Welcome to WebMaster MailRoom

So, you have a website and want more direct contact to your visitors. You want to obtain more information about them, let's say, in order to target your marketing efforts at them. Perhaps you want to keep your customers up-to-date about your products and services. Or maybe you want to bring news and information to people interested in a certain subject.

No matter which one of these scenarios describes you, what you need is a program that allows you to easily create extensive messages, while at the same time enabling you to conveniently manage a large address database.

WebMaster MailRoom unites these two functions in such as way as to make the management of extensive data a breeze, whether you are distributing newsletters, memos or targeted surveys, conducting letter or ad campaigns, or cold-mailing.

WebMaster MailRoom provides you with the easiest method of creating client databases for targeted marketing: simply include a **form** on your website, with which to collect the desired address information and other data from your visitors. The program then analyzes this data and sorts it automatically according to **recipient lists** set up by you (e.g. newsletter subscribers, contest participants, people interested in a certain product, etc.).

If you want to give your **mail merge messages** an individualized look, you will find that WebMaster MailRoom provides you with far-reaching formatting possibilities, as well as with the option of integrating logos, **images** and **tables**. Furthermore, you can personalize each message by inserting **user fields** containing all the data for the specific user.

Finally, if you have created your website with **web to date** by DATA BECKER, you now have the ideal productivity duo. The two programs are guaranteed compatible, and the similar program interfaces make it easy to get used to and work with WebMaster MailRoom.

The DATA BECKER Team wishes you hours of mailing enjoyment with WebMaster MailRoom!

Inbox

The messages you receive in WebMaster MailRoom are mainly requests for the subscription/cancellation of subscriptions (e.g. for newsletters), notices of participation in contests, etc. All of these messages, whether they announce subscriptions or requests for subscription cancellations, are listed in the **Inbox** area. A new message is displayed in the Inbox as soon as it arrives, provided it fulfills the prerequisites for being received in WebMaster MailRoom (see below).

The automation process of WebMaster MailRoom starts at the same time. The sender of the received message is added as a new **recipient** and assigned to an existing **recipient group**, if the program can identify an appropriate group for him/her.

If the sender has contacted you via a form, the program recognizes the additional data from the form and assigns it to the new recipient together with the e-mail address. Such additional data may include name, address, and phone number, but also personal interests. The only prerequisite is that this data should have been entered in **user-defined fields** in the form.

Note: If the sender hasn't contacted you via a form but through a normal e-mail message, WebMaster MailRoom creates a new recipient record with the e-mail address and the assigned **recipient group**. You will then have to enter additional data (e.g. name, address, etc.) by hand under **Recipient Properties**.

Working in the Inbox area 

1. All received message are listed in a table in the **Inbox** area. The table contains four fields: **Sender**, **Type**, **Details** and **Date**. Click on one of these fields to change the order in which the messages are sorted according to this field. To change the width of a column, place your cursor over the column division and move the cursor in the desired direction while keeping the mouse button depressed.
2. The listbox above the table allows you to filter the received messages according to established criteria. WebMaster MailRoom analyzes the format of each incoming message and assigns it different characteristics according to its type. All messages are displayed by default. The program differentiates between the following types of messages:

Message Type	**Meaning**
Subscriptions via e-mail	All messages regarding a request for subscription (e.g. to a newsletter) which were sent via an e-mail program.
Cancellations via e-mail	All messages regarding the cancellation of a subscription (e.g. to a newsletter) which were sent via an e-mail program.
Subscriptions via form	All messages regarding a request for a subscription (e.g. to a newsletter) which were sent via a form.
Cancellations via form	All messages regarding the cancellation of a subscription (e.g. to a newsletter) which were sent via a form.
Error	All messages where the category is unclear or faulty are classified under this type. They can include: - Requests where the sender of the message has not included an

	e-mail address - Requests from recipients on the **Blacklist** - Subscriptions/Subscription cancellation requests regarding a faulty subscription (e.g. because of a typo)
Unknown e-mail	If messages which do not fulfill the prerequisites for being received through WebMaster MailRoom (see below) reach your e-mail server, they are interpreted as "unknown e-mails". These messages do appear in the Inbox as having arrived, but rather the program leaves them on the server, so you can receive them in your regular e-mail program. You cannot read or edit these messages in WebMaster MailRoom.

3. Above the table, you will also find the following buttons. Select a message in the table and click

Ÿ on to view the **message properties** of the selected message,

Ÿ on to delete the selected message,

Ÿ on to view the **sender's properties**,

Ÿ on to check if you have new messages on the server.

Note: Because all recipient data is automatically interpreted and managed by WebMaster MailRoom when a message arrives, you can delete your messages immediately, for the information has already been processed. We only recommend keeping a message if you want proof of having received an entry or a subscription or cancellation request.

Prerequisites for receiving messages in WebMaster MailRoom

For an incoming mail to be correctly identified, received and analyzed by WebMaster MailRoom, it must have a **valid e-mail address** and a **subject which the program can interpret**. This means that the entry in the subject line—with which your client subscribes or unsubscribes to a newsletter, for instance—is predetermined.

If the subscribe/unsubscribe requests comes in an e-mail created through an **online form** on your website, you don't have to worry about the subject, since it is generated automatically ("formsubscribe" or "formunsubscribe"). If you want to make it possible for your clients to subscribe/unsubscribe through regular e-mail, however, you must let them know what they should fill into the subject line. There are three commands at your disposal for each kind of request, followed by the corresponding subscription abbreviation. This is the abbreviation you defined when you created your **subscriber or recipient group**.

The subject line must fulfill the following requirements:

Request	**Subject Line Entry**
Subscription:	subscribe subscription abbreviation add subscription abbreviation + subscription abbreviation
HTML subscription:	subscribe subscription abbreviation html

	add subscription abbreviation html + subscription abbreviation html
Subscription cancellation:	unsubscribe subscription abbreviation remove subscription abbreviation - subscription abbreviation
Subscription to all/Cancellation of all:	subscribe all / unsubscribe all add all / remove all + all / - all

Note: We recommend encouraging subscriptions/cancellations of subscriptions via an **online form**, since here the subject entry is generated behind the scenes. In actuality, e-mailing usually only occurs when there are cancellations of existing subscriptions.

Outbox

Once you have created a new mail merge message under **Mail Merge Messages** and have clicked on the **Send mail merge message** button, the message is deposited in the Outbox. Here, you can view it again and delete it if necessary, or finally send it to the mail server and your recipients.

Note: You can forego the temporary sending of your messages to the Outbox by changing the user settings in the **Send options**. Then, clicking on the button sends the messages directly to the mail server. This means, of course, that you have no further chance of reviewing your message and reversing the sending command.

Working in the Outbox area

1. All messages to be sent are listed in a table in the **Outbox** area. The table contains three fields: **Recipient**, **Subject** and **Created on**. Click on one of these fields to change the order in which the messages are sorted according to that field. To change the width of a column, place your cursor over the column division and move the cursor in the desired direction while keeping the mouse button depressed.

2. Above the table, you will see three buttons. Select a message in the table and click

   Ÿ on to **Show message**,

Ÿ on to delete the selected message,

Ÿ on to send all messages in the Inbox to the e-mail server and their recipients.

Tip: To select multiple e-mails, use the arrow keys, while keeping the [Shift] key depressed.

Sent messages

Once you have successfully sent one or several messages from the **<u>Outbox</u>**, they appear in the **Sent Messages** area. The functions available to you here correspond to those in the **<u>Outbox</u>** area.

Working in the Sent Messages area

1. All sent messages are listed in a table in the **Sent Messages** area. The table contains four fields: **Recipient**, **Subject**, **Created on** and **Sent**. Click on one of these fields to change the order in which the messages are sorted according to that field. To change the width of a column, place your cursor over the column division and move the cursor in the desired direction while keeping the mouse button depressed.

2. Above the table, you will find three buttons. Select a message in the table and click

   Ÿ on to **<u>Show message</u>**,

Ÿ on to delete a selected message,

Ÿ on to move an already sent message back to the Outbox in order to send it out again.

Tip: To select multiple e-mails, use the arrow keys, while keeping the [Shift] key depressed.

Transfer errors

If the messages in the **Outbox** could not be sent for whatever reason, they are not placed in the **Sent Messages** box, but are moved into the **Transfer Errors** folder. The functions available to you in this area correspond for the most part to those in the **Outbox** area.

Working in the Transfer Errors area

1. All messages which could not be sent are listed in a table in the **Transfer Errors** area. The table contains four columns: **Recipient**, **Subject**, **Created on** and **Send attempt**. Click on one of these fields to change the order in which the messages are sorted according to that field. To change the width of a column, place your cursor over the column division and move the cursor in the desired direction while keeping the mouse button depressed.

2. Above the table, you will find three buttons. Select a message in the table and click

   Ÿ on to **Show message**,

Ÿ on to delete the selected message,

Ÿ on to move an already sent message back to the Outbox in order to send it out again.

Tip: To select multiple e-mails, use the arrow keys, while keeping the [Shift] key depressed.

Recipients

Usually, all your client records belong to one or several groups. For instance, if you offer a newsletter with news about your company, all subscribers can be part of the "Company newsletter" group. Participants in a contest can be in a different recipient group. Each recipient can be included in several groups simultaneously, however. After all, it is very possible that a newsletter subscriber also wants to take part in your contest.

Because WebMaster MailRoom is capable of reading and analyzing recipient information from incoming messages, the program creates a new recipient record containing all properties it is able to interpret for each message sent through an **online form** created with web to date or for each e-mail subscription. The program also simultaneously assigns the recipient to a predefined group. If the recipient sends you a request for cancellation, the record is automatically removed from the assigned group.

In the **Recipients** area, you can gain an easy overview of the size and composition of each group. You can select any recipient in the table and edit his or her **properties**. You can also add new recipients to the group or move existing recipients, as well as expand the list of **user-defined fields** with which you ask for your client's data in your **online form**.

To find out how to create a new group, go to **Group Properties**.

Working in the Recipients area
Whether you have selected a group you have created yourself or one of the predefined groups, like **All recipients** or **Blacklist**: the view that is presented to you in this area differs only in the names of the group members listed in the table.

1. From the folder list, select the group you want to view.
2. The table shows you all recipients belonging to this group, e.g. the subscribers to a particular mailing list. The table fields correspond to the **user-defined fields** and are identical to the text entry fields in the **online form** you created with web to date. To change the order in which the entries are sorted, click on one of the column heads. This is helpful particularly with extensive recipient lists.
3. Use the buttons in the toolbar for the following commands:

Icon	Command	Meaning
	**Recipient properties**	Opens the **properties** of the recipient selected in the list.
	**Delete recipient**	Deletes the recipient selected in the list. Beware! If this recipient also appears in another group, he or she will be deleted from there as well. To delete the recipient only from the current group, use the **Group assignment** or right-click to open the context sensitive menu and select the command **Delete Recipient from this Group.**

	**New recipient**	Opens the dialog window **New Recipient** and adds a new recipient to the group.
	**User-defined fields**	Opens the dialog window **User-defined Fields**, where you can create and edit form fields.
	**Group properties**	Opens the **Properties** of the current group.
	**Delete group**	Deletes the current group in its entirety.
	**Show messages to this group**	Switches to the **mail merge message** functions and displays all mail merge messages assigned to the current recipient group.
	**Group assignment**	Opens the **Group Assignment** dialog window, where you can change the group assignment of the selected recipient.

The Recipients and Groups function group

WebMaster MailRoom manages all recipient data in the **Recipients and Groups** function group. This data includes the name and e-mail addresses of your subscribers, as well as all information provided through the **user fields** of an **online form** created with web to date and included on your website. Yet the **Recipients and Groups** function group is more than just a collection of data: by defining individual user groups according to certain themes and assigning each recipient record to one or several of these groups, you build a database of recipients sorted by interests and themes, which you can expand at any time. At the same time, you can exclude individual recipients from receiving messages by placing them on the **Blacklist**, if they have informed you that they don’t want to receive any further messages from you. Thus, the targeted marketing possibilities made available by WebMaster MailRoom are quite considerable.

If you requested the creation of sample groups when you opened a new project with the WebMaster MailRoom **Start Wizard**, you will find the empty sample groups "Standard" and "Premium" in this area.

In the **Recipients and Groups** function group, you can also define the **properties for each individual recipient**, i.e. you can specify not only the cases in which your clients should be contacted, but also the mailing format in which this should be done, the form of address for each client, etc.

Note: WebMaster MailRoom pretty much creates new newsletter recipients for you: the automation process of the program starts immediately after the receipt of a subscription request. The message is analyzed, and a new recipient record is created from the extracted data and assigned to a user group. If you want to create user groups that are not automatically composed from subscriber data (e.g. for extensive mailing and cold-mailing processes), you can import recipient and client data from other databases or address books into WebMaster MailRoom by using the **import function**.

Click **here** to find out more about receiving messages in WebMaster MailRoom.

Recipient and Groups area functions

The **Recipients and Groups** area offers you all the important functions you need to create recipient or user groups in an easy overview. As an alternative, you can also use the icons in the toolbar of the work area. You can recognize commands that refer to recipients by the symbol , and commands that refer to recipient groups by the symbol

.

1. **New recipients and groups**
   Click on the entry **Add a new recipient** or on the  button to create a new recipient record. Click on the entry **Create a new group** or on the

 button to create a new recipient group. A newly created group appears in the table below containing an overview of all groups.

2. **Editing recipients and groups**

In order to see which recipients have been assigned to a group or in order to edit the properties of individual group members, you must first open the group in the work area. You can do so over the folder list on the left or by switching groups in the table displayed in the work area. The table displays not only the user groups you created, but also all unassigned recipients, as well as all those recipients who have requested to be dropped from a mailing list ("Blacklist").

Recipients	Contains all entries assigned to the corresponding recipient group. (The number and names of the groups appear according to your input).

(All recipients) Offers the complete list of recipients assigned to the different recipient lists.

(Not assigned) Contains recipient entries not assigned to any recipient list.

(Blacklist) Contains recipients who have requested that no more mail be sent to them.

To open a group, double-click on its entry.

The following commands are available over the buttons at the bottom of the table (or in the toolbar of the work area):

Delete group Deletes the recipient list selected in the table.

Properties Opens the **Properties** of the recipient group selected in the table.

Show messages Switches you to the **Mail Merge Message** function group and displays all mail merge messages assigned to the selected recipient group.

Creating new recipient databases
There are two ways in which to create recipient databases:

1. **Automatic recipient creation:** The automatic set-up of recipients usually happens without you noticing and is based on the ability of WebMaster MailRoom to analyze the data contained in incoming messages. The recipients are then automatically assigned to a group, to which their data records are sent. The requirement for this process is that the recipient be requesting a subscription (e.g. to your newsletter) via an **order form** or an e-mail message.
2. **Manual recipient creation:** In all other cases, you need to set up the recipient manually using the button. You may have to do this, for instance, if you want to use the mail merge function in WebMaster MailRoom to write to an outside user circle (e.g. to offer your services to potential clients). The **import function** of WebMaster MailRoom allows you to import existing address books or contact lists into WebMaster MailRoom out of other applications.

Editing messages

The actual creation of mail merge messages happens in the **Edit Message** area. Click in the message field with the mouse, then type in the text of your message.

There are two main message formats, each with its own formatting possibilities:

- **Messages in HTML format:**
  This format offers you extensive options for formatting your messages. In addition to bolding and italicizing, you can freely define the font and font size, change the font and background colors, adjust the alignment of the text and even **insert tables**. In HTML, you may also **insert images**.
- **Messages in plain text format:**
  The plain text format offers only limited formatting possibilities. The extensive formatting leeway afforded by HTML does not exist here.

Because not all e-mail clients can correctly receive HTML messages, the question of the format in which you create your message mainly depends on the format which your recipient can read. Because you don't know that, you should request this information through your **order form** and store it in the **recipient properties**.

How to create and edit messages in HTML format

1. Open the message editing work area by either creating a new mail merge message or clicking on an existing one. Make sure that you are in HTML format. You can recognize this by the fact that the HTML button underneath the work area is depressed.

2. Type in the text of the message or edit the existing text. If you have already created your message in another application (e.g. in Word), you can copy this text into the current message by going to **Mail Merge/Import Mail Merge Message** (you will lose images through this process, however).

Note: All the commands used below can also be executed by selecting the corresponding entries in the **Format** menu or from the context sensitive menu (which opens when you right-click).

3. Select the font and font size from the listbox in the toolbar of the work area. When you select the font, bear in mind that the recipient must also have it on his/her computer, even if he/she can receive HTML messages. To make sure that the message really looks the way you intend it to, you should only use the most common fonts, e.g. Arial, Times New Roman or Tahoma. It is for this reason that the choice of fonts in WebMaster MailRoom is limited.

4. Format the text according to your wishes. The following options are available for formatting HTML messages:

F Italicizes the selected section or word.
K The selected section or word appears in bold.
A Opens the **Color** [T.N. Did not come across this in the resources] dialog window, where you can assign another color to the selected section or word.
Left aligns the selected section.
Centers the selected section.
Right aligns the selected section.
Justifies the selected section.

5. In HTML format, you can also insert the following additional elements, in order to make the mail merge message more interesting for your recipients:

Inserts a **table** into your HTML message.
Increases the width of the column where the cursor is located.
Decreases the width of the column where the cursor is located.
Inserts a **user field** into your message. Select the desired field from the list of **decision fields**.
Opens the **Insert External Link** dialog window, where you can link individual words to Internet or WWW addresses.
Opens the **Insert Image** dialog window, where you can insert images as image files into your mail merge message.

6. If you have incorporated **user** or **decision fields** into your message, they are first only represented as placeholders in the work area. To check how the field content looks for the different recipients, you should view the whole message in the **send preview**. To preview your message, either click on the button in the toolbar or on **Preview** in the following dialog window.

7. To send your mail merge message, click on the **Send mail merge message** button . In the next dialog window, you can change the **mail merge message properties** one more time; then, click on the **Send** button to send the message to the **Outbox**.

8. To view or edit the **mail merge message properties**, click on the button.

9. Do white backgrounds bore you? You can select a different background color for your HTML message by choosing the **Background Color** command from the **Format** menu. Pick a new background color from the **Color** dialog window and confirm your choice by clicking on **OK**.

10. Also in the **Format** menu, you can create **decision fields** and **text blocks**IDH_DIALOG_PHRASES and insert **file attachments**.

How to create and edit messages in text format

To create a mail merge message in plain text, you need to enable the **Text** button in the work area of a new message. All formatting possibilities are then unavailable, and the number of available commands is restricted to the following buttons: **Mail merge message properties**

, **Send mail merge message**
, **Send preview**
and **Insert user field**
.

With the help of the **Format** menu, you can create additional **decision fields** and **text blocks**IDH_DIALOG_PHRASES for your text message, as well as insert **file attachments**.

How to copy a message from one format into the other

If you have already created your message in one of the two formats, you can copy it into the other one without any trouble, simply by clicking on the **Copy** button. Please note that formatting done in HTML will be lost when copying into text format.

We recommend that you check the copy result at all times. Textual references to images make sense in an HTML message but not in a text message.

The Mail Merge Messages function group

The **Mail Merge Messages** function group is the WebMaster MailRoom area in which you compose and manage messages in order to send them to the desired **recipient groups**. The most usual mail merge form is the newsletter, but you can compose any kind of message in the **Mail Merge Messages** area.

Basically, you should compose any message which you want to send to several recipients without changing the basic text but with the addition of user-specific content as a mail merge message in WebMaster MailRoom. This will save you a lot of time as compared to a normal e-mail program.

In WebMaster MailRoom, you have two different possibilities of customizing your mail merge messages:

Ÿ by inserting **user fields**,

Ÿ by inserting **decision fields**.

Note: Mail merge messages must always be assigned to one or several recipient groups; otherwise, you can't send the messages because you are lacking recipient information.

All processes of creating and editing a message are carried out in the **Mail Merge Messages** area.

Working in the Mail Merge Messages area

1. Open the Mail Merge Messages area in the work area by selecting **Mail Merge Messages** from the folder list or by clicking on the button in the toolbar. An overview of all important actions appears in the work area.

2. To create a new mail merge message, click on the **Create a new message** entry or on the button in the work area toolbar. A dialog window opens, in which you can adjust the **Mail Merge Message Properties**.

3. In the table in the work area, WebMaster MailRoom shows you all messages you have already composed by default. If you have already sent one of these messages, the date it was mailed out is also displayed. To open a message (e.g. to edit it further), double-click on its entry. The desired message is then displayed in the work area.

4. You can delete a mail merge message by clicking on an entry in the table to select it then clicking on **Delete message** or the button . You are then prompted to confirm the decision, after which the message is removed from the program.
Note: To delete several messages simultaneously, keep the [Shift] key depressed and use the arrow keys to select any number of messages.

5. To view and edit the **properties** of the selected message, click on the desired message then on **Properties** or the button in the work area toolbar.

6. For an overview of the messages assigned to individual **recipient groups**, filter the messages by selecting the desired group from the listbox in the work area toolbar. In this listbox, you can also choose to view all unassigned messages (e.g. so you can assign them to one or several groups).

The Sending and Receiving function group

The **Sending and Receiving** function group gives you access to all processes related to the sending and receiving of messages (e.g. mailing, sending newsletters, receiving subscriptions, etc.).

The **Sending and Receiving** area gives you an overview of your current mailing situation. In addition, it provides you with easy access to all subordinate folders, as well as to the most important mailing functions. You can reach this area by clicking on the button in the program toolbar or by selecting it from the folder list on the left.

Accessing the Sending and Receiving folders

There are three possibilities for opening individual folders in the **Sending and Receiving** function group:

1. By clicking on a folder in the folder list on the right side of the main WebMaster MailRoom window
2. By clicking on the corresponding icons at the top of the **Sending and Receiving** area
3. By clicking on the corresponding entries within the **Sending and Receiving** area

The **Sending and Receiving** function group contains the following folders:

Icon	Folder	Meaning
	Inbox	Lists all received messages.
	Outbox	Lists all messages to be sent.
	Sent Messages	Lists all messages which have already been sent.
	Transfer Errors	Lists all messages which have been sent incorrectly because of problems (e.g. wrong e-mail address).
	Images Used	Lists all images you have inserted into your mail merge messages.

Accessing the Sending and Receiving function group transfer processes

The **Sending and Receiving** area gives you direct access to the most important data transfer processes. These processes are available under **Transfer**, or over the corresponding icons above the work area.

Icon	Transfer process	Meaning
	Send Outbox	Click on this icon to mail messages from the Outbox.
	Query Inbox	Click on this icon to check whether there are new messages in the Inbox.
	Publish image files	Click on this icon to publish the image files you use in your messages.

Start screen

The program starts with the main window of WebMaster MailRoom. This window is composed of a folder list on the left and a larger work area on the right. The display in the work area depends on the specific group of functions you have selected from the folder list.

The start screen of the work area offers you quick overview and access to the three main function groups of the program. In the folder list, it opens with the top level of the folder hierarchy (represented by the icon).

1. **Sending and receiving messages**

   The **Sending and Receiving** function group informs you about the message traffic through the **Inbox**, **Outbox** or the **Sent Messages**. To access this function group, click on the **Switch to Sending and Receiving** text entry or on the button above the work area.

If you want to check for new messages as soon as you start the program, click on the **Check the Inbox for new subscriptions** text entry or on the button.

2. **Mail merge messages**

   The **Mail Merge Messages** function group is the designated WebMaster MailRoom area for creating and editing messages (e.g. newsletters, advertising mails, etc.). To reach it, click on the **Switch to Mail Merge Message overview** text entry or on the button above the work area. To compose a new mail merge message, click on **Create a new mail merge message** or on the

button.

3. **Recipients and groups**

For every WebMaster MailRoom project, you can create and manage different recipient groups for different mail merge messages. You can input specific information for each recipient under **Recipients and Groups** . To reach this area, click on the **Switch to Recipients and Groups overview** text entry or on the button. To create new recipients and groups, click on **Create a new recipient or group** or on the

button.

You can reach these three function groups over either the program toolbar or the folder list.

The link in the bottom right-hand corner of the screen takes you to the website of WebMaster MailRoom.

You can return to the start screen while the program is running by clicking on the **Start** button.

Images used in messages

When you send a **mail merge message** containing images to the **Outbox**, the image files are routed to a different area – the folder **Images Used**. Images are handled differently because they are not mailed out over the e-mail server like normal messages but are stored on your web server. When the recipient opens his/her mail, the e-mail client automatically downloads the image. Thus, the **Images Used** fulfills two roles: first, it gives you an overview of all the images you have used; second, it allows you to exclude individual images from being sent or even to delete them before a data transfer has occurred.

Note: If you want to send messages containing images, don't forget that you have to send the message and the image file separately! While the message is sent from the Outbox to the e-mail server and from there directly to the recipient, images are transferred to the web server from the Images Used folder. For such messages, it makes sense to first transfer the images and only then send the messages, so the recipient can download the image file from the web server as soon as he/she has received the message.

Working in the Images Used area

1. All images contained in messages are listed in a table in the **Images Used** area. The table contains the fields **File name** and **WWW address**, which shows you the path under which the file is or should be saved. Click on either of these fields to change the order in which the image files are sorted. To change the size of the column, set the mouse above the dividing line and drag it in the desired direction while keeping the mouse button depressed.

2. Unlike in other areas of the **Sending and Receiving area** group of functions, here, you will find an additional information window underneath the table. Clicking on one of the individual table entries displays not only detailed information about the file, but also a preview of the image. After all, image file names are not always obvious.

3. Above the table, four buttons offer you the following functions:

Marks the selected image as ready to be published. The image will then be sent to the web server during the next data transfer.

Marks the selected image as already published. The image will then be excluded from being sent to the web server during the next FTP transfer.

Deletes the selected image. If the image was already sent to the server, this doesn't change anything, of course. Otherwise, this image becomes inaccessible to the recipient.

Starts the uploading process during which all selected image files are transferred to the web server. You can recognize selected files by the icon
.

4. To delete an image from the web server, you need to access it directly over an FTP program and delete it there. You should leave images on the server for an extended period of time, however, because once you delete the file on the server the recipient cannot open it anymore. Recipients who have been on holidays, for instance, would only find a placeholder instead of an image.

Field properties

As soon as you create a new **user-defined field** or start editing a an existing one, you are asked to determine its **Field Properties** in a dialog window. There are two field properties you can define:

- **Field name:** This is the designation under which the field is saved and displayed in forms. You can incorporate the data you collect from this field into your mail merge messages to customize them according to your target audience.
- **Field abbreviation:** It is important that you define an abbreviation, so that the personal information which the recipient enters into the field as it appears in a **web form** can be transferred to WebMaster MailRoom. If you are not using a **web form**, you also don't need to enter an abbreviation.

Creating user-defined fields

In the **User-defined Fields** dialog window, you define the fields that you want to make available for your WebMaster MailRoom project. The function of user-defined fields is to collect information about the recipient. In addition to the collecting of information about your clients, which you can use to target your marketing efforts more directly towards them, you can also incorporate this information into your mail merge messages in order to customize them for your clients.

Click **here** to find out more about **inserting user fields** into mail merge messages.

The **user fields** are usually the same fields that your clients and other interested parties have to fill out in your **order form** on your website. Common fields include salutation, first name, last name, address, city, zip code and phone number. However, you can also find out more detailed information, such as occupation and interests, using these fields. The type and number of user fields depends on what kind of information you want to collect about your clients, i.e. on the purpose and extent of your targeted marketing efforts.

In order for WebMaster MailRoom to read the data that you collect from your recipients with the help of the **order form** correctly and to transfer it to the automatically created recipient record, it is important for the user fields to correspond with those in the web form.

Note: You create the fields for every WebMaster MailRoom project only once. Which user fields are taken into account for individual **user groups**- whether only a few or all - however, depends on the fields you integrate into your **order form**.

Working in the User-defined Fields dialog window

1. Open the **User-defined Fields** dialog window for a **recipient group** by clicking on the button or by selecting the **User-defined Fields** command from the **Recipients and Groups** menu.
2. The table which opens displays all fields you have already created or which WebMaster MailRoom has created for you when you started a new project. You will find the name of the field next to the user field icon ; next to it is the corresponding abbreviation (if applicable), which connects the field to your **order form**.
3. Click on the **New field** button to create a new user field and define its **field properties**.
4. Click on **Edit** to open the **Field Properties** of the field selected in the table in order to edit them.
5. Click on the **Delete** button to irreversibly remove the field selected in the table from your WebMaster MailRoom project.
6. The buttons **Move up** and **Move down** move the selected field one row up or one row down in the table.
7. Confirm your changes by clicking on the **Apply** button.

Recipient properties

The dialog window **Recipient Properties** always appears when you create a new recipient or when you want to edit existing recipient information. WebMaster MailRoom has the ability to analyze incoming messages and read recipient information, so the program creates a new recipient record containing all properties it can interpret whenever you receive a message through an **online form** created with WebMaster MailRoom or a simple e-mail request.

How to create a new recipient of edit existing recipient data

1. From the folder list, select **Recipients and Groups** and click on the **Add a new recipient** text link in the work area or on the corresponding button . As an alternative, you can also select the **New Recipient** command from the **Recipients and Groups** menu. The **Recipient Properties** dialog window opens.
2. Enter the correct e-mail address of the recipient in the properties field under **E-mail** or change existing names.
3. Under **User fields** enter the corresponding information, if known. The **Salutation**, **First name** and **Last name** fields are created by default; you can create additional fields as **user-defined fields**.
4. Enable the control box under **Blacklist** if you don't want to send any more messages to this e-mail address. The record is then saved under the **Blacklist** group.
5. Assign a subscriber list to the recipient by enabling the control box next to the group. You can assign one or several subscriber lists to each recipient. If you don't enable any group, no messages are sent to the recipient and he/she is saved under the **Not assigned** group.

   Note: The automation process of WebMaster MailRoom ensures that the record is automatically removed from the assigned group(s) when the recipient cancels his/her subscription.
6. Under **Format**, decide whether the recipient should receive HTML or text mail merge messages. If you have asked your subscriber how he/she wants to receive messages in an online form, the information is stored automatically.
7. Confirm your entries with **OK**. If you want to create an additional recipient, click on the **OK and new** button.

User settings for the e-mail server

The most important prerequisite for problem-free data traffic (receiving subscription requests and sending out mail merge messages) is correct user information. Only when these settings are correct can you communicate with your e-mail and web servers.

To ensure the correct transfer of mails, go to the **File** menu and select the command **User Settings**, then click on **E-mail Server**.

The **User Settings** opens. Click on the **E-mail server** tab and enter the correct information in the following fields.

Sender's e-mail: Enter here the e-mail address that you want to display for your recipients (e.g. clients). This is usually your e-mail address or that of your company.

Sender (name): Enter here the name that you want to display for your recipients or clients. In addition to your name or that of your company, it may also contain a short description, such as "newsletter".

Incoming (POP3): Enter here your POP3 address or that of your incoming mail server. You can obtain this information from your provider or server administrator.

Account name (POP3): Enter here the name of the POP3 mail account on your incoming mail server. You can request the provider or server administrator to set up this account for you and provide you with the relevant information.

Password (POP3): Enter here the password for your POP3 account. You may have received it from your provider or defined it yourself. For security reasons, the password is displayed as stars (*) on the screen.

Outgoing (SMTP): Enter here your SMTP address or the address of your outgoing mail server. You can obtain this information from your provider or server administrator.

If your SMTP outgoing mail server requires you to log in, which is often the case, you need to enable the corresponding control box underneath the data entry fields and enter the SMTP account name and its password. Otherwise, you won't be able to send your WebMaster MailRoom messages. Click on the **Use POP3 login** button to automatically apply the above POP3 information.

Confirm the settings by clicking on **OK**.

You can also open the user settings when you are in a mail merge message, i.e. when you have opened a mail merge message in the work area. To do so, click on the **Send mail merge message** button or on **Send preview**

and on **Send options** in the dialog window that opens. There, go once again to the **E-mail server** tab.

User settings for the web server

The most important prerequisite for problem-free data traffic (receiving subscription requests and sending out mail merge messages) is correct user information. Only when these settings are correct can you communicate with your e-mail and web servers.

If you have inserted images into your mail merge messages, the images are not mailed out to every recipient separately, but are uploaded to your web server only once. This saves mailing time and costs, for the image information is not received by your clients directly (i.e. in the received messages), but is called up over a connection to the web server. When your clients receive your message, their e-mail program automatically downloads your image files from the web server.

To ensure the correct transfer (upload) of image data to your web server, select the **User Settings** command from the **File** menu and go to **Web Server**.

In the **User Settings** dialog window that opens, go to the **Web server** tab and fill in the correct information in the following data entry fields.

WWW address:	Enter here the WWW address where your website is located on the web server (e.g. "www.yourwebsite.com"). If you want to save your image files in a specific directory, expand the address to include the directory (e.g. "www.yourwebsite.com/images"). Also enter the name of the directory under "FTP default directory" (see below).
FTP server:	Enter the name of your FTP server. You can obtain this information from your provider or server administrator.
FTP username:	Enter here the login name for the FTP server. You can obtain this information from your provider or server administrator.
FTP password:	Enter here the password for your FTP server. You may have received the password from the provider or defined it yourself. For security reasons, the password is displayed as stars (*) on the screen.
FTP default directory:	The FTP start directory is the directory in which you want to store the images on your server. If you have entered your URL as your WWW address (e.g. "www.yourwebsite.com"), you can leave this field empty, for in this case you have not defined your own directory. If, on the other hand, you have created a special folder on your web server (e.g. "www.yourwebsite.com/images"), you need to enter the name of the folder here (e.g. "images"). For WebMaster MailRoom image files you don't usually need to create your own directory.

Enable the control box under **Do not use PASV** to prevent passive data transfer (PASV). This may happen when you have problems transferring data with this transfer mode (e.g. satellite Internet connections). Generally, however, you should disable the control box.

Close the dialog window by clicking on **OK**.

Advanced firewall / proxy settings

If in addition to the FTP settings, you also want to set up a proxy server, click on the **Advanced firewall /**

proxy settings button. In the **Firewall/ Proxy Settings** dialog window, select the type of firewall you use from the listbox, fill out the data entry fields with information about the **Server, Port, Username** and **Password** for the firewall, then confirm your settings with **OK**.

Note: Please be aware that these settings are not the norm. Usually, you can skip the settings for the proxy server or firewall. For more information on proxy servers and firewalls, contact your provider.

You can also open the user settings when you are in a mail merge message, i.e. when you have opened a mail merge message in the work area. To do so, click on the **Send mail merge message** button or on **Send preview**

and on **Send options** in the dialog window that opens. There, go once again to the **Web server** tab.

User settings send options

On the **Send options** tab, you can determine how the finished messages will be transferred from the Outbox to your e-mail server. You can get to the send options either by using the **User Settings** entry in the **File** menu or, if you currently have a mail merge message open in the work area, by clicking on the **Send mail merge message** button or the **Send preview** button

, and afterwards clicking on **Send options**. You can enable the following control boxes to change the send options:

Send Outbox contents automatically:

When you select this option, the messages to be sent will leave the Outbox immediately and be transferred to your e-mail server. If you don't select this option, the messages will collect in the Outbox and need to be sent manually. In the last case, it is still possible to check the messages and edit them prior to sending.

Publish images automatically:

When you select this option, any images that are accompanying your mail merge messages will be published immediately, meaning they will be transferred to the web server. If you don't select this option, the messages will first be collected under **Images Used** and need to be sent manually.

Send a maximum of xxx per sending session:

If you've selected this option, you can limit the number of e-mails that should be sent to the e-mail server. Use the spinbox or directly enter the number of messages that should be sent per sending session. Such a limit is recommended if the amount of e-mail activity is intense, so the burden on the computer and the server is kept to a minimum.

Do not send before xxx:

WebMaster MailRoom gives you the option of delaying the sending of messages. You have the option of entering a time, according to the clock, for sending the messages, so that your computer is less burdened (e.g. at night). The requirement for this, however, is that an Internet connection is present at that time. To do this, enable the control box and enter the corresponding time in the spinbox.

Confirm your choices by clicking on **OK**.

Mail merge message properties

As soon as you want to create a new **mail merge message**, you will be asked via a dialog window to establish its **properties**. For existing messages, you can change the properties afterwards at any time, using this same dialog window.

How to create a new mail merge message

1. Go to **Mail Merge Messages** in the folder list and, in the work area, click on the **Create a new message** text link, or on the corresponding button. Alternatively, you can go to the **Mail Merge** menu and select the entry **New Mail Merge Message**. The corresponding dialog window will open.
2. In the **Subject** text box, enter a description that should appear for the recipient in the subject line, such as "Newsletter".
3. In the field underneath, **To recipients of**, you have to determine which **subscription groups** the message should be assigned to, meaning, which recipients should receive the e-mail. In the list that contains all the groups you have created, check the control boxes of the corresponding **recipient groups**. If you don't select any groups, i.e. don't assign any recipients, you cannot send the message later on.
4. If you determine while you are trying to assign groups that the desired recipient group has not yet been created, you can open the dialog window for creating new groups and determining the **group properties** by clicking on the button **Create new group**.
5. By enabling the lower control box, **Use the Design Wizard**, you can indicate whether you want to use a special header or an HTML layout for the new mail merge message from the start, and therefore open the **Design Wizard**. Otherwise, disable the control box.
6. Confirm your entries with **OK**.

How to change the properties of an existing message

1. Go to the message whose properties you want to change, and click on the button to show the properties of the mail merge message. The corresponding dialog window will open. The window will contain the settings you last specified.
2. Change the settings as described above and then click on **OK**.

Group properties

The dialog window **Group Properties** appears either when you create a new recipient group or when you want to edit an existing one.

How to create a new group or change the properties of an existing group

1. Go to **Recipients and Groups** in the folder list and, in the work area, click on the **Create a new group** entry or on the corresponding button, . Alternatively, you can also go to the **Recipients and Groups** menu and select the **New Group** entry. The **Group Properties** window will open.

2. For the **Name**, enter a name for the new group or rename an existing group.
3. For the **Abbreviation**, specify an abbreviation for the new group or change the existing one.

Entering a field abbreviation determines the assignment of incoming e-mails from prospective subscribers, and is always necessary for newsletter recipient groups who cancel or subscribe via an online form or by e-mail.

4. Confirm your entries with **OK**.

Message preview

If you want to include **user** or **decision fields** in your mail merge message, they will only at first appear as placeholders in the work area. By opening the **Message Preview** dialog window, you can verify if the field content results are correct for the various recipients. The various field types will no longer be shown as placeholders, but with their actual, individual content.

How to use the Message Preview window

1. Call up the **Message Preview** window by clicking on the toolbar button within the message you would like to preview. If you haven't done so already, assign one or more **recipient groups** to the message in the dialog window that appears and then click on **Preview**.

2. On the right of your screen, you will see the entire mail merge message according to how you have personalized it for the active recipients on the left side of your screen. Depending on how many **user** or **decision fields** you have inserted in to the message, the preview will change as soon as you click on a different recipient.

3. Use the following buttons for navigating between the individual recipient records.

Use this button to jump to the first recipient and view the personalized message.
Use this button to view the personalized message for the previous recipient.
Use this button to view the personalized message of the next recipient.
Use this button to jump to the last recipient and view the personalized message.

4. If, in the preview, you determine that the message for a specific recipient has an error or is not what you had in mind (e.g. the wrong salutation was used), you can exclude that message from being sent. Make sure that the relevant recipient is selected in the list on the left, then disable the button . The recipient will then be shown as inactive (

) when displayed.

5. Once you have ascertained that the message was created correctly for all recipients, you can place it in the **Outbox** by clicking on **Send messages** .

6. Close the message preview by clicking on the **Close** button.

Inserting file attachments

Regardless of whether the message is in HTML or plain text format, you can at any time attach a file to the mail merge letter. The file will be stored as an attachment to the message, which the recipient can then open. You can attach any file you wish. Whether or not the contents will be displayed depends, however, on the recipient's computer and the programs he/she has installed.

Note: Please be aware that, in contrast to images used in the message, attached files are not placed only once on your web server, but are rather a permanent component of each message. This means that if you send a mail merge message to 100 recipients, for example, the attachment will also be sent one hundred times. For very large attachments, this can become a huge burden on your computer. You should be wary of sending large file attachments (approx. 1 MB or larger) for the sake of your recipients. If you want to give your customers access to larger files, we recommend you place a link in the download area of your website, along with a note stating the associated file size.

How to attach a file to your mail merge message

1. Open the message to you would like to attach a file, and then go to the **Format** menu and click on **Insert File**. The **File Attachment** dialog window will then open.
2. Use the button to select the directory and file that you want to insert as a file attachment, and confirm your choice with **Open**. As soon as you have selected a file, it will be shown immediately in the file overview along with its size. Repeat this step if you want to insert additional files.
3. If, in addition, you wish to save the file in another location from its original source (e.g. in the directory of your WebMaster MailRoom project), select the corresponding file in the file overview, click on the button, and select the desired folder. Confirm your selection by clicking on the **Save** button.
4. To remove an exported file from the mail merge message, select it in the file overview and click on . The file will be removed from the message.
5. Once you have selected the desired file, close the dialog window by clicking on **Close**.

Note: You can recognize a file attachment in the work area for the mail merge message in question by the paper clip symbol at the top right. You can also call up the **File Attachment** window by clicking on this symbol.

Start window

Each time you open WebMaster MailRoom, the **start window** will appear, where you can determine which WebMaster MailRoom project you want to open.   Select from the following options:

- **Start a new project:** Select this option and click on **OK** to launch the **Start Wizard**, which will lead you through the most important program settings.
- **Open an existing project:** Select this option and click on **OK** to continue working on an existing project.   Select the project in the **Open WebMaster MailRoom Project** dialog window that opens.
- **Open the most recently edited project:** Select this option and click on **OK** to open and continue working on the project shown.

Importing recipient addresses

In some cases, the program may be unable to automatically create recipient records. This usually occurs when the recipients themselves did not contact you through an **order form** or via e-mail. This can be the case, for example, if you want to use WebMaster MailRoom's mail merge functions to contact companies or clients you do not know, in order to send them advertising or information about your services. In such instances, you would have to manually enter every single recipient.

Perhaps you already have a completed address lists in another program, such as in the address book for your e-mail program. WebMaster MailRoom allows you to import contact or address lists from other applications, such as Outlook, Access, or Excel. Naturally, you can also transfer user groups from other WebMaster MailRoom projects to the current one.

How to import recipient addresses from other programs

The requirement for importing addresses from other applications is that you have exported the file from the corresponding program (e.g. Outlook) as a CSV (table with comma separated values) or a TXT or TSV (text file with tab separated values) file. You can find out how to do this in the corresponding application's manual.

1. To import a recipient group, go to the **Recipients and Groups function group** and click on the group to which you would like to transfer the recipients.
2. Go to the **Recipients and Groups** menu and select the **Import Group/From Other Program** entry.
3. The dialog window **Import Recipient Addresses** will open. For the file type, indicate whether you want to import a CSV or TXT/TSV file, and search for the desired export file. Confirm your choice with **Open**. The **Import Wizard** will then appear.
4. The list shown in the **Import Wizard** contains the profiles of various export files. From the list, select the profile that corresponds to the export application; otherwise, specify **General**. Click on **Next**.
5. In the next step, you will be required to assign the imported fields to the existing fields in your current WebMaster MailRoom project. This is based on the assumption that the address list you want to import uses several or different fields. By specifying which of the fields should be transferred to which WebMaster MailRoom **user field**, you can for the most part avoid any data loss or errors from occurring.

   To assign the fields, first go to the window on the left, in which all the specified **user fields** are listed. There, select the first field, **E-mail address**, by clicking on it then select the corresponding field from the window on the right, which contains a collection of the fields from the imported file. If you click on the yellow arrow between the two windows, the two fields will be assigned to each other. Repeat this step for all other fields.
6. While you are performing this task, you may find that the currently defined user fields do not suffice. Click on the button **Define fields** to create new **user fields** or to edit existing ones.
7. The option underneath allows you to determine if the new recipients should receive messages formatted as HTML or plain text. In addition to a global assignment (all recipients prefer either HTML or text), you can – if it exists – specify the field used to determine who receives HTML formatted messages for the imported recipient list.

8. Click on the **Finish** button. The addresses will then be transferred to the user groups specified in your WebMaster MailRoom project.

How to import recipient addresses from other WebMaster MailRoom projects
You can either import all recipients or only selected user groups from other WebMaster MailRoom projects.

1. If you want to import all recipient information from another WebMaster MailRoom project, go to the **Recipients and Groups function group** and click on the group to which you would like to transfer all of the recipients. Call up the corresponding project by going to the **Recipients and Groups** menu and selecting the **Import Group/From a WebMaster MailRoom Project** command. Confirm with **OK**. The recipients have now been completely transferred to the specified group.
2. If you only want to import a selected recipient group from another WebMaster MailRoom project, you have to first export the group as a CSV file (see note). Once you have done so, call up the group in the current WebMaster MailRoom project into which you would like to insert the new recipients. Go to the **Recipients and Groups** menu and select the **Import Group/From Other Program** entry.

   Note:
   Exporting individual recipient groups
   Go to the **Recipients and Groups group** and select the group to be exported by clicking on it, and then, in the **Recipients and Groups** menu, select the **Export Group/To Other Program** entry. Once you have indicated the desired directory in the **Export Recipient Addresses** dialog window, WebMaster MailRoom will save the user group as a CSV file ("comma separated value").
3. In the **Import Recipient Addresses** dialog window, look for the directory and CSV file in which you saved the WebMaster MailRoom recipient group, and confirm your choice with **Open**.
4. The Import Wizard will then open. Follow the steps described above in order to assign the user addresses and import them.

Inserting decision fields

Decision fields are an extended form of **user fields** and are also used to personalize mail merge messages.

Whereas you employ user fields merely to insert the contents of recipient records, decision fields can analyze the content of the text and react by providing different kinds of output. The information contained in the fields is thereby evaluated according to different decision criteria – the decision tree – which you have specified. Insert decision fields whenever a decision needs to be made between various words or paragraph elements. User fields, in contrast, are always definite.

For example: If you want to write a message to Mr. Miller with the salutation "Dear Mr. Miller", the information "Mr." and "Miller" is based on user fields. "Dear" is, in contrast, a piece of information based on a decision field whose evaluation routine has determined that, due to the salutation "Mr.", you are dealing with a male recipient, and therefore produces the result "Dear" instead of "Dearest" (if you have, for example, defined the salutation "Dear" for men, and "Dearest" for women). To put it simply, it is possible to incorporate user fields into decision fields, meaning, that it is possible to create the salutation "Dear Mr. Miller" entirely using decision fields.

Decision fields only function in a meaningful way by evaluating user fields. It is irrelevant, however, if the user field to be evaluated is part of the message or not. In addition, more than one user field can be evaluated within the decision field. You can find out exactly how to create decision fields using a decision tree **here**.

How to insert a decision field into your mail merge message

In order to insert a decision field into a **mail merge message**, you first have to have created it in the **Decision Field Editor**. There are already several predefined salutations included in WebMaster MailRoom.

1. Place the cursor at the desired position in the mail merge message. Go to the **Format** menu or use the context menu, and select **Insert Decision Field**. A dialog window with a similar name will open, where all existing fields are listed. Using the mouse, select the one you want to insert, and confirm your choice with **Insert**. **2.** As with the user fields, a placeholder will now be inserted in the desired position (curly brackets containing the field name). In the actual message, the information obtained through the query criteria in your decision field will take the place of the placeholder.

3. You can also assign a different decision field to a previously inserted placeholder by double-clicking on the placeholder, thereby calling up the **Insert Decision Field** dialog window once again. In the window, select the new field and confirm your choice with **Insert**. The old field contents will then be replaced.

4. It is particularly important to monitor the actual results when using decision fields. To do so, use the **message preview**, which you can call up using the button. There you can test how the decision field reacts to the various types of recipient information for each recipient, and how it changes according to the query routine you have provided.

Note: Inserting decision fields is accomplished more quickly by going to the toolbar in the work area and clicking on . In the pop-up window that opens, select the desired field from the area underneath the separator. You can also use this window to insert user fields. These are listed above the separator.

5. Several buttons, located to the right of the field overview, are available for the following commands:

- **New field** launches the **Decision Field Editor**, used for creating new decision fields.
- **Edit** launches the **Decision Field Editor**, used for editing the selected decision field.
- **Rename** opens a dialog window, where you can rename the selected decision field.
- **Save copy** creates a copy of the selected decision field and opens a dialog window in which you can specify the name for the copy.
- **Delete**, following a confirmation prompt, deletes the decision field in the program.

Creating and editing decision fields

Decision fields function based on queries made to the user fields.   You can create these queries as a tree diagram in the Decision Tree Editor.   Depending on how the querying process is designed, the results produced in the message will differ.   The functionality of your **decision fields** is therefore mostly dependent on how sensibly you've created your decision tree.

Laying out decision trees is always based on the same principle: a logical condition is first assigned to the user field.   Depending on whether or not the recipient meets the requirements of certain conditions, which are contained in the user field, the corresponding result – namely, the desired text – will be outputted.   If a condition is not met, a further query could result, so that the decision tree branches out ever more.

What in theory sounds complicated becomes clearer once you have had the logical structure of the Decision Tree Editor explained to you somewhat.

Note: Because creating a decision tree must be thoroughly thought out and a certain basic understanding is required, several fields for various forms of address have been predefined to serve as an example.   In order to understand the principle of decision trees, it is helpful to have a quick look at how these fields are arranged.

How to create a decision field in the Decision Tree Editor.

1. To get to the Decision Tree Editor, first go to the **Format** menu and open the dialog window **Insert Decision Field** and click on the **New field** button there.   The **Edit Decision Field** dialog window, containing the Decision Tree Editor, will then open.
2. A decision tree consists of two components: first the question, or the query node, in which you define the logical condition, and second, the answer, or the output node, which provides the result (in this case the text to be outputted).   When creating a new field, the smallest possible decision tree is displayed automatically in the Editor window: a query node (recognizable by the little violet box), which branches into two output nodes (recognizable by the little yellow boxes).
3. To edit the nodes, or, in other words, define the node properties, click on the respective box.   You can identify selected boxes by their red borders.   Depending on whether you have selected a query or an output node, what's shown above will be differ.   While you have the possibility to determine the user field to be analyzed and the conditions of the analysis for query nodes, you simply need to enter the text to be outputted for output nodes.
4. In the diagram window, click on the first query node.   You can see two windows above the diagram window: The first one shows all **user fields** you have created, the other the conditions for comparison that will serve as analytical criteria.   Enter the comparison value in the input field on the right side (you are using this value to test the corresponding user field).

   A query node therefore works on the following principle: if the field meets the condition, case 1 (=first output node) applies, and, if not, case 2 (=second output node) applies.   To assign a query condition to the first node, select the user field that refers to the new decision field in the left window.   In the second window, indicate in which way (logical condition) the user field should be tested.   In the right input field, write the content for which the field should be tested.

Example: Let's assume you want to start a mail merge message with "Dear Mr. XY" or "Dearest Ms. XY", where XY stands for the last name of the recipient. Because you want to use a different salutation depending on the gender of the recipient, you have to test the user field "salutation" (man/woman) in the query node. The requirement is that the user field "salutation" (man/woman) possesses this information. Therefore, in the first window located on the left, indicate "salutation" as the user field. Use the condition "is equal to" to compare the field with the value "Mr.", which you need to enter in the input box. This means that when the condition "Mr." is met in the user field "salutation", the first output node will be inserted and, if the condition is not met, the second one will be inserted. [T.N. the example has been somewhat modified since the German referred to using the masculine and feminine forms of 'Dear']

5. With the mouse, go to the first output node in order to define what should occur if the first condition of the query node is **met**. The upper display changes and offers you an input field for the text that will be outputted. You can enhance this text with a **user field**, which in this case only affects the output text of the decision field, but not the query routine itself. You can add a user field to the text output window through dragging and dropping, double-clicking, or with the yellow arrow .

Example: As long as the condition "Mr." in the user field "salutation" is fulfilled, the mail merge message should begin with "Dear Mr. XY". Add the field "lastname" afterwards from the user field window as a placeholder for the actual recipient name ("XY"). Naturally, you could also incorporate the salutation ("Mr.") from the user field window in the same way.

6. Now, move the mouse pointer to the second output node in order to define what should occur when the condition of the query node is **not met**. Proceed in the same way as with the first query node, and confirm what you've entered with **OK**. Herewith you've created a decision tree with the smallest possible scope.

Example: If the salutation for the recipient is not "Mr.", then the recipient must be female (assuming you have only specified these two types of salutations for the user field). Therefore, in the text field for the second output node, write "Dearest Ms." and, afterwards, add the user field "lastname".

Note: Decision trees are not always as short and concise as in this example. It can happen very easily that, instead of having the second output node, a second condition still needs to be queried. A query node can always lead to further query nodes. For an example of how various decision fields look, take a look at the predefined sample fields for various salutations included in WebMaster MailRoom.

7. You can use the two buttons for query nodes and output nodes in the upper part of the dialog window or, with the help of the context menu, accessible by right-clicking, convert an existing field from one type to the other. This has the following important results:

Ÿ If you transform an **output node into a query node**, another query will be possible instead of the second result (in the example, "Dearest Ms."), and therefore a new branch (query node plus two output nodes).

Ÿ If you transform a **query node into an output node**, the tree, after a confirmation prompt, will in contrast decrease in size. Use this method if you want to delete a branch that you have just created.

Note: You can use decision fields for more than incorporating greetings or similar short passages into your mail merge messages. Depending on the information you want to obtain through your **forms**, you can produce entire contents using decision fields. If, for example, you ask your recipients using fields whether they are more interested in cars or motorcycles, you can send them product information on either cars or motorcycles, depending on which they indicated. This way, your clients will only receive information that they truly find interesting.

Inserting user fields

With user fields, it's possible to insert recipient-specific information in your mail merge messages in order to make them more personal. You can employ user fields, for example, if you want to start your message with "Hello Mr. Miller", instead of the general salutation "Dear Sir/Madam". The contents of the user fields are based on the information provided either automatically by WebMaster MailRoom or by the information you specified manually for each recipient. If you have used an online form on your website to create your recipient groups, the user fields will usually be created from the same **form fields** the recipients were asked to fill out.

An advanced version of the user field is the so-called **decision field**, which can be used to insert the personal elements through analysis of the user fields in an even more polished way. The greeting formula "Dear Mr. Miller" is, strictly speaking, a combination of user and decision fields: while the decision field determines that we're dealing with a male subject (for this example, let's imagine we want to use "Dear" for men and "Dearest" for women"), and not with a female subject, WebMaster MailRoom inserts the information from the recipient record into the user field.

The difference between a user field and a decision field is that the one merely inserts information such as names and addresses (user field), while the other determines the environment – namely, it checks the user field information and reacts according to the contents, thereby "deciding" which information follows (decision field). You can learn more about creating and editing user fields **here**.

How to insert a user field into a message

Working with user fields of course requires that you have created such fields and have filled them with data. You can find out how to do this **here**.

1. To insert a user field into a **mail merge message**, position the cursor at the desired spot. Go to the **Format** menu or use the context menu and select the **Insert User Field** entry. The **Insert User Field** window will open, in which all the available user fields are listed. With the mouse, select the data field you want to insert, and confirm your selection by clicking on **Insert**.
2. A placeholder (curly brackets containing the field name) will then be inserted into your message at the spot you indicated. In the actual message, the personal information of the respective recipient record (e.g. for {lastname}, the name "Miller") will be inserted there.
3. You can also, at a later point, assign a different user field to a placeholder that you have already inserted. To do so, double-click on the placeholder to call up the **Insert User Field** dialog window. Within the window, select the new user field and confirm your selection by clicking on **Insert**. The old field content will now be replaced by the new one.
4. It is especially important for inexperienced users to monitor the actual text – the one without the placeholder. To do so, use the **message preview**, which you can call up using the button. There you can check the content of every field for each recipient, as well as the layout of the fields within the body of the message.

Note: You can insert user fields more quickly if you go directly to the toolbar in the work area and click on . In the pop-up window that opens, select the desired field. You can use this window to insert decision fields at the same time. They are listed underneath the separator.

Messages view

Before sending your messages from the **Outbox** (when you don't have the possibility to call them back any more), you have one more opportunity to check over each message. To do so, display the message one more time using the **message preview**.

1. To call up the message, go to the **Outbox** work area and ensure that the message you want to display is even listed there.

2. Select the message and click on the  button to view the message. Alternatively, you can also double-click on the e-mail entry.

3. The **message preview** provides you with information about the recipient address and the subject, as well as the message content. The text is displayed in either HTML or plain text, depending on the format in which it was created.

4. You cannot make any changes to the message in the **message preview**. In order to make changes, select the message and click on the  button to first delete it from the Outbox. Then go to the commands for mail merge messages in the corresponding message, modify the text there, and move it again to the Outbox.

Inbox properties

WebMaster MailRoom attaches a note to every message that passes through the **Inbox**. This note shows you the type of message and all the important details about its status (the message properties), in addition to the e-mail address of the sender (or the new recipient). If an error occurs in the Inbox, you will receive a more precise breakdown of the sources of the error.

Call up the dialog window to view the message properties by clicking on the  button, or double-click on the relevant message. Various message boxes will inform you if received the message took place normally or if there were errors. If everything proceeded without any problems, the sender of the message is automatically added as a new recipient by WebMaster MailRoom. If there were errors, you have the option of using the **Send message** button to contact the sender via e-mail. If you click on the button, the message window of your e-mail program (e.g. Outlook) will open. The address of the sender will already be entered there.

Inserting images

Using images in your HTML messages differs functionally from using all other elements that you can insert in your WebMaster MailRoom messages. Characteristically, images (WebMaster MailRoom supports the JPG, GIF and BMP graphics formats) are not contained in the actual message, although they are displayed there. They are stored on your web server. As soon as one of your recipients receives your message, their e-mail program will connect to your web server and download the image.

This has a big advantage: sending the (usually) large image only requires a single data transfer, namely from your computer to the web server. Because the message itself does not contain any images, the sending process is sped up. However, you should still keep in mind the file size of your images: the time required for the recipient to download the image, for the most part, remains the same. Therefore, it is better to use small image files! 500 KB should be the absolute upper limit.

Note: The transfer of image files to your web server requires that you have entered the correct **server information** in the **User Settings** in the **File** menu.

How to insert an image into your HTML message

1. Ensure that the message into which you want to insert the image has been created in HTML format. You determine this by whether the HTML button below the messages work area is activated.

2. Place the cursor at the position you wish to insert the image, and then click on the button, or go to the **Format** menu and select the **Insert Image** entry. The dialog window **Insert Image** will open.
3. Here, specify the directory and the file name of the image to be inserted. You can select from the usual graphics formats JPG, GIF, and BMP, and use the listbox **File type** to limit the display of files to these types. As soon as the desired file is shown under **File name**, click on **Open**.
4. The **Insert Image** dialog window will appear, where you can view the selected image in its original size.

5. The original dimensions of photos in particular are far too large to be shown in your message. Therefore, you have to opportunity, to change the size in increments or decrements of one fifth, using the and buttons. For larger intervals, you should use the listbox. Click on **OK** to confirm your choice.

Note: Increasing and decreasing the size of an image has an effect on file size. Therefore, be careful if you want to increase an image's size. Also, note that the size you indicate in this dialog window cannot be modified later: to change the size of an image after you have inserted it, you will have to delete it and then insert it again as described here.

6. The selected image will then be shown in the messages work area. If you click on it, a dotted border will appear around it, showing it is selected. This way, you can then copy the image, cut it out, or change its layout.

Inserting tables

In HTML-formatted messages, you have, in addition to the usual formatting styles, the option of inserting tables and editing them independently from the rest of the text. This way you can make the message more visually appealing to the recipient.

How to insert a table in an HTML message

1. Ensure that the message in which you want to insert the image has been created in HTML format. You determine this by whether the HTML button below the messages work area is activated.

2. Place the cursor at the position you wish to insert the table, and then click on the button, or go to the **Table** menu and select the **Insert Table** entry. The dialog window **Insert Table** will open.
3. Enter the number of columns and rows using the combo boxes, and confirm the information with **OK**; the table will appear in your message.
4. Then enter your text in the individual table cells.

How to edit a table

1. If you determine that the number of columns or rows you initially set is not sufficient, you can at any time insert new columns. To do so, go to the **Table** menu and select the **Insert Column** or **Insert Row** entry.

2. Table columns should in most cases be of varying width, depending on their contents. To increase or decrease the size of the table, use the or

buttons. Place the cursor in the column that you want to change, and click on the corresponding button.
3. To delete the table, likewise go to the **Table** menu. Select the **Delete Table** command.

4. Proceed in this manner to also delete individual columns or rows. The only requirement is that the cursor is placed in the region to be deleted. Then go to the **Table** menu and select **Delete Column** or **Delete Row**.

5. If you want to colorize your table, you can either change the background of the entire table or that of the individual columns or rows. To do so, place the cursor in the region to be changed and go to the Table menu, select the entry **Table Color**, **Column Color**, or **Row Color**.

6. To find out how to add a border to your table, click **here**.

Defining table borders

In addition to the normal formatting options for text within the table, you can also define the way the table border should look. You can change the relevant settings in the **Table Border** dialog window, which you can call up by going to the **Table** menu and selecting the **Table Border** entry. Ensure first that the cursor is placed within the table.

After calling up the dialog window, you can choose between:

Ÿ **No table border (gridlines)**: the table is shown without a border.

Ÿ **Thin table border**: the table is shown with a fine, non-emphasized border.

Ÿ **Strong table border**: the table is shown with a thick, emphasized border.

Note: The gridlines that are shown when you have selected to have no table border only appear in the display area. By contrast, the recipient will see the table without any borders – and, of course, without the gridlines.

Enable one of the option fields and confirm your selection with **OK**.

Wizard for group assignments

There are various options for changing the way a recipient is assigned to a group. One of the ways is through the dialog window **Recipient Properties**. By contrast, the **Assignment Wizard** makes it possible for you to change group assignments not just for individual recipients, but for several recipients at once, e.g. to move or delete one or more recipients from a group.

How to use the Assignment Wizard

1. Call up the **Assignment Wizard** window by clicking on the button for one of the recipient groups, or by going to **Recipients and Groups** menu and selecting the **Group Assignment** entry. Ensure first that you have selected a recipient or recipients in the **recipient work area** whose group assignment you wish to change

2. In the middle window (of three), you can find all the recipient groups listed that have been created in the current WebMaster MailRoom project. To add these recipients or the selected recipients to another group, select them in the middle window and then click on the icon above the left window. You can also move the selected group(s) by dragging and dropping them. Similarly, you can also delete these or selected recipients from individual groups. In this case, use the icon located above the right window, or drag and drop to move the relevant group(s).

3. If you don't want to move these or selected recipients to another user group but rather want to place them on the blacklist, thereby preventing them from receiving any more messages, click on the **Assign selected recipients to the blacklist** option field at the bottom.

4. In the listbox **Preferred e-mail format**, you then have the option to retain the mail format specified in the **recipient properties** for the selected recipients, or to assign them new properties (HTML or text).

5. Confirm your choices with **OK**.

Note: You can select multiple recipients within a group by holding down the [Shift] key and using the arrow keys. You can use the keyboard shortcut [Ctrl]+[A] to select all the recipients in a group.

Inserting a Web link

You will probably want to place a link within your mail merge message, e.g. to your website. In HTML-formatted messages, you can create a link using the **Insert External Link** window, where you can insert any text you wish to lead not only to an Internet address, but can also to an e-mail address (when the recipient clicks on the latter link, the message window of the e-mail program automatically opens).

Note: The option of using any text as a link is not available if you are creating your message in plain text. There you can merely enter valid Internet addresses in the form of "www.youraddress.com" as a Web link. To insert an e-mail link in a text message, the e-mail address needs to contain "mailto:" in front of it: "mailto:name@address.com".

How to insert an external link into an HTML message

There are two ways of inserting a Web link into an HTML message: you can either insert the entire valid Internet address (URL), or you can assign a destination link to any desired word, without the URL being displayed.

1. To insert a simple Internet address as a link in your mail merge message, place the cursor at the position in your message where the URL should appear, and open the dialog window **Insert External Link** by clicking on the icon. Alternatively, you can also go to the **Insert Web Link** entry in the **Format** menu.

Enter the valid Internet address in the **URL** text box (e.g. "www.databecker.com") and confirm with **OK**. The address will then be inserted at the specified position. The way it's underlined and highlighted makes it recognizable as a Web link.

2. To link any desired word in your mail merge message to an Internet address, you must first select the word in the messages window using the mouse. Then click on the icon and enter the desired Internet address in the **URL** text box. After confirming your entry by clicking on **OK**, the selected word will have the target link assigned to it. Here, too, there is evidence that the word is a Web link – recognizable by the underlining and how it's highlighted. Naturally, you can in the same way transform multiple words – even an entire paragraph, in theory – into a Web link.

3. When you enter a URL, you can immediately check the destination link by clicking on the **Display** button. Your Internet browser will then open and display the website you have specified, assuming the address is correct.

4. To insert an e-mail link, which will automatically open the message window of the e-mail program, click on the button **Create e-mail link** and, in the dialog window that opens, enter the desired e-mail address. This will be entered into the URL window, supplemented with the command "mailto:". Confirm the entry with **OK**.

Note: Notice that within WebMaster MailRoom, the links to websites as well as the ones for e-mail are not functional. These will function once the message has been sent, or, more precisely, when the recipient receives it. The same goes for Web links created in plain text format: even if you specify the URL or mailto links manually, these links will only become active once the recipient receives the message.

Form Wizard

WebMaster MailRoom analyzes all of the incoming messages from your online forms according to the field information contained within and then, where applicable, automatically stores the information into the predefined recipient records. For this automatic recipient analysis to complete successfully, it is necessary that your forms were also created in WebMaster MailRoom, so that there is a link between the form, its **user fields** and the analysis program.

You can create forms for ordering or canceling subscriptions using the **Form Wizard**. There, you can decide in which format the form should be created: as an HTML form, which you can incorporate into HTML projects (e.g. your existing website) or as web to date form, which you can conveniently insert into existing web to date projects, and which can be edited later.

Note: web to date is a desktop-based CMS (Content Management System) from DATA BECKER, which you can use as an aid, even without HTML knowledge, to create professional websites and update or reorganize them with ease. You can find out more about web to date at **Fehler! Textmarke nicht definiert.**.

Creating order forms with WebMaster MailRoom

1. Call up the Form Wizard from the **File** menu by selecting the **Create Order / Cancellation Form** entry. Make sure that the **Order form** option is selected.
2. Normally, only one of the predetermined subscriptions can be ordered or cancelled using a form. By selecting the control box **Recipient is given the option to subscribe**, you are allowing the recipient to choose which subscription (newsletter, help wanted ad, etc.) he/she wants to receive. In the finished form, the individual mailing groups will then be displayed as control boxes that can be enabled.
3. Click on **Next** in order to enter, in the dialog window that follows, which recipient information you want to obtain via your online form, i.e. which **user fields** should be inserted into the form. Select the desired fields by enabling the corresponding control boxes. All of the fields you have created in the current WebMaster MailRoom project are listed in the overview. Should you determine that the fields that are currently available are not enough to acquire the desired information while you are in the middle or creating the form, you will first have to go to **Recipients and Groups** to **create a new user-defined field**, so that it will be available in the overview.

   Note: Do one or more of the user fields created by you seem to be missing in the overview? The reason for this could be that you haven't specified an abbreviation under **Field Properties**. Even if the field abbreviation isn't displayed on the website and is used only for internal management, it is absolutely necessary for smooth communication between WebMaster MailRoom and your form. Go back and specify an abbreviation in the **Field Properties** window.
4. After selecting the user fields to be used in the form, go to the next dialog window by clicking on **Next** in order to determine which subscription can be ordered via the form. In this list, too, all the subscription groups for which you have specified an abbreviation are listed. You can use the form to allow subscriptions to all groups, or to only a particular group. Select the groups to which your clients can subscribe from the overview by clicking on them.

   Note: If at the beginning of the Form Wizard you selected the option **Recipient is given the option**

to subscribe, you don't only need to specify one or all groups; you can specify any number of subscription groups. The groups will then be made available in the finished form for the visitor to select from.

5. Under **Format**, you can specify in the appropriate field whether the interested visitor can select the e-mail format. In this case, an option will be included in the finished form that allows the visitor to select the message format as either HTML or text. With the two other listbox entries, you can predetermine the e-mail format. Confirm your choices once again with **Next**.

6. In the next step, determine the format in which the order form should be created. As previously mentioned, there are two choices here.

   Creating the form in web to date format and incorporating it into a web to date project:

   If you have created your website using **web to date** from DATA BECKER, the easiest way to proceed is to insert the WebMaster MailRoom form into it. The form will then be saved as a W2F file, readable by web to date, and then incorporated into the open web to date project as a form paragraph.

   Ÿ To create a W2F file and thereby a web to date form, enable the option **Save as web to date form** and then click on the **Finish** button. In the dialog window **Save Form As**, you can determine the save name and location in which the web to date form should reside. Here, select, for example, the project folder of your web to date website, and then confirm your choice with **Save**.

   Ÿ To incorporate your form into your web to date project, go to the main page or to the subpage on which your form should appear. Create a new paragraph and select the **Form** paragraph type. As soon as you click on **OK**, the dialog window **New Form** will open. Here you will now see the option **Incorporate WebMaster MailRoom form**, which you need to select. By clicking on **Finish**, the **Open Form** window will appear. If you now specify where you've saved the W2F file (see above) and click on **Open**, the form you've created in WebMaster MailRoom, complete with all its user fields, will then be insert as a web to date form paragraph in the current main page or subpage. You do have the option of further editing your form in web to date, but, even though it interacts smoothly with WebMaster MailRoom, it is not recommended

   Creating the form in HTML format:

   You can incorporate an HTML-formatted form into any website. To do so, click on the **Create HTML form** option. In addition, indicate the server to be used for sending the form information or the script to be used.

   Sending forms using the WebMaster MailRoom Form Service (recommended)

   If you select this service from WebMaster MailRoom, all sent forms will be routed through the WebMaster MailRoom server. WebMaster MailRoom's form script will be used for this. This is the preset option and the recommended method for most users. The only time you shouldn't select this option is if you are using your own server or you want to use your own form script.

   Click on **Next** and, in the first text box of the dialog window that appears, specify the e-mail address to which you want to send the form data. In the lower text box, enter the webpage that should appear as soon as the visitor to your site has sent the form. This can be the start page of your website. It is preferable, however, to create a dedicated confirmation page for your website that informs the user that the subscription has been submitted (e.g. "Thank you very much for your order").

Sending forms via another server (only for advanced users)

Just because your provider provides space on his server doesn't necessarily mean that that server is also equipped to handle incoming form data correctly. Therefore, you should be certain that the server you specify here truly is a so-called active server. If that's the case, you can copy WebMaster MailRoom's form script to the server. You can find scripts for various server types on the WebMaster MailRoom CD.

Click on the second option if you want the form contents to be processed by your own server, and then on **Next**. In the dialog window that follows, you have to enter the Internet address in the **Mail Gateway URL** field of the form script to which all the form data should be sent, in addition to the specifications described above.

Using your own form scripts (for advanced users only)

If you are experienced enough to set up your own scripts, enter the necessary information in the dialog window that appears by clicking on the third option:

Mail Gateway URL — Defines the ACTION property, i.e. the address to which the form data should be sent.

Method — Defines the METHOD property of the form. The values POST or GET are allowed. The W3 consortium recommends the GET method, if the program used for analyzing the data only requires the data as a functional parameter. The POST method is recommended for all situations where the program performing the analysis will undergo further operations such as inserting the data into a database. In addition, POST is better suited for larger amounts of data than GET, for which the parameters are appended to the URL. Generally, you should use the POST method.

Encoding — Defines the ENCTYPE properties of the form. Possible values are *application/x-www-form-urlencoded*, *text/plain* und *multipart/form-data*. Generally, you should use *application/x-www-form-urlencoded*.

The following settings are possible for **Additional form field script information**:

E-mail address — If you have to tell your script the e-mail address to which the message should be sent using a <input type="hidden"> tag, you can enter the name and the value of the tag here. You can find out more from the documentation that comes with your script.

Subject — Specify in this field the subject with which the script you are using is going to send the e-mail.

Confirmation URL — Many scripts allow a confirmation page to be displayed (or to which the user is redirected) after sending the e-mail. If this parameter is controlled by a tag, enter its name and value here.

Once you have decided upon one of the three methods and you have entered the necessary information, the only thing you need to do is format the HTML document. When doing so, you should make sure that the form visually fits into your existing website. Select the **Font** that you are using on all the other pages, and decide if you want to use **Bold headings**. Under **Form color**, select a background color. This, too, should correspond with all the other backgrounds. With **Element color**, you can assign a color to the user fields. Here, you can also choose the same color as the form. Use **Font color** to determine the color of the fields and headings. Although you can assess your choices in the **Preview** window, you have the option of assessing the complete form in HTML view – including all user fields – by clicking the **Display form** button.

Click on **Finish** to save the form as an HTML document under a name and directory you have specified. You can use the HTML editor with which you created your website to incorporate the document or the HTML source code into any given website.

Creating cancellation forms with WebMaster MailRoom

Creating cancellation forms is almost identical to creating order forms. The only difference is that the option to choose user fields is missing for cancellations. The reason for this is: when canceling (e.g. newsletter subscriptions), the interested party no longer needs to provide any information, but merely needs to make the cancellation known.

To create a cancellation form, proceed in the same manner as described for order forms.

Creating and editing text blocks

Depending on the type of mail merge messages you're creating, its purpose and its make-up, certain phrases, sentences or entire paragraphs can often repeat themselves. If you're distributing a monthly newsletter, every issue should, for example, conclude with a masthead or a note on how to unsubscribe. So that you don't have to enter these text passages anew each time, WebMaster MailRoom offers you the option of creating permanent text blocks, which are independent of the message and can be inserted at any point.

Note: You are saving text within a text block. Text blocks are always created globally for the entire WebMaster MailRoom project. Therefore, it is completely irrelevant in which mail merge message you create the text block: they are also available for every other message.

How to create new text blocks and edit existing ones

1. Go to any mail merge message and then to the **Format** menu or the context menu and select the **Text Blocks** entry there. Alternatively, you can also press the [F3] key. The **Text Blocks** dialog window will open.
2. The **Text Blocks** dialog window is divided into two areas: an upper overview window, in which all the text blocks that have been created so far are listed, and a lower preview window, which displays the text block selected above in its entirety.
3. To create a new text block, click on the **New** button and write the desired text in the text entry area in the **Create New Text Block** window that appears. To access the text block more quickly later on, you can define a shortcut key in the corresponding listbox, which you can use to conveniently select the text block. You can choose from the letters A to Z. Normally, the shortcuts are assigned successively. Confirm your entries by clicking on **OK**.
4. The new text block will then be listed in the overview window.
5. Naturally, with the exception of the assigned shortcut key, you can change any text block at any time. To do so, select the block you want to change in the overview window and click on the **Edit** button. Make the changes in the **Edit Text Block** dialog window and then click on **OK** to accept the altered content.
6. If you want to remove outdated text blocks from the list, select the desired entry and simply click on the **Delete** button. The text block will then be immediately removed from the list.

Note: You can also define a text passage after you have created it in a mail merge message as a text block. To do so, select the desired part of the passage in the work area of your mail merge message and, as described above, open the **Text Blocks** dialog window. If you then click on **New**, the selected passage will already be inserted. All you have to do now is define a shortcut key and click on **OK** to create the new text block. Note that proceeding in this way, however, causes all formatting of the selected passage to be lost.

How to insert a text block in a message

1. To insert a text block into a message, first place the cursor at the position you want the saved text passage to appear. Then use the [F3] key, or the **Text Blocks** entry in the **Format** menu or the context menu, to call up the text block overview.

2. You can insert the text block by selecting the entry and then clicking on the **Insert** button. It's faster, though, to hit the letter of the shortcut key assigned to the block.

3. The text passage is then inserted into the mail merge message and, if necessary, can be further edited as you would normal text.

Loading and saving text blocks

If you have created several WebMaster MailRoom projects, you can exchange any of the text blocks between the various projects. To import the data, you will first have to have saved it as an M2T file. Use the **Save as** button to convert the text block to this file format, and then specify where you want to save it.

To use a text block from another project in your current WebMaster MailRoom project, click on the **Load from** button and, in the window that opens, specify where you saved the M2T file. As soon as you click on **Open** to confirm your choice, the text blocks contained in the M2T file will be added to the current project.

Delayed sending

If you have enabled the control box for delayed sending in the user settings under **Send options**, and you indicated a specific time – perhaps because the computer isn't in use as much then – the messages placed in the **Outbox** will not be sent immediately to the e-mail server but rather at the scheduled time.

If you click on the **Send** button  in the Outbox prior to this time, the **Delayed Sending** window will open. It will provide you with information about the scheduled (as indicated by you) as well as the current send time/date.

You can remove the delay by clicking on **Send now**. The message selected in the Outbox will then be sent immediately.

Start Wizard step "Start"

If you indicate that you want to open a new WebMaster MailRoom project in the **Start window**, the Start Wizard will automatically start. Its task, over several steps, is to query you on important information for WebMaster MailRoom's functionality, including information about your e-mail address or the server. You can change the settings you undertake here at a later time while you are working on a project.

When the Start Wizard appears, you are first asked to supply information about the sender. In the first text box, **Sender's e-mail address**, enter the e-mail address that should appear to the recipients i.e. the one that your clients should see. This is normally your e-mail address or that of your company.

For **Sender (name)**, specify the name that should appear to your recipients or clients as the sender. This can be, aside from your own name, also the name of your company, or a keyword (e.g. "newsletter").

You can change what you've entered here any time by going to the **File** menu and selecting **User Settings/E-mail Server**.

Confirm your entries with **Next** to continue on to the next window in the Start Wizard.

Start Wizard step "SMTP server"

In the **SMTP server address** text box, enter your SMTP address, or your outgoing mail server address. The outgoing mail server accepts the messages sent from WebMaster MailRoom and forwards them to the specified recipients.   You can find out your SMTP address from your provider or your server administrator.

You can change what you've entered here any time by going to the **File** menu and selecting **User Settings/E-mail Server**.

Confirm your entries with **Next** to continue on to the next window in the Start Wizard.

Start Wizard step "Use subscriptions"

One of WebMaster's special features is its ability to automatically analyze all incoming orders and cancellations for your subscriptions (e.g. newsletters). This way, **recipient records** for new prospects/customers will be created (or deleted, in the case of a cancellation), without your needing to do anything.

You can set up WebMaster MailRoom in such a way that you merely need to use the program for creating and sending **mail merge messages**. It makes even more sense to also make use of the automatic management of Inboxes at the same time. This way, all e-mail that is associated with a particular subscription won't be downloaded by your default e-mail program but instead by WebMaster MailRoom and displayed as new messages in the **Inbox** work area. The automatic process described above will take place at the same time.

The automatic management of your Inboxes has two requirements: one, that the incoming e-mails meet the **requirements for being received via WebMaster MailRoom** , and two, that you've specified the correct address for you incoming mail server – the so-called POP3 server. Without this information, WebMaster MailRoom is unable to receive mail.

If you want to receive e-mail regarding your subscriptions using WebMaster MailRoom, thereby making use of the automatic management for creating and managing recipient information, then enable the option **Yes, use newsletter subscription**. In the next step, you can then enter the address of your POP3/incoming mail server. If you don't want to use WebMaster MailRoom for receiving messages, choose the second option.

Confirm your entries with **Next** to continue on to the next window in the Start Wizard.

Start Wizard step "POP3 server"

If in the previous step you decided upon using the automatic management of incoming mail in WebMaster MailRoom, you will now have to enter the address of your POP3/incoming mail server. The POP3 server accepts all the messages from your recipients or customers and forwards them to the e-mail address you indicated, where they are downloaded by WebMaster MailRoom and automatically analyzed. Fill in the following fields:

POP3 server address: Here, enter the POP3 address, or the address of your incoming mail server. You can obtain this from your provider or server administrator.

Account name: Here, enter the name of the POP3 mail account that was set up on your incoming mail server. Your server administrator or provider can perform setting up such an account. Ask your provider or administrator for the name.

Password: Here, enter the password for your POP3 account. This was provided by your provider, or you selected it yourself. For security reasons, only stars (*) will be displayed on the screen.

You can change what you've entered here any time by going to the **File** menu and selecting **User Settings/E-mail Server**. By entering a POP3 address, you are automatically selecting the option of receiving all subscription related mail (orders or cancellations) using WebMaster MailRoom.

Confirm your entries with **Next** to continue on to the next window in the Start Wizard.

Start Wizard step "Use images"

If you want the **mail merge messages** you have created in WebMaster MailRoom to contain **images**, the images will not be sent via e-mail in the outgoing messages, but instead stored once on your web server. As soon as the recipient opens your e-mail message, the e-mail program will automatically download the image from the web server. Proceeding in this way has the huge advantage that the image only needs to be sent once – namely, to your WWW server – and does not need to be sent individually for each e-mail. This saves a noticeable amount of time and money, in particular for extensive e-mail activity.

With the help of the two options, decide if you want to use images or not. If you select the first option, **Yes, I want to use images**, you will have to enter the login information for the server on which you want to store the images in the next step.

Confirm your entries with **Next** to continue on to the next window in the Start Wizard.

Start Wizard step "WWW server"

If in the previous step you decided to use images in your mail merge messages, you will now need to enter the address of your web server. You will need to store all images on your web server, from where they are automatically downloaded by the recipient's e-mail program. Fill in the following fields:

WWW address: Here, enter the WWW address of the web server where your website resides (e.g. "www.yourwebsite.com"). If you want to store your image files in a particular directory, expand the address by entering the corresponding directory (e.g. "www.yourwebsite.com/images").

FTP server name: Here, enter the name of your FTP server. You can obtain this information from your provider or server administrator.

FTP username: Here, enter the username for your FTP server. You can obtain this information from your provider or server administrator.

FTP password: Here, enter the access password for your FTP server. This was provided by your provider, or you selected it yourself. For security reasons, only stars (*) will be displayed on the screen.

You can change what you've entered here any time by going to the **File** menu and selecting **User Settings/Web Server**. By entering a web server address, you are automatically selecting the option of including images in your messages.

Confirm your entries with **Next** to continue on to the next window in the Start Wizard.

Start Wizard step "Create user fields"

By creating **user fields**, you have the option of individualizing mail merge messages to make them recipient-specific. You can employ user fields to manage all personal data, such as gender, name or address of the recipient. By **inserting user fields** into your messages, you are giving them a human touch.

In this step, indicate if you want sample user fields, such as salutations and the first and last names of the recipient, to be automatically created for the new WebMaster MailRoom project. You can at a later time always alter or delete these fields and, of course, add more fields easily enough.

To create sample fields (recommended), enable the option **Yes, please create sample fields**.

Confirm your entries with **Next** to continue on to the last window in the Start Wizard.

Start Wizard step "Create groups"

User groups refer to the subscriptions that you are managing in your WebMaster MailRoom project (e.g. newsletters for various topic-related groups). Therefore, your **recipients** should be assigned to at least one user of recipient group. In each WebMaster MailRoom project, you have the option of creating various parallel recipient groups, which allows you to manage various subscriptions concurrently.

As with user fields, you can also automatically create new sample groups when starting a new project. These are the groups "Standard" (recipients who have ordered a simple subscription), and "Premium" (recipients who will receive extensive mail merge messages, or ones who have paid for a newsletter or made contributions). Be aware that in both cases empty groups will be created; the sample groups will not contain any recipient records.

Even if these two groups don't exactly meet your requirements, it is particularly recommended for users who are new to WebMaster MailRoom to create sample groups so that they can acquire an understanding of using subscriptions. Naturally, you can delete both of these groups at a later time, or replace them with your own group, and, of course, also add more groups with ease.

After you have decided for or against creating sample groups by selecting an option, you can close the Start Wizard by clicking on the **Finish** button. In the dialog window that then opens, **New WebMaster MailRoom Project**, determine a save location and, under **File name**, enter a name for the project.

Confirm the information you've entered by clicking on **Save**. Your new WebMaster MailRoom project has now been created.

Inserting an unsubscribe link

Regardless of the newsletter you are sending out, you should always give your recipients the option of canceling their subscription. You can either organize the canceling of subscriptions using a special cancellation form, which you have created using the **Form Wizard** in WebMaster MailRoom and have incorporated into your website, or you can deal with cancellations via e-mail: your recipient sends you an e-mail, whose heading meets the subject entry **requirements for WebMaster MailRoom** on the one hand, and, at the same time, also contains the necessary information for the automatic subscription management of WebMaster MailRoom to recognize it as a cancellation (as opposed to an order).

Because it's not possible to prevent the recipient from making a mistake when entering the information in the subject line, it is recommended to insert a **Cancellation Link** in every newsletter (assuming it's been created in HTML format). Doing so automatically inserts an **e-mail link** with the format "mailto:". The message window, which will automatically be opened by the recipient's e-mail program when he/she clicks on the link, will already contain all the necessary information for canceling the corresponding subscription in the subject line.

How to insert a cancellation link in your message

1. To insert a cancellation link in your message, first ensure that the relevant message is being displayed in the work area of your mail merge messages. Place the cursor at the desired position (e.g. the end of the message).
2. Go to the **Format** menu or, by right-clicking, open the context menu, and select the entry **Insert Unsubscribe Link**. The corresponding dialog window will open.
3. Within the tabular overview, select the subscription group which should be cancelled using the unsubscribe link. This should generally be the group you've actually assigned to the current mail merge message.
4. In the lower text box, the address to which the cancellation e-mail should be sent is shown – it is the same as the one you specified under **E-mail Server** in the user settings, and thus usually your own. Change the entry to define a new recipient address, and then click on **OK**.
5. For HTML e-mails, WebMaster MailRoom automatically inserts the text "Click here to unsubscribe from this newsletter" at the point where you inserted the unsubscribe link; the word "here" is created as a link. You can, of course, change the text at any time.
   The following passage is inserted in e-mails formatted in plain text: "You don't want to receive any more e-mails? Send an e-mail with the subject "unsubscribe group name" to user@address.com", where the name of the subscription as well as the e-mail address are automatically inserted by the program.

Design Wizard

Using the Design Wizard, you can design the headers you use in HTML-formatted messages in various ways. This way, your newsletters will have an unmistakable, unique character. From classical to modern, with or without graphics – WebMaster MailRoom offers you a wide variety of designs. Every design exists in various, sequentially determined, color combinations, which can, however, be changed at any time. The requirement for using the designs is the same as for all design options in e-mails: the message has to be created in HTML.

Note: Designs inserted in the message and created in the Wizard are saved as a graphic, or, more precisely, a GIF file. WebMaster MailRoom manages these much like every other image: the designs are not sent directly to the recipient, but are stored once on your web server.

How to use the Design Wizard

1. To incorporate a design in an existing mail merge message, ensure that the message is being displayed in the work area. Call up the Design Wizard by going to the **Format** menu, or using the context menu, and selecting the entry **Use Design**. The **Design Wizard** window will then appear.
2. In the text boxes **Heading** and **Slogan**, enter the text for your message header. Make sure your heading is something precise and clear, such as the title of the newsletter; for the slogan, include some secondary information, such as the circulation number or the topic. You can see what you've entered in the preview window below.
3. You then have to assign a design to your heading. To do so, pick one of the predefined variations. In the **Design** window, click through the various types, then verify the result in the preview window.
4. Various color combinations are shown in the **Color palette** window. See how they look with the design you have chosen.
5. If you would like to use colors other than the ones given here, click below the **Color palette** window on the **User-defined** entry. You then have the option of changing the individual components of the design, using the five fields on the left. [T.N. Should be right?] In addition to the font colors for the slogan and heading, you can also adjust the colors of the two design elements (Logo A and Logo B). In addition, you can also determine the color of the HTML e-mail here. You can see all changes you've made in the preview window.
6. Once you've created a design you are happy with, click on **OK**. It will then be placed in your HTML message. There you can move the design, center it, or place it anywhere you want in the usual way.