

1.5

Using eMerge

Version 1.5 supplement

Using eMerge

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Version 1.5 supplement
First Edition

Contents

What's in this document	4
Installing Internet Config	4
Upgrading eMerge	4
Using the eMerge 1.5 upgrader	5
Sending the messages	8
Monitoring a campaign	9
Attachments	10
Sending large files	10
Sending files to Windows users	11
Attaching a file	11
Removing a file	12
Managing your mailing lists	12
Importing address books	12
Removing duplicate recipients	20
Duplicating recipients	20
Excluding lists of recipients	20
Changing statuses	23
Jump to a specific entry	23
Drag-and-drop shortcuts	24
Printing	24
Printing a mailing list	24
Printing a form letter	24
Printing a personalized letter	24
Troubleshooting	25
Status messages	25
Long delays	26

What's in this document

We've written this supplement to bring you up to date on the changes we've made to eMerge since we produced version 1.0 of the manual *Using eMerge*. All page references in this supplement refer to pages in that manual.

Installing Internet Config

The Internet Configuration System is a collection of Macintosh applications and extensions designed to make your life easier by locating all your various Internet preferences in a single file that can then be accessed by all your Internet applications. eMerge uses Internet Config to interpret the creator and file type of your attachments so that it can include them correctly when the attachment is encoded.



Warning: Before using eMerge 1.5, make sure that you've installed and properly configured Internet Config.

A number of popular Internet applications automatically install Internet Config. Check to see if it's installed on your system before going to the trouble of downloading and installing it again. Otherwise, you can find the latest version of Internet Config on the following website:

<http://www.stairways.com/ic>

Upgrading eMerge

Page 23: Before you upgrade to eMerge 1.5, you should be aware of the following changes to certain files used by eMerge.

- We have changed the format of eMerge Preferences file. eMerge 1.5 automatically updates your current preferences file to the new format.



Warning: Once you have successfully upgraded to eMerge 1.5, do not resume using an older version of eMerge, it may corrupt your new preferences file.

- We have also changed the format of eMerge campaigns. You can open old campaigns in eMerge 1.5, but you cannot open any new campaigns with an older version of eMerge.

Using the eMerge 1.5 upgrader

You can download upgrades from our website at:

<http://www.galleon.com/emerge/support/upgrades>

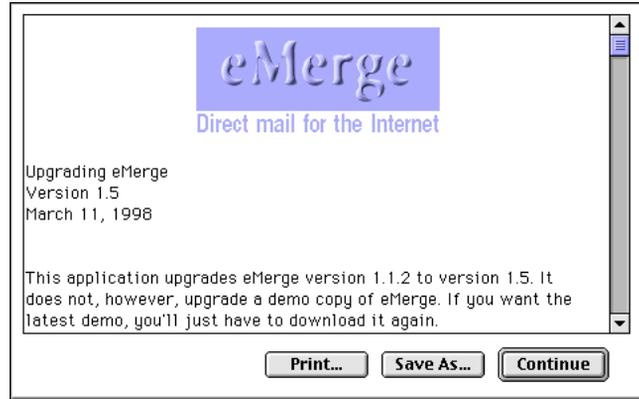
These upgrades take the form of small applications that patch your original copy of eMerge. The latest upgrades eMerge version 1.1.2 to version 1.5. If you wish to upgrade an earlier version of eMerge you must first upgrade it to version 1.1.2 using the appropriate upgrade applications, also available from our website.

To upgrade your original copy of eMerge, follow these instructions:

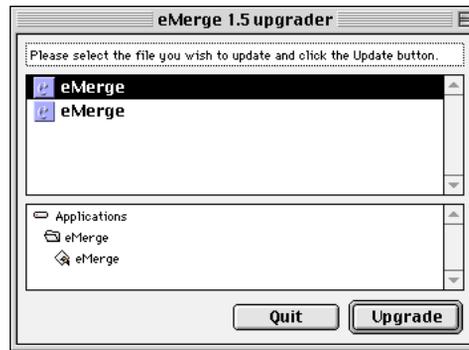
- 1) Make a copy of your eMerge application. Perform the upgrade on this copy, do not upgrade the original. Keep the original in case the upgrade fails.
- 2) Make a copy of the eMerge Preferences file. You'll find it in the following folder on your main hard disk:

System Folder → Preferences → eMerge Prefs *f*

3) Double-click on the eMerge upgrade application.

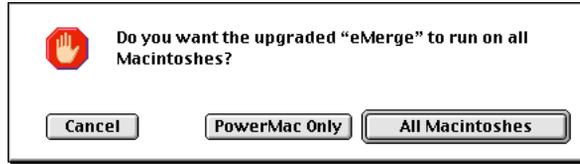


4) Click Continue



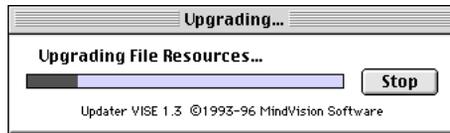
A window appears containing a list of every copy of eMerge on your computer and their location on your hard disk. You may want to jot these down, so you can delete any extra copies later.

- 5) Select the copy of eMerge you want to upgrade, and click Upgrade.

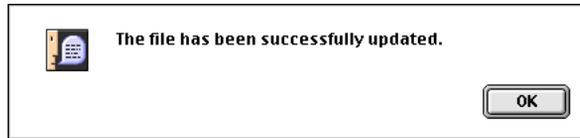


You can choose to create a version specific to the type of Macintosh you're using, or a version that works on all types of Macintosh.

- 6) Click the button corresponding to the version you want. If you don't know which you want, play it safe and create a version that runs on all types of Macintosh.

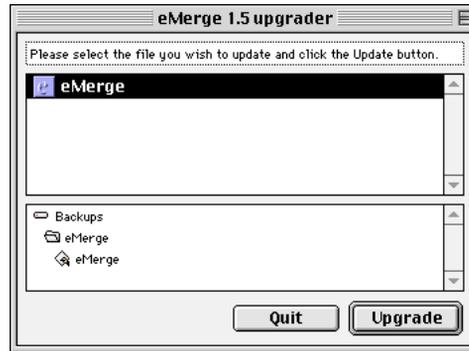


The application starts upgrading your copy of eMerge.



When it's done, the new version of eMerge is saved to your hard drive in the same location as the old version, and the old version is moved to the Trash.

7) Click OK.



8) Click Quit.

9) Delete the original version of eMerge and any extra copies of the old application you may have lying around. If you don't, the Finder may not know which version to start when you double-click on an eMerge campaign file.

If you have any problems with this procedure, please send us a note at support@galleon.com, or give us a phone call at 416-955-1777.

Sending the messages

Page 34: eMerge no longer sends only one message at a time. Instead, it can now open up to 24 simultaneous connections to the Internet. You'll find that this has resulted in a significant increase in speed. The number of simultaneous connections is limited by the speed of your connection, but we've found that a typical 28.8 K connection can easily support ten simultaneous connections.

The progress dialog has been simplified. There is but a single button to press. Use it to cancel the campaign or to close the dialog when the campaign is finished.



You'll also notice that eMerge gives you a lot more feedback as the campaign progresses. Yes, it may still take a while for those last few messages to reach their destination, but no longer will you wonder if the application has hung.

Monitoring a campaign

eMerge quickly saves the status of each message whenever that status changes. In this way, you can cancel a campaign at any point and resume it later. And if the campaign is interrupted for any reason, you always know which recipients have received their message and which have not.

Cancelling a campaign: To stop sending messages, click the cancel button in the Progress dialog. Those messages that can be cancelled are stopped right away; those that cannot, must be sent. Do not attempt to force eMerge to quit. Messages with large attachments can take a long time to send. Even small messages can encounter long delays.

Resuming a campaign: To resume sending your messages, from the menu bar, choose Messages → Resume Sending. eMerge begins sending any messages that have not yet been sent, including any messages that may have been previously cancelled.

Attachments

eMerge allows you to attach any number of files to the messages you send. The same files are sent to each person on your mailing list.

Sending large files

If your attachments together exceed 32K you may encounter problems sending those files by e-mail. Some mail servers do not accept large attachments, other mail servers restrict this privilege to certain users.

Campaigns that include large attachments can also take a long time to send, since the files are sent to each recipient individually. All those messages end up tying up a lot of storage space and generally contribute to the growing congestion on the Internet.

If you attempt to send a large file, eMerge displays the following message:



We recommend that you consider removing the attachment and instead including a link in your form letter that points to an FTP site or a web page containing the file.

Sending files to Windows users

Macintosh files consist of two parts: a resource fork and a data fork. Windows files, on the other hand, contain only data. This can present problems when sending Macintosh files to Windows users.

eMerge encodes Macintosh files in AppleDouble format and sends them as MIME attachments. This maintains both the resource fork and the data fork of Macintosh files. Macintosh files without resource forks (PDF files for example) are not AppleDouble encoded.

If your mailing list includes both Macintosh and Windows users, you should first test any attachments you'll be sending on both platforms.

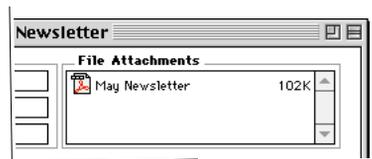
Attaching a file

To attach a file to your eMerge campaign, follow these steps.

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



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



Managing your mailing lists

Removing a file

To remove a file from the attachment list, select the file and press Delete.

Page 49: eMerge 1.5 includes a number of new functions to help you build and manage your mailing lists.

Importing address books

eMerge recognizes the address books of a number of standard Macintosh e-mail readers.

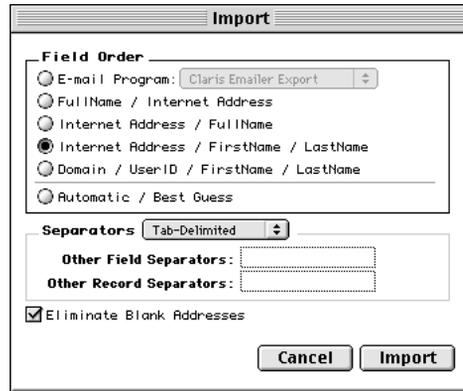
Claris Emailer: To import your Claris Emailer address book into eMerge, follow these steps.

- 1) Open Claris Emailer.
- 2) From the menu bar, choose File → Export Addresses.

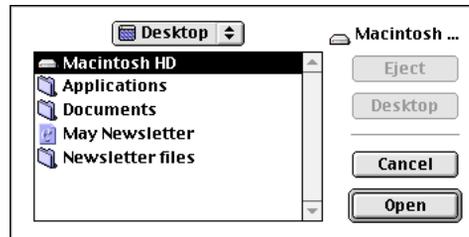


- 3) Click Save.
- 4) Open eMerge.

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



- 6) Click on E-mail Program and select Claris Emailer Export from the list of available formats.
- 7) Click Import.

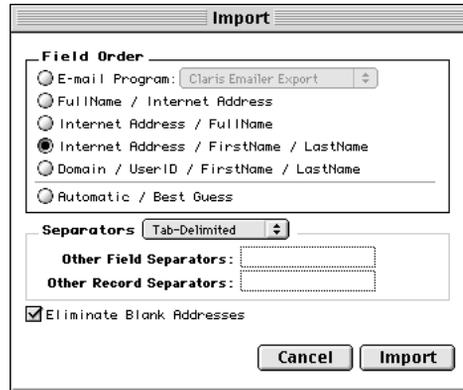


- 8) Find the file named Claris Emailer Export you created in [step 3](#) and click Open.

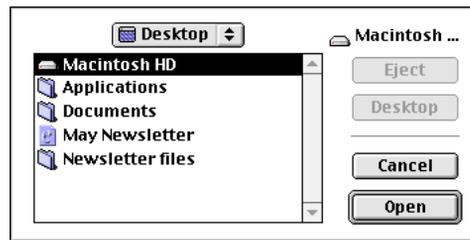
Your addresses are imported into eMerge.

Eudora: To import your Eudora address book into eMerge, follow these steps.

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



- 3) Click on E-mail Program and select Eudora Nicknames from the list of available formats.
- 4) Click Import.

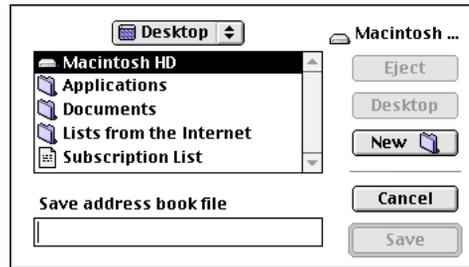


- 5) Find the file named Eudora Nicknames. Typically this file is located on your main hard disk in the following folder: System Folder → Eudora Folder.
- 6) Click Open.

Your addresses are imported into eMerge.

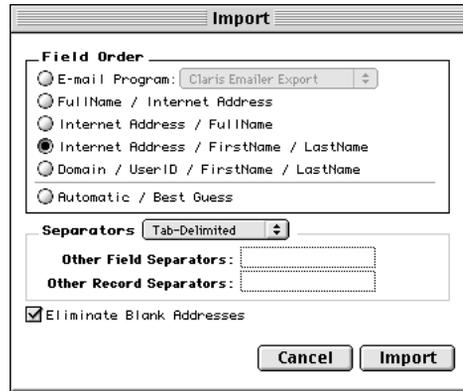
Netscape Communicator: To import your Netscape Communicator address book into eMerge, follow these steps.

- 1) Open Netscape Communicator.
- 2) Display your address book.
- 3) From the menu bar, choose File → Save As.



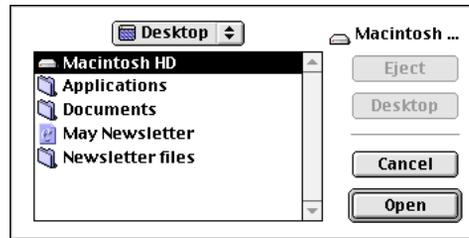
- 4) Enter a name for the address book file and click Save.
- 5) Open eMerge.

6) From the menu bar, choose File → Import.



7) Click on E-mail Program and select Netscape Address Book from the list of available formats.

8) Click Import.

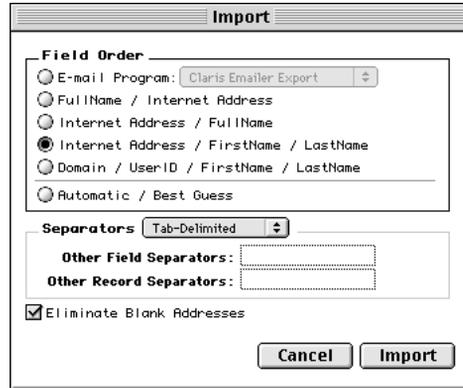


9) Find the file you created in [step 4](#) and click Open.

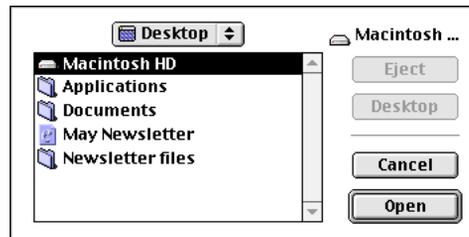
Your addresses are imported into eMerge.

Netscape Navigator: To import your Netscape Navigator address book into eMerge, follow these steps.

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



- 3) Click on E-mail Program and select Netscape Address Book from the list of available formats.
- 4) Click Import.

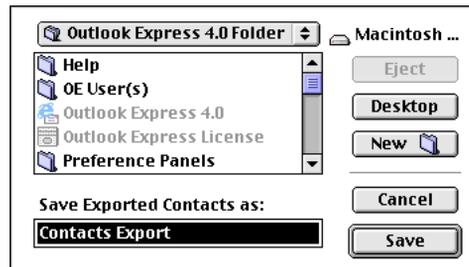


- 5) Find the file named AddressBook.html. Typically this file is located on your main hard disk in the following folder: System Folder → Preferences → Netscape *f*.
- 6) Click Open.

Your addresses are imported into eMerge.

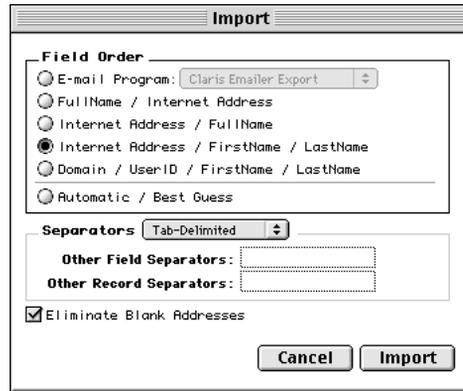
Outlook Express: To import your Outlook Express contact list into eMerge, follow these steps.

- 1) Open Outlook Express.
- 2) From the menu bar, choose File → Export Contacts.

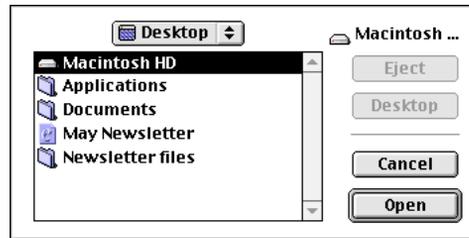


- 3) Click Save.
- 4) Open eMerge.

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



- 6) Click on E-mail Program and select Outlook Express Export from the list of available formats.
- 7) Click Import.



- 8) Find the file you created in [step 3](#) and click Open.

Your addresses are imported into eMerge.

Removing duplicate recipients

eMerge can search through your mailing list and identify recipients with the same name or with the same Internet address. eMerge will send a message only to the first of these duplicates, all remaining duplicates are marked with the Duplicate status.

To remove all the recipients in your mailing list with the same Internet address, follow these steps:

- 1) From the menu bar, choose List → Find Duplicate Addresses.
- 2) Sort your mailing list on Status. Refer to page 62 of *Using eMerge*.
- 3) Select the recipients marked with the Duplicate status.
- 4) Press Delete.

Duplicating recipients

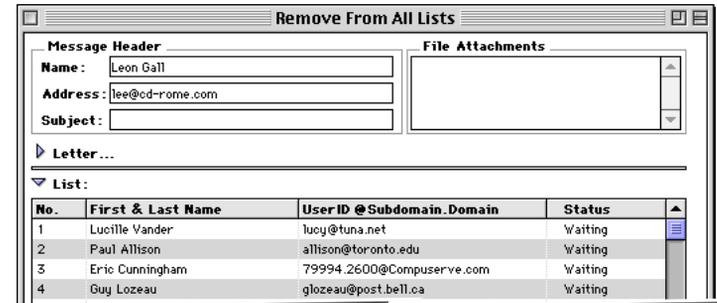
If you need to enter similar information for a number of recipients, you may find it easier to enter it for the first recipient and then use a copy of that entry as a template for the remaining recipients.

To duplicate a recipient, from the menu bar, choose List → Duplicate Recipient. You can then change the information you want to change.

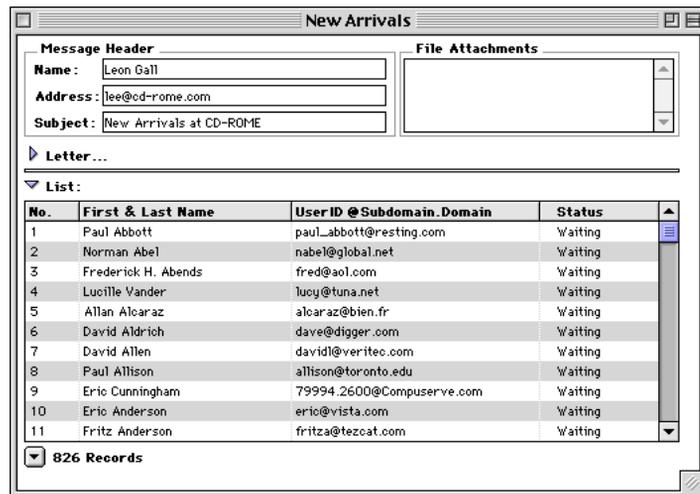
Excluding lists of recipients

If you send out enough e-mail, you're bound to find people who don't want to hear from you anymore. With eMerge you can build a list of these people and exclude them from your campaigns. To do so follow these steps.

1) Maintain your exclusion list in a separate campaign.



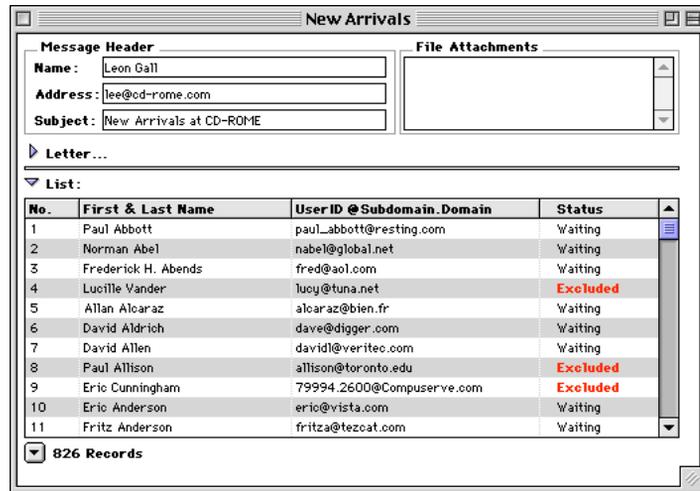
2) Open the campaign you're about to send.



- 3) From the menu bar, choose List → Exclude List.



- 4) Find the list of people you want to exclude and click Open.

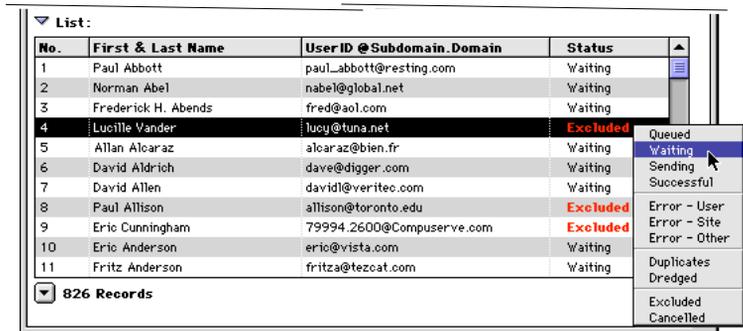


The people from the exclusion list are marked with the Excluded status. You can rest assured that excluded entries are skipped when you send your campaign, or you can delete these entries from your mailing list.

Changing statuses

You can change the status of any recipient in your mailing list. For instance, after excluding recipients, you may later decide to resume sending them messages. To change the status of a recipient, follow these steps.

- 1) Choose the recipients whose status you want to change.
- 2) While holding down the Control key, click on their status.



- 3) Choose the new status from the pop-up list.

Jump to a specific entry

To jump to a specific entry in your mailing list, follow these steps.

- 1) Click on No. in the list heading



- 2) Enter the number of the recipient you want jump to and click OK.

Drag-and-drop shortcuts

eMerge includes the following drag-and-drop shortcuts to make your life a little easier.

- You can drag and drop text from any text field to any other text field within eMerge, and you can drag and drop text between eMerge and other applications.
- You can drag and drop recipients within a mailing list or between campaigns. You can drag and drop text onto the mailing list, and eMerge will do its best to interpret it as recipient information.
- You can drag and drop files onto the attachment window.

Printing

Printing a mailing list

To print your mailing list, from the main menu, choose File → Print List.

Printing a form letter

To print your form letter, choose File → Print Letter.

Printing a personalized letter

If your form letter is particularly long and complicated, you may find it useful to print and proofread a personalized version. To print the letter for a particular recipient, follow these steps.

- 1) Select the recipient.
- 2) From the main menu, choose Messages → Preview.

The letter preview for that recipient appears.

- 3) Choose File → Print Letter

Troubleshooting

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.

Status messages

Page 66: The following describes changes to the text of the status messages and expands on the descriptions of the messages and their associated error codes. For more information on viewing an error code refer to "Getting more information" on page 67.

- *Error–Other (formerly Error)*: This status message can have the following error codes:

(- 7) We've found that this error is more often than not the result of a poor connection to the recipient's mail server, or a poorly configured mail server. You should always try to send these messages again. Or you can let your own mail server do this for you by temporarily changing the SMTP Options in your Application preferences to Mail Server Only (refer to page 21 of *Using eMerge*) and resending the messages. Doing this forces your Mail Server to do all the hard work of sending and resending; it also lets you know if the error is more serious.

(-9) This indicates an invalid address format. These invalid addresses are detected by eMerge before any queries are sent to the Internet.

- *Error–Site (formerly Site ID??)*: This status message can have the following error codes:

(-2) eMerge could not resolve the address. There may have been a problem connecting your domain name server, and you should try sending this message again.

(-12) eMerge has authoritatively determined that the address does not exist.

- *Error–User (formerly User ID??)*: eMerge successfully connected to this recipient’s mail server, but the user ID was not found there.

Long delays

Some of our customers have experienced long delays and frequent errors when trying to connect directly to some mail servers. This is largely due to the nature of the Internet, especially when attempting to communicate with sites that are far from your own. If you encounter these problems on a regular basis or for specific addresses, we recommend that you send these messages using the Mail Server Only option described on page 21 of *Using eMerge*.

Often, too, you will encounter a long delay when sending the final few messages in a campaign or when cleaning up after cancelling a campaign. Again, this is due to vagaries of some Internet mail servers. Once eMerge connects to a mail server, it will wait until it receives the expected feedback before disconnecting. Some servers, however, don’t behave particularly well, and so we also allow eMerge to give up after a predefined time limit of two minutes. But you’d be surprised how often messages are successfully sent even after waiting so long.