catalog. Leon has purchased eMerge in order to personalize the letters and announcements he sends to his customers and to mount other direct mail campaigns in an effort to attract more people to his site. This chapter describes the steps he follows to create and execute CD-Rome's first eMerge campaign.

An eMerge campaign file consists of three parts:

The message header is the information that appears at the top of each message generated by the campaign, and is typically what appears in the list of messages in people's in boxes. It shows them who the message is from and what the message is about.

The form letter is the template from which all the messages are generated. Typically it contains a number of variables that can have different values for each recipient on the mailing list.

The mailing list is the list of people who are to receive the message. It includes their e-mail addresses and all the other information needed in order to fill out the variables on the form letter.

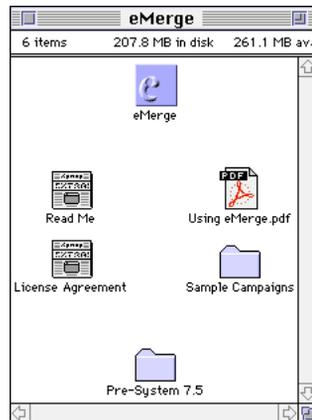
When you send a message to one of the people on your mailing list, eMerge builds that message by filling in the blanks on the form letter with the appropriate information from that person's record. eMerge then puts the standard message header at the top of the message, signs onto the Internet, and delivers the message.

When you send the message to everyone on your mailing list, every one of them receives a personal, customized message.

Creating a new campaign

Leon's first eMerge campaign is a simple one. A number of his customers recently ordered an album, and the orders have been delayed. To send them each a personal apology, Leon needs to follow these steps.

- 1) Open the eMerge folder.



2) Double-click on the eMerge application icon.

Untitled 1

Your Full Name:

Your Internet Address:

Subject of Message:

▼ Letter: Standard Variables ▼ Custom Variables ▼

▼ List: 0 Records

First & Last Name	User ID@ Domain	Status
-------------------	-----------------	--------

0 Records ▼

This form contains all three parts of the eMerge campaign: the message header, the form letter, and the mailing list. Since the letter and the list can both get quite long, we've made it possible to hide these items when you aren't editing them. To hide the letter, for example, click on the triangle next to the Letter header. To reveal the letter, click on the triangle again.

- 3) For Your Full Name, enter the name that you want to appear in the header of each message in this campaign.
- 4) For Your Internet Address, enter the Internet e-mail address that you want to appear in the header.

Note: There is no way to verify the e-mail address you enter in this field. So, be careful. If you enter your address incorrectly, there will be no way for the recipient to know who to respond to.

- 5) For Subject of Message, enter the title that you want to appear in the header.



The screenshot shows a window titled "Untitled 1" containing a form with three input fields:

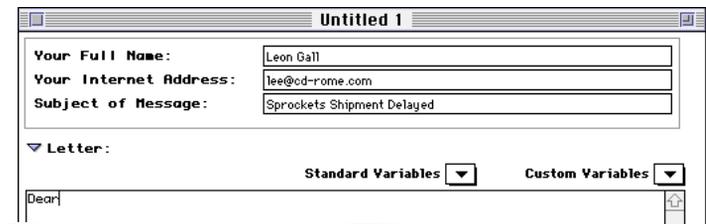
- Your Full Name:** Leon Gall
- Your Internet Address:** lee@cd-rome.com
- Subject of Message:** Sprockets Shipment Delayed

Below the fields is a section labeled "Letter:" with a downward-pointing arrow.

Composing the form letter

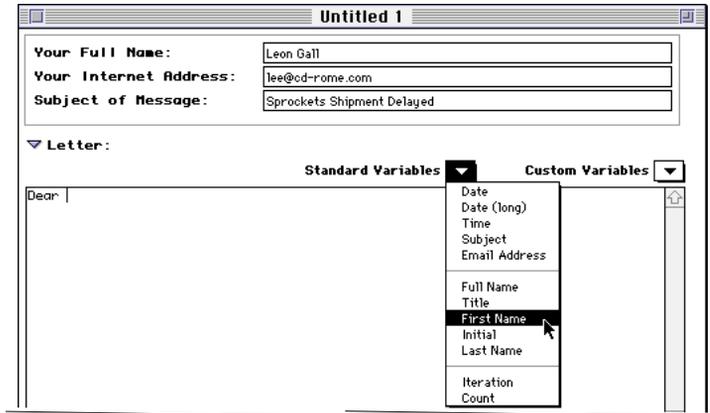
The form letter is the template from which all the messages are generated. Typically it contains a number of variables that can have different values for each recipient on the mailing list. In this example, Leon wants each letter to greet the recipients by their first name.

- 1) Click in the Letter field and start typing.

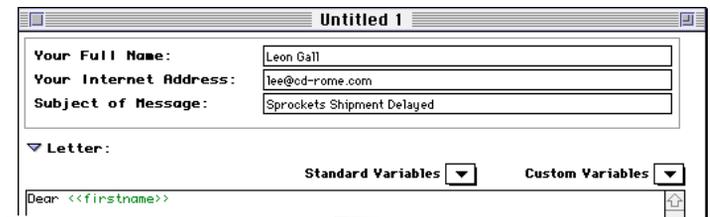


This screenshot shows the same form as above, but with the "Letter:" section expanded. The text "Dear" is typed into the field. To the right of the field are two dropdown menus: "Standard Variables" and "Custom Variables".

- 2) To insert a variable, choose the variable name from one of the menus above the letter.



Firstname is a standard eMerge variable that is filled using the name you enter in the mailing list. For more information on the standard variables you can use, refer to [“The standard variables” on page 37](#). To create your own custom variables, refer to [“Creating your own variables” on page 40](#).



Within the letter, variable names are enclosed by two sets of angle brackets and are displayed in color on color displays.

3) Continue typing the letter.

Untitled 1

Your Full Name:

Your Internet Address:

Subject of Message:

▼ Letter:

Standard Variables ▼ Custom Variables ▼

Dear <<firstname>>

This is just to let you know that there's been a problem getting the latest Sprockets CD in from England, and even though I ordered a whole box of them, the distributor won't even give me a date to expect them.

If you want to cancel your order, please send me a note. Otherwise, I'll ship it out to you as soon as they arrive.

Sorry for the inconvenience.

Lee

Creating the mailing list

The mailing list is the list of people who are to receive the message. It includes their e-mail addresses and all the other information needed to fill out the variables on the form letter. To add people to a mailing list, follow these steps.

- 1) To make more room for the list, you can close the letter by clicking the triangle next to the Letter header.
- 2) From the menu bar, choose List → New Recipient.

New Recipient

<< First < Prev 1/1 Next > Last >>

First and Last Names:

Internet Address:

▸ Variables...

Apply Cancel OK

Leon's first campaign 3

- 3) For First and Last Name, enter the full name of the recipient.

You can also enter an initial or as many middle names as you want. eMerge gets the value of firstname from the first word in this field.

- 4) For Internet Address, enter recipient's e-mail address.



New Recipient

<< First < Prev 1/1 Next > Last >>

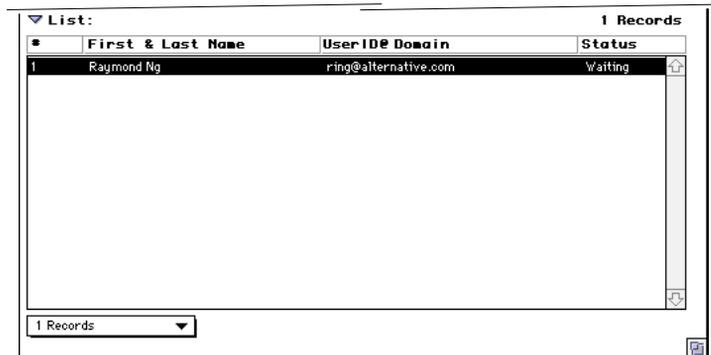
First and Last Names:
Raymond Ng

Internet Address:
ring@alternative.com

Variables...

Apply Cancel OK

- 5) Click OK.



List: 1 Records

#	First & Last Name	User ID @ Domain	Status
1	Raymond Ng	ring@alternative.com	Waiting

1 Records

The recipient is added to the mailing list.

- 6) Repeat [step 2](#) through [step 5](#) for each person you want to add.

▼ List: 8 Records

#	First & Last Name	UserID@ Domain	Status
1	Raymond Ng	rning@alternative.com	Waiting
2	Bob Cooper	cooper@aol.com	Waiting
3	Pascal Sharpe	ps@pandemonium.fr	Waiting
4	Françoise Levesque	frank@zone.com	Waiting
5	Glenn G. Maurice	glenn@procom.net	Waiting
6	Charles Forte	chuck5@aol.com	Waiting
7	Lewis Michaels	Lewis@earthlink.net	Waiting
8	Robert J. McCracken	orack@aol.com	Waiting

8 Records ▼

Previewing the messages

Before you send your messages, you should check that all the variables are being filled in correctly and that the letter looks the way you want it to look.

1) From the menu bar, choose Messages → Preview.

Preview: Raymond Ng

<< First < Prev 1/8 Next > Last >>

From: Leon Gall <lee@cd-rome.com>
To: Raymond Ng <rning@alternative.com>
Subject: Sprockets Shipment Delayed

Dear Raymond

This is just to let you know that there's been a problem getting the latest Sprockets CD in from England, and even though I ordered a whole box of them, the distributor won't even give me a date to expect them.

If you want to cancel your order, please send me a note. Otherwise, I'll ship it out to you as soon as they arrive.

Sorry for the inconvenience.

Lee

Show Unknown Variables

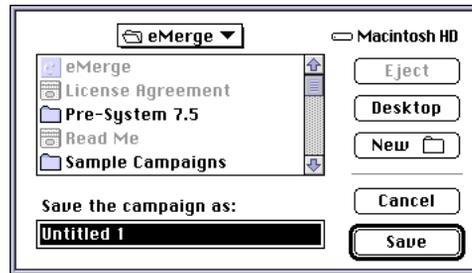
The standard variables are highlighted in green. (Don't worry, this is just so you can identify them quickly; they won't be green when the message is sent.) Any variables that don't have a value are highlighted in red.

- 2) To move through the mailing list, click Next.
- 3) When you are done, close the Preview window.

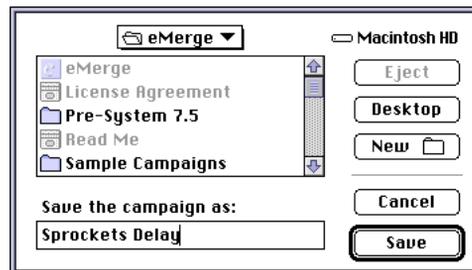
Saving your work

Before you attempt to send your messages, it is always a good idea to save all the work you've done. To save an eMerge campaign, follow these steps.

- 1) From the menu bar, choose File → Save.



- 2) For Save As, enter the name of your campaign.



3) Click Save.

The campaign is saved, and the new campaign name appears at the top of the campaign form.

Sending the messages

When you send your messages, eMerge builds each message by filling in the blanks on the form letter with the appropriate information from each recipient's record. It then puts the standard message header at the top of the message, signs onto the Internet, and delivers the message.

To send a message to all the recipients on the mailing list, follow these steps.

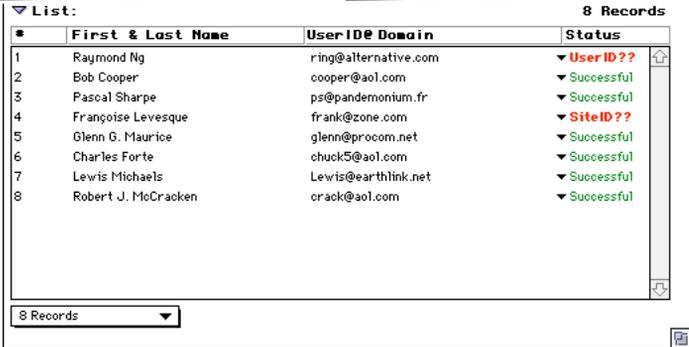
1) From the menu bar, choose Messages → Send To All.

List:	
#	First & Last
1	Raymond N...
2	Bob Cooper
3	Pascal Sha...
4	Françoise L...
5	Glenn G. Ma...
6	Charles For...
7	Lewis Mich...
8	Robert J. McCracken crack@aol.com

8 Records	
Status	User ID??
Queued	

For each address, eMerge goes through a series of steps, that you can watch in the progress window. This example shows eMerge part way through the sending process. It successfully sent the second message but failed to send the first message because the e-mail server to which it was sending the message did not recognize the recipient's user ID.

- 2) When eMerge has processed all the entries in the mail list, click Done to close the Progress window.



List:		8 Records	
#	First & Last Name	User ID@ Domain	Status
1	Raymond Ng	ring@alternative.com	▼ User ID??
2	Bob Cooper	cooper@aol.com	▼ Successful
3	Pascal Sharpe	ps@pandemonium.fr	▼ Successful
4	Françoise Levesque	frank@zone.com	▼ Site ID??
5	Glenn G. Maurice	glenn@procom.net	▼ Successful
6	Charles Forte	chuck5@aol.com	▼ Successful
7	Lewis Michaels	Lewis@earthlink.net	▼ Successful
8	Robert J. McCracken	crack@aol.com	▼ Successful

8 Records

In this example, eMerge successfully sent all but two messages. The second error indicates that eMerge could not find any mail server named zone.com on the Internet.

Correcting addresses

To correct an entry in the mailing list, follow these steps.

- 1) Double-click on the entry in the mailing list.

The screenshot shows a window titled "Raymond Ng" with a navigation bar at the top containing buttons for "<< First", "< Prev", "1/8", "Next >", and "Last >>". Below the navigation bar are two text input fields: "First and Last Names:" containing "Raymond Ng" and "Internet Address:" containing "rng@alternative.com". A "Variables..." link is visible below the fields. At the bottom are three buttons: "Apply", "Cancel", and "OK".

2) Correct the information.

This screenshot is identical to the one above, showing the "Raymond Ng" window with the same form fields and navigation controls.

In this example, Leon entered the wrong user ID for Raymond Ng.

- 3) Click OK.
- 4) Repeat [step 1](#) through [step 3](#) for each entry you want to correct.
- 5) Select the entries you want to resend.

To do this, select the first entry. Then, holding down the Command key, select the remaining entries.

▼ List: 8 Records

#	First & Last Name	UserID@ Domain	Status
1	Raymond Ng	rng@alternative.com	▼ UserID??
2	Bob Cooper	cooper@aol.com	▼ Successful
3	Pascal Sharpe	ps@pandemonium.fr	▼ Successful
4	Françoise Levesque	frank@zone.ca	▼ SiteID??
5	Glenn G. Maurice	glenn@procom.net	▼ Successful
6	Charles Forte	chuck5@aol.com	▼ Successful
7	Lewis Michaels	Lewis@earthlink.net	▼ Successful
8	Robert J. McCracken	crack@aol.com	▼ Successful

8 Records ▼

6) Choose Messages → Send To Selected.

eMerge goes through the same process it went through before, but only for the messages you've selected.

▼ List: 8 Records

#	First & Last Name	UserID@ Domain	Status
1	Raymond Ng	rng@alternative.com	▼ Successful
2	Bob Cooper	cooper@aol.com	▼ Successful
3	Pascal Sharpe	ps@pandemonium.fr	▼ Successful
4	Françoise Levesque	frank@zone.ca	▼ Successful
5	Glenn G. Maurice	glenn@procom.net	▼ Successful
6	Charles Forte	chuck5@aol.com	▼ Successful
7	Lewis Michaels	Lewis@earthlink.net	▼ Successful
8	Robert J. McCracken	crack@aol.com	▼ Successful

8 Records ▼

This time, however, eMerge sends the two messages successfully, and Leon Gall's first direct mail campaign is a complete success.

Saving the campaign

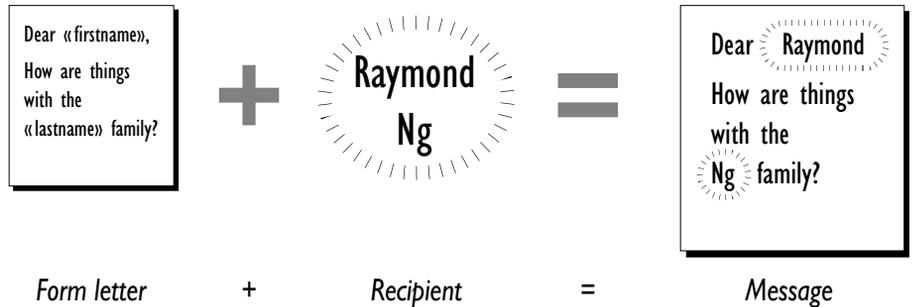
At this point, you can save your campaign. You may want to use the form letter again, or you may eventually want to send a different message to the same mailing list.

You can also save a campaign before eMerge has successfully delivered all the messages. The status of each message in the campaign is saved along with everything else, so you can later load the campaign and start sending messages again where you left off.

Writing better form letters

While we cannot promise that eMerge will make you a better writer, we can say that your letters will be more personal, more informative, and ultimately more useful to you and your customers. Instead of sending the same, generic letter to everyone on your mailing list, eMerge allows you to customize every message you send.

To do this, eMerge offers a series of standard variables, or you can define your own. You can place variables anywhere in your letter and give these variables a different value for each recipient. When eMerge sends a message to a recipient, it inserts these values into the form letter.



The standard variables

eMerge maintains a series of standard variables that are available in every eMerge campaign. These are listed below.

- *subject*: The subject of the message. This is the value you enter in the message header.

- *fullname*: The full name of the recipient. This is the value in the First and Last Name field on the New Recipient form, and is the same as the name that you see on the mailing list.
- *title*: The recipient's title. Mr., Mrs., Ms., and so on. If no title is found, then this variable is empty.
- *firstname*: The recipient's first name. If there is only one name in the First and Last Name field, then eMerge assumes that it is the first name.
- *initial*: The recipient's middle initial. If no initial is found, then this variable is empty.
- *lastname*: The recipient's last name. If there is only one name in the First and Last Name field, then eMerge assumes that it is the first name and leaves this variable empty.
- *email*: The recipient's e-mail address.
- *count*: The number of messages you've instructed eMerge to send. If you send all the messages at once, this is the same as the total displayed on the mailing list.
- *iteration*: The position of the message in the list of messages that eMerge is sending. If you send all the messages at once, this is the same as the number displayed next to each recipient on the mailing list.
- *date*: The date that the message is created by eMerge and sent, in the short date format specified in the Date & Time control panel on your computer.

- *longdate*: The date that the message is created by eMerge and sent, in the long date format specified in the Date & Time control panel on your computer.
- *time*: The time that the message is created by eMerge and sent, in the time format specified in the Date & Time control panel on your computer.

How eMerge breaks up the full name

eMerge breaks each recipient's full name into its components: title, first name, middle initial, and last name. To determine these values, eMerge looks for the spaces in the full name that separate the components.

To determine the title, it looks at the characters before the first space in the full name and matches this word against a built-in list of titles. If this word is not a title, it assumes that it is the recipient's first name.

To determine the middle initial, eMerge looks at the word after the first name. Middle initials consist of a single character or a single character followed by a period.

To determine the last name, eMerge works backward from the end of the full name. If there is only one name in the full name, then eMerge assumes that it is the first name and leaves the last name empty.

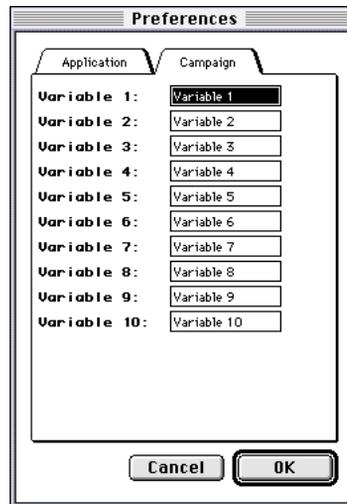
If you don't like the way eMerge is breaking up a particular name, you can force the application to do things your way. For example, if you add Darrin Van Dyke to your mailing list, eMerge will assume that his last name is Dyke. To force eMerge to recognize the entire last name, you can enclose it in quotation marks—"Van Dyke"—or replace the space

with an underscore character—Van_Dyke. Either way, the message you send interprets the last name correctly as Van Dyke; it does not include the quotation marks or the underscore character in the final message.

Creating your own variables

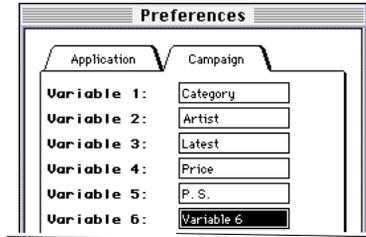
eMerge fills in the standard variables automatically, but you can define up to ten of your own custom variables and fill them in manually for each recipient. To define the variables for a campaign, follow these steps.

- 1) From the menu bar, choose Edit → Preferences.
- 2) Click the Campaign tab.



These are the ten custom variables you can use in the campaign.

- 3) Change the names so that you can more easily remember what each variable contains.



4) Click OK

Using variables

Using variables in your form letters involves two steps: first you must define where in the letter the variables appear, then for each recipient you must supply the value for each custom variable you've used in your letter. In this chapter we describe how to enter these values by hand; in the next chapter we describe how to import these values from an existing database.

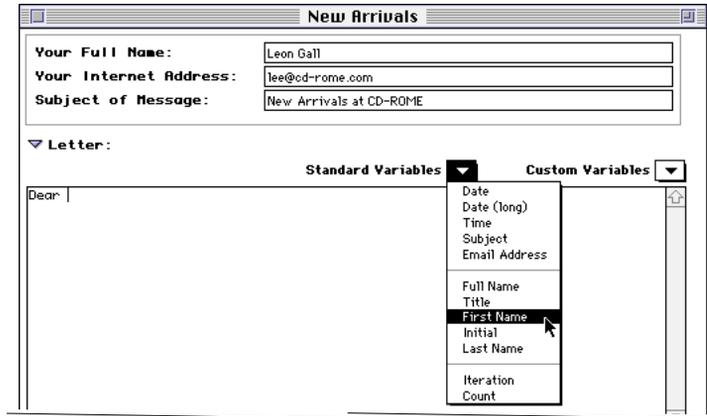
Composing a form letter

To create a form letter with variables, follow these steps. As you write the letter, you should keep in mind the different values your variables might contain and make sure that the different messages will flow smoothly.

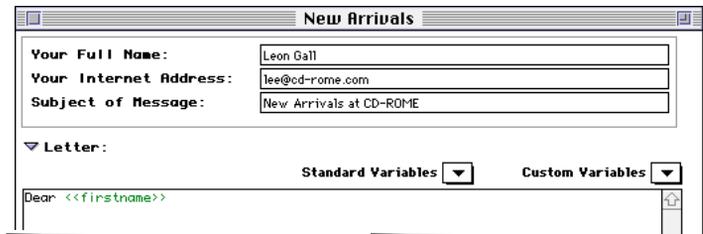
1) Begin typing the letter.

Writing better form letters

- 2) To insert a variable, choose the variable name from one of the menus above the letter.



Within the letter, variable names are enclosed by two sets of angle brackets and are displayed in color on color displays.



If you are a good typist and are loathe to take your fingers from the keyboard, you can enter the variables by hand. Remember to enclose the variable name in two sets of angle brackets. (Use the greater-than and less-than characters.) As soon as you enter a valid

Writing better form letters

label, eMerge recognizes it as such. If the label does not change color, you probably entered the name incorrectly.

- 3) Finish typing the letter, adding variables where you want them.

The screenshot shows a web-based form letter editor window titled "New Arrivals". It contains three input fields: "Your Full Name" with the value "Leon Gall", "Your Internet Address" with "lee@cd-rome.com", and "Subject of Message" with "New Arrivals at CD-ROME". Below these is a section labeled "Letter:" with two dropdown menus: "Standard Variables" and "Custom Variables". The main text area contains the following content:

```
Dear <<firstname>>,  
I have just finished updating the CD-ROME Web page.  
Since you are interested in <<Category >> music, you'll probably be interested  
in <<Artist>>'s latest release. If you don't already own "<<Latest>>", you'll  
definitely want to buy a copy at our low price of $<<Price>>!  
Hope to see you online.  
Lee  
<<P. S.>>
```

In this example Leon Gall, is creating a campaign that let's his customers know when he receives CDs that might interest them.

Entering values

eMerge automatically fills the standard variables in your form letters, but it's up to you to enter the values for the custom variables you use. To enter these values you must perform the following steps for each person on your mailing list.

In this example, we're assuming that you've already entered a list of names and address. Alternatively, you can enter values for the custom variables when you create each new recipient.

- 1) Double-click on the person's name.

The screenshot shows a window titled "Paul Abbott" with a navigation bar at the top containing buttons for "<< First", "< Prev", "1/826", "Next >", and "Last >>". Below the navigation bar, there are two text input fields: "First and Last Names:" containing "Paul Abbott" and "Internet Address:" containing "paul_abbott@resting.com". A "Variables..." header with a right-pointing triangle is located below the input fields. At the bottom of the window are three buttons: "Apply", "Cancel", and "OK".

- 2) Click on the triangle next to Variables header.

This screenshot shows the same "Paul Abbott" window, but the "Variables" section is now expanded. The "Variables:" header has a downward-pointing triangle. Below it is a list of variable fields with corresponding input boxes: "Category", "Artist", "Latest", "Price", "P. S.", "Variable 6", "Variable 7", "Variable 8", "Variable 9", and "Variable 10". The "Apply", "Cancel", and "OK" buttons remain at the bottom.

- 3) Enter a value for each of the variables you've used in your form letter.

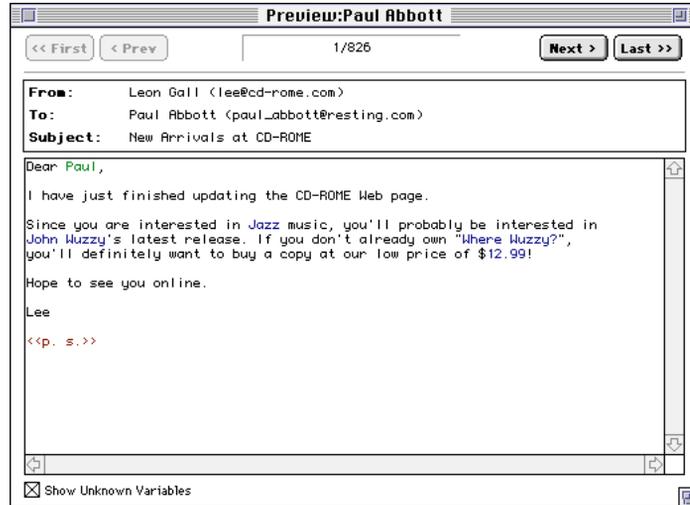
The screenshot shows a window titled "Paul Abbott" with a navigation bar at the top containing buttons for "<< First", "< Prev", "1/826", "Next >", and "Last >>". Below the navigation bar are two text input fields: "First and Last Names:" containing "Paul Abbott" and "Internet Address:" containing "paul_abbott@resting.com". A section titled "Variables:" is expanded, showing a list of ten variables with their corresponding values in text boxes: "Category" (Jazz), "Artist" (John Wuzzy), "Latest" (Where Wuzzy?), "Price" (12.99), "P. S." (empty), "Variable 6" (empty), "Variable 7" (empty), "Variable 8" (empty), "Variable 9" (empty), and "Variable 10" (empty). At the bottom of the window are three buttons: "Apply", "Cancel", and "OK".

The text you enter can be as long as you want. We've given you a window a little more than two lines high, but that shouldn't stop you from entering paragraphs of text, or even whole letters. If you have trouble editing such large amounts of text in such a small window, you can copy and paste it from any text editor.

- 4) Click Apply.

Writing better form letters

- 5) To see how these values look in the form letter, from the menu bar, choose Messages → Preview.



eMerge highlights the standard variables, your custom variables, and any custom variables for which you have not entered a variable. The highlights do not appear in the message eMerge sends.

If you don't enter a value for a variable, eMerge displays the variable's name in its proper position in the preview and highlights it in red. In this example, Leon has not entered anything for Paul Abbott's «P.S.». To hide these unknown variables in the preview, deselect Show Unknown Variables. This lets you see exactly what your message will look like.

Managing your mailing lists

This chapter describes how to use eMerge to build and maintain your mailing lists. It shows you how to export your lists, import information from other applications, and dredge through files and folders for Internet addresses. It also describes some simple tools that make it easier to use your lists.

Importing database records

The chances are pretty good that you already have a lot of useful contact information stored in a database. If you can save this information as a text file, you can import it into eMerge.

Before you can import your database records into eMerge, however, you must first create a text file in a format that eMerge can handle.

Choosing an import-export format

eMerge can handle records in the following standard formats:

- tab-delimited
- comma-delimited
- merge
- basic

To determine which format best suits your needs, refer to the documentation that came with your database application. eMerge also allows you to define a custom format, where you specify the character that marks the end of each field and another character that marks the end of each record.

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You must also instruct your database application to export the key fields of each record—the recipient’s name and the recipient’s Internet address—in an order that eMerge can handle. eMerge recognizes the following field orders:

- *FullName/Internet Address*: the full name, followed by the full Internet address
- *Internet Address/FullName*: the full Internet address, followed by the full name
- *Internet Address/FirstName/LastName*: the full Internet address, followed by the first name, and then the last name

When eMerge reads records in this format, it puts the firstname and lastname together as the full name.

- *Domain/UserID/FirstName/LastName*: the portion of the Internet address that follows the @, followed by the portion of the address that proceeds the @, followed by the first name, and then the lastname

When eMerge reads records in this format, it puts the pieces of the Internet address together into a full address (including the @) and it puts the firstname and lastname together as the full name.

Finally, place your variables in each record after these key fields. Make sure to put them in the same order they appear in the campaign’s variable list.

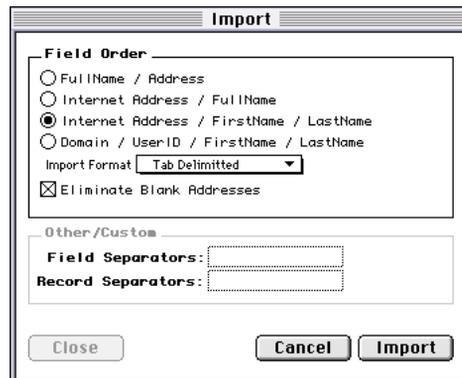
In the following example, Leon Gall has created a comma-delimited text file from his database, and used the FullName/InternetAddress field order. The records match the variables he defined in the example in [Chapter 4](#).



Importing a text file

To import a text file into eMerge, follow these steps.

- 1) From the menu bar, choose File → Import.



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- 2) Choose the options that match the format you used to export the text file from your database application. These options are described in [“Choosing an import-export format” on page 47.](#)

The screenshot shows the 'Import' dialog box with the following settings:

- Field Order:**
 - FullName / Address
 - Internet Address / FullName
 - Internet Address / FirstName / LastName
 - Domain / User ID / FirstName / LastName
- Import Format:** Comma Delimited
- Eliminate Blank Addresses

Below the 'Field Order' section, there is an 'Other/Custom' section with 'Field Separators' and 'Record Separators' text boxes. At the bottom of the dialog are 'Close', 'Cancel', and 'Import' buttons.

To prevent eMerge from importing records with blank addresses, select Eliminate Blank Addresses.

- 3) Click Import.

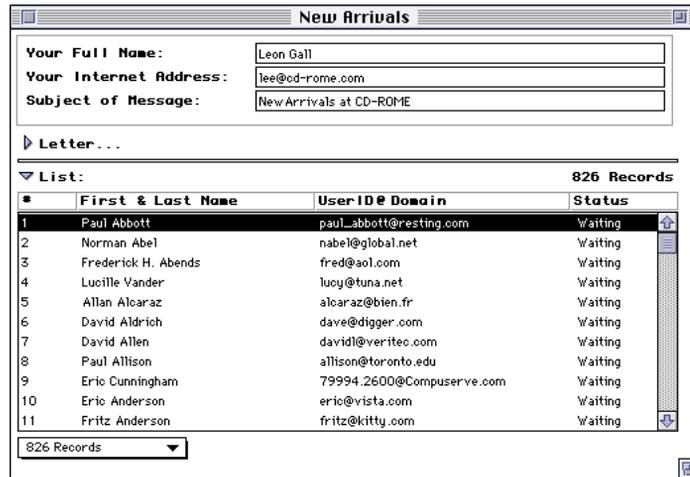
The screenshot shows a progress dialog box with the text '421 Imported' and three buttons: 'Close', 'Cancel', and 'Import'.

The counter keeps track of the records as they are imported.

The screenshot shows a progress dialog box with the text '826 Imported' and three buttons: 'Close', 'Cancel', and 'Import'.

- 4) Click Close when you're done.

The imported records appear in your mailing list.



- 5) To check that the variables were imported correctly, double-click on one of the recipients.



6) Click on the triangle next to the Variables header.

The screenshot shows a window titled "Paul Abbott" with navigation buttons: "<< First", "< Prev", "1/826", "Next >", and "Last >>". Below the navigation is a section for "First and Last Names:" with a text field containing "Paul Abbott". Underneath is "Internet Address:" with a text field containing "paul_abbott@resting.com". A section titled "Variables:" is expanded, showing a table of fields:

Category	Jazz
Artist	John Wuzzy
Latest	Where Wuzzy?
Price	12.99
P. S.	
Variable 6	
Variable 7	

If you look back at the text file on [page 49](#), you'll notice that Leon only entered values for the first four variables. When eMerge reaches the end of a record, it assumes that the remaining variables are empty. In this example, Leon wants to enter the P. S. values by hand, but only for a few of his customers.

Dredging

If you aren't lucky enough to have a database full of potential customers, you can use eMerge to find them. Using the dredging function, eMerge will read through any file on your computer—or a whole folder full of files—searching for Internet addresses and adding them to your mailing list.

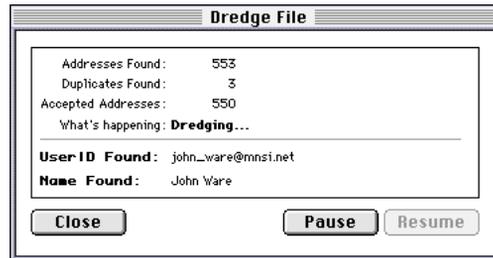
Dredging files

To search through a single file for Internet addresses, follow these steps.

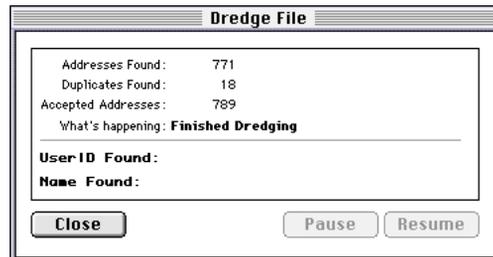
- 1) From the menu bar, choose Dredge → Dredge File.



- 2) Find the file you want to dredge and click Open.

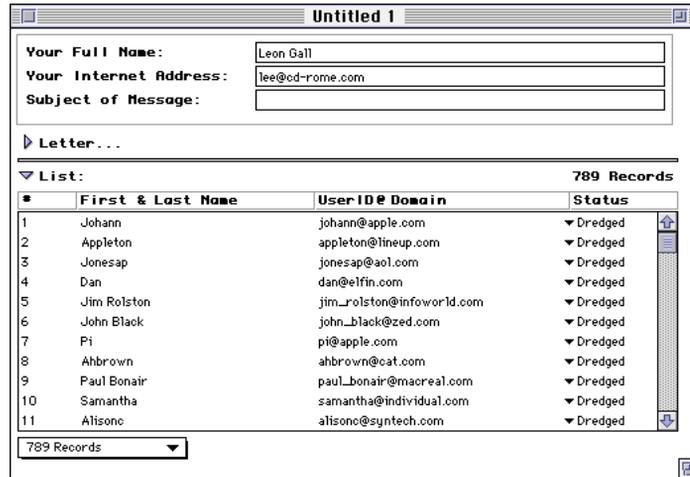


eMerge displays the addresses as it finds them.



3) Click Close when you're done.

The dredged addresses appear in your mailing list.



eMerge does the best that it can to interpret the user IDs in the addresses it finds and uses this to fill out each recipient's name. Often the person's user ID is the same as his or her full name, and eMerge recognizes this. For instance, in the fifth entry above, eMerge recognized that a person with the user ID of jim_rolston is probably named Jim Rolston. With some of the other addresses on this list, it wasn't quite so lucky.



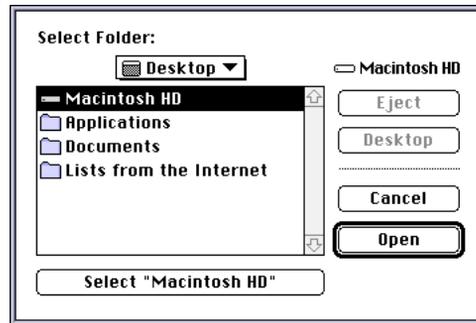
Warning: You should always check through dredged lists before using them. Depending on the contents of the files you dredge, the information for some recipients may not be filled in completely, and some records might contain incorrect addresses.

Dredging folders

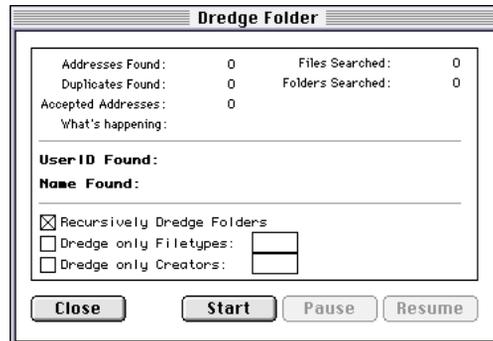
If you have a lot of files to dredge, you can put them all in a single folder and dredge the folder. You can even dredge every folder on your entire hard disk.

To dredge a folder, follow these steps.

- 1) From the menu bar, choose Dredge → Dredge Folder.



- 2) Find the folder or disk you want to dredge and click Select.



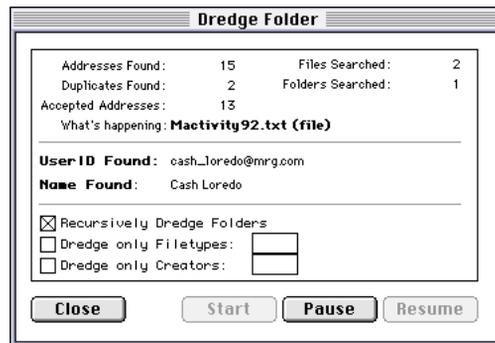
3) Select the dredge options you want.

Recursively Dredge Folders lets you dredge folders within folders (within folders), no matter how deeply they're nested.

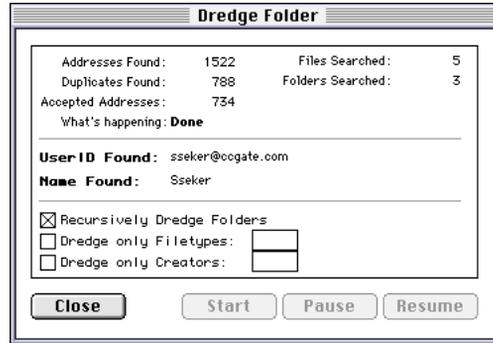
Dredge Only Filetypes restricts the dredging to the file type you specify. Otherwise, eMerge dredges all the files it finds.

Dredge Only Creators restricts the dredging to files created by the application you specify.

4) Click Start



eMerge goes through the folder and dredges the files it finds. What's Happening shows you the file eMerge is currently working on.



5) Click Close when you're done.

The dredged addresses appear in your mailing list.

Exporting a mailing list

Once you have taken the time to build a mailing list in eMerge, you'll probably want to use it in another campaign or export it to another application. For instance, you might just want to use eMerge to dredge for addresses and use your database application to process them further.

Exporting a list to another campaign

To use a list in another eMerge campaign, select the recipients you want from the source list, copy, and paste them into the destination list.



Warning: When you copy recipients between lists, eMerge does not copy the names of the variables. It only copies the contents of each variable and pastes them in the same position on the destination list. The contents of the first variable in the source list are pasted in the first variable on the destination list, the second in the second, and so on.

Managing your mailing lists 5

If you aren't careful, this can lead to problems. For example, suppose you are trying to combine two lists of customer information. If the customer account number is in Variable 4 in one list, and in Variable 5 in the other list, you are going to encounter serious problems with form letters that include the account number.

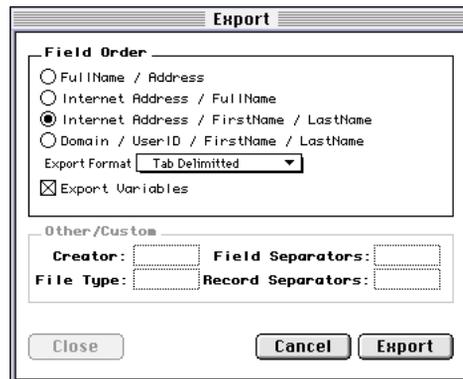
You should, therefore try to maintain some uniformity in the lists you create. If you still find yourself with two incompatible lists, you'll have to export them to a text file and coordinate them using a text editor or your database application.

Exporting a list to another application

To export a list to another application, eMerge can write the contents of your list to a text file. The first thing to do is to determine the best format to use for your application. eMerge can export lists in the same formats it recognizes when importing lists. Refer to [“Choosing an import-export format” on page 47.](#)

To export a mailing list, follow these steps.

- 1) From the menu bar, choose File → Export All.

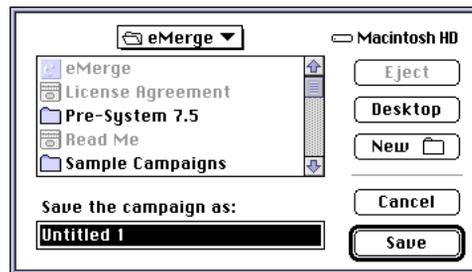


Managing your mailing lists **5**

- 2) Choose the options that match the format that best matches the needs of the application into which you'll be importing the file. These options are described in [“Choosing an import-export format” on page 47](#).
- 3) If you want to export the variables along with the names and addresses, make sure that Export Variables is selected. If you just want to export the names and addresses, make sure that Export Variables is not selected.
- 4) Enter a value for Creator and File Type.

These determine what type of file eMerge creates. If you leave these fields blank, eMerge creates a generic Macintosh text file.

- 5) Click Export.



- 6) For Save As, enter the name of the text file you're exporting.
- 7) Click Save.



eMerge counts through the records as it exports them.

- 8) Click Close when you're done.

Sorting a list

eMerge allows you to sort your mailing list on any of the fields that appear in the list. To sort on a field, click on that field's name in the list header. You can click on First Name or Last Name, User ID or Domain Name, and Status. Option-clicking on a field sorts the records in reverse order.

Sorting on names and addresses put the records into alphabetical order. Sorting on Status moves duplicate addresses together to the top of the list, followed by any addresses that generated errors when you attempted to send a message to them.

Note: You cannot sort your mailing list on any of your custom variables.

Searching a list

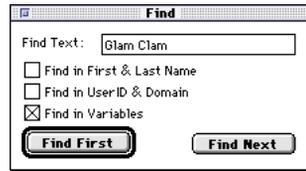
eMerge allows you to search for a string of characters in your mailing list. To search for a string, follow these steps.

- 1) From the menu bar, choose List → Find.



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- 2) For Find Text, enter the string you are searching for.



You can restrict the search to the Internet addresses, the names, or the variable fields.

- 3) Click Find First.

4	Lucille Vander	lucy@tuna.net	Waiting
5	Allan Alcaraz	alcaraz@bien.fr	Waiting
6	David Aldrich	dave@digger.com	Waiting
7	David Allen	david@veritec.com	Waiting
8	Paul Allison	allison@toronto.edu	Waiting
9	Eric Cunningham	79994.2600@CompuServe.com	Waiting
10	Eric Anderson	eric@vista.com	Waiting

826 Records

eMerge highlights the first record in the list that contains the string you are searching for.

- 4) To take a quick look at the variables for that record, Control-click on the record.

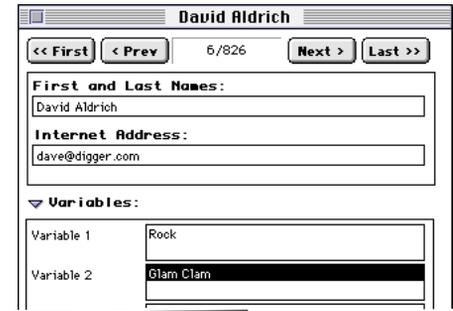
4	Lucille Vander	lucy@tuna.net	Waiting
5	Allan Alcaraz	alcaraz@bien.fr	Waiting
6	David Aldrich	dave@digger.com	Waiting
7	David Allen	david@veritec.com	Waiting
8	Paul Allison	allison@toronto.edu	Waiting
9	Eric Cunningham	79994.2600@CompuServe.com	Waiting
10	Eric Anderson	eric@vista.com	Waiting

826

Variables:

- Variable 1: Rock
- Variable 2: Glam Clam
- Variable 3: Nicer than You
- Variable 4: 25.99
- Variable 5: <none>
- Variable 6: <none>
- Variable 7: <none>
- Variable 8: <none>
- Variable 9: <none>
- Variable 10: <none>

5) To edit a variable, select it from this pop-up menu.



Selecting recipients

eMerge offers a few tools to make it easy to select recipients from your mailing list.

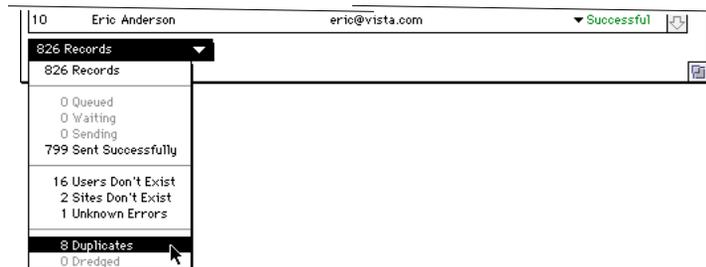
Selecting individual recipients

If you want to select a number of recipients throughout the list, click on the first person, then Command-click on the remaining people.

Selecting recipients by their status

To select all the recipients with a particular status, from the menu bar, select List → Select Status, then the status you want to select.

Alternatively, you can use the select menu below the mailing list.



Trouble shooting

This chapter describes the error messages and other problems you might encounter when using eMerge. It also tells you how to contact Galleon Software's Technical Support department.

Contacting Technical Support

As a registered purchaser of eMerge, you are entitled to free technical support through Galleon Software's site on the World Wide Web. We suggest you try there first. That's where you'll find the latest update to the application and lists of frequently asked questions.

If you want to contact Galleon Software's Technical Support department, send a message describing your question to:

support@galleon.com

Or you can reach us by fax at:

416-955-0696

However you reach us, we'll do our best to get back to you before the end of the business day. If you would like us to give you a call, please include your phone number in your message and the best times to contact you.

Reporting problems

If you discover any problems with eMerge or if you have any ideas for improving the product, we'd like to hear from you. Without feedback from our customers, we'd be working in a vacuum. Please send your messages to:

`development@galleon.com`

Status messages

The following is a list of the status messages that appear in the mailing lists. Consult this list when you are having problems sending a message, or just when you need more information on the status of a particular record.

- *Waiting:* eMerge is waiting for you to send a message to this address.
- *Queued:* You have instructed eMerge to send a message to this address. The message is waiting its turn in the message queue.
- *Sending:* eMerge is in the process of sending a message to this address.
- *Successful:* eMerge has successfully sent a message to this address.
- *Error:* When eMerge was sending a message to this address, it encountered an unknown error. This is usually the result of a problem with the network, a connection error, or a problem with MacTCP or Open Transport.

You should try resending the message. If the problem persists, contact your network administrator or your Internet service provider.

- *User ID??:* eMerge successfully connected to this recipient's mail server, but the user ID was not found on the server.

Verify the user ID and try sending the message again. The user ID might be invalid or it may have been deleted from the mail server.

- *Site ID??:* eMerge could not find this recipient's mail server on the Internet.

Verify the domain name and try sending the message again.

- *Duplicate:* The address for this recipient is the same as another address in this mailing list.

eMerge prevents you from sending the same message more than once to the same person. Correct the address, if you mistakenly duplicated an address; or delete one of the recipient's duplicate records, but make sure that you delete the correct record.

- *Dredged:* This recipient was just found in a dredged file.

Getting more information

To get more information on the status of a recipient, click on the triangle next to the status message.

6	David Aldrich	dave@digger.com	Successful
7	David Allen	david@veritec.com	Error: -2
8	Paul Allison	allison@toronto.edu	Attempts: 1
9	Eric Cunningham	79994.2600@CompuServe.com	Date: 2/26/1997
10	Eric Anderson	eric@vista.com	Time: 21:49:27

826 Records

The following are the messages you can find in this little display:

- *Error*: The error code that corresponds to the status message.
- *Attempts*: The number of times you have attempted to send a message to this recipient.
- *Date*: The date of the last attempt.
- *Time*: The time of the last attempt.
- *Number of occurrences*: The number of times an address was found in a dredged file.

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