

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.

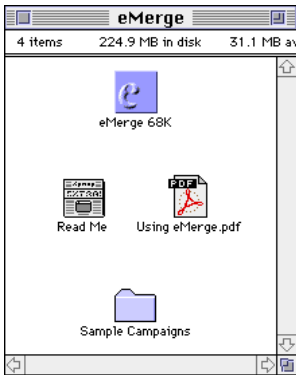
When you send a message to one of the people on your mailing list, eMerge builds that message by filling in the blanks on the form letter with the appropriate information from that person's record. eMerge then puts the standard message header at the top of the message, signs onto the Internet, and delivers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

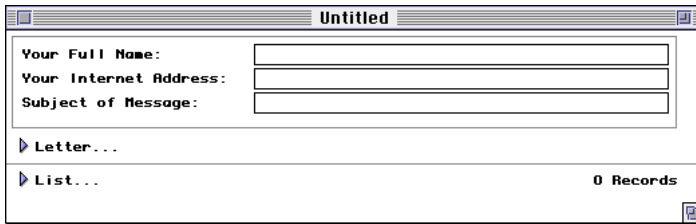
- 1) Open the folder named eMerge.



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



- 3) Choose File → New Campaign.



The screenshot shows a window titled "Untitled" with a standard Mac OS interface. It contains three text input fields labeled "Your Full Name:", "Your Internet Address:", and "Subject of Message:". Below these fields are two sections with expandable headers: "Letter..." and "List...". The "List..." section displays "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

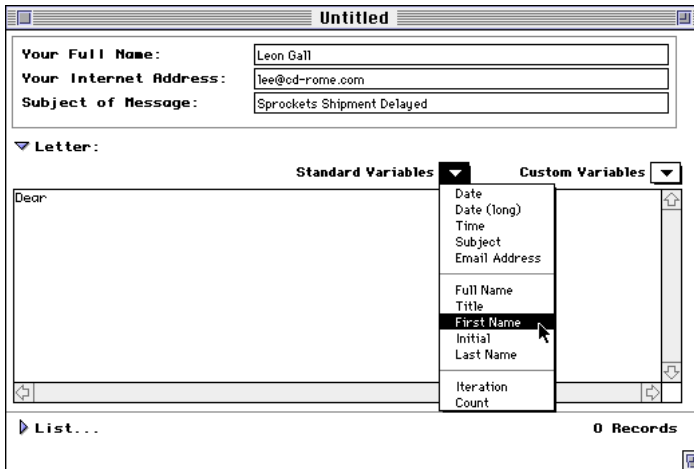
Subject of Message: Sprockets Shipment Delayed

▼ Letter: Standard Variables Custom Variables

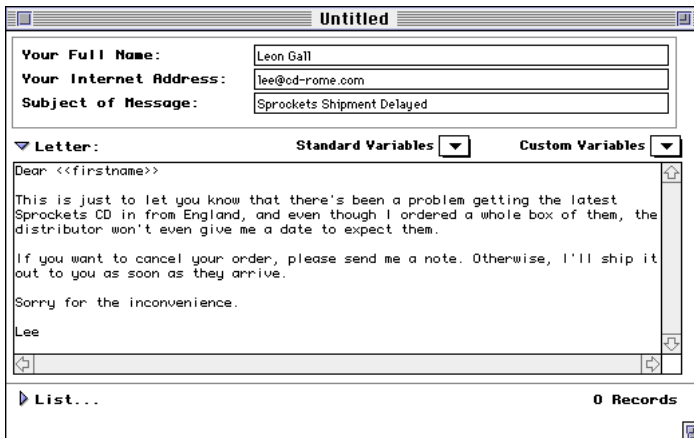
▶ List... 0 Records

- 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.

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: 0 Records

First & Last Name	User ID@ Domain	Status
0 Records		

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, there are two main input fields. The first is labeled "First and Last Names:" and contains the text "<new recipient>". The second is labeled "Internet Address:" and contains the text "userid@company.com". Below these fields is a section labeled "Variables..." with a small blue triangle icon. 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.

This screenshot shows the same dialog box as before, but with updated information. The "First and Last Names" field now contains "Raymond Ng". The "Internet Address" field now contains "ring@alternative.com". All other elements, including the navigation buttons and the "Variables..." section, remain the same.

- 5) Click OK.

Untitled

Your Full Name:

Your Internet Address:

Subject of Message:

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

Dear <<firstname>>

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

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

Sorry for the inconvenience.

Lee

▼ **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.

Untitled

Your Full Name:

Your Internet Address:

Subject of Message:

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

Dear <<firstname>>

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

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

Sorry for the inconvenience.

Lee

List: **8 Records**

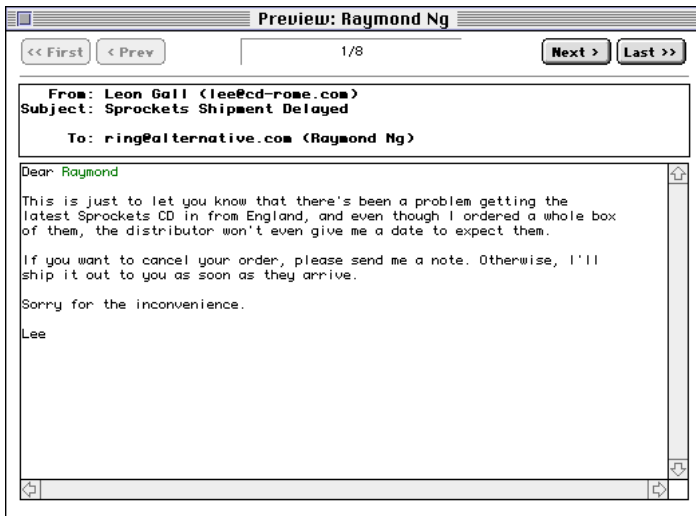
#	First & Last Name	UserID@ Domain	Status
1	Raymond Ng	ring@alternative.com	Waiting
2	Bob Cooper	cooper@aol.com	Waiting
3	Pascal Sharpe	ps@pandemonium.fr	Waiting
4	Françoise Levesque	frank@zone.com	Waiting
5	Glenn G. Maurice	glenn@procom.procom.net	Waiting
6	Charles Forte	chuck5@aol.com	Waiting
7	Lewis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

8 Records

Previewing the letters

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

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



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.

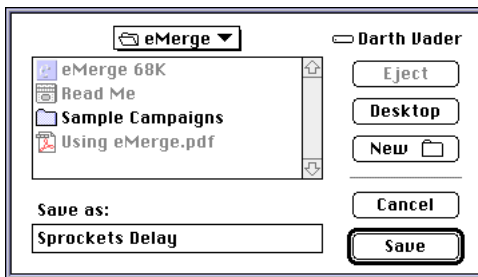
Saving your work

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.

Sprockets Delay

Your Full Name:

Your Internet Address:

Subject of Message:

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

Dear <<firstname>>

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

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

Sorry for the inconvenience.

Lee

▼ List: **8 Records**

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

Records ▼

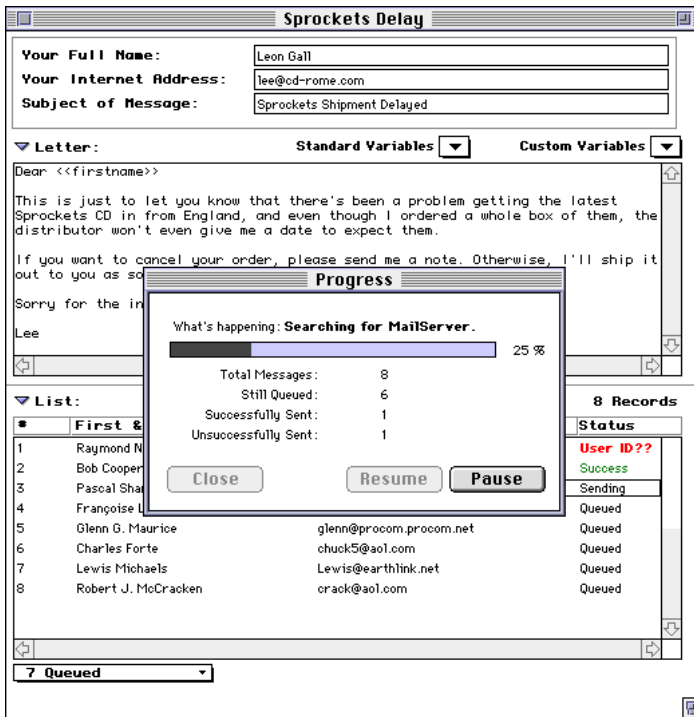
The campaign is saved, and the new campaign name appears at the top of the campaign form.

Sending the messages

When you send your messages, eMerge builds each message by filling in the blanks on the form letter with the appropriate information from each person's record in your mailing list. It 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.

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

- I) From the menu bar, choose Actions → Send To All.



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.

Sprockets Delay

Your Full Name:Leon Gall

Your Internet Address:lee@od-rome.com

Subject of Message:Sprockets Shipment Delayed

Letter:Standard VariablesCustom 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:8 Records

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

7 Queued

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.

2) Correct the information.

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.

Sprockets Delay

Your Full Name:Leon Gall

Your Internet Address:lee@cd-rome.com

Subject of Message:Sprockets Shipment Delayed

Letter:Standard VariablesCustom 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:8 Records

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

7 Queued

6) Choose Actions → Send To Selected.

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

Sprockets Delay

Your Full Name:Leon Gall

Your Internet Address:lee@cd-rome.com

Subject of Message:Sprockets Shipment Delayed

Letter:Standard VariablesCustom 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:8 Records

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

7 Queued

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

Saving your work

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

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