

Leon's first campaign

Leon Gall runs a service on the Internet he calls CD-Rome. Customers browse through his site on the World Wide Web and order their favourite music from the CDs in his catalog. Leon has purchased eMerge in order to personalize the letters and announcements he sends to his customers and to mount other direct mail campaigns in an effort to attract more people to his site.

An eMerge campaign file consists of three parts:

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

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

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

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

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

Creating a new campaign

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

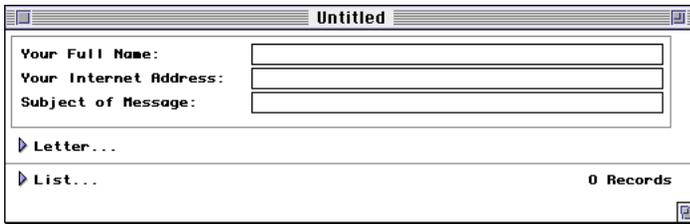
- 1) Open the folder named eMerge.



- 2) Double-click on the eMerge application icon.



- 3) Choose File → New Campaign.



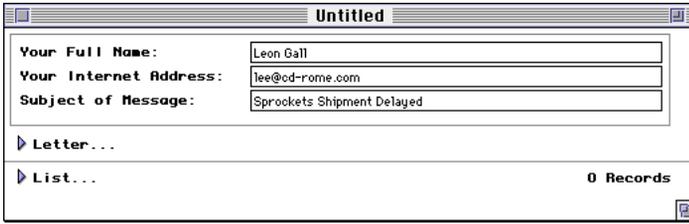
The screenshot shows a window titled "Untitled" with three input fields for "Your Full Name:", "Your Internet Address:", and "Subject of Message:". Below these fields are two expandable sections: "Letter..." and "List...". The "List..." section shows "0 Records".

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

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

Note: Unlike the application you use to read and reply to e-mail, eMerge does not send mail through your mail server. eMerge communicates directly over the Internet with the mail servers for each person on your mailing list. Because of this, there is no way to verify the e-mail address you enter in this field. So, be careful. If you enter your address incorrectly, there will be no way for the recipient to know who to respond to.

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



Untitled

Your Full Name: Leon Gall

Your Internet Address: lee@cd-rome.com

Subject of Message: Sprockets Shipment Delayed

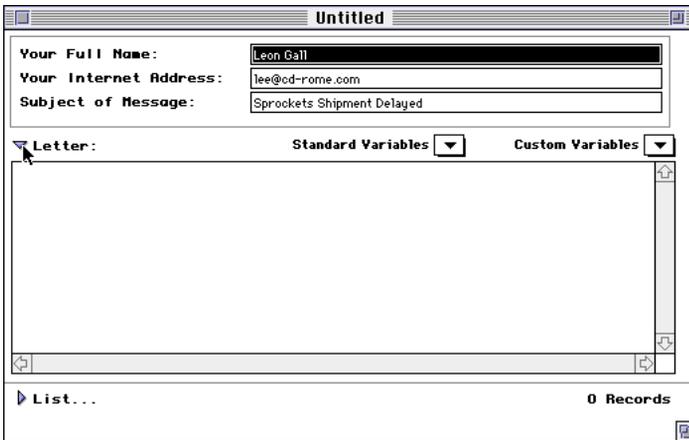
▶ Letter...

▶ List... 0 Records

Composing the form letter

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

1) To reveal the letter, click the triangle next to the Letter header.



Untitled

Your Full Name: Leon Gall

Your Internet Address: lee@cd-rome.com

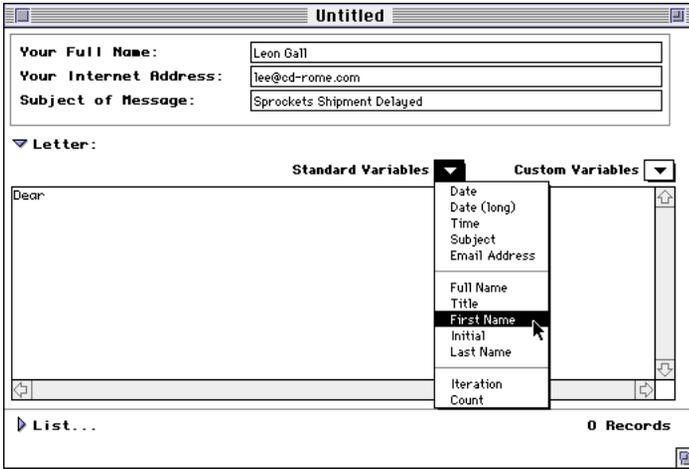
Subject of Message: Sprockets Shipment Delayed

▼ Letter: Standard Variables Custom Variables

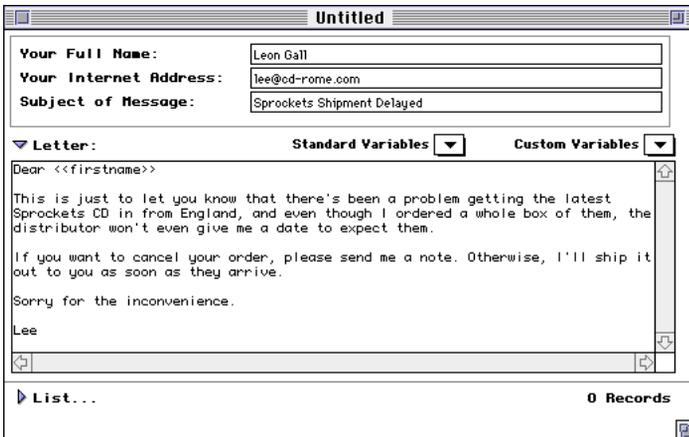
▶ List... 0 Records

2) Type the letter.

To insert a variable, choose the variable name from the menu above the letter.



This example includes a single variable, `firstname`. Within the letter, variable names are enclosed by two sets of angle brackets and are displayed in color on color displays.



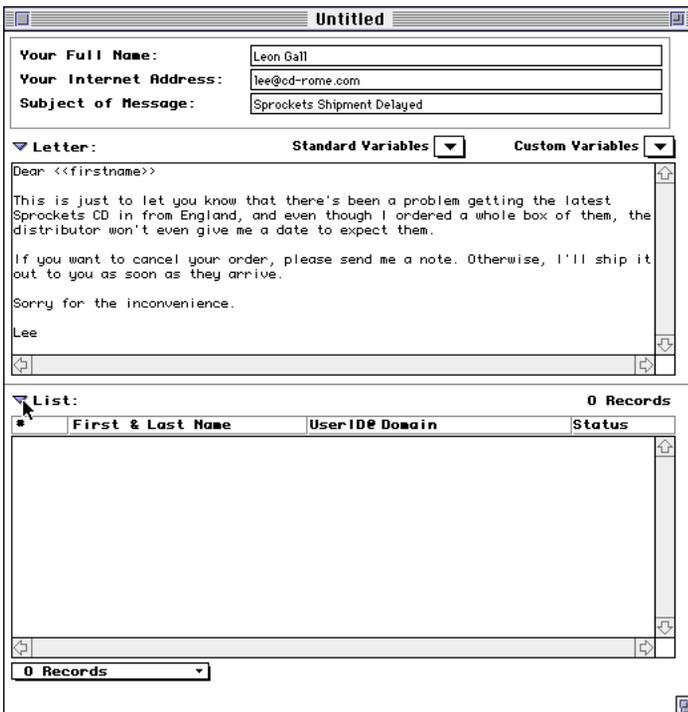
`Firstname` is a standard eMerge variable that is filled using the information you enter in the mailing list. For more information on the standard vari-

ables you can use refer to “The standard variables” on page 28. To create your own variables, refer to “Creating your own variables” on page 31.

Creating the mailing list

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

- 1) To reveal the letter, click the triangle next to the List header.



To make more room for the list, you can close the letter by clicking the triangle next to the Letter header.

- 2) From the menu bar, choose List → New Recipient.

The screenshot shows a dialog box titled '<new recipient>'. At the top, there are navigation buttons: '<< First', '< Prev', '1/1', 'Next >', and 'Last >>'. Below these is a section labeled 'First and Last Names:' with a text input field containing '<new recipient>'. Underneath is the 'Internet Address:' section with a text input field containing 'userid@company.com'. A 'Variables...' link is visible below the address field. At the bottom of the dialog are three buttons: 'Apply', 'Cancel', and 'OK'.

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

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

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

The screenshot shows the same dialog box as before, but now the 'First and Last Names' field contains 'Raymond Ng' and the 'Internet Address' field contains 'ring@alternative.com'. The rest of the interface, including the navigation buttons and the 'Apply', 'Cancel', and 'OK' buttons, remains the same.

- 5) Click OK.

Untitled

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

▼ **Letter:** Standard Variables ▼ Custom Variables ▼

Dear <<firstname>>

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

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

Sorry for the inconvenience.

Lee

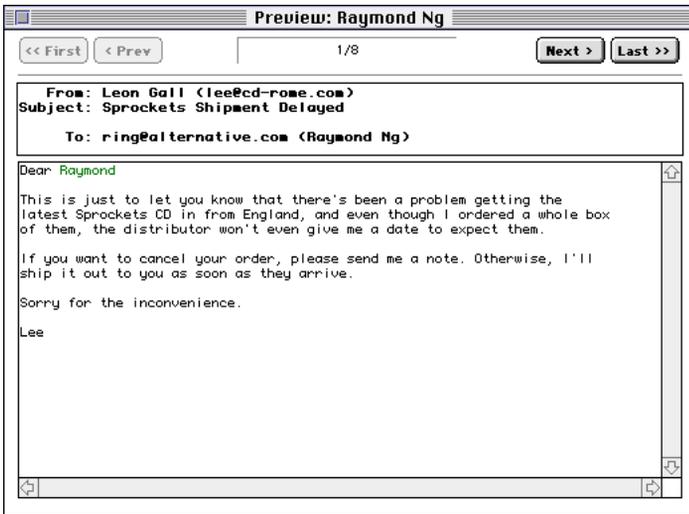
▼ **List:** 1 Records

	First & Last Name	UserID@ Domain	Status
1	Raymond Ng	ring@alternative.com	Waiting

1 Records ▼

The recipient is added to the mailing list.

6) Repeat step 2 through step 5 for each person you want to add.



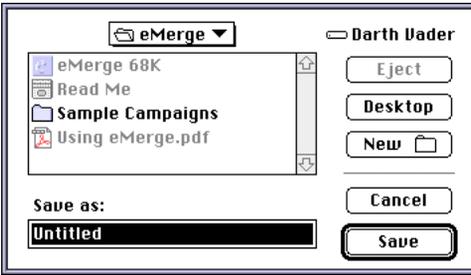
The variables are highlighted in green. (Don't worry, this is just so you can identify them quickly; they won't be green when the message is sent.) Any variables that don't have a value are highlighted in red.

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

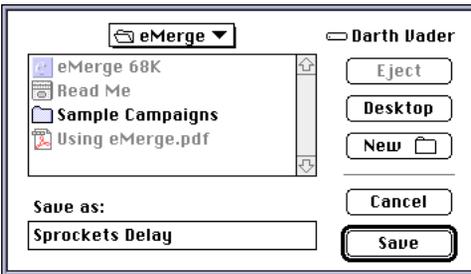
Saving your work

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

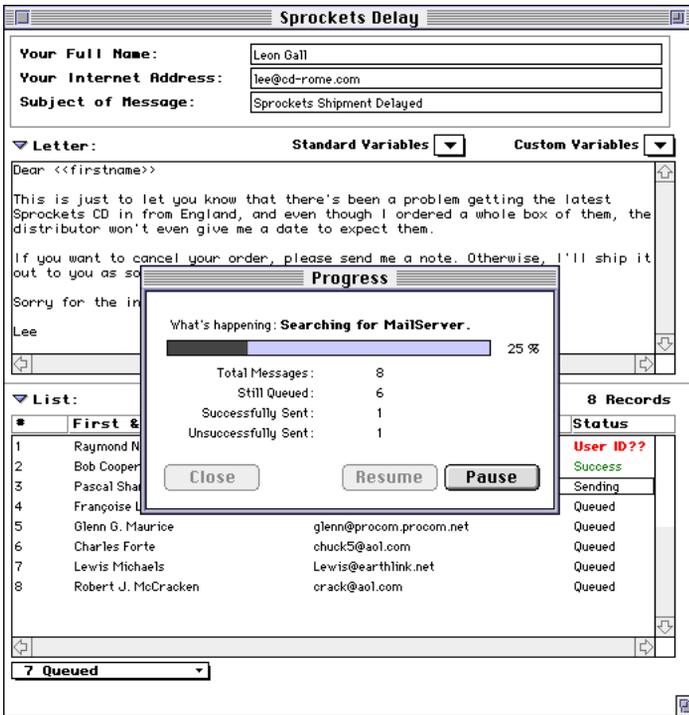
- 1) From the menu bar, choose File → Save.



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

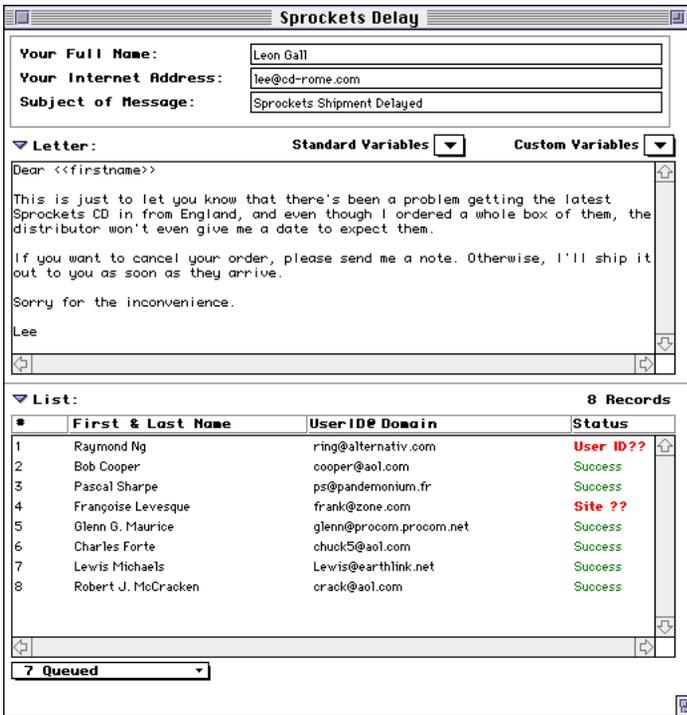


3) Click OK.



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

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



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

Correcting addresses

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

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

The screenshot shows a window titled "Raymond Ng" with a progress indicator "1/8". It contains two text input fields: "First and Last Names" with the value "Raymond Ng" and "Internet Address" with the value "rng@alternative.com". There are navigation buttons at the top and bottom, and a "Variables..." section that is currently collapsed.

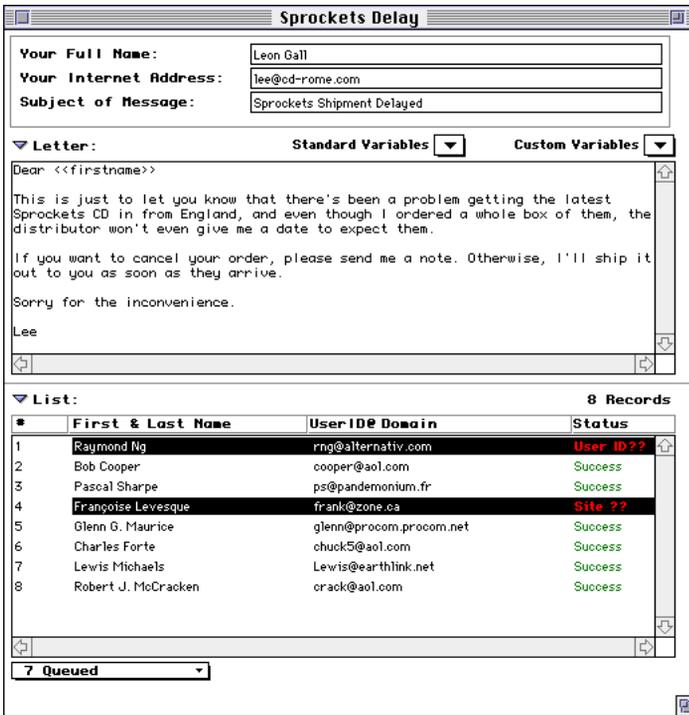
2) Correct the information.

This is an identical screenshot to the one above, showing the data entry window for "Raymond Ng" with the same values and layout.

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

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

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



6) Choose Actions → Send To Selected.

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

