License Agreement

Please read the license agreement carefully. You must agree to its terms before purchasing a license for GroupMail or downloading any version of GroupMail.

License Agreement

END-USER LICENSE AGREEMENT FOR "GroupMail Free, Personal & Business Editions."

IMPORTANT - READ CAREFULLY Please read the following license agreement. You must agree to its terms before purchasing a license for GroupMail or downloading any version of GroupMail.

This end-user license agreement ("EULA") is a legal agreement between you (either an individual or a single entity) and Infacta Ltd. for GroupMail Free, Personal & Business Editions, including computer software, electronic documentation and printed materials ("SOFTWARE"). By downloading, installing, copying, or otherwise using the SOFTWARE, you agree to be bound by the terms of this agreement. If you do not agree to the terms of this EULA, promptly destroy all copies of the SOFTWARE, including any updates, in your possession or return them to Infacta Ltd.

The SOFTWARE is protected by copyright laws and international copyright treaties, as well as other intellectual property laws and treaties. The SOFTWARE is licensed, not sold.

1. GRANT OF LICENSE. Infacta Ltd. grants to you as an individual, a personal, nonexclusive license to make and use copies of the SOFTWARE in the manner provided below. If you are an entity, Infacta Ltd. grants you the right to designate one individual within your organization to have the right to use the SOFTWARE in the manner provided below.

Infacta Ltd. may have patents or pending patent applications, trademarks, copyrights, or other intellectual property rights covering the SOFTWARE. You are not granted any license to these patents, trademarks, copyrights, or other intellectual property rights except as expressly provided herein. Infacta Ltd. reserves all rights not expressly granted.

Infacta Ltd. reserves the right to terminate this license at any time, at which time you must destroy all copies of the Software you have previously installed.

2. COPYRIGHT. All title and copyrights in and to the SOFTWARE (including, but not limited to, any images, photographs, animation, video, audio, music, text, and "applets," incorporated into the SOFTWARE), the accompanying printed materials, and any copies of the SOFTWARE, are owned by Infacta Ltd. and its suppliers. The SOFTWARE is protected by copyright laws and international treaty provisions. Therefore, you must treat the SOFTWARE like any other copyrighted material except that you may either (a) make one copy of the SOFTWARE solely for backup or archival purposes, or (b) install the SOFTWARE on a single computer provided you keep the original solely for backup or archival purposes. You may not copy the printed materials accompanying the SOFTWARE.

3. DISCLAIMER OF WARRANTY

NO WARRANTIES. The SOFTWARE PRODUCT is provided "as is" without warranty of any kind. To the maximum extent permitted by applicable law, Infacta Ltd. and its suppliers disclaim all warranties, either express or implied, including, but not limited to, implied warranties of merchantability and fitness for a particular purpose and any warranty against infringement, with regard to the SOFTWARE. This limited warranty gives you specific legal rights. You may have others that vary from state/jurisdiction to state/jurisdiction.

4. CUSTOMER REMEDIES. Infacta Ltd.'s entire liability and your exclusive remedy shall not exceed the price paid for the SOFTWARE.

5. NO LIABILITY FOR CONSEQUENTIAL DAMAGES. To the maximum extent permitted by applicable law, in no event shall Infacta Ltd. or its suppliers be liable for any damages whatsoever (including, without limitation, damages for loss of business profits, business interruption, loss of business information, or any other pecuniary loss) arising out of the use of or inability to use this Infacta Ltd. product, even if Infacta Ltd. has been advised of the possibility of such damages. Because some states/jurisdictions do not allow the exclusion or limitation of liability for consequential or incidental damages, the above limitation may not apply to you.

6. DO NOT SEND UNSOLICITED E-MAIL. Be aware that you are solely responsible for the messages you send. In many cases, sending unsolicited e-mail is in violation of the law, and you will be solely accountable and liable for damages and violations.

We reserve the right to refuse technical support and/or other services if you:

1. send unsolicited mail; or
2. you hijack a mail server relay; or
3. distribute illegal information or materials; or
4. forge header information; or
5. put false of misleading information in the subject; or
6. fail to provide a means for unsubscribing from your lists.

Table of Contents

CHAPTER 1 *Introduction*

Welcome to Infacta GroupMail, the ultimate list management and distribution solution. The award-winning GroupMail offers you the ability to do the following:

- Send a personalized message to thousands of recipients with one mouse click.
- Add unique attachments to each e-mail.
- Send HTML messages that are fully customizable.
- Filter your e-mails so that you can accurately target your recipients.
- Manage subscriptions easily and process any undelivered mail simply and transparently.

GroupMail Versions

GroupMail is available in following three forms:

- GroupMail Free Edition
- GroupMail Personal Edition
- GroupMail Business Edition

GroupMail Free Edition

GroupMail Free provides limited functionality. While it allows you to send e-mail messages to groups, it does not offer the same versatility as the Personal and Business editions. GroupMail Free provides a good starting point, but we highly recommended that you upgrade to either GroupMail Personal or GroupMail Business. GroupMail Free includes the following restrictions:

- Standard send mode only
- Limited to one connection
- Limited address book import support
- No add-ons support
- Send a maximum of 100 recipients per mailing

GroupMail Personal Edition

GroupMail Personal gives you extra functionality over GroupMail Free. It allows you to manage groups and lists of any size, and allows you to send messages up to ten times faster than GroupMail Free. GroupMail Personal provides the following functionality:

- Multiple connections, up to three, when sending e-mail
- Direct sending - no need to use your Internet Service Provider's (ISP's) mail server
- No sending limitations
- Free Add-ons

GroupMail Business Edition

GroupMail Business provides all of the functionality of the GroupMail application. Download and install Add-ons to further increase this functionality. GroupMail Business features include the following:

- All of the features available in GroupMail Personal
- Multiple connections, up to 128, when sending e-mail

- Allows users to connect directly to external databases and make those connections appear like groups in GroupMail (no need to import)
- A high-speed send engine which allows you to send e-mail directly to your recipients, or through an SMTP server
- Ability to import many address books and distribution lists (See Table 1, *List of Import File Types,* on page 3.)

Import File Types

GroupMail imports the following file types, depending on the GroupMail version you are running.

Table 1 List of Import File Types

File Type by Name	**GroupMail Edition**		
	Business	**Personal**	**Free**
America Online (AOL) 4 - 9	✓	✓	✓
Eudora Light/Pro (4, 5, 6)	✓	✓	✓
GroupWise 5.5, 6, 6.5	✓		
LDIF	✓		
Lotus Notes 4.6.4 or later, including R5, 6, 6.5	✓		
Microsoft Exchange Global Address List (GAL)	✓		
Microsoft Exchange Server	✓		
Microsoft Outlook (97 - 2003) (PST)	✓		
Microsoft Outlook (PAB)	✓		

Table 1 List of Import File Types (Continued)

File Type by Name	GroupMail Edition		
	Business	**Personal**	**Free**
Microsoft Outlook Express (WAB)	✓	✓	✓
Mozilla 1.2 - 1.8	✓	✓	✓
Netscape 4.x	✓	✓	✓
Netscape 6.2, 7.x	✓	✓	✓
Opera 6 and 7	✓	✓	✓
Palm Desktop (before 4.1.4)	✓	✓	✓
Pegasus	✓	✓	✓
PINE	✓	✓	✓
Thunderbird	✓	✓	✓

Technical Support

For technical problems with GroupMail, contact the GroupMail technical support team at the following:

- e-mail: support@infacta.com
- web: http://www.infacta.com/support.asp

You can also contact Technical Support using the Help menu options, Technical Support Resources and Priority Customer Contact Form.

Note: Infacta Ltd. supports all editions of GroupMail; however, priority support is given to GroupMail Personal and GroupMail Business users.

Product Information

The About GroupMail Window provides helpful links and product information. To access this information, open the About GroupMail window (see Figure 1 on page 6) using one of the following methods after opening GroupMail:

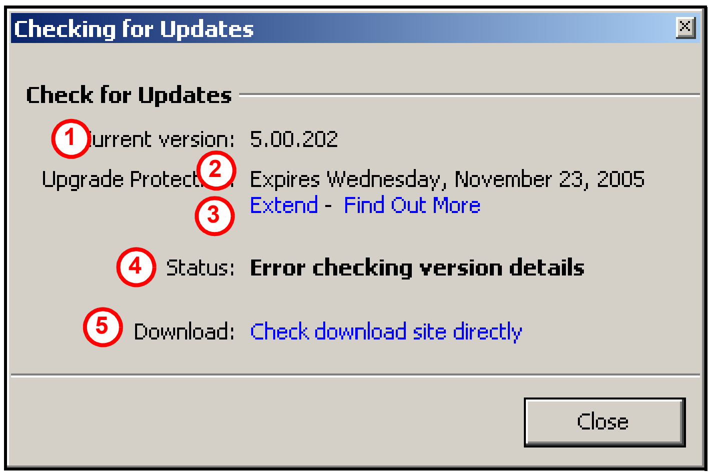
- Click the GroupMail logo, located in the Home workspace
- Click the menus, Help > About GroupMail.

1 Link for technical support.
2 Link to check for updates.
3 Link for upgrade protection.
4 Link to Infacta's home page.
5 Opens window to enter product key.

Figure 1 About GroupMail Window

Checking for Updates

Click *Check for Updates* in the About window (see Figure 1) to view information about updates (see Figure 2 on page 7).



1. Current version of GroupMail
2. Upgrade protection expiration date
3. Link to extend this protection, and to find out more
4. Status of software checks with final result
5. Download site, if necessary

Figure 2 Checking for Updates Window

CHAPTER 2 *Getting Started*

This chapter covers a variety of topics to help you get started using GroupMail.

System Requirements

The minimum system requirements include the following:

Operating System	Windows 98, ME[a], NT4, 2000, XP and Windows Server.
Processor	Pentium; Pentium 2 or better is recommended.
Memory	Minimum of 64 Mb; 128 Mb is recommended.
Hard Drive Space	100 Mb or more.

a. Task List is not available in Windows 98 and ME. Use the Action Menu. (See *The User Interface* on page 39 for more information.)

Downloading and Installation Instructions

The Free, Personal, and Business Editions of GroupMail are available for download; however, you will need a logon user name and key. These are e-mailed to you when you purchase the software.

See the Infacta Web site for more information. To download the most recent version of GroupMail, follow these steps:

1. Go to the downloads page on the Infacta Web site: http://www.infacta.com
2. Enter your name and key.
3. Click the logon button.
4. Click the download link. The File Download dialog box displays.
5. Select a location on your system for saving the file, and click Save.
6. When the file has been fully downloaded, double-click the groupmpro.exe or groupmplus.exe file.
7. Enter the product key.
8. Follow the installation wizard instructions (see *Installation Wizard Instructions* on page 12).

Note: The download may take several minutes.

GroupMail CD-ROM Installation Instructions

To install GroupMail from the CD-ROM, follow these steps:

1. Close all other applications.
2. Insert the GroupMail CD-ROM into your CD-ROM drive.

3. Enter the product key.

4. Follow the installation wizard instructions (see *Installation Wizard Instructions* on page 12).

Note: If the installation setup program does not automatically start, follow the steps listed in *Steps for Manually Starting the CD-ROM* on page 11, and continue with *Installation Wizard Instructions* on page 12.

Steps for Manually Starting the CD-ROM

1. Click the Start button on your Windows system.

2. Select the Run option.

3. Type D:\autorun.exe (where D is your CD-ROM drive) and click OK (see Figure 3).

4. Enter the product key.

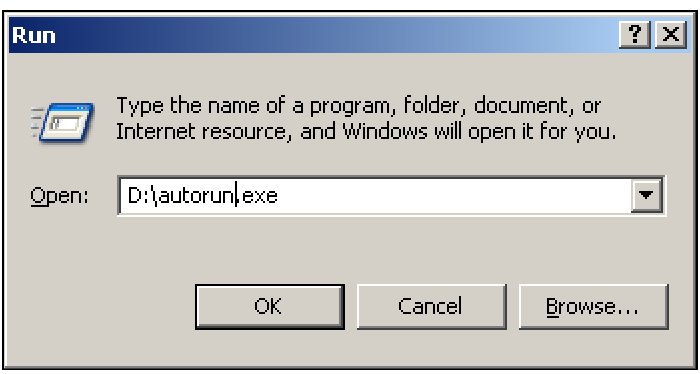


Figure 3 Manually Starting the Installation Process

Installation Wizard Instructions

1. Start the GroupMail software.

   If necessary, refer to *Downloading and Installation Instructions* on page 9, *GroupMail CD-ROM Installation Instructions* on page 10, or *Steps for Manually Starting the CD-ROM* on page 11.

2. When the Setup Wizard opens, click the Next button (see Figure 4).

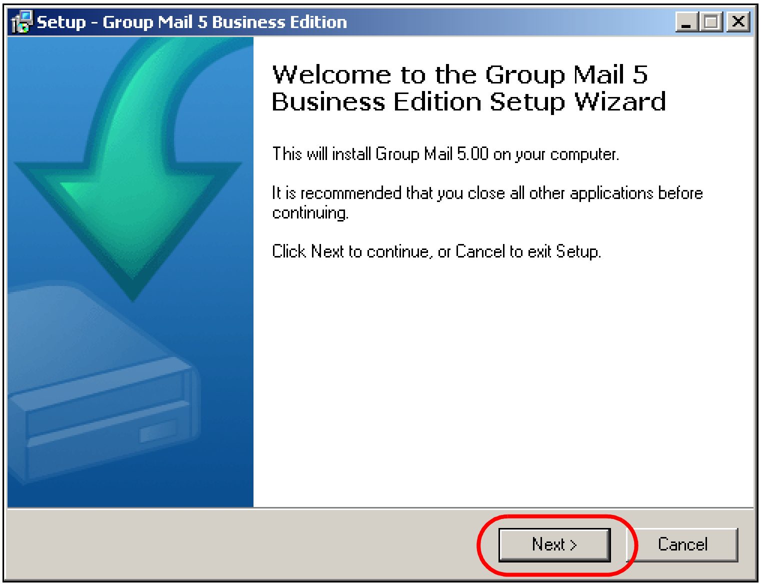


Figure 4 Setup Wizard Welcome Window

3. Read the License Agreement carefully. You must agree to the License Agreement for the installation to proceed.

Note: If you disagree with any clause in the Agreement, click “I do not accept the agreement” and the installation will stop.

4. After clicking the appropriate license agreement radio button, click Next (see Figure 5).

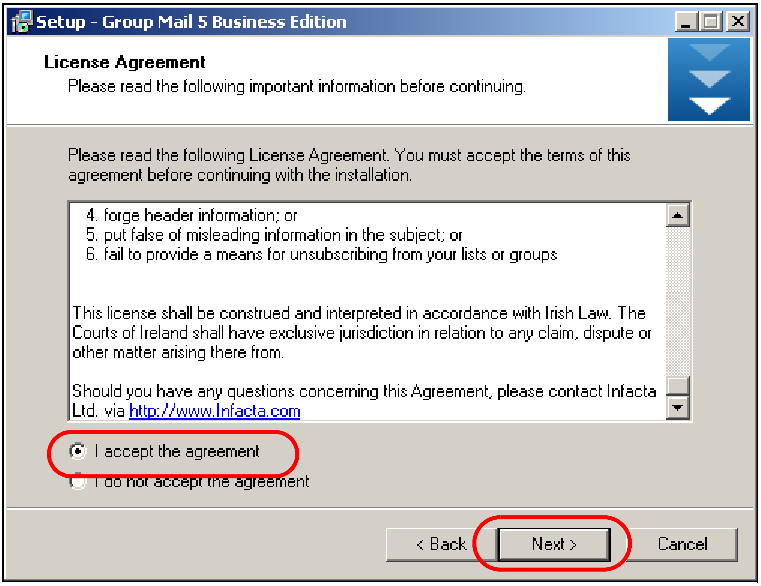


Figure 5 License Agreement Window

5. Please read the release notes. You will find important information contained in this area.

Note: Release notes may be copied to a text file for future reference.

6. Click Next after reading the release notes (see Figure 6).

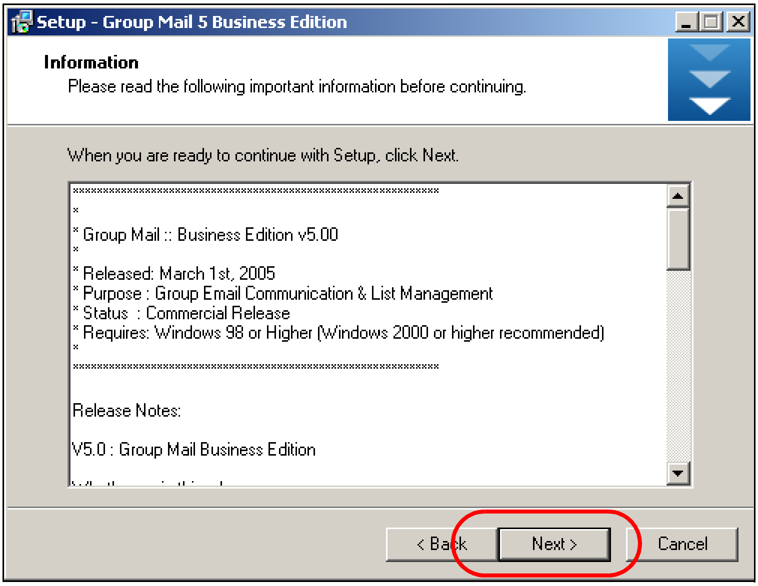


Figure 6 Release Notes Window

7. Select the destination location for installing GroupMail (see Figure 7 on page 15) and click Next.

Note: By default, GroupMail installs into the Program Files folder. To select a location other than the default location, click Browse and navigate to the location of your choice.

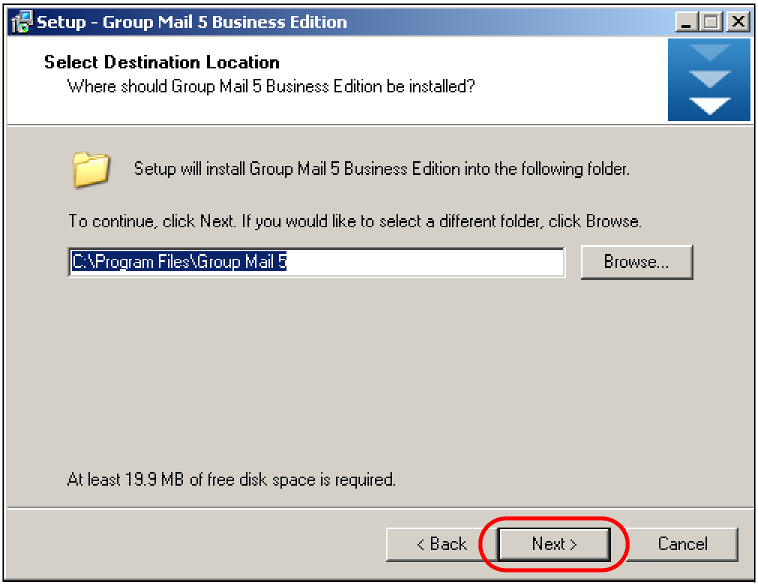


Figure 7 Installation Destination Folder

8. Decide which additional components, if any, you want to install.

Note: You can install Add-ons (see *Add-ons Manager* on page 158) and Templates (see *Using Templates* on page 131) by checking the corresponding check boxes. If you do not want to install these components, ensure that the check boxes are not selected.

---

9. Click Next to continue the installation (see Figure 8).

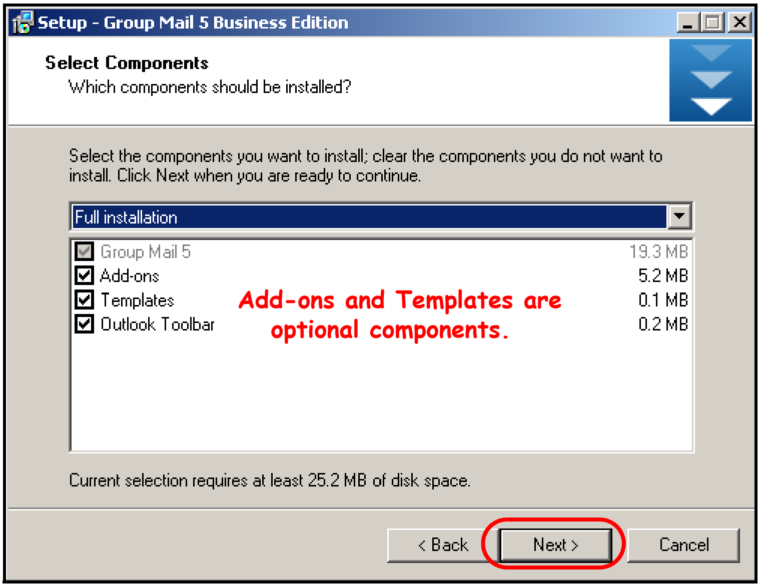


Figure 8 Install Components Window

10. Decide where to place the GroupMail shortcut. If you want to place it somewhere other than the Start Menu folder, click Browse and navigate to the folder of your choice (see Figure 9). Click Next.

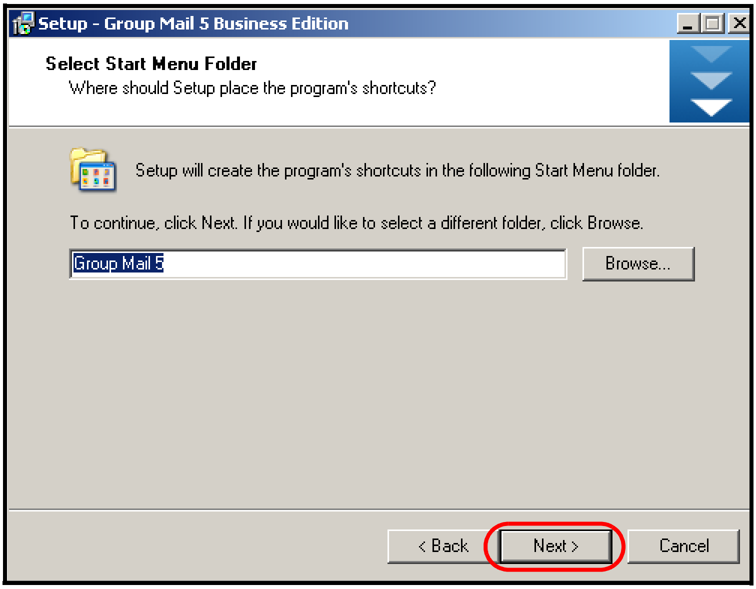


Figure 9 Shortcuts Window

11. Decide if you want to create GroupMail shortcut icons. If so, decide on the location—on the desktop, in the Task Bar's Quick Launch area, or both. Check the appropriate check box, or boxes, to create the shortcut(s). See Figure 10.

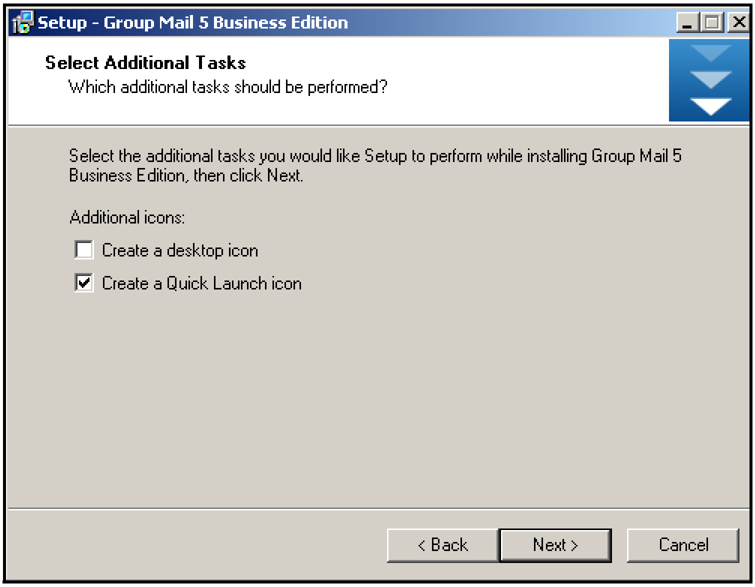


Figure 10 Additional Tasks Window

Note: The Quick Launch icon appears on the left side of the Task Bar, near the Start button.

12. Review your settings by moving the Slider Bar. If you want to change any settings, click Back; otherwise, click Install to continue with the installation (see Figure 11).

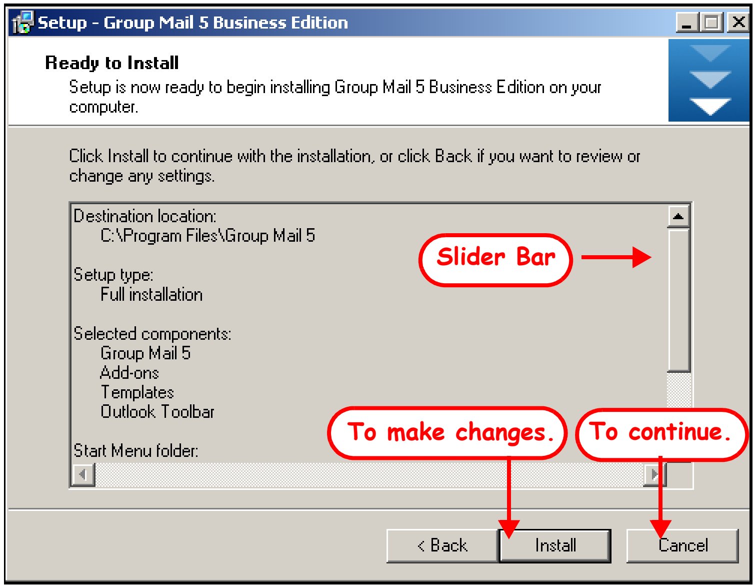


Figure 11 Begin Installation Window

13. GroupMail will now install on your computer. Figure 12 shows the window that displays while the software installs.

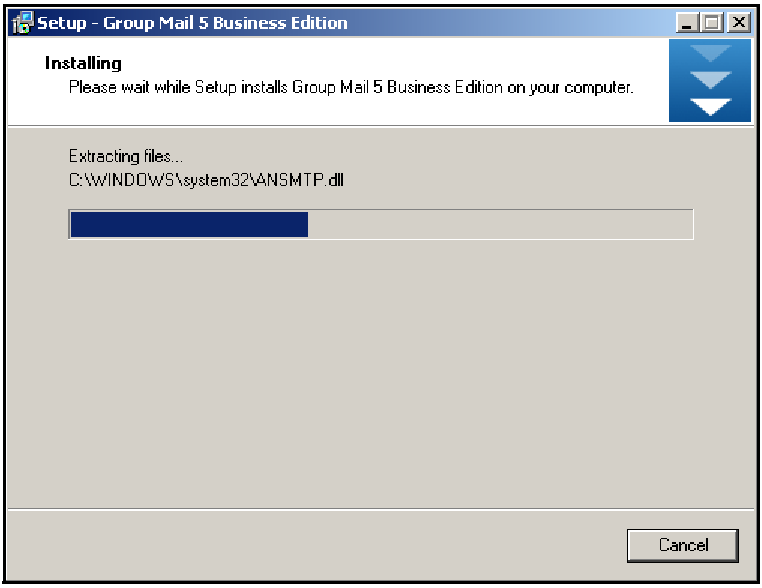


Figure 12 Installing Window

14. After the installation completes, you can launch GroupMail immediately by clicking the check box “Launch GroupMail 5 now” and then clicking Finish (see Figure 13). If you do not want to launch GroupMail 5 now, simply uncheck the box.

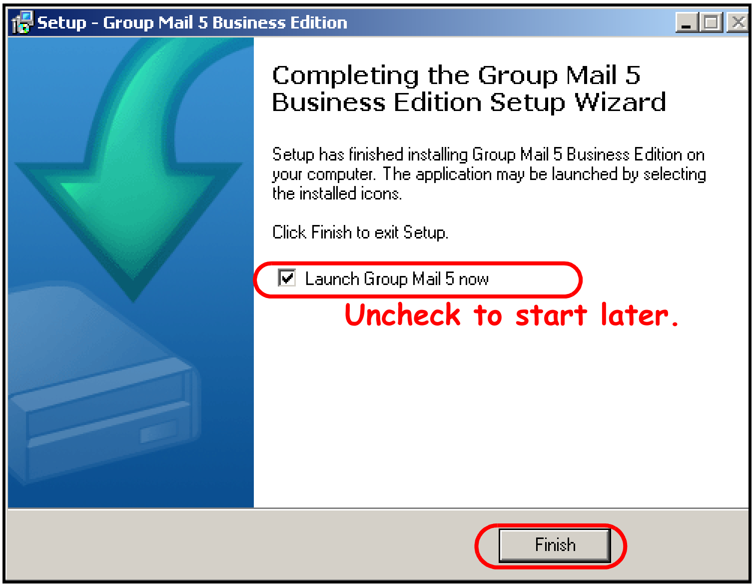


Figure 13 Installation Complete Window

Getting Started Helper

Use the Getting Started Helper, located in the GroupMail Help menu, to guide you through the initial Account and Group setups. To use this feature, follow these steps:

1. From the Help menu, click Getting Started Helper.

2. In the Getting Started window, click Next (see Figure 14).

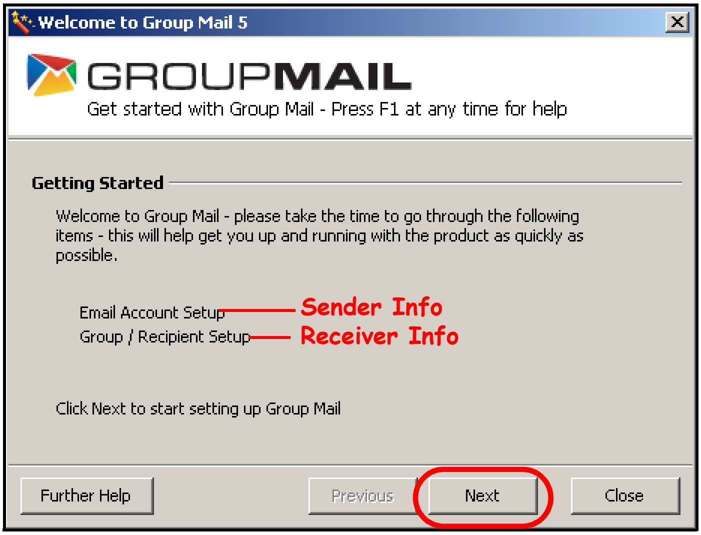


Figure 14 Getting Started Helper Window

3. The Email Account & Identity Setup options let you set up your Account first or go directly to configuring Groups (see Figure 15).

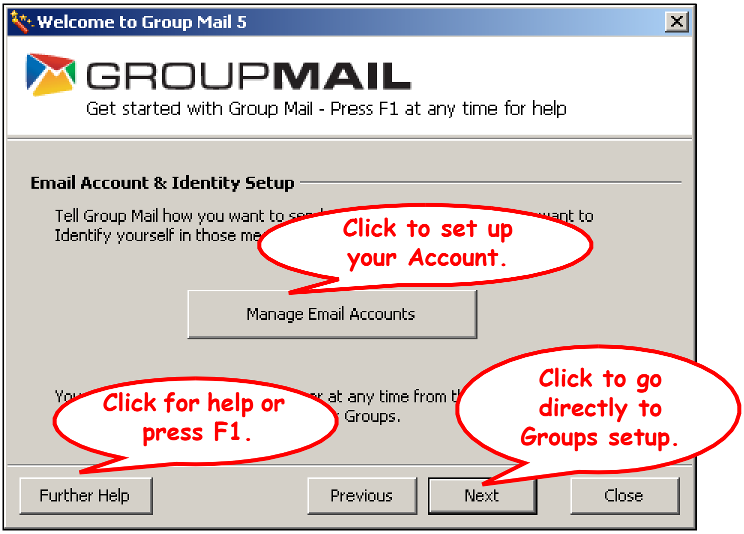


Figure 15 Email Account and Identity Setup Window

Note: To set up your Account information, click Manage Email Accounts and continue with the following steps.

Using the Accounts Manager to Create a New Account

1. In the Account Manager window, create a new Account by clicking New (see Figure 16).

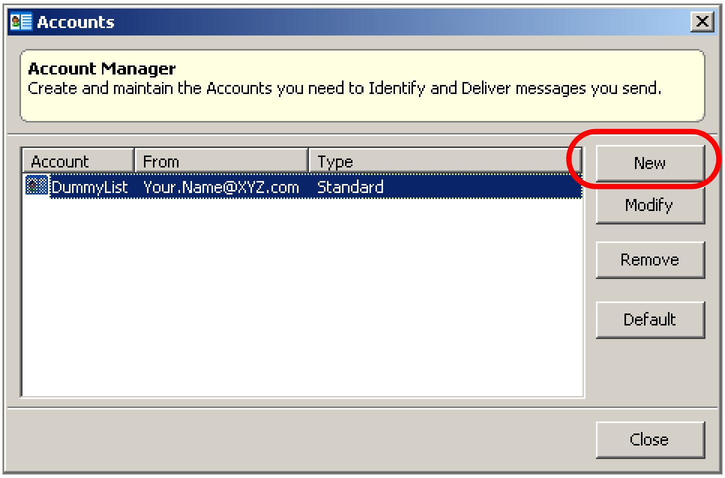


Figure 16 Account Manager Window

Note: Chapter 7 on page 141 discusses the Account Manager in detail.

---

2. In the Account Properties window, enter a descriptive name for your Account, and enter the appropriate information for both the User Information tab (see Figure 17 on page 26) and the Delivery Options tab (see Figure 18 on page 27). Table 2 on page 25 describes the fields for the User Information tab, and Table 3 on page 29 describes the fields for the Delivery Options tab.

Note: Generally, you will not need to change the default values for the Delivery Options. However, if it is necessary to do so, please consult with your System Administrator or your ISP for information on configuring these options.

Table 2 Account Properties: User Information Tab

Name	Enter the name of the person responsible for the e-mail.
Organization	Enter the name of your organization or business.
Email address	Enter the e-mail address of the person responsible for the e-mail.
Reply-to address	Enter the e-mail address to which you want responses sent.
Custom headers	Click Configure to create custom headers (see also *Custom Headers* on page 146).

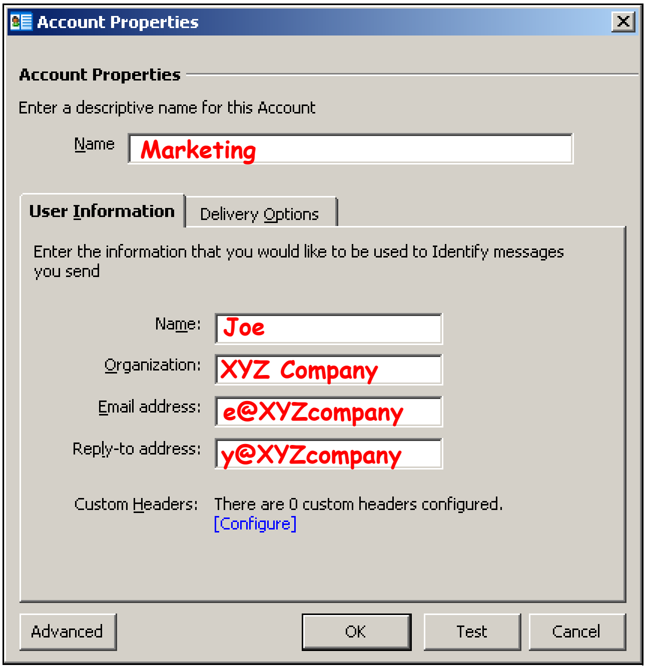


Figure 17 Sample Account Properties - User Information Window

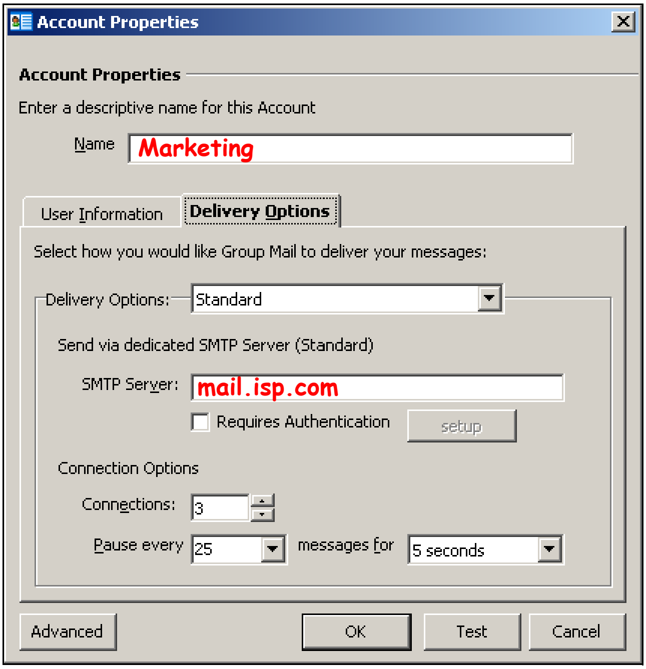


Figure 18 Sample Account Properties - Delivery Options Window

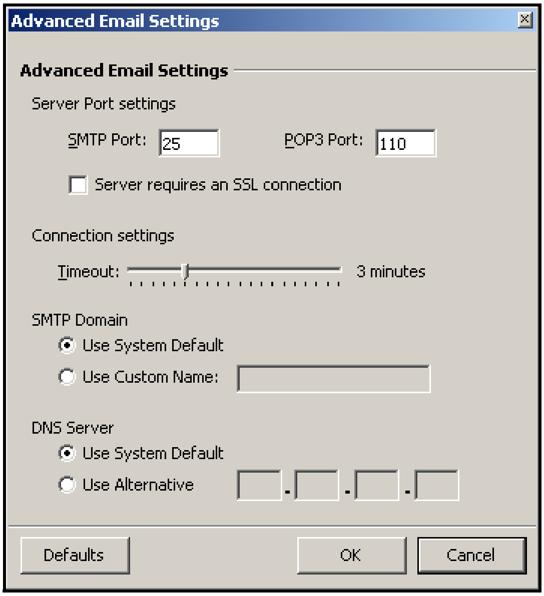


Figure 19 Advanced Email Settings

Table 3 Account Delivery Options

Delivery Options Select from Standard, Direct, or Pickup. **Standard** Sends through an SMTP Mail Server. **Direct** Sends messages directly from the computer using GroupMail. **Retry** - Select the number of times to retry sending a message. **Route on Error** - This selection is optional. Enter the SMTP Relay server address for receiving failed messages. This selection can be used on its own or in conjunction with the Retry option. If the Retry option has been selected, the Relay on Error option only activates after the all retries have been exhausted. **Pickup** - Sends messages to a particular folder in a certain format for a third party application to pick them up and process them.
SMTP Server If you selected the Standard delivery option, enter the name of the dedicated SMTP Server. If the server requires **authentication**, check the Requires Authentication box, click Setup, and enter any required authentication information.

Table 3 Account Delivery Options (Continued)

Connection Options Set the number of connections. Values range from 1 to 128, depending on the version of GroupMail you are using. You can opt to momentarily stop sending messages after a certain number of messages have been sent and for a certain amount of time: **Number of messages sent** Values are 100, 150, 200, 250, 300, 400, 500, or 1000. **Time to pause** Values are No Pause, 5 seconds, 30 seconds, 1-10 minutes, 20 minutes, 30 minutes, or 1 hour.
Advanced Accept the Advanced Email Settings' defaults by clicking Defaults and OK, or enter your own settings and click OK (see Figure 19). **Server Port Settings** Set port numbers for SMTP and POP3. If Server requires an SSL connection, check the box. **Connection Settings** Set the time for a connection time-out. Values range from 30 seconds to 10 minutes. As you drag the slide bar, the amount of time displays above the pointer. **SMTP Domain** Use the system default or enter a custom name. **DNS Server** Use the system default or enter an alternative IP address. **Defaults** Click to return to the default values.
Test Test your settings by clicking the Test button. If your settings are not the way you want them, make changes, and re-test.

3. When your Advanced Email Settings are satisfactory, click OK, close the Account Manager and click Next.

Finishing with the Getting Started Helper

1. If this is your first GroupMail installation you need to set up the Groups to receive your mailings. Chapter 4 on page 49 covers Group setup in detail.

   If you had a previous version of GroupMail installed, you will see those groups listed in the drop-down Groups field (see Figure 20).

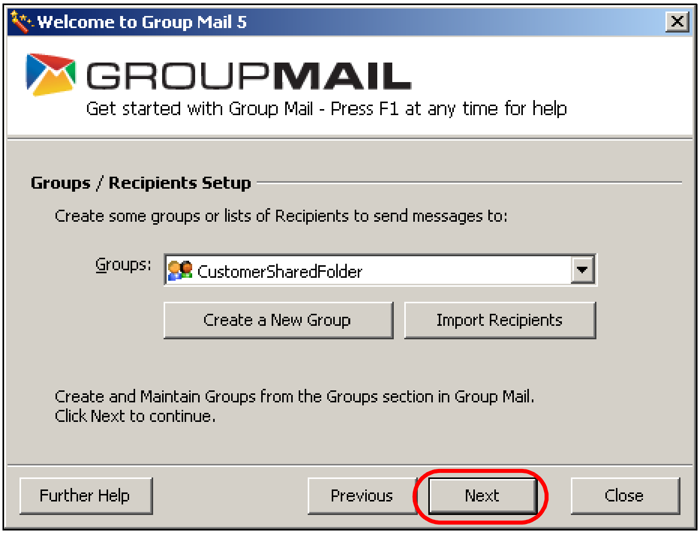


Figure 20 Groups Setup Window

2. Click Next to proceed.

3. Click Close to begin using GroupMail (see Figure 21 on page 32).

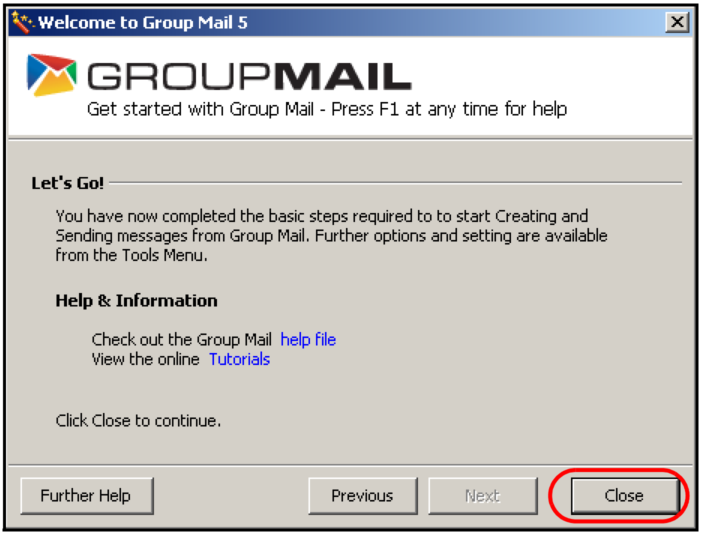


Figure 21 Last Step in Using Getting Started Helper

Scheduler

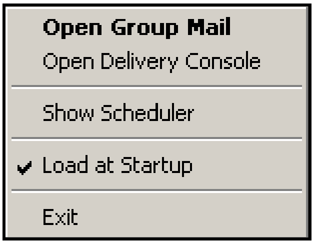
Scheduler creates and manages a mailing schedule. Chapter 6 on page 133 discusses Scheduler in detail.

Scheduler Icon

When you open GroupMail for the first time after rebooting your computer, the GroupMail Scheduler icon ( ) appears in the System Tray, located in the right side of the Task Bar. Use the Scheduler icon to show the Scheduler menus.

Scheduler Icon Menus

The following Scheduler menus can be accessed from the Scheduler icon.



Open GroupMail

Opens GroupMail if it was closed.

Open Delivery Console

See *Delivery Console* on page 34.

Show Scheduler

If GroupMail is open, Show Scheduler takes you directly to the Scheduler. If GroupMail has been closed, right-click on the Scheduler Icon menu and select Show Scheduler to reopen the Scheduler. Scheduled events will then take place.

Load at Startup

Select this menu option to automatically load Scheduler when you start your computer. If selected, a checkmark appears beside the menu name.

Exit

Closes Scheduler, removing the icon from the System Tray. While this action does not close the GroupMail program, it does close Scheduler and any items scheduled in GroupMail will not be processed. To reschedule an event, go to Scheduler in the GroupMail program, open the event, and then click OK.

Note: If you close the Scheduler with the Exit menu, scheduled events will not take place.

Delivery Console

The Delivery Console (see Figure 22 on page 35) shows the delivery status of the current mailing, and lists in the Queue tab the mailings that are waiting to be sent.

To do this...	Click this button...
Pause the current delivery	Pause Delivery
Halt delivery	Stop Delivery
Hide the Delivery Console main window	Hide
Delete mailings in queue	Delete Selected (Queue tab active)

Note: If you click the Hide button, the Delivery Console icon remains in the System Tray. Reopen the window by clicking the Delivery Console Status menu.

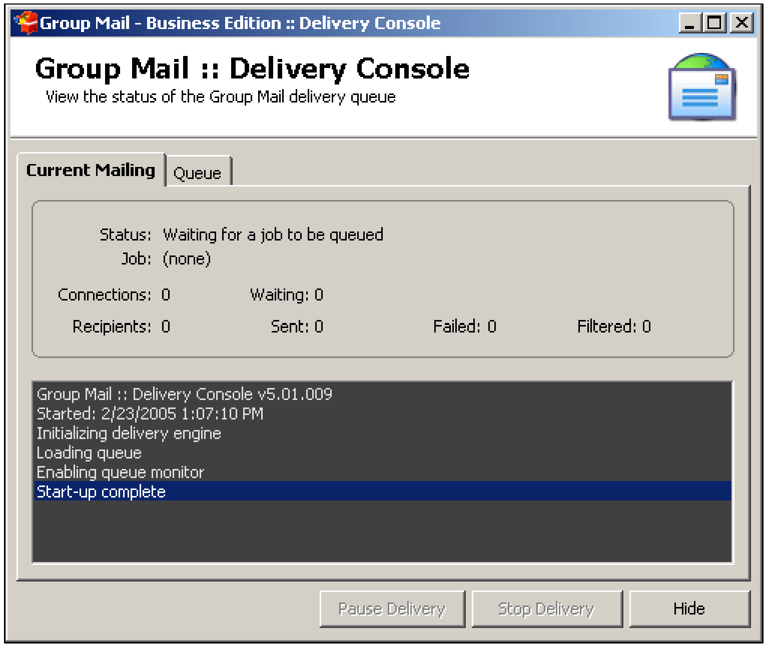


Figure 22 Delivery Console

Delivery Console Icon

When you open GroupMail for the first time after rebooting your computer, the GroupMail Delivery Console icon ( ) appears in the System Tray. You can use the Delivery Console icon in two ways:

1. Double-click the icon to go directly to the Delivery Console.

2. Right-click the icon to access the Delivery Console menus.

Delivery Console Menus

The following Delivery Console menus (opposite) can be accessed from the Delivery Console icon.

<u>Delivery Console Status</u>

This option opens the Delivery Console.

<u>Load at Startup</u>

This option opens the Delivery Console on startup.

<u>Exit</u>

Exit completely closes down the Delivery Console, and removes the icon from the System Tray. Use the Scheduler icon to reopen the Delivery Console if you selected Exit.

GroupMail 3 Formats

To update an existing installation of GroupMail 3, follow these steps:

1. Ensure that GroupMail 3 is not running, and start GroupMail 5.

2. Select File > Import > GroupMail 3 Settings.

3. Select the appropriate options (see Figure 23 on page 37). Click Convert and, when the process completes, click Close.

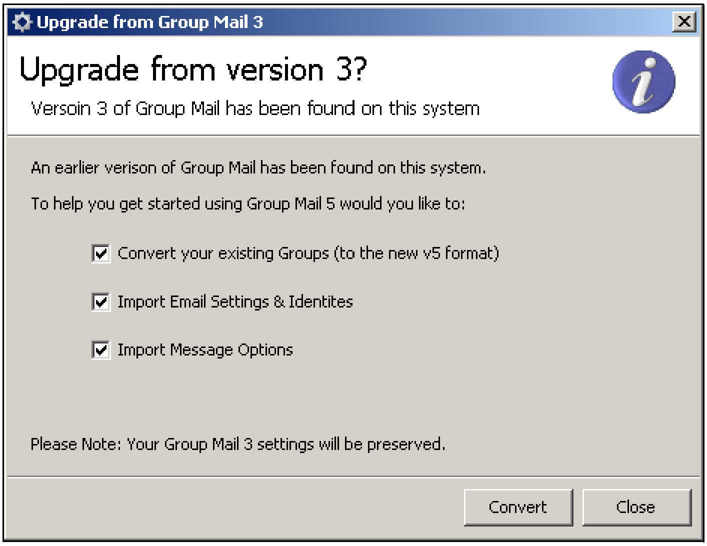
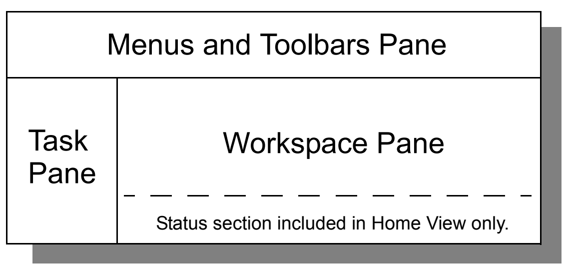


Figure 23 Upgrade Window

CHAPTER 3 *The User Interface*

The User Interface (see Figure 24 on page 40) provides quick access to all of the functions needed to create, send, and manage group e-mail. You can use menus or toolbar icons to take you to the screens necessary to perform tasks.

Simplistically speaking, the user interface is divided into three panes, as shown here:



Note: The User Interface appears slightly different for users of Windows 98 and ME. Instead of using the Task Pane, use the Go Menu which is located in the Menus and Toolbars Pane.

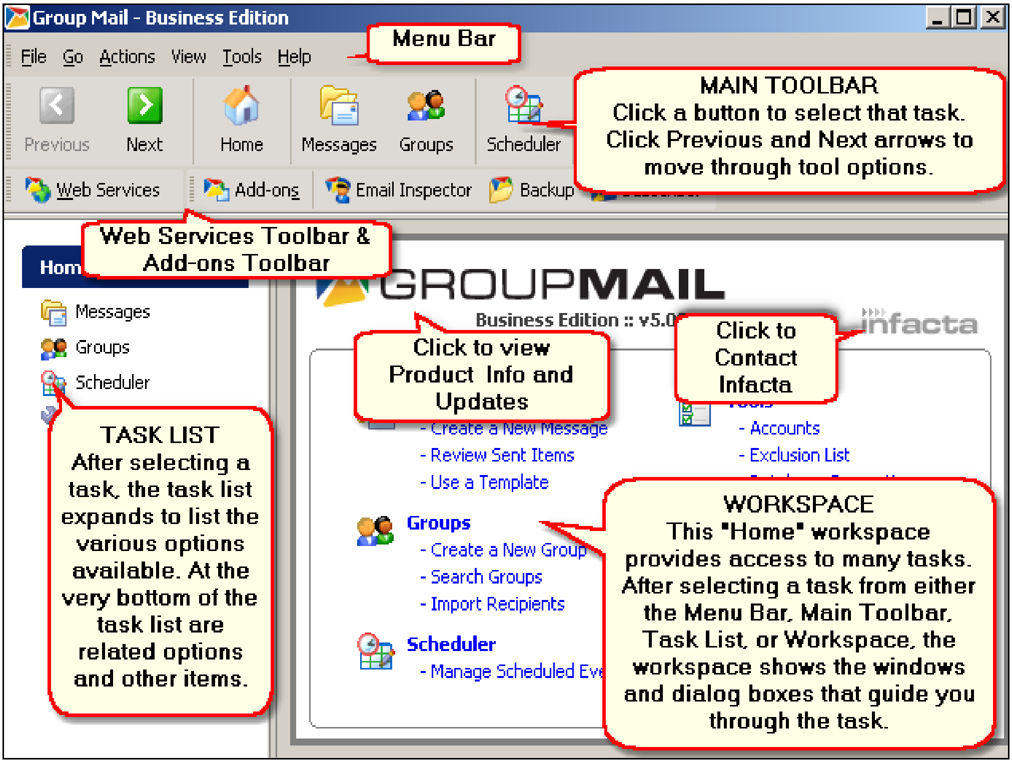


Figure 24   GroupMail User Interface

The following chart briefly describes the main areas of the interface. In-depth discussions follow for each of these areas.

Menu Bar	Provides access to GroupMail menus.
Main Toolbar	Lets you select functions using buttons.
Web Services Toolbar	Provides quick access to online services.
Add-ons Toolbar	Provides quick access to Add-on programs.
Task List	Selects tasks specific to the menu or function selected.
Workspace	Area in which you do most of your work.
GroupMail Logo	View product and update information.
Infacta Logo	Connects you with the Infacta home page.

Adjusting the User Interface Size

You adjust the size of the user interface window by dragging the window borders. To increase the Workspace area, you can also turn off the Toolbars and the Task List. The Menu Bar cannot be turned off.

If the screen size is small, some tools at the bottom of the Task List may not be visible. Use the Task List scroll bars to scroll down. Then click on the chiclets ( ) to view all of the available options.

Workspace

The Workspace is the area in which you create and manage your e-mail. The appearance of the Workspace varies, depending on the task you select from the Menu Bar, the Toolbar, the Task List, or the Home Workspace.

Adjusting the Workspace Size

Adjust the size of the Workspace by turning on and off the Toolbars and by dragging the window borders.

Note: To drag the window borders, move the mouse pointer over the edges or corners of the window. When the pointer changes to a double-ended arrow, hold down and drag with the left mouse button. Release the button when the window is the size you want.

Menu Bar

The Menu Bar is always visible. The Menu Bar selection determines the options available in the Workspace and the Task List. The menus include the File menu, the Go menu, the Actions menu, the View menu, the Tools menu, and the Help menu.

File Menu

Use the File menu to do the following:

- Create a new message.
- Create a new group using GroupMail Format or an external database.
- Import e-mail recipients from an address book, a file, or a database.
- Import GroupMail 3 settings.
- Export groups.
- Exit GroupMail.

Go Menu

When you select an option from the Go menu, the Task List and the Workspace view change to reflect the selected option.

Actions Menu

The Actions menu options vary, depending on the current option. Many of these actions also appear in the Task List.

View Menu

The View menu adjusts the appearance of the Workspace by turning on and off the Main Toolbar, the Web Services Toolbar, the Add-ons Toolbar, and the Task List. To see the toolbars and Task List, check them in the View menu. Uncheck them to hide them.

Tools Menu

Use the Tools menu to do the following:

- Access the Account Manager.
- Create an Exclusion List.
- Set up Database Connections.
- Access Web Services such as Link Tracking, Opt-in Forms, and Online Polls.
- Manage Add-ons.
- Select Message-related Options such as font options and spell check.
- Create and maintain signatures in the Signature Manager.

Help Menu

The Help menu provides important and useful features such as Help Contents, Online Tutorials, and Getting Started Helper; Enter Product Key; Check for Updates, Technical Support Resources, Priority Customer Contact Form, and Customer Downloads; and About GroupMail.

Toolbars

The Toolbars provide quick access to the menu options. You can open and close the Toolbars, depending upon your need to view them. You can open and close the Toolbars using the Views menu or by right-clicking the mouse. In addition, you reposition the toolbars on your computer to give you a larger work area.

Main Toolbar

The Main Toolbar (see Figure 25) provides navigation and quick access to tasks. By default, the Main Toolbar is visible when you open GroupMail, but you can close it and reopen it (see *Closing and Reopening the Toolbars* on page 46).

Figure 25 Main Toolbar

Navigation Arrows

Use the Previous and Next navigation arrows to move quickly through the Main Toolbar buttons. As you move through the various buttons, the Workspace changes to reflect the available options.

Home

The Home button re-sets the Workspace to the Home view.

Messages

Use the Messages button to manage drafts and sent messages as well as templates and other documents. If the Task List is visible, options specific to this function appear there.

<u>Groups</u>

Use the Groups button to create and manage groups of recipients and connections to databases. If the Task List is visible, options specific to this function appear there.

<u>Scheduler</u>

Use the Scheduler buttons to create and manage scheduled GroupMail events. If the Task List is visible, options specific to this function appear there.

<u>Tools</u>

Use the Tools button to manage accounts, an exclusion list, and database connections; access Web Services such as Link Tracking, Opt-in forms, and Online Polls; manage and configure available Add-ons; set message options; run spell check; and create and maintain signatures to use in your messages.

Add-ons Toolbar

Use the Add-ons Toolbar to manage and configure available add-ons for GroupMail. The Add-ons Toolbar can be moved about on your PC screen or it can be turned off entirely (see *Closing and Reopening the Toolbars* on page 46).

Web Services Toolbar

The Web Services toolbar links to *Group-Metrics.com*. From here you can learn more about, and sign up for, a number of web-based utilities and applications which help you to better communicate with your customers. The Web Services toolbar can be moved about on your PC screen or it can be turned off entirely (see *Closing and Reopening the Toolbars* on page 46).

Closing and Reopening the Toolbars

You can open and close the Toolbars using a right-click of the mouse or using the View menu (see the following examples).

Closing the Toolbars...

Using right mouse button	Using the View menu
1. Position the cursor on the Toolbar. 2. Click the right mouse button. 3. Uncheck the Toolbar checkbox.	1. From the Menu Bar, select View > Toolbars. 2. Uncheck the Toolbar checkbox.

Reopening the Toolbars...

Using right mouse button	Using the View menu
1. Position the cursor on the Toolbar. 2. Click the right mouse button. 3. Check the toolbar checkbox.	1. From the Menu Bar, select View > Toolbars. 2. Check the Toolbar checkbox.

Repositioning the Toolbars

Only the Add-ons and Web Services Toolbars can be repositioned. The Web Services Toolbar can be positioned anywhere on your monitor screen. The Add-ons Toolbar can only be positioned within the GroupMail window.

1. With the Toolbar visible, locate the vertical bar on the left side of the Toolbar (see view, opposite).

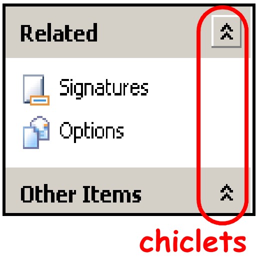
2. Position the mouse cursor over this bar. Notice that the cursor changes to crosshair. Click and hold down the left mouse button.

3. Without letting go of the mouse button, drag and drop the Toolbar to its new position.

Note: Be sure the cross hair is visible before trying to reposition the Toolbars. If you click the Toolbar and let go of the mouse, the Toolbar opens.

Task List

The Task List shows the options available based on the task selected from the Menu Bar, the Main Toolbar, or the Workspace. You can change the appearance of the Task List in two ways:



1. Reduce and expand the Task List menus by clicking the chiclets (see view, opposite).

2. Use the View menu to turn on and off the Task List.

Note: The Task List is not available for Windows 98 or ME.

Performing Basic Tasks

As you use GroupMail, you will observe that you can often access the same task from the Menus, Toolbars, Task List and Workspace. This accessibility allows you to quickly perform various tasks.

CHAPTER 4 *Working with Groups*

In GroupMail, a mailing list is called a Group. You set up fields in each Group to store contact details and other data for each recipient (for example: name, address, phone number, etc.). Use the information in these fields to personalize messages for each recipient. You can have multiple groups, and particular recipients can be included in multiple groups or excluded from certain groups.

Note: At a minimum, each Group must store the e-mail address of the recipients.

GroupMail uses two types of Groups—GroupMail Format Groups and External Database Groups.

- GroupMail Format Groups store the recipient details locally on your PC or on a shared network folder (see *GroupMail Format* on page 50).
- External Database Groups link to a database that you select (see *External Databases* on page 59).

Figure 26 shows the User Interface when Groups is selected.

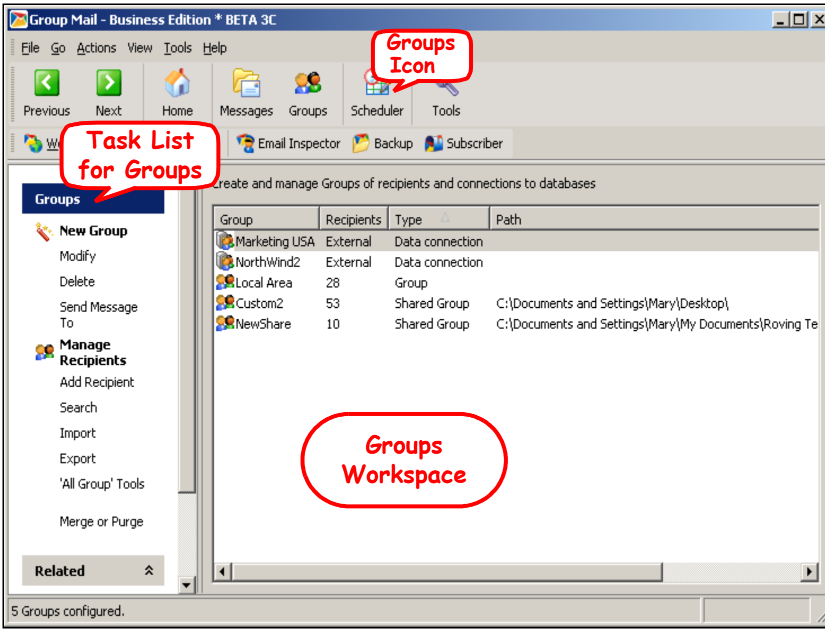


Figure 26 Groups Workspace

GroupMail Format

GroupMail Format recipient details are stored locally on your PC or on a shared network folder.

Creating a New Group (GroupMail Format)

1. Open GroupMail to the Groups workspace. (Click the Groups toolbar icon or select Groups from the Go menu.)

2. In the Groups Task List, click Create a New Group.

3. Leave the GroupMail Format (Default) radio button checked, and click Next (see Figure 27).

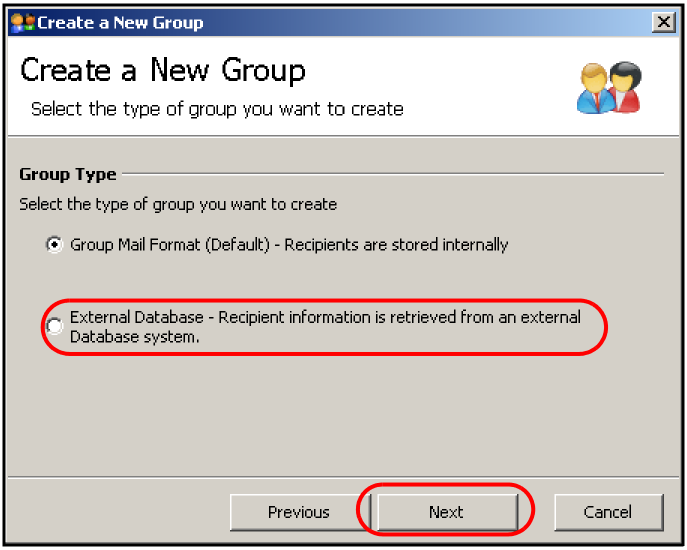


Figure 27 New Group Window

4. Select the location in which to store the new group and click Next (see Figure 28 and Table 4).

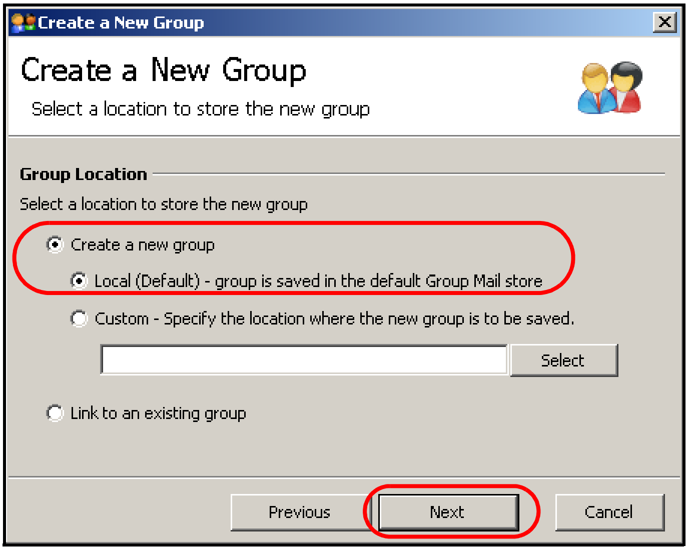


Figure 28 Group Location Window

Table 4 Group Storage Location Options

Local (Default)	Select this option to save the Group in GroupMail's default location.
Custom	Click the Select button to browse to and select a location of your choice for storing the Group information.

5. Set up the structure (i.e., the fields) for the details you want stored with each Group recipient (see Figure 29). At a minimum, each Group must include an e-mail address field.

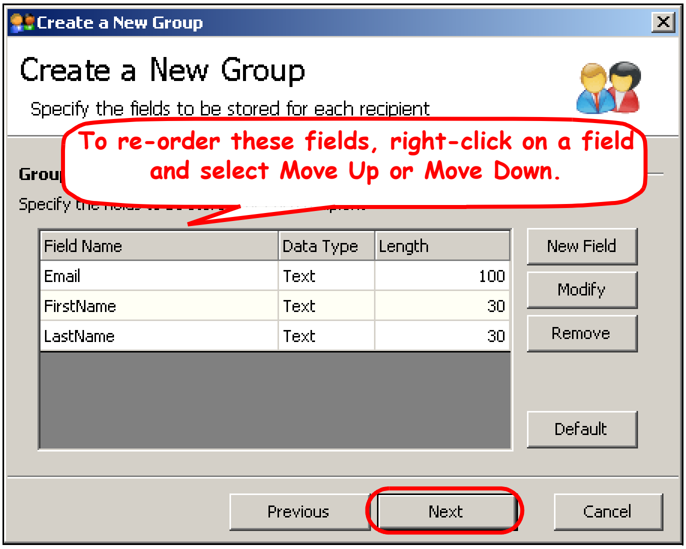


Figure 29 Group Structure Window

Note: Currently, if you want to change the group structure *after* the Group is created, you will create a new group and then use the Move or Copy functionality to send the data to the new group. To change the group structure *now* (add, modify, or remove a field), see *Working with Fields* on page 55.

---

6. Click Next after the structure is set up.

7. From the drop down Email field, select the name of the field that holds the e-mail address (see Figure 30). Click Next when you are done.

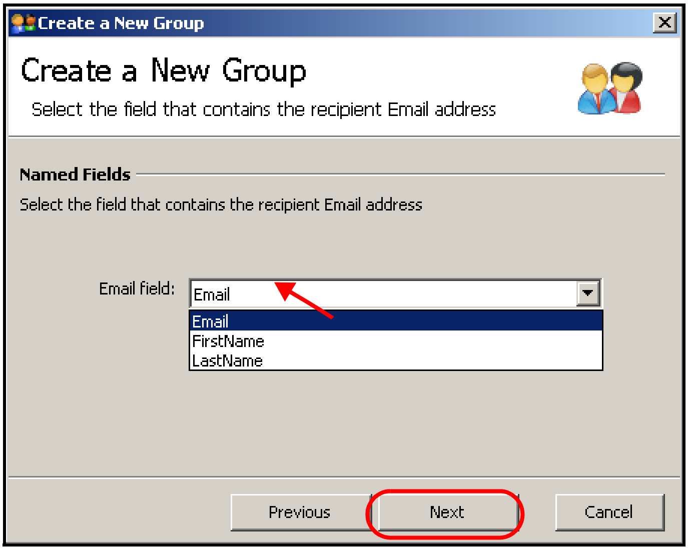


Figure 30 Email Field Window

8. Enter a name for this new group and click Create (see Figure 31 on page 55).

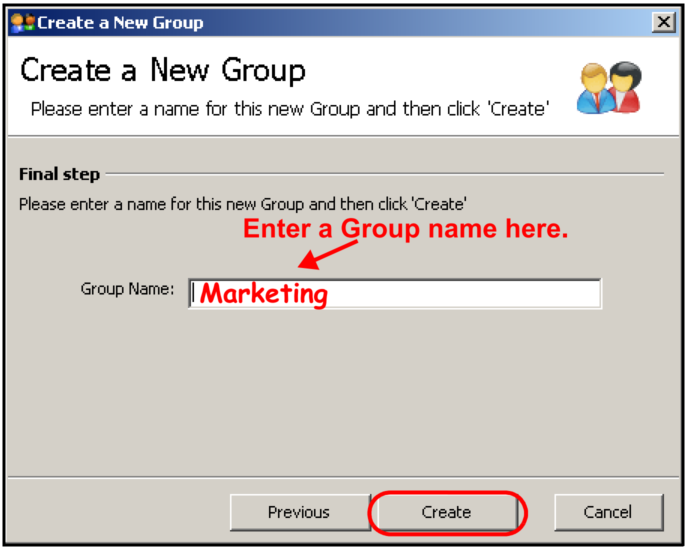


Figure 31 Naming the New Group

Note: To review your information before creating the Group, click Previous.

Working with Fields

While creating a new Group, you can retrieve GroupMail 3 fields, add new fields (see page 56), modify existing fields (see page 57), and remove fields (see page 57). In addition, fields have size limitations (see Table 5, *Field Size Limits,* on page 58).

GroupMail 3 Fields

You can restore GroupMail 3 fields by clicking the Default button (see Figure 29 on page 53).

Creating a New Field

1. In the Group Structure window (see Figure 29 on page 53) click New Field.

2. In the window that opens (see Figure 32), enter a field name (limited to 10 characters), field type, and field size.

Note: The Field Name should be unique to the Group, up to 10 alphanumeric or underscore characters and start with an alpha character.

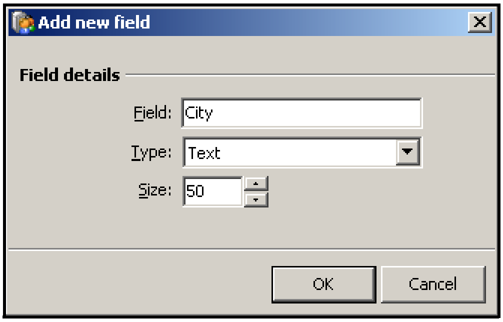


Figure 32 Add New Field Window

3. Click OK. The new field is added to the list of other fields.

4. Continue steps 1—3 until you have set up all of the new fields.

Note: See Table 5, *Field Size Limits,* on page 58 for a list of field size limitations.

Modifying a Field

1. In the Group Structure window (see Figure 29 on page 53), highlight the field to change and click Modify.
2. Change the field name, type, and size as necessary.
3. Click OK.
4. Continue modifying fields as necessary.

Removing a Field

1. In the Group Structure window (see Figure 29 on page 53), highlight the field to delete and click Remove.

Note: There is no "undo" to the Remove process, so if you unintentionally delete a field, you will need to add it back (see *Creating a New Field* on page 56).

Field Size Limitations

The Email address field is limited in size to 240 characters. The following limits exist for the other field types:

Table 5 Field Size Limits

Field Type	Max Length	Range
Text	254	ANSI text up to 254 chars
Number	20	-.9999999999E+19 to .9999999999E+20
Date	8	Jan 1st 0001 to Dec 31st 9999
Currency	8	-922337203685477.5807 to 922337203685477.5807
Boolean	1	True / False
Unicode	254	127 Unicode characters

Modifying Groups (GroupMail Format)

Modifying GroupMail Format Groups renames or moves the Group.

1. Open GroupMail to the Groups workspace. (Click the Groups toolbar icon or select Groups from the Go menu.)

2. Highlight the Group to modify.

3. Click Modify in the Task List, and the Modify Group Details window opens (see Figure 33 on page 59).

4. To change the Name, see *Changing a Group Name* on page 59.

5. To change the location, see *Moving a Shared Group* on page 59

Figure 33 Modify Group Details Window

Changing a Group Name

1. Change a Group name by typing over the existing name.

2. Click OK when you are done.

Moving a Shared Group

1. Change a Shared Group's location by clicking the ellipse button and navigating to the new destination.

2. Click OK when you are done.

External Databases

External Database group types store Group recipient details in an external database. GroupMail links to this database to retrieve information.

Creating a New Group (External Database)

1. Open to the Groups Workspace (Go > Groups or click the Groups icon).

2. In the Task List, click Create a New Group.

3. Click the External Database radio button and click Next (see Figure 34).

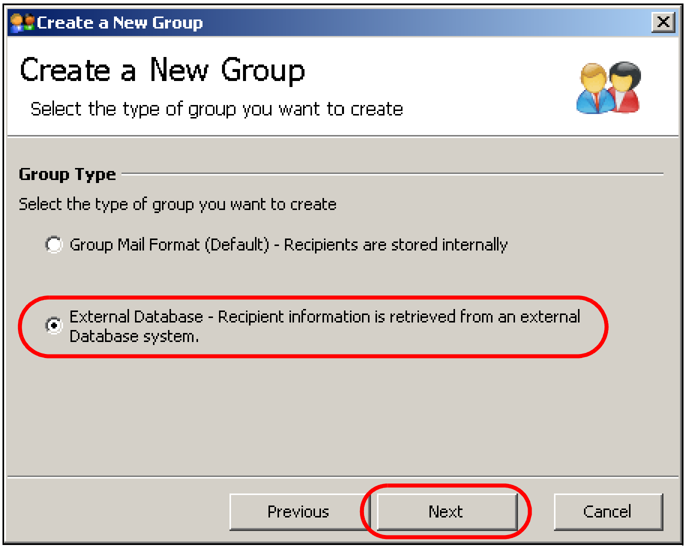


Figure 34 External Database Group Type Window

4. From the Database connection window (see Figure 35), highlight the database you want to use and click Next.

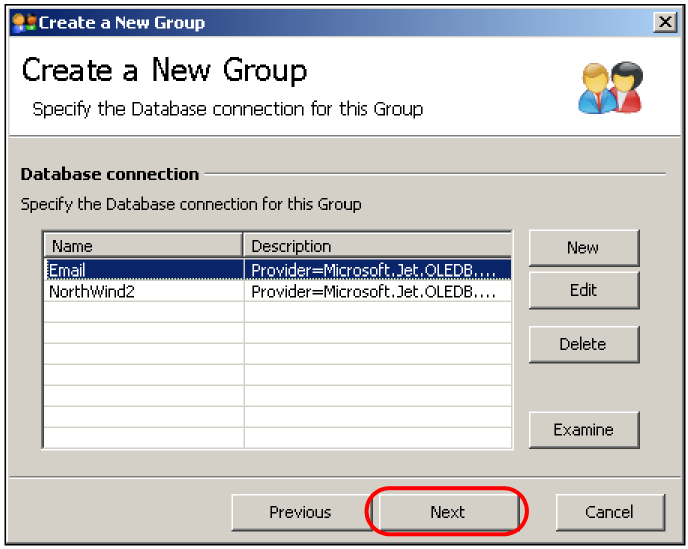


Figure 35 Database Connection Window

Note: If the database does not appear in this window, click New to create a new database connection. See Chapter 7 on page 141 to create, edit, delete, or examine a database connection.

5. Select data from a database table or from database records for this Group. (See *Selecting a Database Table for a Group* on page 62 or *Using Database Records for a Group* on page 65.)

6. In the Create a New Group / Named Fields window, select the field that you want to use for retrieving e-mail addresses from the drop-down list. Click Next.

7. As the final step, enter a name for this Group and click Create.

Selecting a Database Table for a Group

1. From the drop-down list of tables, select the table that has the information you want to link to (see Figure 36).

Figure 36 Selecting a Database Table

2. If necessary to review the contents of a table, click [Filter] and select an SQL query (see Figure 37).

Figure 37 Filter for Running SQL Query

Note: The Query Builder lists previous queries and allows you to add, modify, or remove the statement. For more information on using SQL queries, see *Importing Recipients* on page 74.

---

3. To see the query results, click Results.... (see Figure 38).

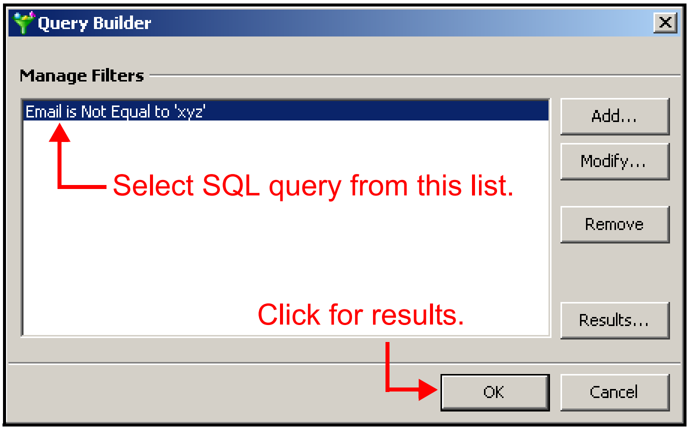


Figure 38 SQL Query Builder

4. After reviewing the results, close the Results window. Click OK on the Query Builder window, and click Next on the Select Records window to continue.

Using Database Records for a Group

1. Click Specify records using SQL, and click [SQL] to start search (see Figure 39).

Figure 39 Beginning Window for Specifying a SQL Query

2. In the SQL Query details window, enter a valid SQL statement (see Figure 40). Table 6, *SQL Query Window Options,* on page 66 describes the window options.

Table 6 SQL Query Window Options

Check Syntax	Enter SQL statement, and click Check Syntax for validity.
Results...	Returns results.
Show/Hide Fields	Review and hide the table names and fields .
Tables	Lists the tables in the selected database.
Fields	Lists the fields in the selected database.

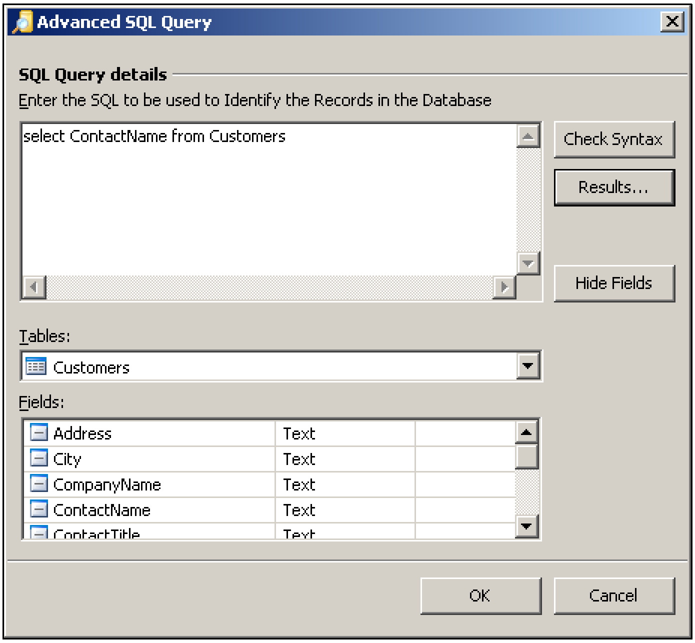


Figure 40   SQL Query Details Window

3. Click Check Syntax. If the statement is valid (see Figure 41), click OK and run the query by clicking Results... in the the SQL Query details window.

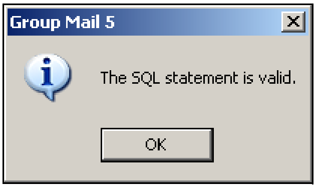


Figure 41 Valid SQL Statement Notification

Note: If the SQL statement is not valid (see Figure 42), click OK and make the corrections. Recheck the statement and proceed when the statement is correct.

Figure 42 Invalid SQL Statement Notification

4. After reviewing the results, close both windows and click Next to continue.

The Results window shows the field name followed by the field data, and the number of records returned.

Figure 43 Returned Results

Modifying Groups (External Database)

Groups linked to an external database can be modified to change the group name, change the database connection, and redefine group contents such as specifying which database table to use, entering a SQL query, and specifying the field that holds an e-mail address.

1. Click Groups in the Home Workspace.

2. Select a group of the type Data Connection.

3. Click Modify in the Task List, and the Modify Database Group window opens (see Figure 44 on page 70). Make the necessary changes (see Table 7, *Modifications Options for External Database Group,* on page 69).

Table 7 Modifications Options for External Database Group

Specify a Name for the Group

Change the name of the database by typing over current text..

Choose a Database Connection

Make changes to the database connection by clicking Manage. (See Chapter 7 for more information on working with the Database Connections Manager.)

Define Group Contents

Select to work with tables or records:

Specify Database Table
Select a database table (see also, *Creating a New Group (External Database)* on page 59.

Advanced data selection and Qualification
Enter an SQL query to select the records you want to use ((see also, *Creating a New Group (External Database)* on page 59.

Specify the Field that contains the Email address

Select the appropriate field.

4. After modifying the database group, click OK.

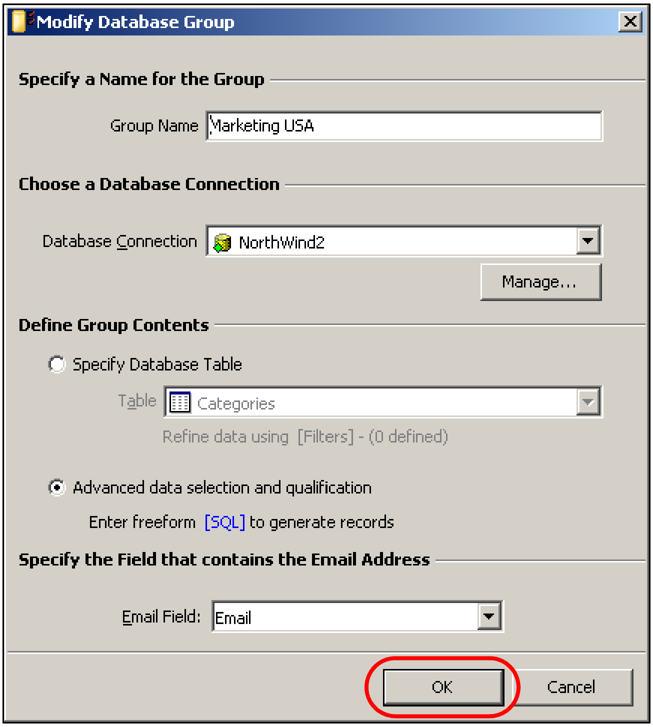


Figure 44 Modify Database Group Window

Deleting Groups

1. Open to the Group Workspace (Go > Groups or click the Groups icon).

2. In the Workspace, highlight the Group that you want to delete.

3. Select Delete from the Task List. (You can also right-click on the Group and select Delete.)

4. When you are prompted, confirm this action by clicking Yes. To keep the Group click No.

Adding a Recipient to a Group

1. Open to the Group Workspace (Go > Groups or click the Groups icon).

2. In the Workspace, highlight the Group to receive the new recipient.

3. Select Add Recipient from the Task List. (You can also right-click on the Group and select Add Recipient.)

4. In the Add recipient details window (see Figure 45), enter the appropriate information by double-clicking in each field, and then click OK.

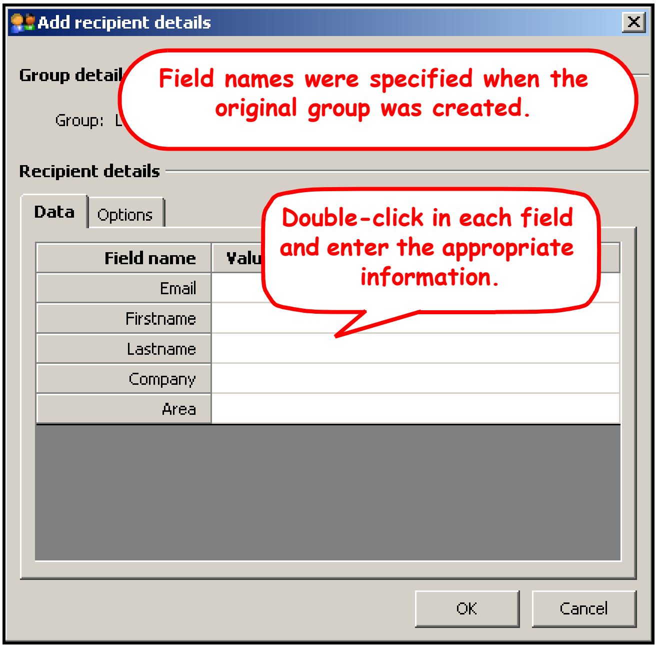


Figure 45 Add Recipient Details Window

5. If, for some reason, you want to exclude this recipient from receiving e-mail, you can set up exclusion information at this time by clicking on the Options tab and making your selections (see Figure 46).

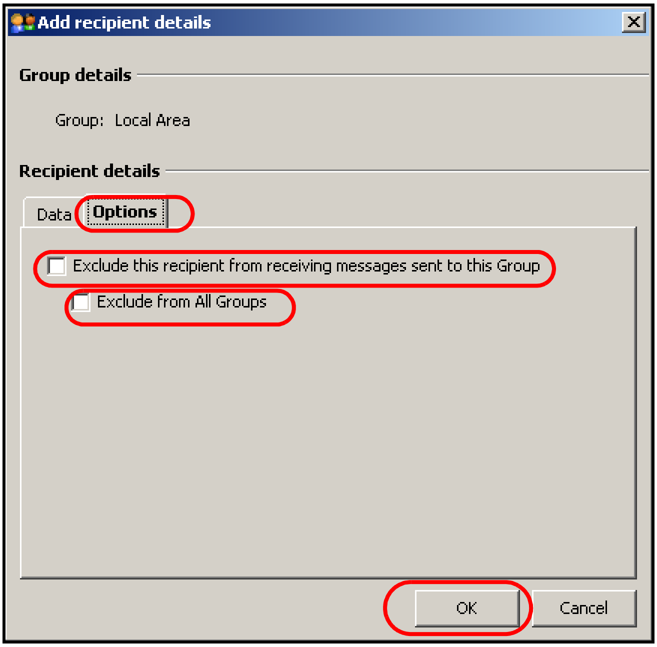


Figure 46 Exclude Recipient Details Window

6. Click the OK button to close the window.

7. Click OK again when you are done adding the recipient.

Note: Rather than enter a large number of recipients one-by-one, use the Import Recipient feature (see *Importing Recipients* on page 74).

Importing Recipients

You can import into GroupMail existing lists, address books, and databases. In addition, you can import data from text and binary files, including Windows clipboard. For a complete list of file types that can be imported, see *GroupMail Business Edition* on page 2.

1. Open to the Groups Workspace (Go > Groups or click the Groups icon).
1. Highlight the Group into which you want to import recipients.
2. Click Import in the Task List (or right-click and select Import).
3. Select the type of importing you want to do (see Figure 47).

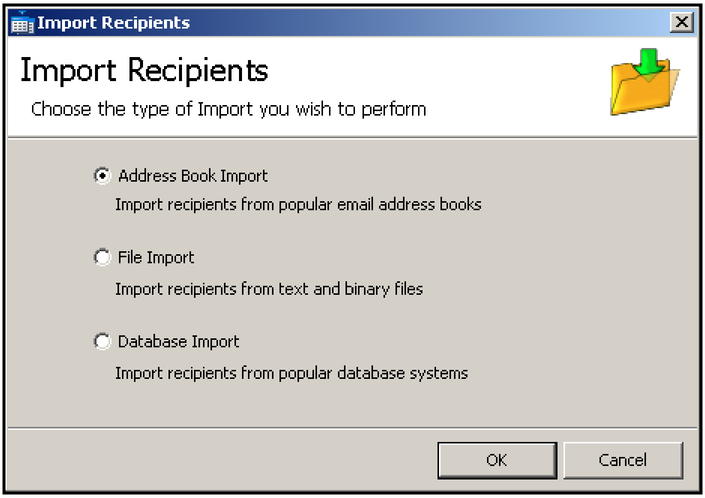


Figure 47 Import Recipient Window

Note: Each type of importing is discussed separately in the following sections: *Address Book Import* on page 75, *File Import* on page 82, and *Database Import* on page 89

Address Book Import

1. Select an e-mail application from the available list and click Next (see Figure 48).

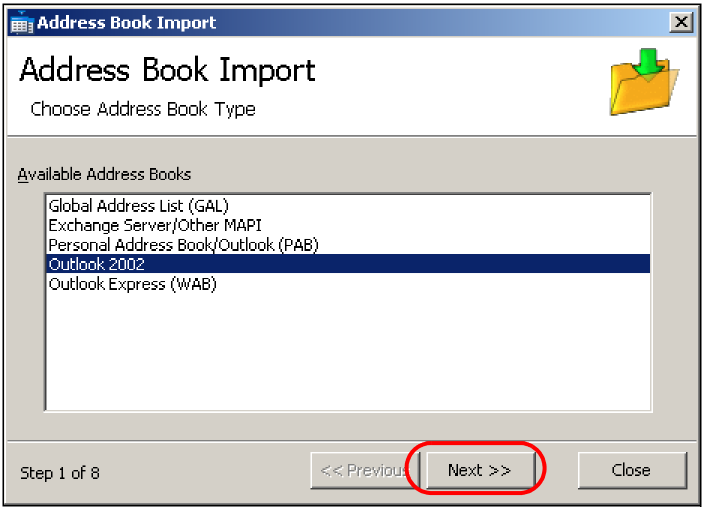


Figure 48 Available Address Book Window

Note: The e-mail program(s) installed on your system determine your choices in the following steps.

2. Select the address book that you want to use and click Next. See Figure 49 and Table 8 for help in determining which option to choose.

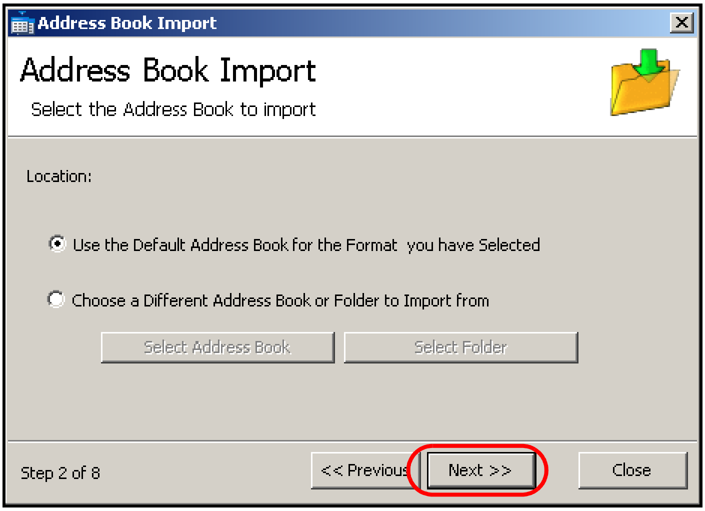


Figure 49 Address Book Import Window

Table 8 Import Location of Address Book

Default Address Book	If you have not set up any address books on your e-mail client, then the Default Address Book will be the only one available.
Different Address Book	If you have set up more than one address book and want to use one, other than the default, select the Different Address Book option. **Select Address Book** Browse to the Address Book location, select, and click OK. **Select Folder** Browse to the Folder location, select, and click OK.

3. Select whether to import the entire address book, or specified distribution lists within the address book (see Figure 50 and Table 9). Click Next.

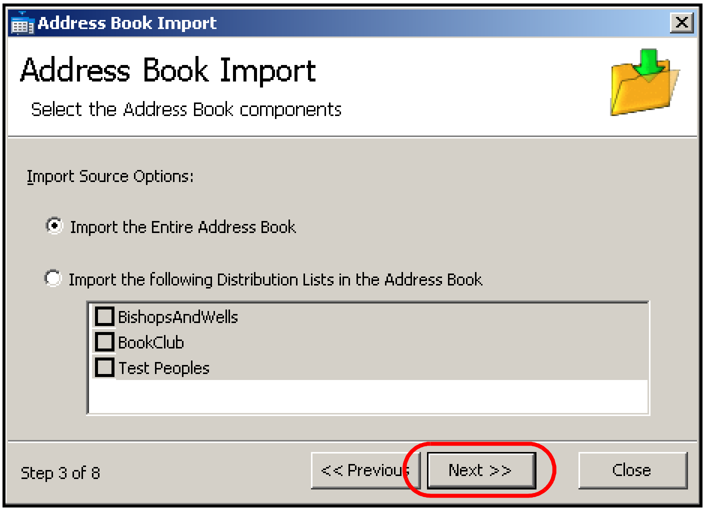


Figure 50 Select Address Book Components

Table 9 Import Address Book Components

Import Entire Address Book	Imports the entire address book.
Import Distribution Lists	You select the distribution lists available from the address book by checking the box, or boxes, next to the list you want to import..

4. Select the Group into which you to import the recipients (see Figure 51). Click Next.

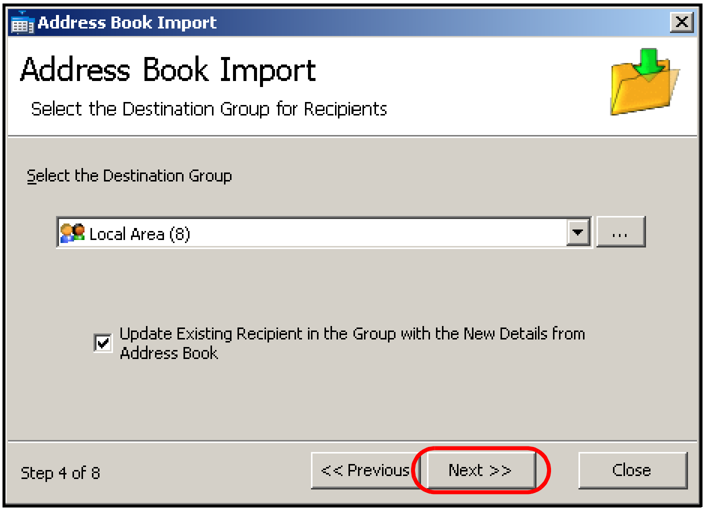


Figure 51 Destination Window

Note: To update existing recipients with new information from the address book or folder, check the update box.

5. Map the address book fields to those already in the Group (see Figure 52).

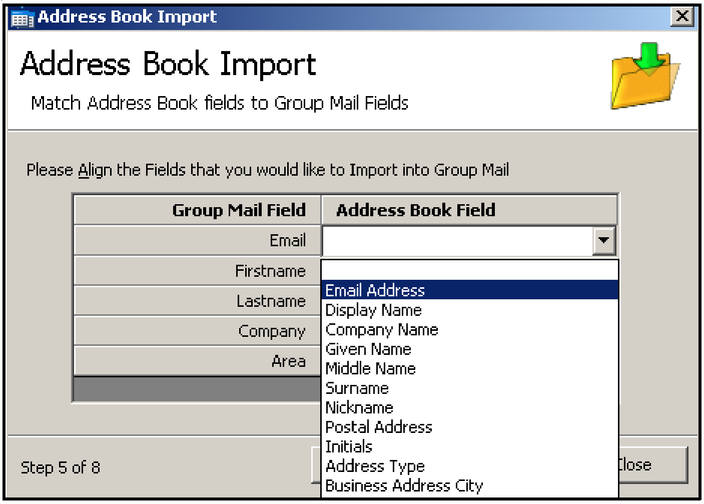


Figure 52 Map Fields Window

Note: If the address book contains more fields than the Group, those fields will not be imported. Also, the only required field is the e-mail field.

6. Start the import process by clicking Start button (see Figure 53).

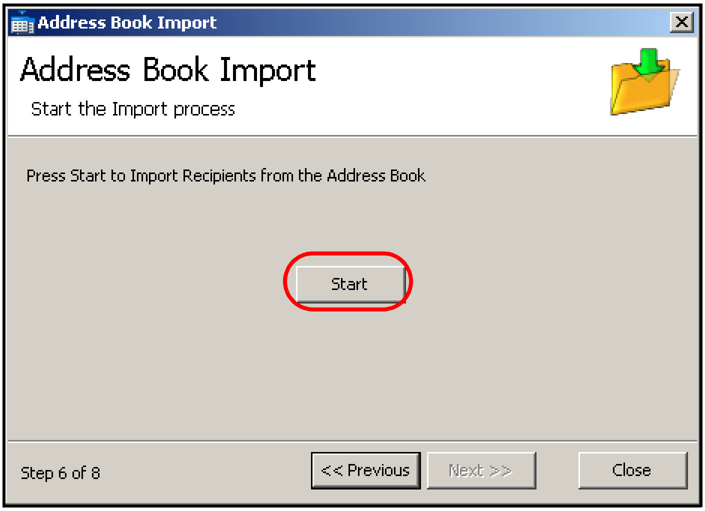


Figure 53 Start Import Process Window

Note: Please wait while GroupMail imports the recipients.

7. After GroupMail imports your recipients, you can review the statistics of the records imported, view the log file to determine which addresses were not imported, and opt to import another address book (see Figure 54 on page 81 and Table 10 on page 81).

8. When you finish, click Close.

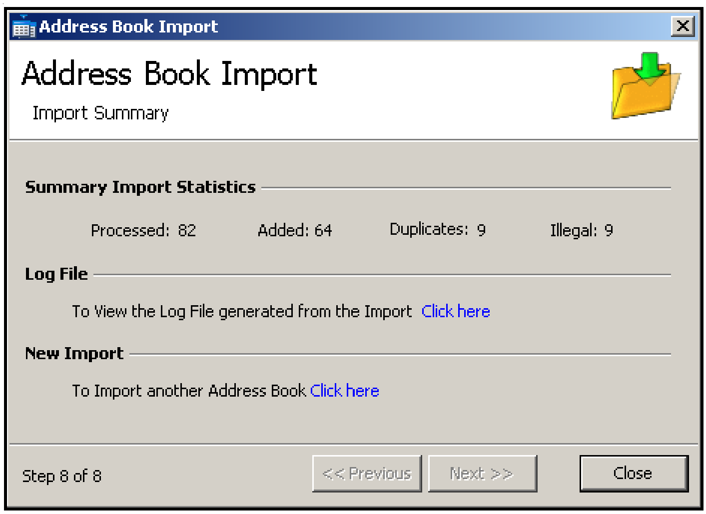


Figure 54 Import Summary Window

Table 10 Summary Options

Summary Import Statistics	**Processed** - the number of recipients reviewed. **Added** - the number of recipients actually added to the Group. **Duplicates** - the number of duplicate entries (not added). **Illegal** - the number of entries not added for other reasons.
Log File	The log file provides information about the records imported including duplicates and those deemed illegal.
New Import	You can import more books from this window—just click on “Click here.”.

File Import

Data imported from a file must be laid out so that it that can be mapped to an existing GroupMail Group. Data can be copied to the Windows Clipboard and then imported into GroupMail, but it still needs a layout.

1. Begin by checking the File Import radio button (see Figure 55) and clicking OK.

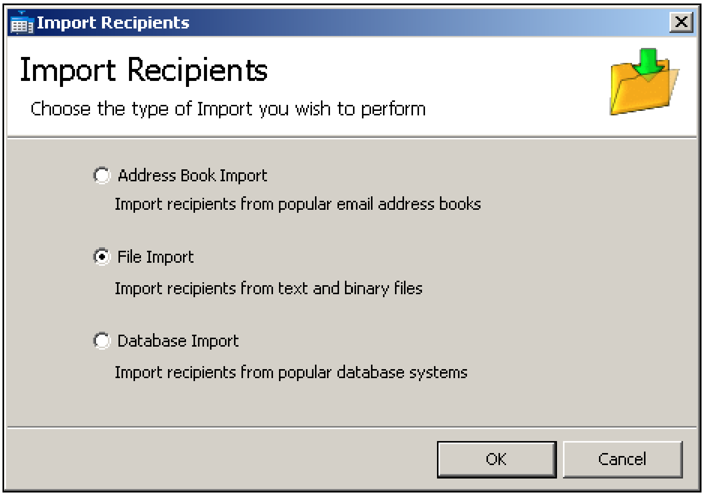


Figure 55 File Import Window

2. Select the location of your data source, either from a file or from the Windows Clipboard (see Table 11 and Figure 56). This procedure is the same for both types of data input.

Table 11 Selecting a Data Source

From File	If the data is coming from a file, you can browse to its location by clicking the Select... button.
From Clipboard	To import data using the Clipboard, copy the data to the clipboard before trying to import the data.

3. Click Next.

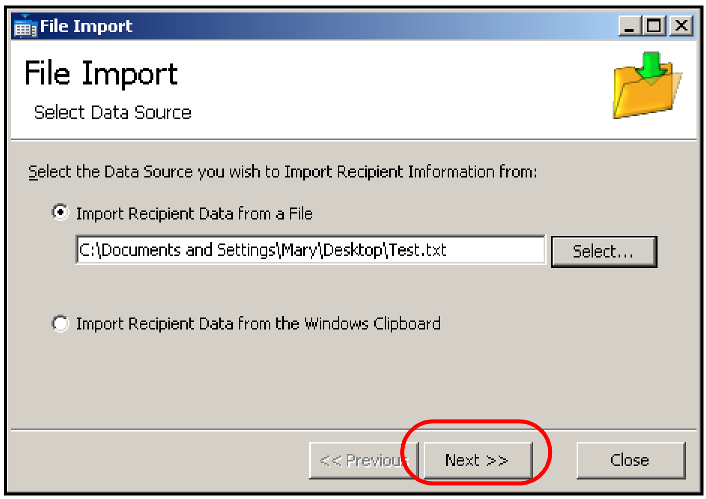


Figure 56 Data Source Selection Window

4. Specify how the data is to be laid out or delimited (see Table 12 on page 84 and Figure 57).

5. Click Next.

Table 12 Mapping Delimited Data

Delimited Text	
	Each Line in the Import Data Enter the number of fields contained on each line.
	Fields are Delimited by the Indicate the delimiter for each field.: Options include comma, tab, spaces, semicolon, and pipe.[a]
All other File/Data formats	
	Instruct GroupMail to retrieve only e-mail addresses.

a. Do not use spaces in addition to another delimiter. The space could be read as a character in the e-mail address resulting in an illegal address.

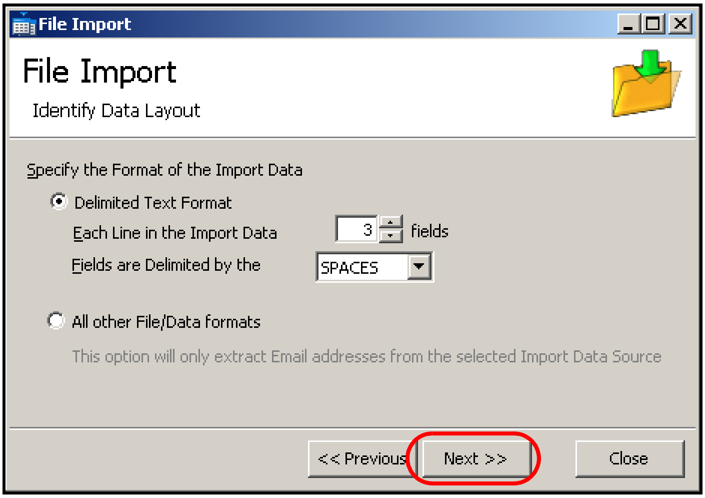


Figure 57 Data Layout Definition Window

6. Select the Destination Group, that is, the Group that will receive the new recipients, by clicking the ellipse button and selecting the Group from the drop-down list (see Figure 58). Click Next.

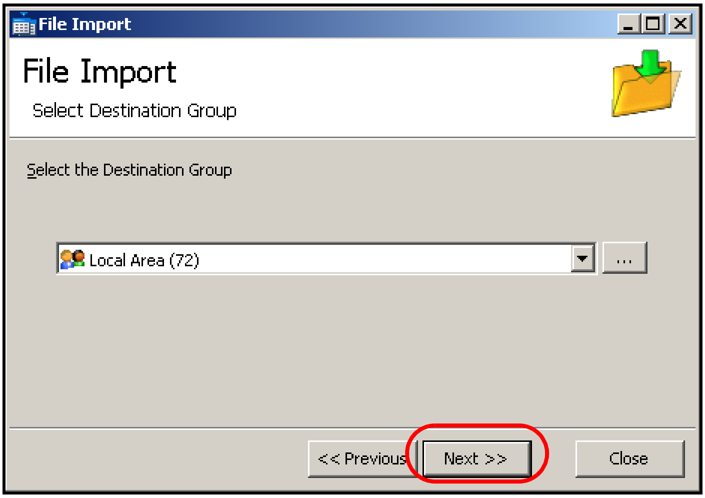


Figure 58 Set Destination Window

7. Map the fields you are importing to the existing GroupMail fields (see Figure 59). Double-click in the Imported fields area to reveal the fields available. Click Next.

Note: It may take a second or two for the GroupMail Fields to populate the window.

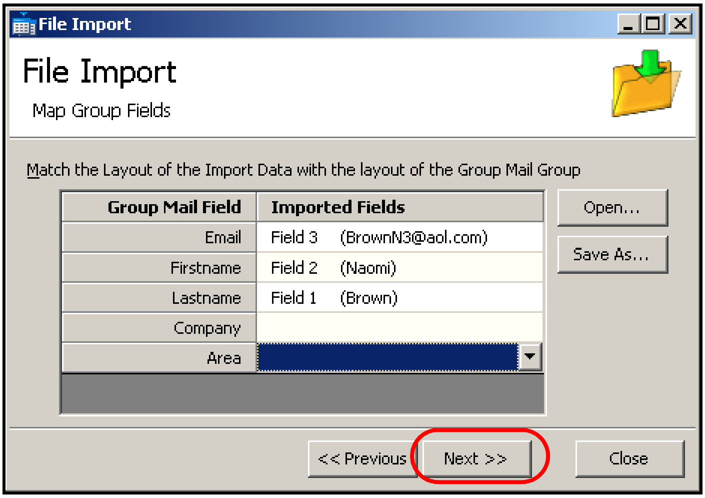


Figure 59 Map Group Fields Window

8. Click the Start button to begin the import process (see Figure 60).

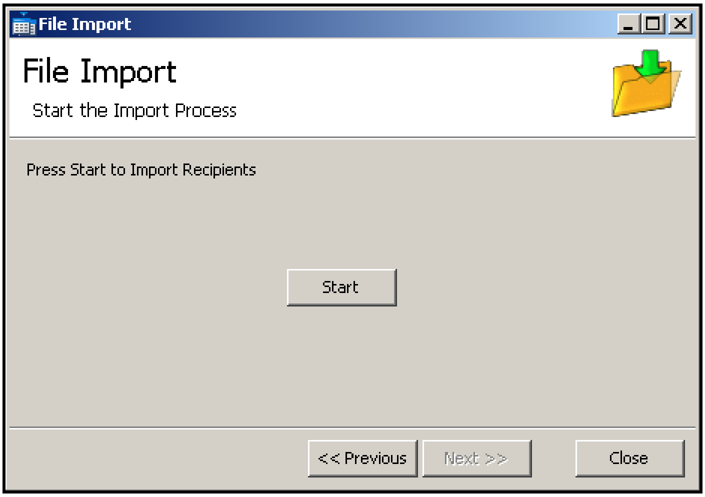


Figure 60 Start Import Process Window

9. After the import process has finished, a summary of the actions displays. (See Figure 61 on page 88 and Table 10, *Summary Options,* on page 81 for a description of the summary information.)

   In Figure 61 on page 88, three records were processed for importing, but none were added because two were duplicates (they were already in the group) and one was illegal (in this case, an illegal space was in the e-mail name).

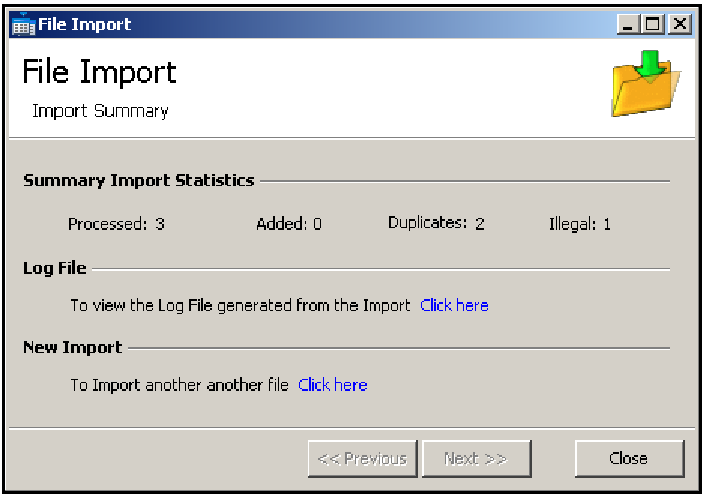


Figure 61 Import Summary Window

10. To view the summary log file, click on [Click here]. Figure 62 shows the two duplicate recipients and the e-mail address that was illegal.

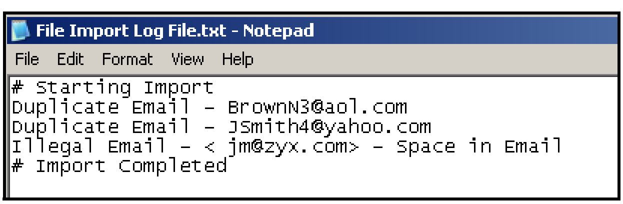


Figure 62 Import Log File

Database Import

1. Select Database Import as the type of import (see Figure 63).

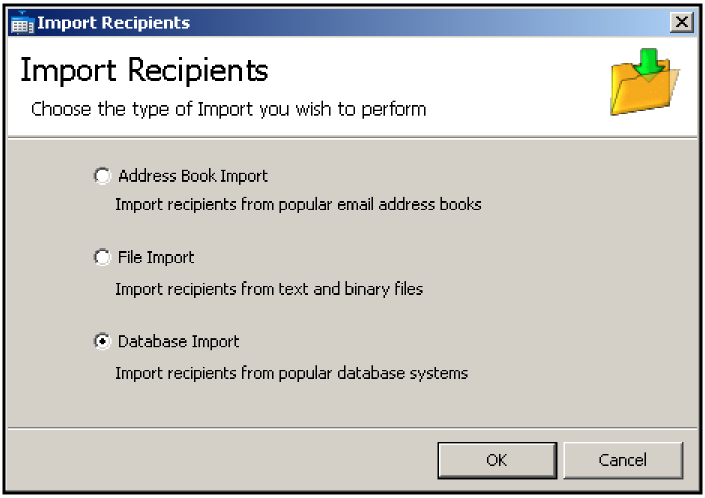


Figure 63 Database Import Window

2. Select the database from which you want to import data (see Figure 64).

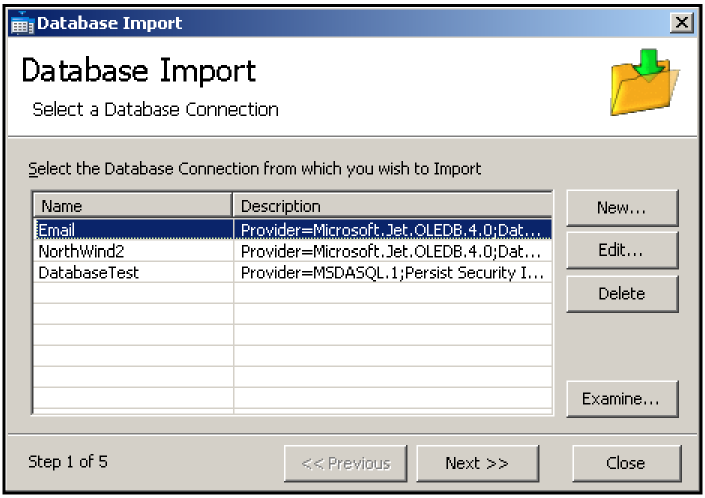


Figure 64 Database Connection Window

3. Identify the data you want to import.
   - You can select a particular table and leave the fields as they are.
   - You can enter a SQL query to return only specified fields.
   - You can enter SQL query independent of a table (see Figure 65 on page 91).

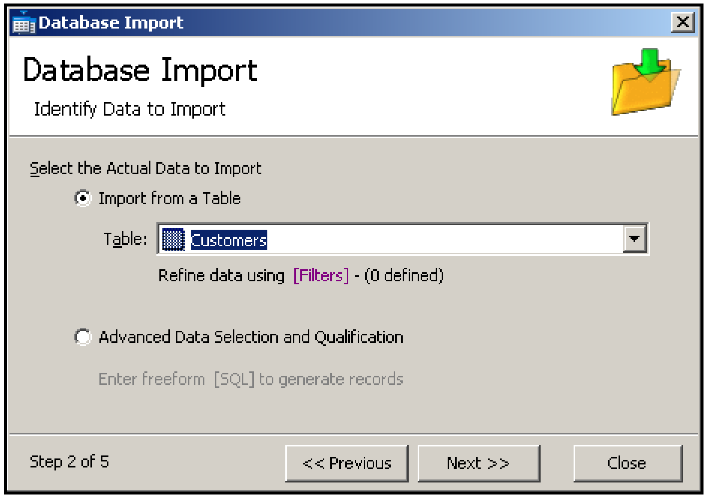


Figure 65 Data to Import Window

4. Select the Group to receive the new recipients (see Figure 66).

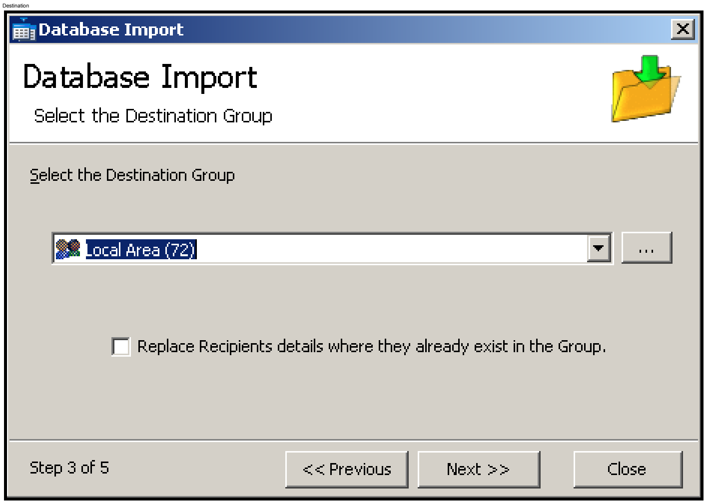


Figure 66 Destination Group Window

5. Map the fields in the Destination Group with fields from the source database (see Figure 67).

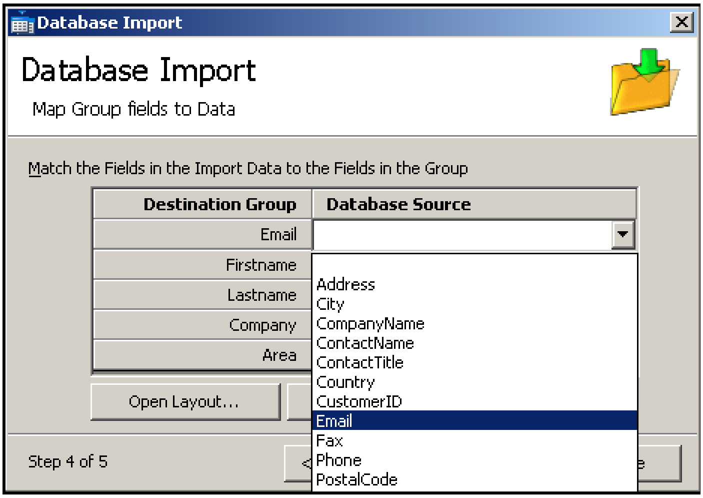


Figure 67 Mapping Window

6. Click the Start Import button (see Figure 68).

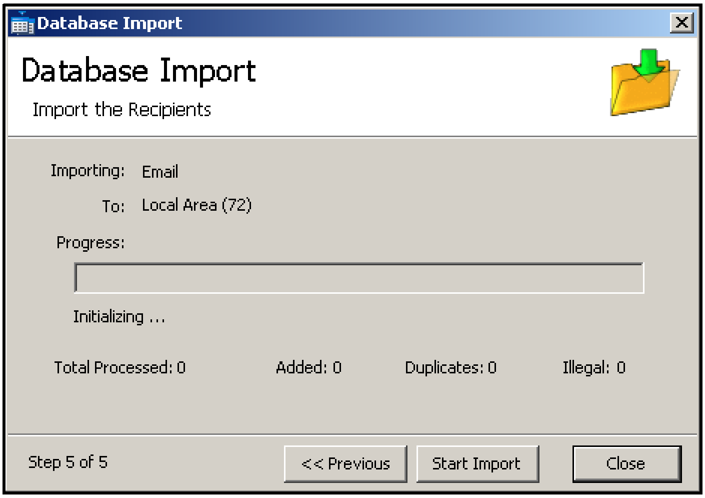


Figure 68 Start Import Window

7. When the import process concludes, you can review the log file by click Yes in the dialog box that opens (see Figure 69).

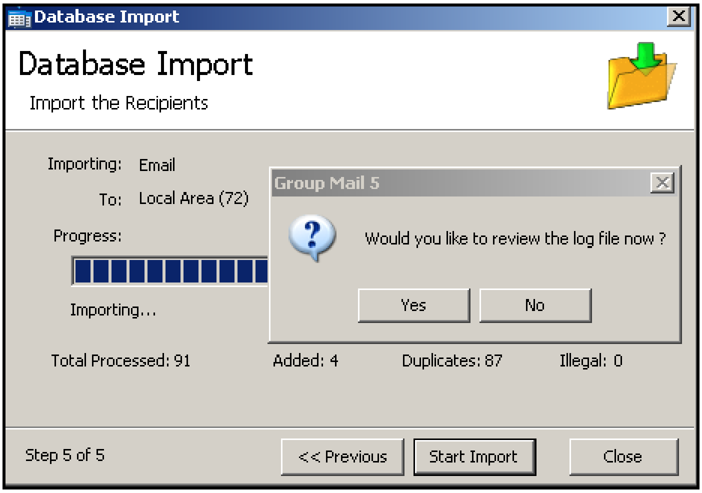


Figure 69 Review Log File Window

Exporting Recipients to an External File

1. In the Groups Workspace, select the Group to export and click Export in the Task List.

2. In the window that opens, set up your export data (see Figure 70 and Table 13). Click Next.

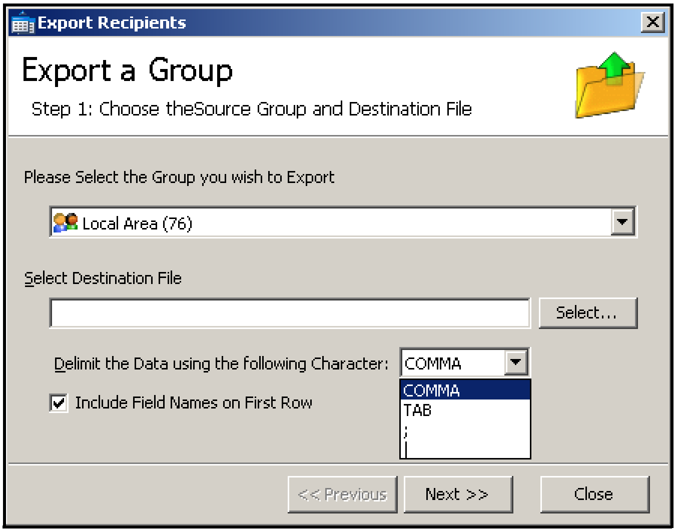


Figure 70 Export Window

Table 13 Decisions to Make in Exporting a Group

Select Group to Export	Select a group from the drop-down list of groups.
Select Destination File	Enter the new filename and location (see following note).

Table 13 Decisions to Make in Exporting a Group (Continued)

Delimit the Data	Select the delimiting character you want to separate the data: comma, tab, semicolon; or pipe.
Include File Names on First Row	Check this box if you want field names listed in the first row of the exported text file.

Note: By default, GroupMail names the export file according to the date and time. For example, *Export20050131_09_41.txt*, indicates an export text file dated January 31, 2005 (20050131) was created at 9:41 a.m. (_09_41).

3. Choose the fields to include in the export (see Figure 71). Click Next.

Figure 71 Export Fields Window

Note: The Check/Uncheck All button is helpful when you have a large number of fields from which to choose.

4. In the Export Recipient Details window, click Export to complete the process (see Figure 72).

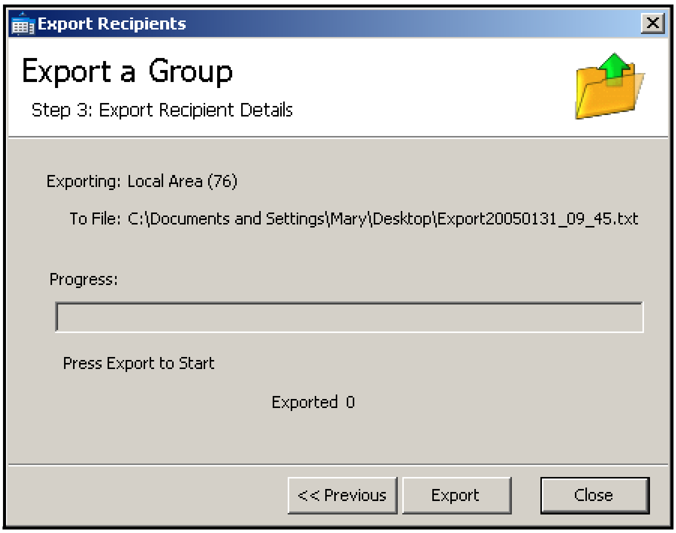


Figure 72 Exporting Window

5. When the export finishes, you will receive a message to this effect (see Figure 73).

Figure 73 Export Completed Window

6. To view the export file, navigate to its location and open it. The text file should resemble the one shown in Figure 74. In this illustration, the first row contains field names.

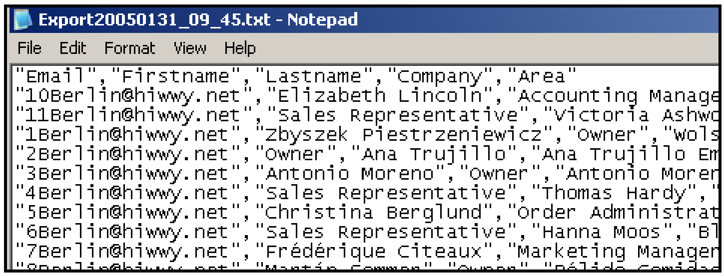


Figure 74 Export File

Linking Groups

The GroupMail linking feature allows you to link to groups that were created by another user on a different system. To link a group to an existing group, that group must be shared.

Sharing Groups

1. In the Groups Workspace, click New Group in the Task List.

2. Leave the default radio button (GroupMail Format) checked, and click Next.

3. Select a Custom location in which to store the new group, enter the path, and click Next.

4. Specify the fields to be stored for each recipient.

5. Select the field that contains the recipient e-mail address.

6. Enter a name for this new group and click Create.

Linking Groups

1. In the Groups Workspace, click New Group in the Task List.

2. Leave the default radio button (GroupMail Format) checked, and click Next.

3. Select Link to an existing group.

4. Use the Browse button to navigate to the group to which you want to link.

5. Click the Link to Group button.

Using the ‘All Group’ Tools

The ‘All Group’ Tools option allows users to search across all groups for e-mail addresses, to update across all groups by e-mail addresses, and to count all recipients in all groups.

Searching for a Record in All Groups

1. Select the ‘All Group’ Tools option from the Groups Task List, and select the Email Search tab (see Figure 75).

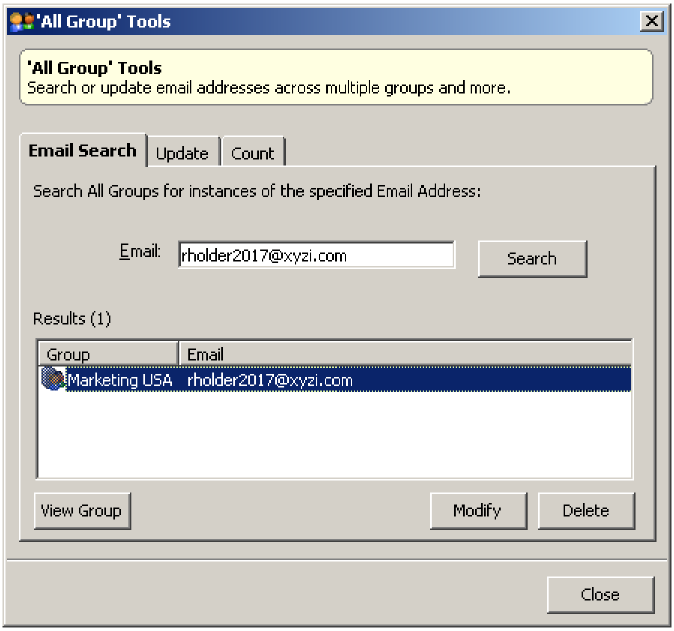


Figure 75 Email Search Window

2. In the Email field, enter the e-mail address that you want to locate. Click Search.

3. To view the entire contents of a returned group, highlight the group of interest, and click the View Group button.

4. To modify the details for this e-mail address, click Modify. See *Modify Recipient Details* on page 105.

5. To delete the record, click Delete. See *Delete [or Exclude] Recipient Record* on page 107.

Updating a Record in All Groups

1. Select the ‘All Group’ Tools option from the Groups Task List, and select the Update tab (see Figure 76).

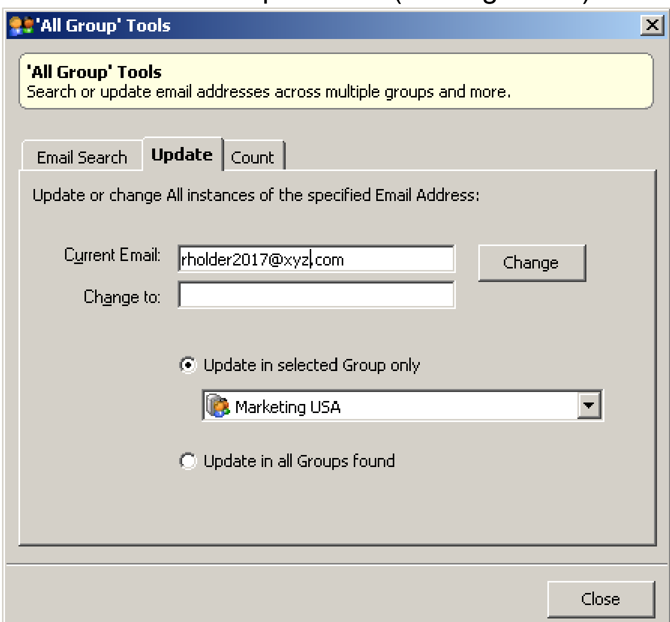


Figure 76 Update Record Window

2. Enter the e-mail address of the record you want to change in the Current Email field, and enter the new e-mail address in the Change to field.

3. Select whether to update a selected group or all groups.

4. Click Change. Results are listed in a new text field.

Counting Records in All Groups

1. Select the ‘All Group’ Tools option from the Groups Task List, and select the Count tab (see Figure 77).

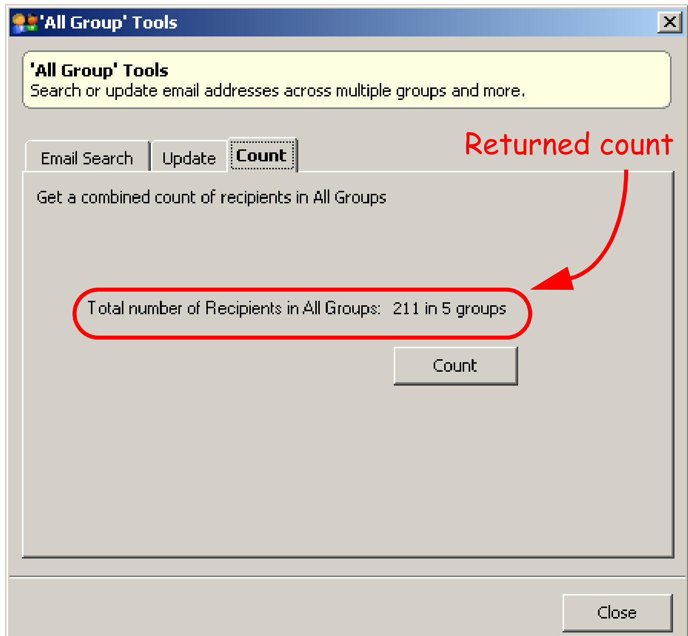


Figure 77 Count Recipients Window

2. To acquire the total number recipients, click Count. The results are listed on the Count window.

Merging and Purging Groups

In the Groups Workspace, select Merge or Purge.

Merging Groups

1. Select Merge groups together from the open dialog box, and click Next.

2. Select Source and Destination groups. If you want to replace Destination recipients' details with details from the Source recipients, check the box. Click Next.

3. Map the fields in the Source group to the Destination group fields. Click Next when you are done.

Note: Saving a layout to a *.gil file saves time in future merges because the *.gil file automatically maps one field to another.

---

4. Click Merge and close the dialog box when you are done.

Purging Groups

1. Select Purge recipients from group(s) from the open dialog box, and click Next.

2. Identify the recipients to purge, either from a group or from a file.

3. In the next dialog box, select at least one group from which recipients will be purged, and click Next.

4. Click Purge.

5. Close the window when you are done.

Note: Reviewing the log files is optional.

Searching for Recipients

To search groups for recipients meeting certain conditions, you specify the group, the field, the search parameter, and the required criteria. GroupMail quickly searches the specified group for matching recipients. If no returns are found, you can easily change the group, field, relationship, or criteria and search again. After locating the recipient(s), you can modify, delete, copy, move, or print the information retrieved.

The Search process is summarized here:

- Select a group to search.
- Select a Where argument from the fields within the group. (Fields were created when you set up the group.)
- Select a relationship between the field and the criteria you will enter. Relationships include Equals, Contains, Starts with, or Ends with.
- Enter the criteria and click the Search button to begin the search.

Beginning the Search Process

Begin a search by activating the Groups Workspace, highlighting a Group, and clicking on Search in the Task List (under Manage Recipients).

1. Set up the search parameters, and click the Search button. As an example, for the string “ber” these arguments have the following meaning:

Equals	field data must match “ber”
Contains	field data must include “ber”
Starts with	field data must start with “ber”
Ends with	field data must end with “ber”

2. In Figure 78 on page 104, GroupMail will search in the Group *NewShare*, for a *ContactName* that contains the string of characters *ber.*

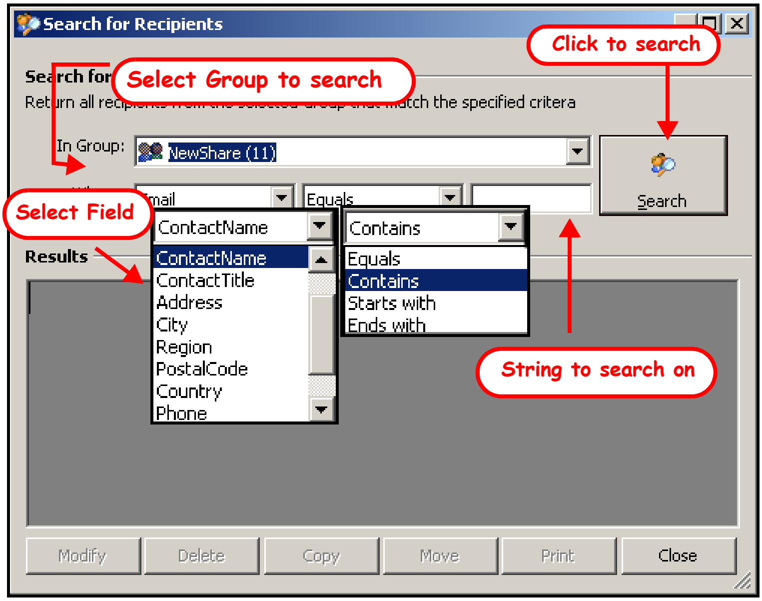


Figure 78 Search for Recipients Window

Note: If no results are returned, you can search another Group, select a different field, change the argument, or change the string.

Working with Returned Records

Select from the following:

- Modify Recipient Details (see page 105)
- Delete [or Exclude] Recipient Record (see page 107)
- Copy Recipient Record (see page 108)
- Move Recipient Record (see page 109)
- Print Search Results (see page 109)
- Exit the Search Window (see page 110)

Note: Delete, copy, and move functions can operate on more than one recipient record at a time. To highlight a number of contiguous recipients, click the first recipient, hold down the shift key, and click the last recipient. Noncontiguous recipients can be selected by holding down the Ctrl key while you click the individual recipients.

<u>Modify Recipient Details</u>

The Modify function provides two operations: modifying the existing data (Data tab) or excluding the recipient from receiving group e-mails (Options tab). See Figure 79.

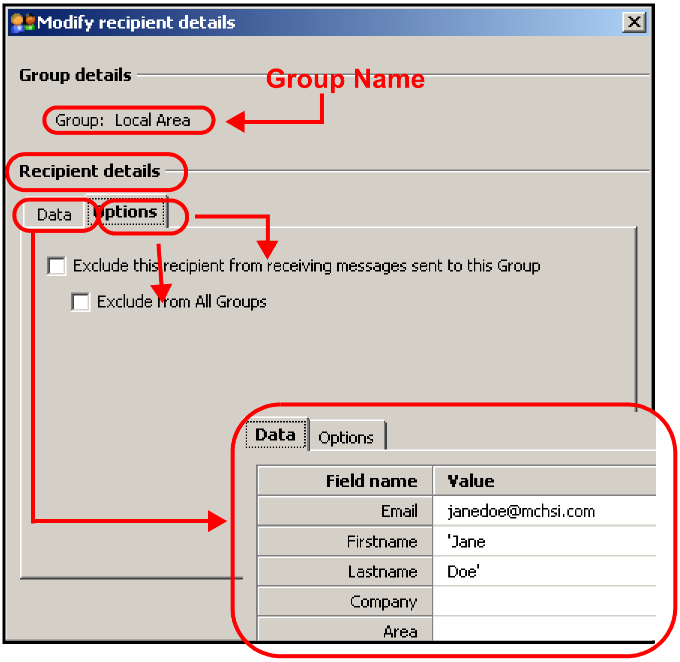


Figure 79 Both Tabs of the Returned Search Data

To modify returned data, follow these steps:

1. Double-click the data you want to change (see Figure 79).
2. Enter the new information, and press Enter.
3. Repeat steps 1 and 2 as necessary to correct the entire search results. Click OK when you are done.

To exclude a recipient from Group e-mails, follow these steps:

1. You can exclude this recipient from receiving e-mails, both in the Group you searched and in all Groups in which the recipient may appear.

2. Check the appropriate boxes on the Options tab (see Figure 79 on page 106).

Delete [or Exclude] Recipient Record

The Delete function allows you to remove a recipient from a group, to exclude the recipient from future mailings, and to apply these actions to all groups in which the recipient is found (see Figure 80).

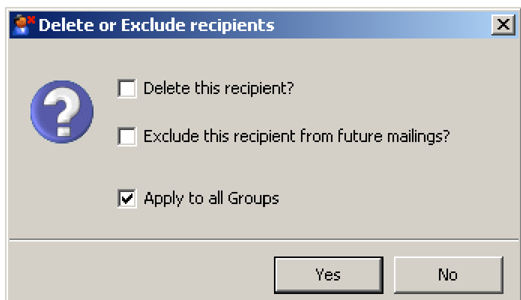


Figure 80 Delete or Exclude Options

To delete a recipient from a group, follow these steps:

1. Highlight the appropriate recipient(s) in the returned search data.

2. Click Delete.

3. In the Delete or Exclude window, check the box, Delete this recipient?, and click Yes.

To exclude a recipient from a group, follow these steps:

1. Highlight the appropriate recipient(s) in the returned search data.

2. Click Delete.

3. In the Delete or Exclude window, check the box, Exclude this recipient from future mailings?, and click Yes.

Note: To delete or exclude this recipient from all groups in which it is found, also select *Apply to all Groups.*

Copy Recipient Record

Records retrieved from a search can be copied to another group. Copying does not remove the recipient from the current Group. Figure 81 shows the copy window where you select the group to copy the recipients to. You will map the returned record fields to the fields in the group to which you are copying.

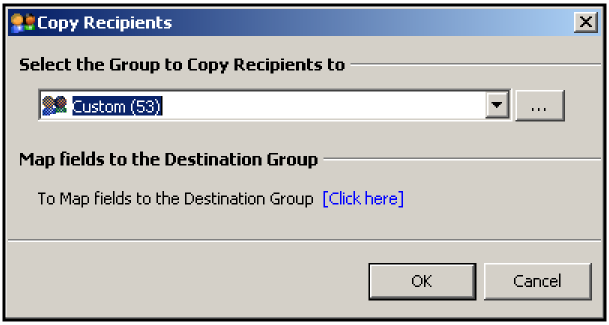


Figure 81 Copy Recipients Window

To copy a record(s) to another group, follow these steps:

1. From the drop-down list in the Copy Recipients window (see Figure 81), select the group to copy recipients TO.

2. Map the Destination Group fields to Source Group fields by clicking on [Click here]. See Figure 82.

3. Click OK.

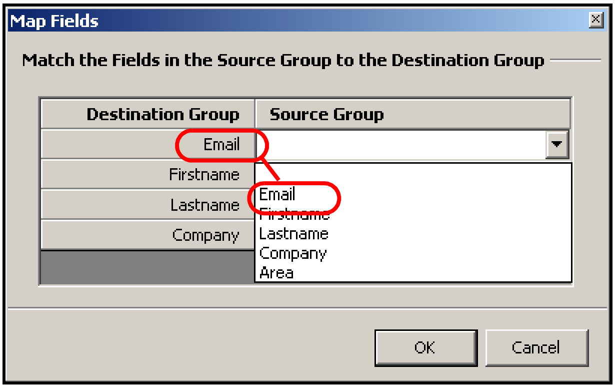


Figure 82 Mapping Fields Window

To copy a record(s) and create a new group, follow these steps:

1. Click the ellipse button (see Figure 81 on page 108).

2. Select the Group Type for the new Group, and follow the steps in *Creating a New Group (GroupMail Format)* on page 50.

3. Map the fields as described previously.

4. Click OK.

Move Recipient Record

The procedure for moving a recipient record is identical to copying a recipient record. However, *moving a recipient record deletes it from the group you are moving FROM.* To move a record(s), follow the steps in *Copy Recipient Record* on page 108, substituting *Move* for *Copy*.

Print Search Results

Click the Print button to print the results of your search.

Exit the Search Window

To exit the Search window, click the Close button.

CHAPTER 5 *Working with Messages*

When you work with messages, you use the Messages Workspace and the Message Editor. The Messages Workspace helps you manage your e-mail and includes four tabs: Drafts, Sent Messages, Templates, and Other Documents. Use the Message Editor window to create and format the message. Menus and toolbars for the Message Editor are discussed in Appendix A, *Message Editor Menus and Toolbar,* on page 171.

The Message Workspace

The Message Workspace (see Figure 83 on page 112) contains four tabs that help you control and manage your e-mail. The tabs include the Drafts tab (see *Drafts Tab* on page 112), the Sent Messages tab (see *Sent Messages Tab* on page 112), the Templates tab (see *Templates Tab* on page 113), and the Other Documents tab (see *Other Documents Tab* on page 113).

The Task List contains shortcuts to various messages operations, related operations, and other functions.

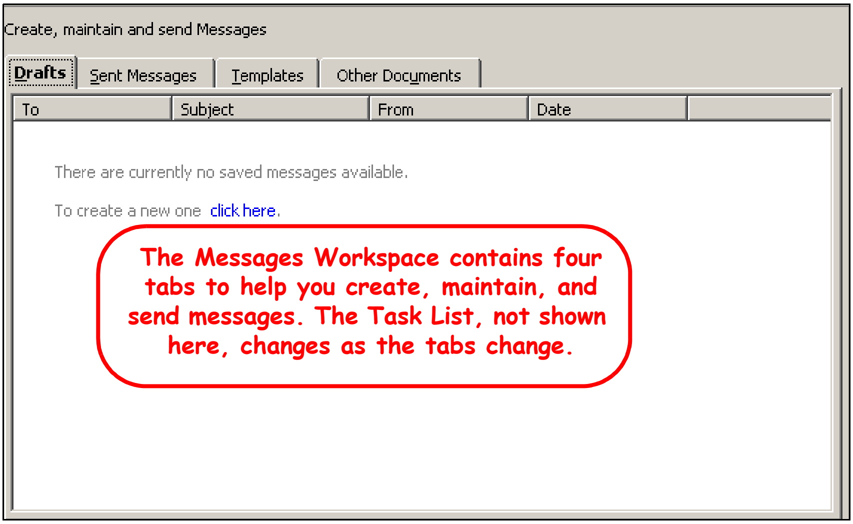


Figure 83 The Message Workspace

Drafts Tab

The Draft tab displays a list of draft messages that you have saved. Double-click on a message to open it. If you have not saved any drafts, the workspace is empty except for a message confirming that no messages have been saved and prompting you to create a new message. In addition to creating and saving messages, you can use the Task List options to edit existing drafts, send messages, and delete messages.

Sent Messages Tab

The Sent Messages tab displays a list of messages that you have sent. Double-click on a message to open it. If you have not sent any messages, the workspace is empty except for a message confirming that no messages have been sent and prompting you to create a new message. The Task List options include resuming and resending messages, editing messages, viewing logs, and deleting saved messages.

Templates Tab

The Templates Tab lists any available templates. The advantage of using templates is that a design can be reused. If you have an e-mail that you want to reuse, save it as a template and retrieve it from the Templates tab.

Other Documents Tab

The Other Documents tab lets you navigate to other documents. You may save an e-mail as a document and then navigate to it using the Other Documents Tab.

The Message Editor

When you create or edit a message, the Message Editor window opens. With the Message Editor, you can preview a message before you send it to your recipients. You can also send a test message to an account of your choice.

When you work in Rich Text (HTML), you can view the HTML code. The appearance of the Message Editor window depends on the text type selected: Plain Text (see Figure 84) or Rich Text (HTML)—see Figure 85 on page 115.

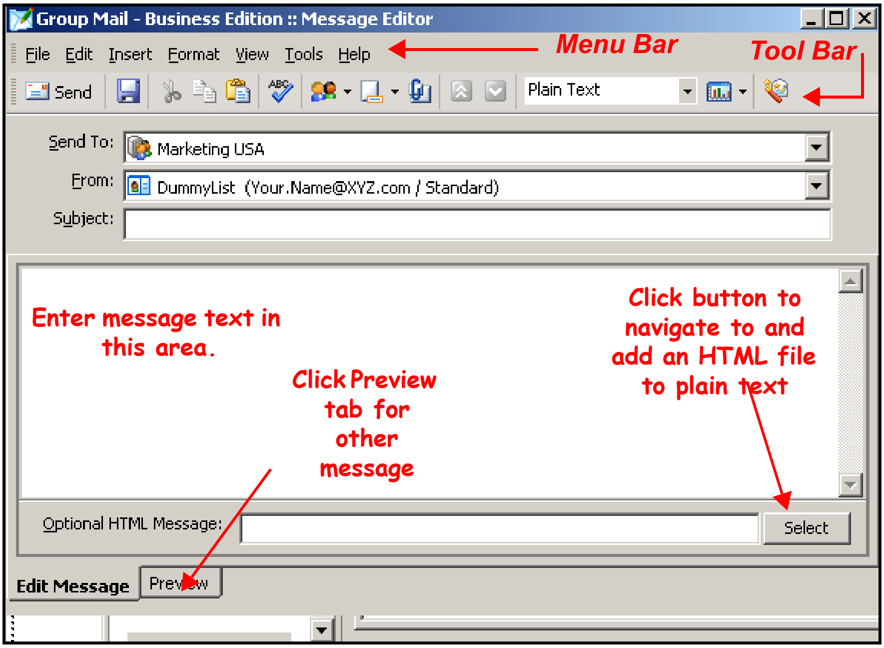


Figure 84 Message Editor Window for Plain Text

Note: See Appendix A for a discussion of the Message Editor menus and toolbars.

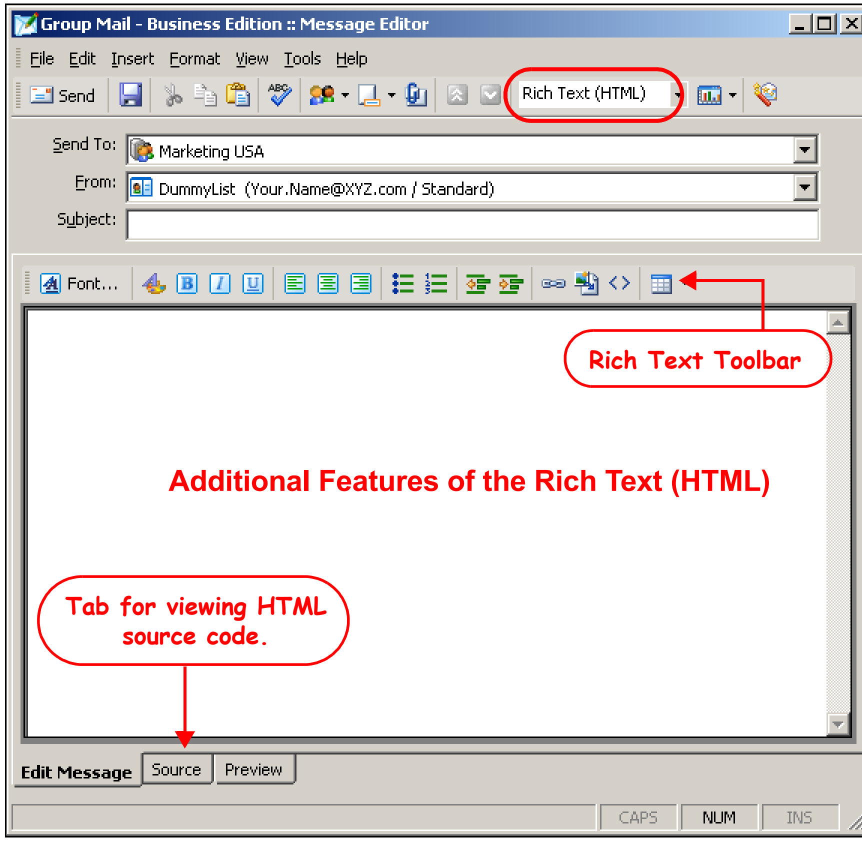


Figure 85 Message Editor Window for Rich Text (HTML)

Opening the Message Editor

To open the Message Editor, create a new message (see *Creating Messages* on page 118) or edit a draft message (see *Editing Messages* on page 123).

Previewing a Message

1. With the Message Editor open, click the Preview tab.

2. Move the Recipients slider bar left and right to choose a recipient from the currently selected group (see Figure 86).

3. In the Local Preview area, select a Target Client, for example, Outlook Express.

4. Click Preview Message. You see what the recipient will see.

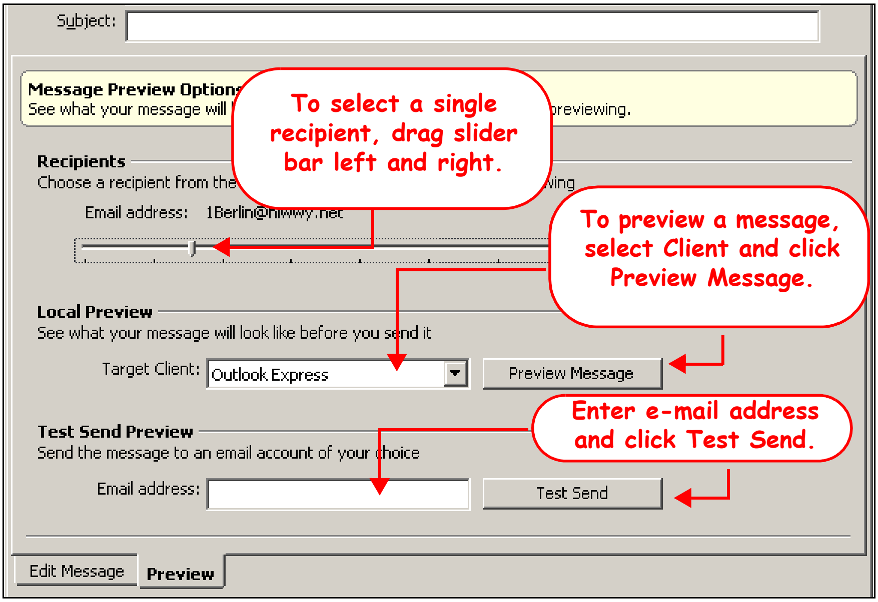


Figure 86 Message Editor Preview Window

Sending a Test Message

1. In the Test Send area of the Message Editor Preview window, enter an e-mail address of your choice.

2. Click Test Send.

3. The Prepare to Send Message dialog box displays the current settings and lets you make changes (see Figure 87).

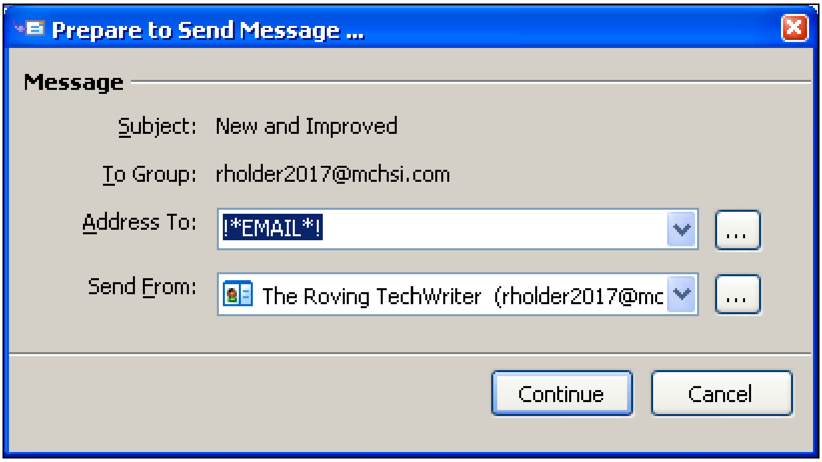


Figure 87 Prepare to Send Message Window

4. Click Continue.

5. The Delivery Console opens displaying the status of the test delivery.

Message Operations

This section provides step-by-step instructions for working with messages.

Creating Messages

1. From the Messages Workspace Draft Tab, click New in the Task List.

2. In the Message Editor, select Plain Text or Rich Text for the message format.

3. Select the Group to send the message to, select who the message is from, and give the message a subject line.

4. Enter the text message.

Note: See Appendix A for a complete description of the Message Editor menus and toolbars.

Entering Text

You can enter the text for your message in several ways, depending on the message format you selected in the Message Editor.

<u>If You Selected Plain Text Format</u>

- You can enter text directly from the keyboard. Just place the cursor in the message area and begin typing.
- You can copy text from another document and paste it in the message area; however, any formatting will be lost.
- You can link to an HTML file to provide a formatted message. If you select this option, any text entered into the message area becomes embedded as the Alternative message. The HTML

shows in HTML-enabled e-mail clients; otherwise, the text shows.

To link to an HTML file, follow these steps:

1. Click the Select button for the Optional HTML Message field.

2. Navigate to the appropriate file.

3. Click Open.

4. Preview the message by clicking the Preview tab.

<u>If You Selected Rich Text (HTML) Format</u>

- You can enter text directly from the keyboard. Rich Text has its own formatting toolbar that you use to format the text (see Appendix A).
- You can copy text from another document, including an HTML file, and paste it in the text area. Formatting is retained; however, if you want, you can reformat the text using the formatting toolbar. When you paste an HTML document in the message area, the HTML code is simultaneously copied to the Source tab. You can then either edit the HTML or format the message text.
- You can enter or copy HTML code directly into the Source tab.

To enter or paste HTML code, follow these steps:

1. Click the Source tab. The following code is already entered:

```
<!DOCTYPE HTML PUBLIC "-//W3C//DTD HTML 4.0 Transi-
   tional//EN">
<HTML><HEAD>
<META http-equiv=Content-Type content="text/html;
   charset=windows-1252"></HEAD>
<BODY>
<DIV style="FONT-FAMILY: ARIAL"> </DIV></
   BODY></HTML>
```

2. Enter or paste your code following the `<BODY>` tag.

3. Preview the message by clicking the Preview tab.

Formatting Text

If You Selected Plain Text Format

If Plain Text format is selected, you cannot format the text in the message. If you copy and paste formatted text, including an HTML document, you will lose the formatting. However, you can work around this limitation by linking to an HTML document. See *Entering Text* on page 118.

If You Selected Rich Text (HTML) Format

If Rich Text (HTML) format is selected, you can copy and paste formatted text and the formatting remains. You can also reformat the text using the Formatting Bar.

Adding Attachments

1. Open the Message Editor by clicking New or Edit from the Messages Task List.

2. Click the Insert > Attachment menus in the Message Editor.

3. Select a file from the list in the Attachment Manager and click OK.

Note: If the file does not appear in the Attachment Manager, click Add File and navigate to the proper file. It will be added to the list, and you can then select it.

Customizing the E-mail

You can customize your e-mail by merging fields of information that are stored in groups with your message. To merge fields, follow these steps:

1. Create a new message, or open a draft message.

2. Position the mouse cursor in the message where you want the field information to appear.

3. From the Message Editor Insert menu, click Merge Fields.

4. From the Insert Recipient Merge Fields window, select the field, or fields, you want to enter.

5. Click Close when you are done.

6. Preview your message to ensure the e-mail appears as you want it.

Printing a Message

1. Preview the e-mail message.

2. In the Target Client window, select File > Print, or click the Print icon.

3. Select the appropriate printer and click Print.

Saving a Draft Message

1. Create or open an e-mail.

2. When you are ready, save the draft by clicking the menus File > Save, or by clicking the save icon on the Message Editor toolbar. The message is saved as a draft in the drafts tab.

3. You can close the message and return to it later.

Note: You can save an e-mail as a draft at any point in its creation.

Setting up the E-mail

1. Open the Message Editor by clicking New or Edit from the Messages Task List.

2. In the Send To field, select the group from the drop-down list that you want to send the message TO.

3. In the From field, select the an address from the drop-down list. If necessary, you can create an account for yourself by selecting File > Account Setup in the Message Editor.

4. In the Subject field, enter a subject for the message.

5. In the Message Format box, on the Menu Bar, select the format type: Plain Text or Rich Text (HTML).

6. You can also assign a priority to the message: High or Low.

Deleting Messages

1. In the Messages Workspace, select an e-mail from the Drafts tab or the Sent Messages tab. To select multiple files, hold down the shift key (for consecutive files) or the Control key (for nonconsecutive files).

2. Right-click and select Delete. Alternatively, you could delete the files using Delete in the Task List.

3. When prompted, confirm that you want to delete the message(s).

Editing Messages

You can edit both active messages and saved drafts.

To edit an active message, follow these steps:

1. Make your changes directly in the open message.

To edit a saved draft, follow these steps:

1. In the Messages Workspace, click the Drafts tab, and highlight an e-mail.

Note: To quickly find a draft, sort through the drafts by clicking a column name.

2. Right click on the e-mail message and select Edit. Alternatively, you can select Edit from the Task List.

3. When the Message Editor opens, make your changes.

4. Be sure to save your changes.

Checking Spelling

1. Open the message you want to spell-check.

2. In the Message Editor, press F7 or select the menus Tools > Spelling.

Using the Dictionaries

GroupMail includes a dictionary in the Message Related Options, Spell Checker tab of the User Interface's Tools menu. GroupMail includes two main dictionaries. You can add dictionaries to this tab, however, you cannot delete them. You can also create and delete user-defined dictionaries.

Reviewing Sent Messages

Sent messages are saved until you delete them. When you open the Messages workspace, all Sent Messages are stored under the Sent

Messages tab. You can sort through the messages by clicking on one of the column names. Right-click to see available options.

Editing Sent Messages

To edit and then resend a Sent Message, follow these steps:

1. Right-click on the message you want to edit and click Edit Message.
2. When the Message Editor window opens, make your changes.
3. You can select Save As to rename the e-mail or keep the original name.
4. Click Send, and work your way through the Prepare to Send window (see *Prepare to Send Message Window* on page 127).

Resume or Resend Message

If you stopped sending a message before it reached all of its recipients, you can resume sending or resend it to the entire list.

1. Right-click on the message you want to resume sending or to resend, and click Resume or Resend.
2. Click the appropriate radio button and work your way through the Prepare to Send window see *Prepare to Send Message Window* on page 127).

Viewing Sent Message Logs

GroupMail compiles text logs containing information about sent e-mails. The logs record everything that happened during the send process. Use these logs to confirm mailings and to note errors.

To view a sent message log, follow these steps:

1. Click Review Sent Items in the Home Workspace.

2. From the list now in the Workspace, highlight the message of interest.

3. Select View Logs from the Sent Messages area of the Task List. Alternatively, you can right mouse click on the message and select View Logs.

4. The View Logs dialog box opens showing delivery status, date and time sent, and a Log field from which you can select the log.

5. Select a log type from the drop-down list. Click View and the log opens in Notepad. (The text file remains open until you close it.)

6. Click Close to close the dialog box.

Sending Messages

1. If the e-mail is open, click Send in the e-mail window and skip to step 5.

2. If the e-mail has been saved, click Drafts in the Messages Task List.

3. From the Drafts tab, highlight the e-mail you want to send.

4. Select Send.

5. Review the Prepare to Send Message window. Make any necessary changes.

6. Click Continue.

7. Review the Delivery Console for information regarding the delivery. If for some reason you want to stop sending the e-mail, click the Stop Delivery button.

Delivery Console

The Delivery Console contains three tabs that provide information about the status of the messages in the delivery queue.

Note: You can open the Delivery Console at any time by right-clicking on the Delivery Console icon ( ) located in the System Tray.

Current Mailing

The current mailing tab lists the send status of the current e-mail: position in the queue, sent status, failures, filters and so forth.

Queue

The queue tab shows message information such as To, From, Subject, and time Submitted.

Note: Hide the Delivery Console by clicking the Hide button.

Prepare to Send Message Window

When you click Send on the Message Editor, the Prepare to Send Message window opens allowing you to make changes to the To and

From addresses and to set options for filtering, excluding, and scheduling.

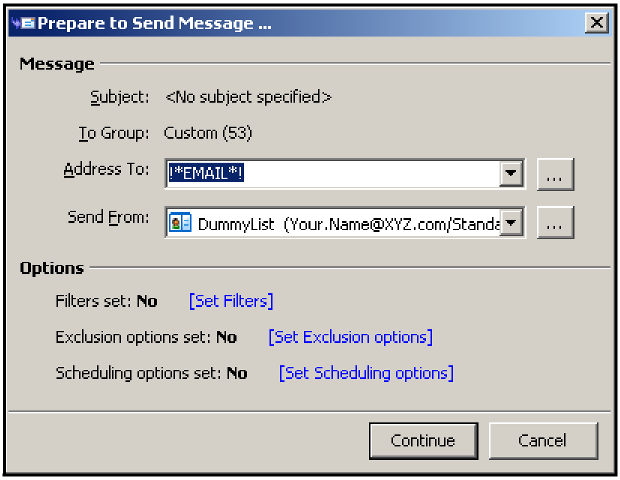


Figure 88 Prepare to Send Message Window

<u>Addressing Options</u>

Addressing options let you choose the text that appears in the To header of a message and select the From account that identifies you as the sender.

To select the text that appears in the To header, follow these steps:

1. In the Address To: field, click the drop-down list.

2. Select the field you want to appear in the header.

3. Click OK.

To create or modify the account that identifies you as the sender, follow these steps:

1. In the Send From: field, either select another account from the drop-down list or click the dotted button to open the Account Manager.

2. In the Account Manager, make the necessary changes. See also, *Account Manager* on page 142.

Exclusion Options

To set some additional exclusions when sending an e-mail message, click Exclusion options set: in the Prepare to Send window, and follow these steps:

Partial Sending

To send a message to a subset of a selected group, follow these steps:

1. Check the box for sending a subset.

2. Enter the number of the recipient to start with.

3. Enter the number of the recipient to end with.

Manual Exclusion / Recover

1. You can create a file of recipients to exclude by opening a text editor and entering one e-mail per line. GroupMail will then compare this list with the group selected and block the recipients on the list.

2. You can also block all of the recipients in selected groups. Check the groups to block.

Scheduling Options

To schedule a future delivery time for sending an e-mail message, click Scheduling options set: in the Prepare to Send window, and follow these steps:

1. In the Scheduled Options window, enter the time and date that you want to send the message.
   - Time displays in 12-hour format: hh:mm tt (for example, 11:59 PM)
   - Use the up and down arrows to change the hours or minutes. Alternatively, you can manually enter the time.
   - Date displays in MM/DD/YYYY format. To set the date, use the pop-up calendar or manually enter the date.

2. If you want to Resend the message, check Repeat or Resend, and select the frequency.

3. You may also opt to resend the message to new recipients only; just check the box.

Setting Filters

To build simple queries to filter or target recipients to whom you are sending an e-mail message, click Filters in the Prepare to Send window and follow these steps:

1. Decide whether you want to send to or ignore recipients.

2. Select a field and its parameters.

3. Enter text.

4. To add additional arguments, select And or Or in the blank field and repeat steps 2 and 3.

5. Continue with steps 2-4 until you have your query the way you want it.

6. Click OK.

Using Templates

Templates provide consistency and ensure that all information is included in your mailing. You can create your own templates or you can use one from the templates included with GroupMail.

Creating Templates

To create a template, open a sent or draft e-mail, or create a new e-mail, and click File > Save As > A Template.

Note: Templates are named according to the text in the subject field.

Renaming Templates

To rename a template, follow these steps:

1. Open an existing template and change the subject line.

2. Click File > Save As > A Template.

3. Delete the original file, if necessary.

Using GroupMail Templates

To use a GroupMail user template, follow these steps:

1. Click Use a Template in the Messages section of the Home Workspace.

2. Highlight the template of choice from the Templates list.

3. Click Use from the Task List or right mouse click on the template name and click Use Template.

4. Enter new information in the Message Editor.

5. Click the e-mail Send button to send.

To use a GroupMail custom template, follow these steps:

1. Click Use a Template in the Messages section of the Home Workspace.

2. Highlight the custom template of choice from the Templates list.

3. Click Use from the Task List or right mouse click on the template name and click Use Template.

4. Fill in the optional fields to customize the template.

5. Click Continue, enter the text in the Message Editor, and send the e-mail.

CHAPTER 6 *Working with the Scheduler*

Use the Scheduler set up delivery schedules, modify messages, and delete scheduled events.

Schedule a New Event

1. In the Home Task List click Scheduler, and then click Schedule a New Event (see Figure 89).

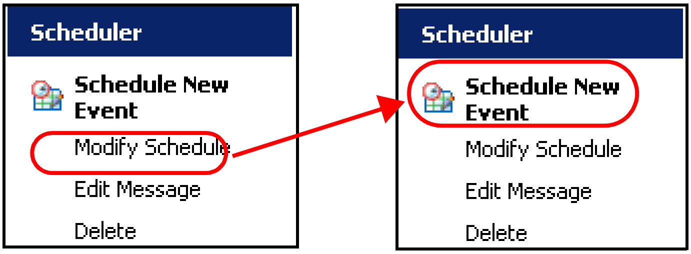


Figure 89 Schedule a New Event using the Task List

2. In the dialog box that opens (see Figure 90), ensure that the radio button "Send a Message" is selected.

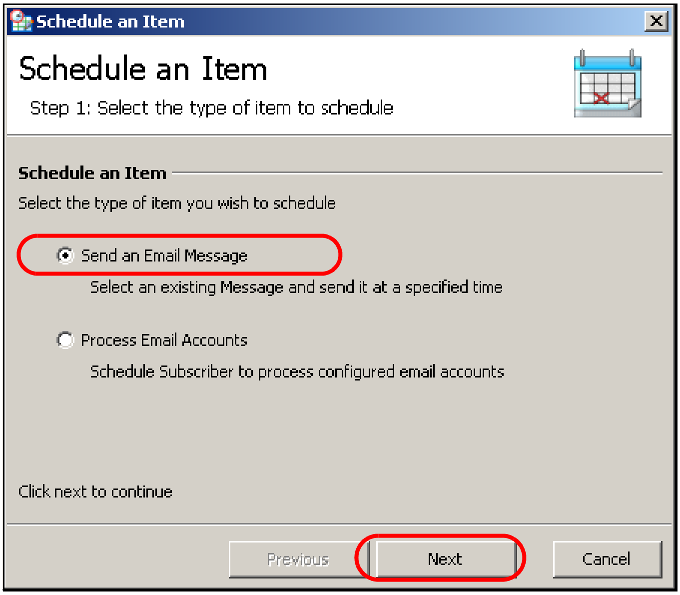


Figure 90 Schedule Event Window

3. Click Next.

4. Set the following details for sending the message (see also, Figure 91 on page 135).

Scheduled for:	Enter time to send, in 12-hour format: hh:mm tt. For example, 11:59 PM.
on:	Select date.
Repeat or Resend	Options include hours, days, weeks, months, years. Also choose to send to new recipients only.

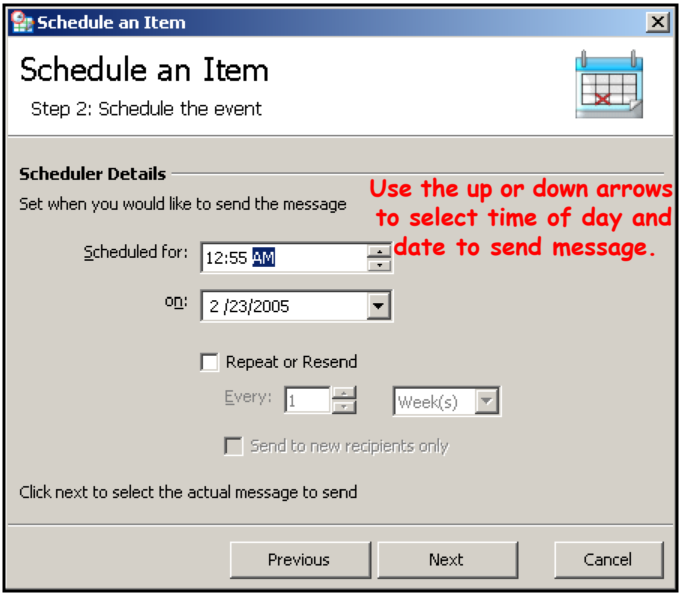


Figure 91 Scheduler Details Window

5. Click Next.

6. From the window that opens (see Figure 92), select the message to send, and click OK.

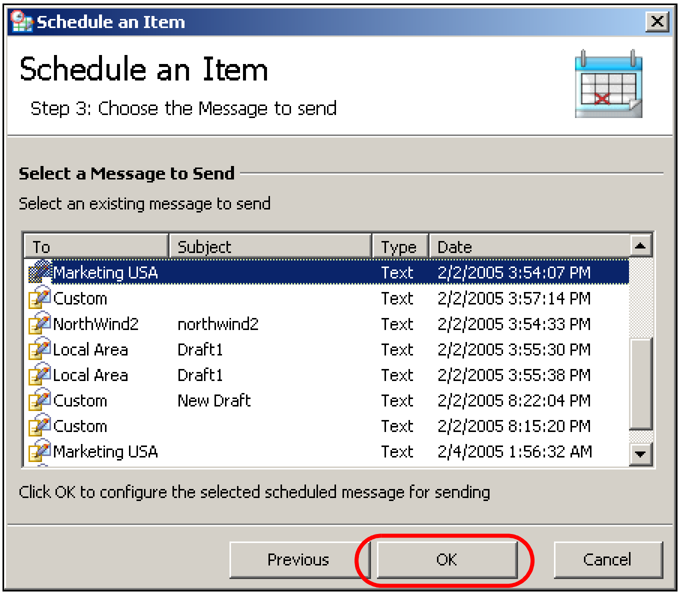


Figure 92 Select Item Window

7. Review the Send options, make any corrections, and click Continue (see Figure 93).

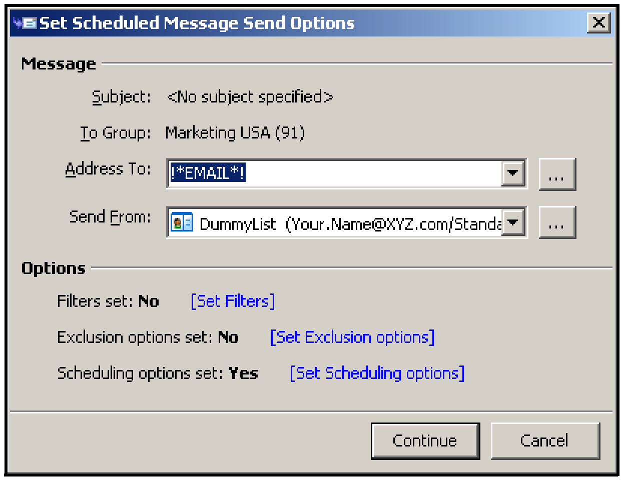


Figure 93 Set Scheduler Options

Note: For information on Filters see *Setting Filters* on page 130. For information on Exclusion options see *Exclusion Options* on page 129. For information on Scheduling options see *Scheduling Options* on page 130

Modifying Scheduled Events

1. Open the Scheduler Workspace (click Scheduler icon).

2. Select a message from the Scheduler Workspace and click Modify Schedule in the Task List (see Figure 94 on page 138).

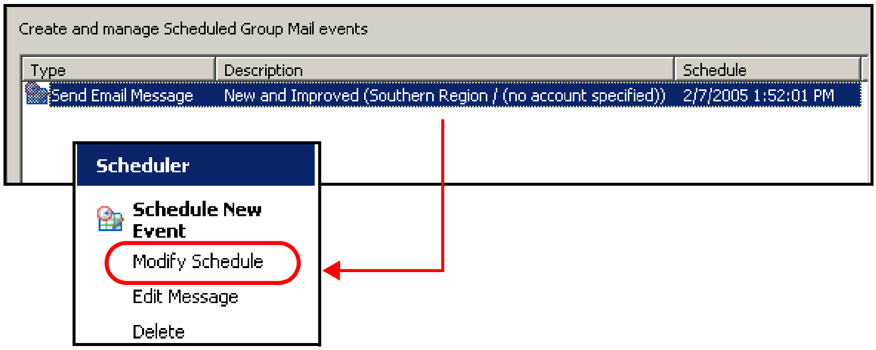
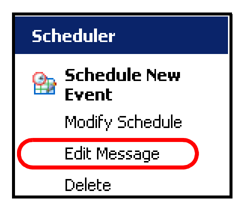


Figure 94 Working with Scheduled Events

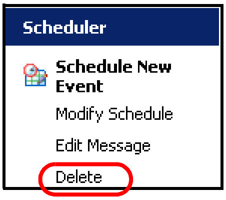
3. Reset the values so that e-mail will be delivered when you want.
4. Click OK. The e-mail will be sent at the time and date specified.

Edit Message with Scheduler



1. In the Home Task List click Scheduler, and select a message from the Workspace.
2. Click Edit Message in the Scheduler Task List (see view, opposite).
3. When the e-mail message opens, make your changes.
4. Save the document and close the e-mail.

Delete Scheduled Event



1. In the Home Task List click Scheduler, and select a message from the Workspace.

2. In the Scheduler Task List, click Delete (see view, opposite).

3. When you are prompted, confirm that you want to delete this e-mail from the Scheduler.

CHAPTER 7 *Working with the Tools*

GroupMail includes several tools to help you manage your e-mail tasks.

- *Account Manager* - Manage user (sender) information.
- *Exclusion Lists* - Maintain a list of recipients that you do not wish to receive messages.
- *Database Connections Manager* - Create and maintain the database connections used to access groups selected from a database.
- *Using Web Services* - Link to Group Metrics online services.
- *Add-ons Manager* - Manage and configure available Add-ons.
- *Message-Related Options* - Includes message encoding, character set, default message type, default font, font style, and spell check.
- *Signature Manager* - Create and manage signatures.

Account Manager

The Account Manager controls user (sender) information. You can create new accounts, modify existing accounts, remove accounts, and set an account as the default from the Account Manager window (see Figure 95 on page 142). To access the Account Manager, click [Manage Accounts] in the Tools Workspace or use the Menu Bar (Tools > Account Manager).

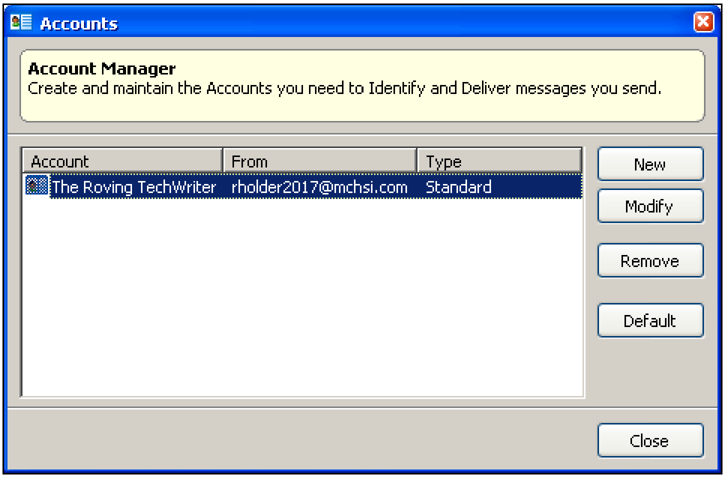


Figure 95 Account Manger Window

After selecting an Account Manager option (New, Modify, or Remove), the Account Properties window opens (see Figure 96 on page 143). In addition to setting up user information, you can also set delivery options (see Figure 97 on page 144).

Creating a New Account

1. In the Account Manager, click New.

2. When the Account Properties window opens, fill in the required User Information:

Account Name	Enter a meaningful name.
Name	Enter the name of the user (sender).
Organization	Enter the name of your organization.
Email address	Enter your e-mail address.
Reply-to-address	Enter an e-mail address to which you want replies sent.
Custom Headers	Set up any custom headers (see *Custom Headers* on page 146).

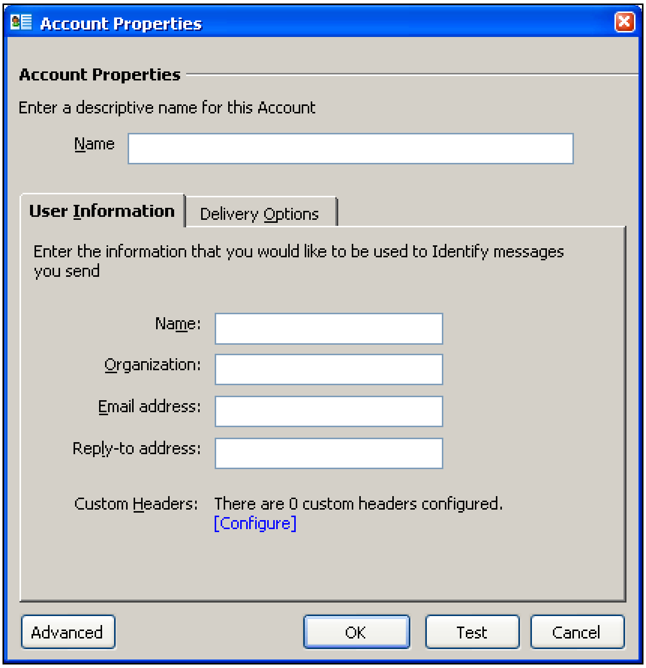


Figure 96 User Information for Account Properties

3. Set up the Delivery Options.

Delivery Options	Select from Standard, Direct, or Pickup (see Table 3, *Account Delivery Options,* on page 29).
SMTP Server	Enter the dedicated SMTP Server (for example, mail.XYZ.com). If authentication is required, check the Requires Authentication check box, and set up the Authentication Settings (see *SMTP Server* on page 29).
Connection Options	Enter the name of your organization.
Advanced	See Table 3, *Account Delivery Options,* on page 29.

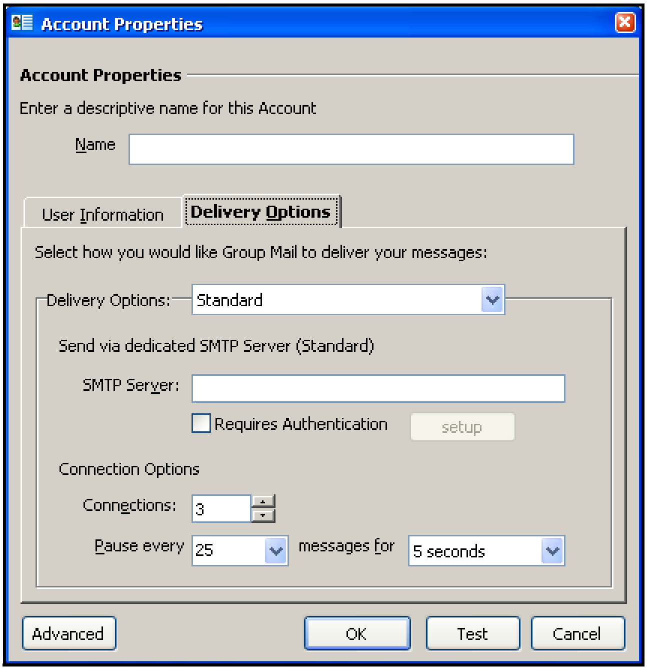


Figure 97 Delivery Options for Account Properties

4. Click the Test button to test that the e-mail settings are configured correctly by sending a test message to yourself (see Figure 98).

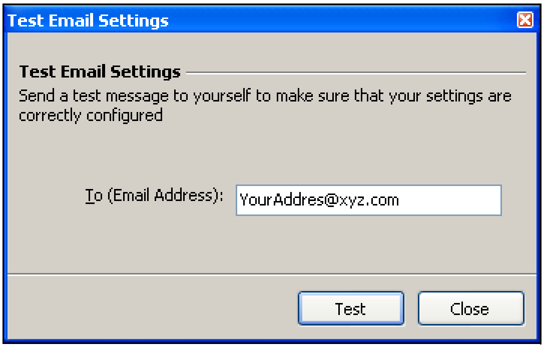


Figure 98   E-mail Test Window

5. Close the window.

Modifying an Account

1. Open the Account Manager (Tools > Account Manager).
2. Highlight the account you want to modify.
3. Click Modify.
4. Make the necessary changes (see *Creating a New Account* on page 142).
5. Click OK and close the Account Manager.

Removing an Account

1. Open the Account Manager (Tools > Account Manager).
2. Highlight the account you want to remove.
3. Click Remove.
4. Close the Account Manager.

Setting a Default Account

1. Open the Account Manager (Tools > Account Manager).
2. Highlight the account you want to set as the default.
3. Click Default.
4. Close the Account Manager.

Custom Headers

E-mail headers provide a log of a message's history. For example, an e-mail that has been forwarded several times often contains a header for each recipient who forwarded the message. The header likely contains From, To, Date, and Subject information.

Some e-mail clients automatically add extra headers such as X-Sender or X-Mailer. These kinds of custom headers add another layer to your message and help ensure that no one is forging your identity. Note that custom headers should begin "X-." Custom headers do not interfere with the normal delivery process.

Creating and Modifying Custom Headers

1. Open the Account Manager (Tools > Account Manager).

2. If this is a new account, click New. If this is an existing account, click Modify. (For more information, see *Creating a New Account* on page 142 or *Modifying an Account* on page 145.

3. In the User Information dialog box, at the Custom Headers: area, click [Configure].

4. In the Custom Headers dialog box, click New (see Figure 99).

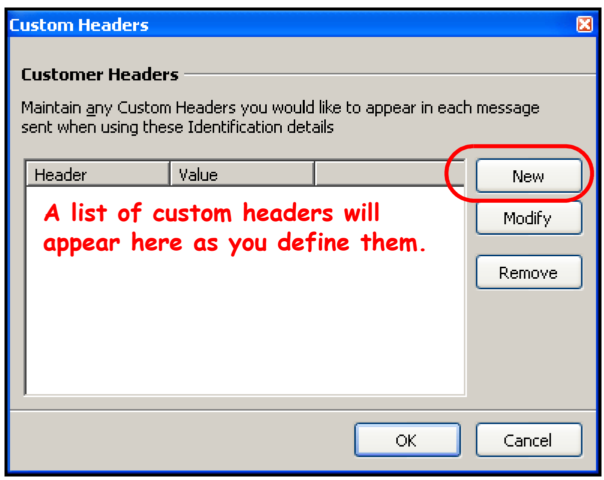


Figure 99 Custom Headers Window

5. Generally, you will leave the Header Name set at its default value, X- (see Figure 100). In the Value field, enter your identifying text. When you are done, click OK.

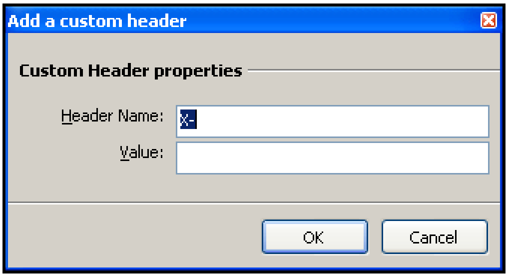


Figure 100 Custom Header Properties Window

6. If you want, you can send a test e-mail to yourself now, or click OK to exit.

Removing a Custom Header

1. Open the Account Manager (Tools > Account Manager).

2. Highlight the account whose header you want to remove, and click Modify.

3. In the User Information tab, at the Custom Headers: area, click [Configure].

4. Select the appropriate header, click Remove, and click OK.
5. Click OK on the next window and Close on the last window.

Exclusion Lists

You create an Exclusion List to ensure that specified recipients do not receive certain e-mails. You can exclude recipients from all groups or from specified groups. Use the Exclusion LIst Manager to add and remove recipients (see Figure 101).

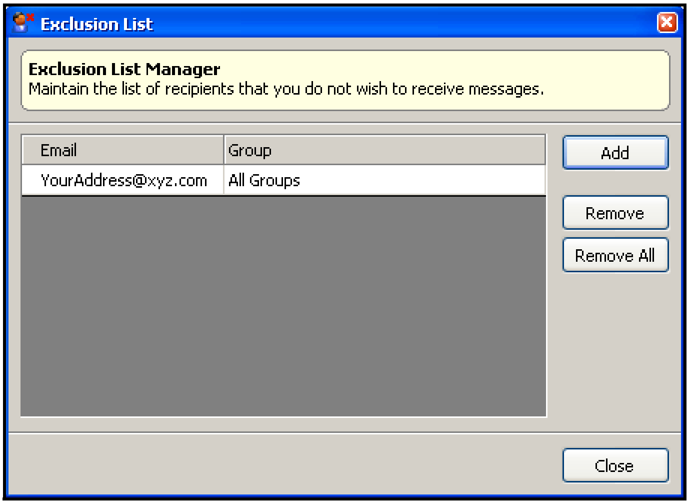


Figure 101 Exclusion List Manager Window

Creating an Exclusion List

1. Open the Exclusion List Manager (Tools > Exclusion List Manager).

2. In the Exclusion List window, click Add.

3. Enter the e-mail address to exclude, and the group(s) from which to exclude this address (see Figure 102), and close the window.

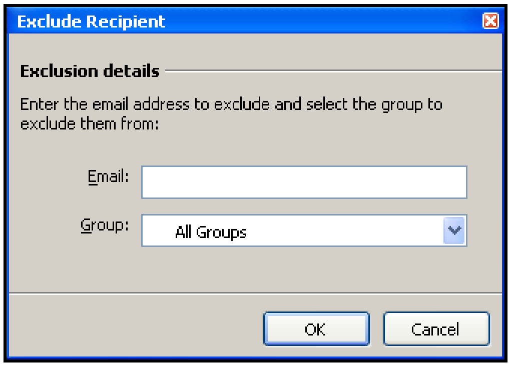


Figure 102 Exclusion Details

Removing an Excluded Address

1. Open the Exclusion List Manager (Tools > Exclusion List Manager).

2. In the Exclusion List window, select a recipient to remove and click Remove.
   - To remove multiple recipients, use the Shift or Control keys to select the recipients. Then click Remove.
   - To remove all recipients, click Remove All.

3. When prompted, confirm that you want to remove the recipient(s).
4. Close the window.

Database Connections Manager

You create database connections to provide access to fields in an external database such as Microsoft Access. These connections ensure that you are using the latest database records and avoid duplication of effort by maintaining a GroupMail group list as well as a database. Use the Database Connections Manager to create new connections and to edit, delete, or examine existing connections.

Creating Database Connections

1. Open the Database Connections Manager (Tools > Database Connections Manager).

2. From the Database Connections Manager window, click New (see Figure 103).

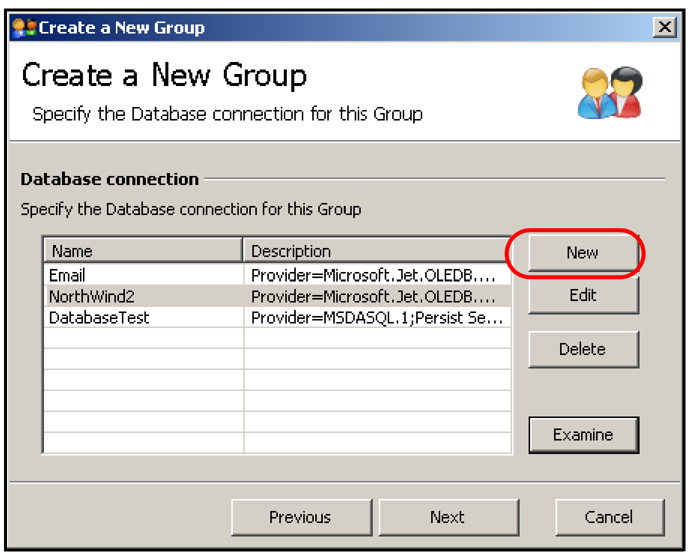


Figure 103 Database Connections Manager

3. In the Create a New Database Connection window, enter a meaningful Connection name and click the Connection string Wizard button (see Figure 104).

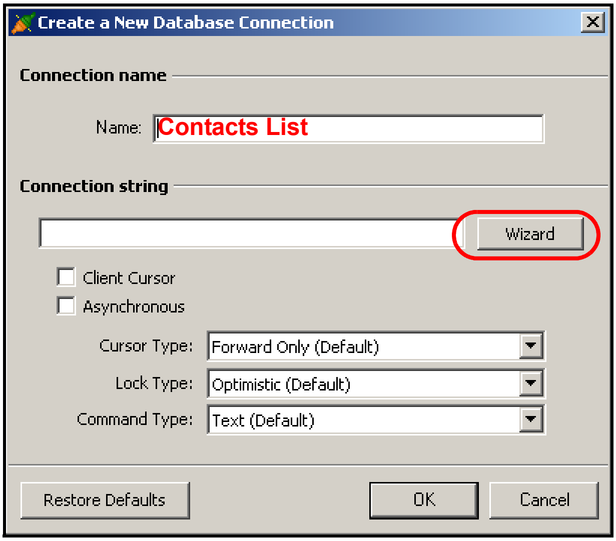


Figure 104 Identify and Set Up Database Connection

Note: Clicking the Wizard button takes you to the Data Link Properties section. You may need to seek assistance from your System Administrator in setting up these pages.

4. The Data Link Properties Provider tab lists available OLE database providers. Select the data to which you want to connect (see Figure 105 on page 153) .

Note: The following notes may help you determine the appropriate driver.

- The drivers may already be installed on your computer, but, if not, your database provider may be able to provide these for download.
- The two categories of drivers that can be used include OLE DB Provider and ODBC Driver. If both driver types are available, use the OLE DB Provider instead of ODBC, as it offers several benefits including more functionality, better performance, and simpler installation.
- If there is no OLE DB Provider for your database listed, but you have an ODBC driver, select the "Microsoft OLE DB Provider for ODBC Drivers."
- Use "Microsoft Jet *n* OLE DB Provider" for *Microsoft Access* databases.

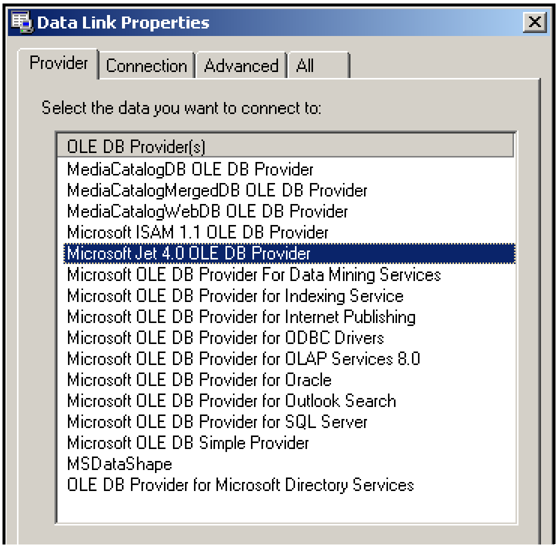


Figure 105 Database Providers Tab

5. After selecting the appropriate provider, click Next.

6. Set up your connection data, and click OK (see Figure 106 on page 155).
   - In this example for Microsoft Access, you browse to the database by clicking the dotted button and selecting the appropriate file.
   - Change the user name if you want.
   - To enter a password, uncheck the Blank password check box and type in the password.
   - To remember the password, check the Allow saving password check box.
   - Click the Test Connection button to ensure the connection works.

Note: The appearance of this window depends upon the database provider previously selected.

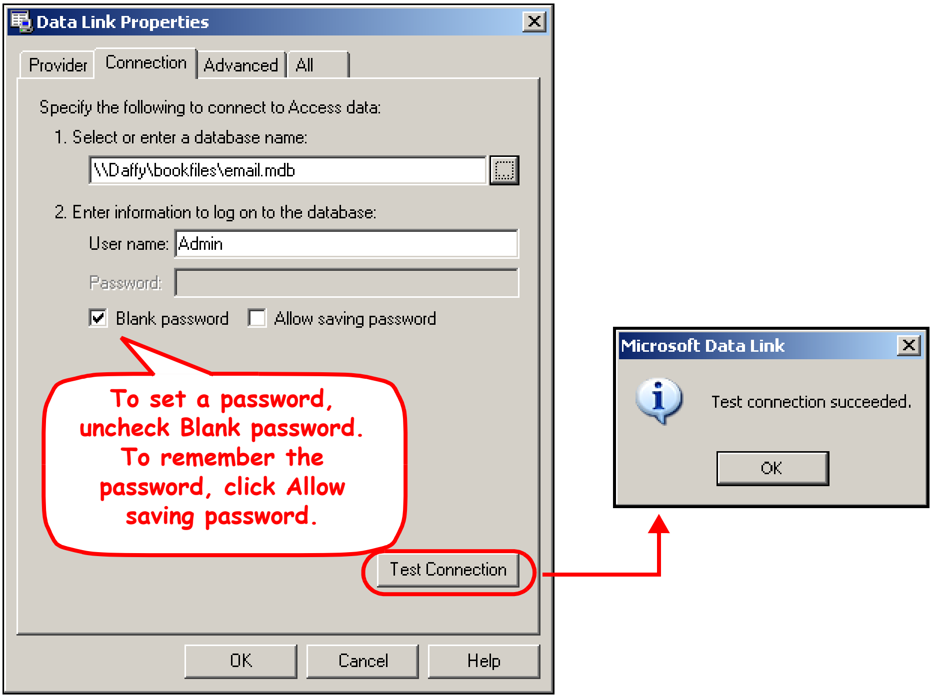


Figure 106 Data Link Connection Window

7. In the Connection tab, click OK to close the Data Link Properties window.

8. Click OK again to close the Create a New Database Connection window.

Modifying Database Connections

1. Open the Database Connections Manager (Tools > Database Connections Manager).

2. From the Database Connections Manager window, highlight the database connection and click Modify.

3. Make the necessary modifications and click OK.

Deleting a Database Connection

1. Open the Database Connections Manager (Tools > Database Connections Manager).

2. From the Database Connections Manager window, highlight the database connection and click Delete.

3. When prompted, answer yes to delete this connection.

Note: If this connection is used in a group, you must remove the group before you can delete the connection.

Examining a Database

By examining an existing database connection, you can determine the fields and field types included in each table of that database.

1. Open the Database Connections Manager (Tools > Database Connections Manager).

2. From the Database Connections Manager window, highlight the database connection and click Examine.
3. Select the a connection and view the tables and associated fields. When you are done, click Close.

Using Web Services

Group-Metrics.com provides tools and services which help you to better communicate with your customers through your newsletters and Group Mailings.

1. To find out more about the services, click [Find out more]—see Figure 107.

2. To sign up for the services, click [Sign up for an account].

3. To have your Username and Password e-mailed to you, click [Locate account details].

4. Once you are registered, check the box to enable Group Metrics support and enter your username and password.

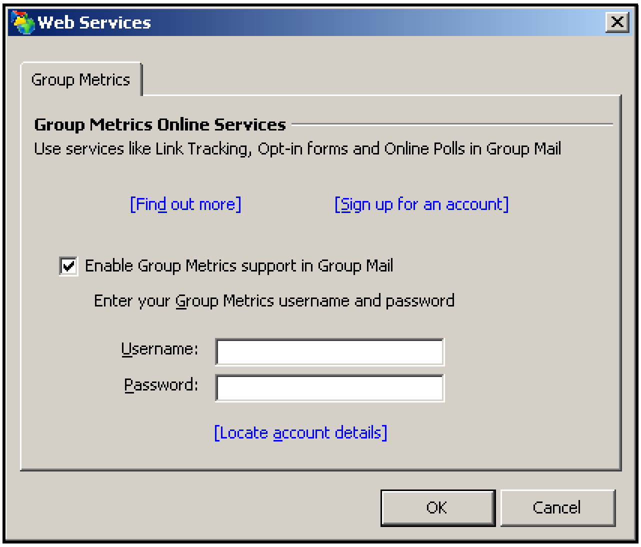


Figure 107 Web Services Window

Add-ons Manager

Add-ons provide additional functionality to GroupMail. Use the Add-ons dialog box to manage and configure the Add-ons available for use in GroupMail. (See also Appendix B on page 183.)

Opening the Add-ons Manager

1. Open the Add-ons Dialog Box (Tools > Add-ons > Manage Add-ons)—see Figure 108.

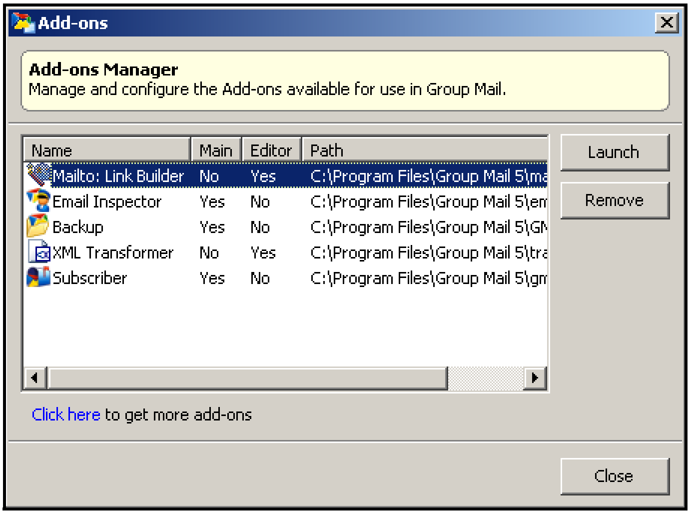


Figure 108 Add-ons Manager

About the Add-ons Manager Dialog Box

The Add-ons Dialog Box provides options for managing and configuring the GroupMail Add-ons.

Field Name	Description
Name	Shows the name of the Add-on.
Main [a]	Yes/No - Is Add-on used in the Main application.
Editor [a]	Yes/No - Is Add-on used in the Editor.
Path	Shows the path to the location of the Add-on.

a. Some Add-ons can be used in both the Main and Editor applications.

Button	Description
Launch	Activates the highlighted Add-on.
Remove	Removes the highlighted Add-on.
Close	Closes the Add-ons Manager.

Link	Description
Click here	Takes you to www.group-mail.com to check for other Add-ons.

Launching an Add-on

1. Open the Add-ons Manager (Tools > Add-ons > Manage Add-ons).

2. Highlight the Add-on you want to use.

3. Click the Launch button.

4. Click Close when you are done.

Removing an Add-on

1. Open the Add-ons Manager (Tools > Add-ons > Manage Add-ons).

2. Highlight the Add-on you want to remove.

3. Click the Remove button.

4. Click Close when you are done.

New Add-ons

The Click here link takes you to Infacta’s web site where you can get information about new add-ons as they become available (see Figure 108).

Message-Related Options

The General tab of the Message Related Options dialog box (see Figure 109) includes message and font options. The Spell Checker tab (see Figure 110 on page 164) includes spelling options and dictionary management.

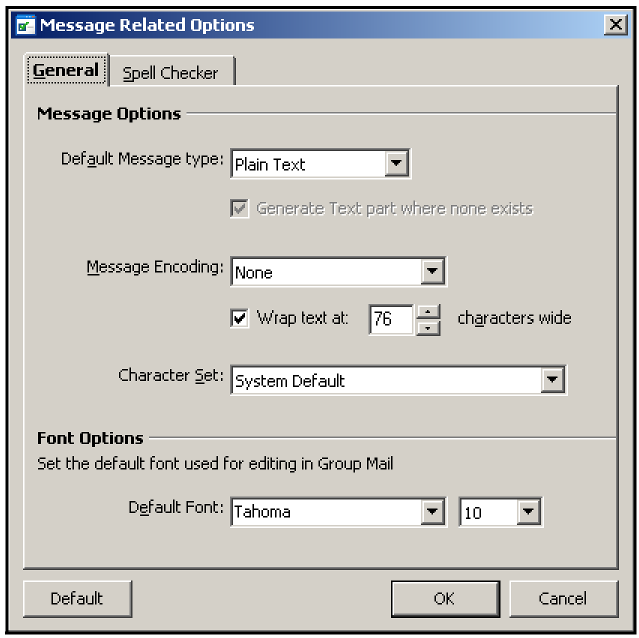


Figure 109 General Tab

General Tab Options

Default Message type

Plain Text

Plain text is just that—no bold, no italics, no bullets, etc. Optionally, you can create a message and format it in HTML and send that file instead of formatted text.

Rich Text (HTML)

Rich text (HTML) provides all the tools necessary to format a message within GroupMail. If you are sending an HTML message, GroupMail can automatically generate and attach a plain text version. The recipient's e-mail client can then choose which version it wants to view—HTML or plain text. If the client doesn't know how to view multi-part messages, it will typically show the Text part normally and the HTML part as an attachment.

Message Encoding

Multipurpose Internet Mail Extensions (MIME) encoding schemes include Printed Quotable and Base64. GroupMail options for message encoding include the following:

Printed Quotable

With this option, data that has lost its original formatting may still be largely readable.

Base 64

Although mostly irrelevant to human readers, this is a more efficient algorithm for sending messages.

None

No encoding is selected.

Character Set
Select the appropriate set from the drop-down list. Options include System Default, Arabic (Windows), Baltic (Windows), and so forth.

Font Options
Set the default font used for editing in GroupMail as follows:

1. In the General tab of the Message Related Options window, select the font of choice from the drop-down list of font families.
2. Select the font size from the drop-down list of sizes.
3. Click OK.

Spell Checker Tab

The Spell Checker tab of the Message Related Options window provides several options for checking your spelling.

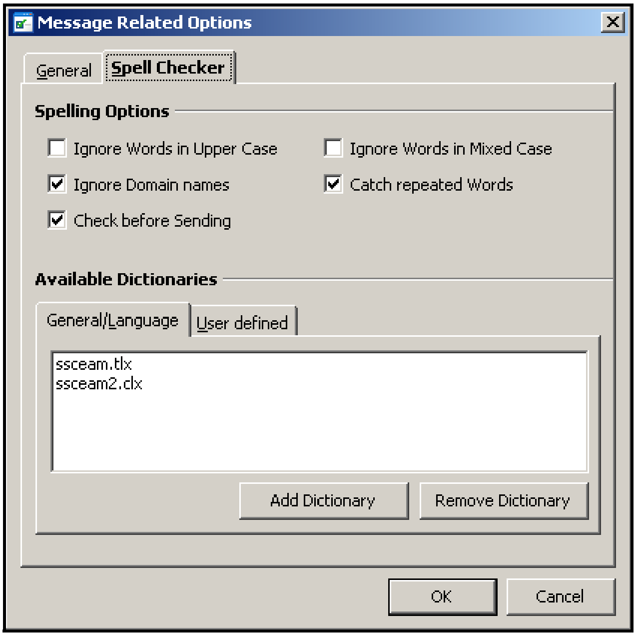


Figure 110 Spell Checker Tab

Spelling Options

- Check or uncheck the options listed.
- Ignore Words in Upper Case
- Ignore Domain names
- Check before Sending
- Ignore words in Mixed Case
- Catch repeated Words

Available Dictionaries

- Using the Spell Checker tab of the Message Related Options window, you can add or remove dictionaries used by the Spell Checker.

- The General/Language tab shows the installed dictionaries. You can add and remove dictionaries by clicking the corresponding buttons.
- You can define a custom dictionary. This option has its own online help file.

Signature Manager

Use the Signature Manager (see Figure 111) to create artistic or informative signatures for your messages. The signature manager creates plain text signatures as well as rich text signatures that can include HTML markup tags. Access the Signature Manager from the following:

- the GroupMail User Interface Tools menu
- the Message Editor's Tools menu
- the Message Editor's Insert > Signature menus

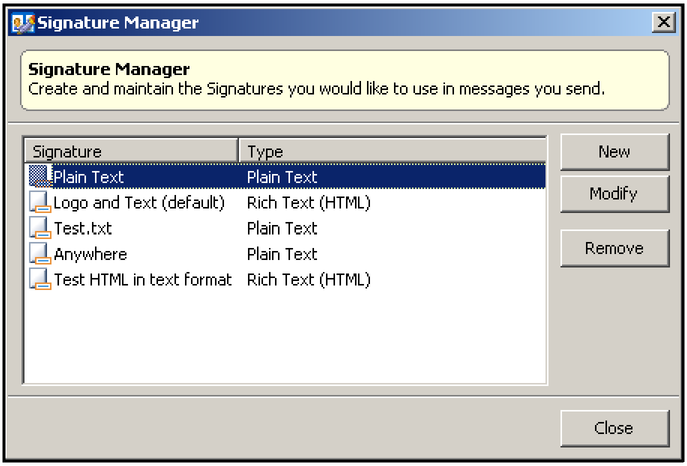


Figure 111 Signature Manager Window

Create Plain Text Signature

1. Open the Signature Manager using one of the following methods:
   - the GroupMail User Interface Tools menu
   - the Message Editor's Tools menu
   - the Message Editor's Insert > Signature menus

2. With the Signature Manager open, click New.

3. In the Signature Properties window (see Figure 112), enter a unique and descriptive name for this signature.

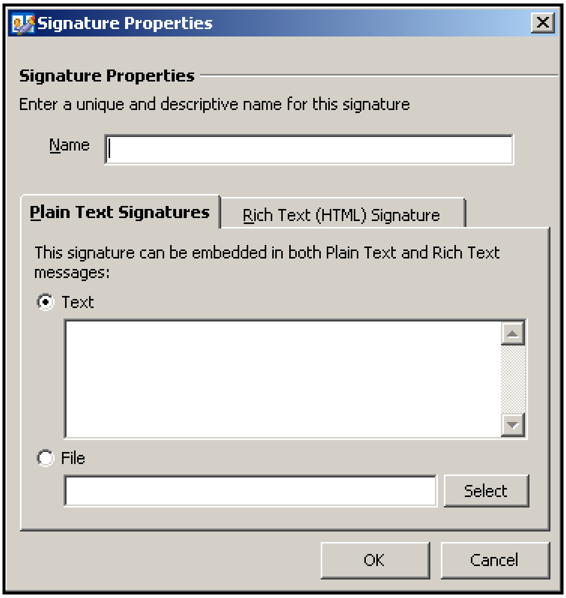


Figure 112 Signature Properties Window

4. If necessary, click the Plain Text Signatures tab.

5. Create the signature:
   - **Text** - You can enter your text directly into the text field.
   - **File** - You can enter the path and filename of a text file that contains the information.
6. Click OK when you are done.

Create Rich Text (HTML) Signature

1. Open the Signature Manager using one of the following methods:
   - the GroupMail User Interface Tools menu
   - the Message Editor's Tools menu
   - the Message Editor's Insert > Signature menus

2. With the Signature Manager open, click New.

3. In the Signature Properties window, enter a unique and descriptive name for this signature. If necessary, click the Rich Text (HTML) Signature tab.

4. Create the signature:
   - **Text** - You can enter your text directly into the text field, including HTML markup tags. If you choose, including the <IMG> tag.
   - **File** - You can enter the path and filename of a text file that already contains the information.
5. Click OK when you are done.

Default Signature

1. Open the Signature Manager.

2. Click the Default button on the Signature Manager window.

Modify Signature

1. Open the Signature Manager.
2. From the list of signatures, highlight the one you want to modify.
3. Click the Modify button.
4. Make the appropriate changes.

Remove Signature

1. Open the Signature Manager.
2. From the list of signatures, highlight the one you want to remove.
3. Click the Remove button.
4. Click Yes to permanently delete the selected signature.

Use a Signature

1. Open a new or draft message.

2. From the Message Editor / Insert Menu select a signature from the list that opens (see Figure 113).

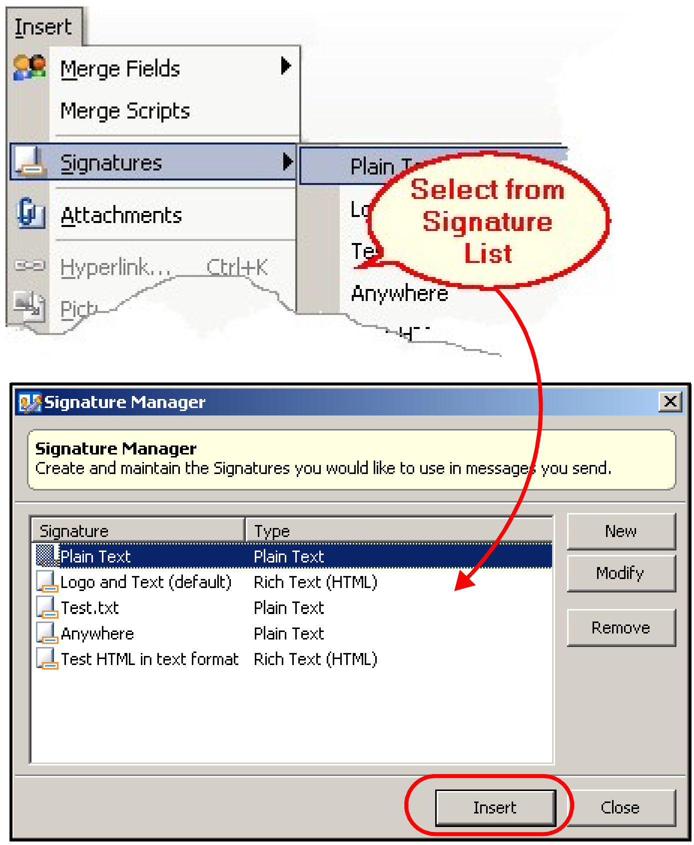


Figure 113 Using Signatures

APPENDIX A Message Editor Menus and Toolbar

Message Editor Menus

The Message Editor menus help you set up your message, provide some administrative tools, and include a help file. For more information, click on the menu below:

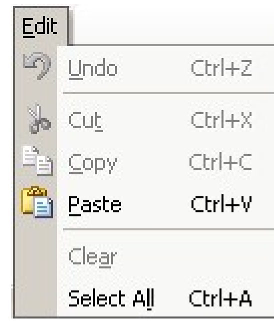
File Menu

The File menu, shown opposite, provides common tasks such as creating a new message, saving a message, and sending a message. It also provides a way to import HTML or URLs, preview you message before you send it, and create a new sender account.

Message Editor FILE Menu **To do this...**	**Select this menu...**	**Use this Keyboard Shortcut...**	**Click Icon on Toolbar...**
Start a new message	New	Ctrl+N	
Import an HTML document in the current message	Import		
Import a web page into the current message (URL)	Import		
Save the current message	Save	Ctrl+S	
Save the current message with a different name	Save As		
Preview the message before sending it	Send Preview		
Send a test message to a single e-mail address	Send Preview		
Send the message	Send	F5	
Create new sender information	Account Setup		
Exit the Message Editor	Close	Alt+F4	

Edit Menu

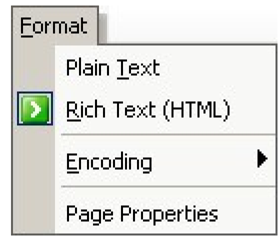
The Edit Menu, shown opposite, provides common editing tasks such cut and paste and the usual Windows shortcuts.



Message Editor EDIT Menu **To do this...**	**Select this EDIT menu...**	**Use this Keyboard Shortcut...**	**Click Icon on Toolbar...**
Undo the last action	Undo	Ctrl+Z	
Cut (remove) highlighted text and paste to clipboard	Cut	Ctrl+X	
Copy (leave original) highlighted text and paste to clipboard	Copy	Ctrl+C	
Paste text from the clipboard	Paste	Ctrl+V	
Remove highlighted text (undo only, no paste)	Clear		
Select all of the text at once	Select All	Ctrl+A	

Format Menu

The Format menu, shown opposite, provides many options for Rich Text (HTML) formatting. If you are working in Plain Text, you can choose to include encoding or switch to Rich Text.



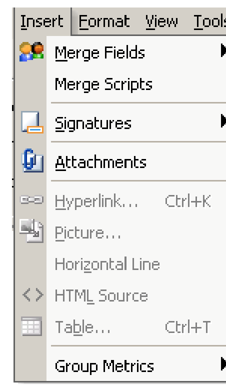
Message Editor FORMAT Menu To do this...	Select this menu...
Send unformatted text	Plain Text
Send formatted text	Rich Text (HTML)
Secure your message with default encoding	Encoding
Set page properties such as the following:	Page Properties
Create a title for your rich text message	Page Properties
Insert a background image in your rich text message	Page Properties
Select a background color for your rich text message	Page Properties
Select a text color for your rich text message	Page Properties
Select a links color for your rich text message	Page Properties
Select a visited links color for your rich text message	Page Properties
Select an active links color for your rich text message	Page Properties
Set left, right, top, and bottom margins	Page Properties

Help Menu

The Message Editor Help menu is very similar to the GroupMail Help File. The only difference is that the Getting Started Helper is missing.

Insert Menu

The Insert menu, shown opposite, provides many options for personalizing your Plain Text and Rich Text (HTML) messages; however, the following menu options apply **only** to Rich Text (HTML): Hyperlink, Picture, Horizontal Line, HTML Source, and Table.

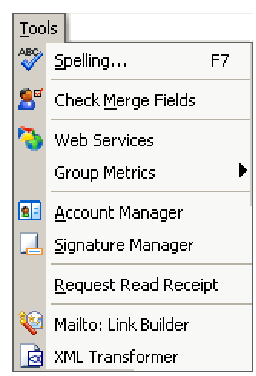


Message Editor INSERT Menu **To do this...**	**Select this menu...**	**Keyboard Shortcut...**	**Message Editor...**
Personalize a message by inserting fields from the selected group into the current message	Merge Fields		
Alter or compare the contents of recipient merge fields	Merge Scripts		
Create and maintain signatures you would like to use in messages you send	Signatures		
Add attachments	Attach-ments		

Message Editor INSERT Menu (Continued)	Select this menu...	Keyboard Shortcut...	Message Editor...
Insert a hyperlink into your message	Hyperlink	Ctrl+K	
Insert an image into your message	Picture		
Insert a horizontal line into your message	Horizontal Line		
Enter HTML code	HTML Source		
Insert (create) a table for in your message	Table	Ctrl+T	
Insert Group Metrics data	Group Metrics		

Tools Menu

The Tools menu, shown opposite, lets you check spelling, check merged field, sign up for and connect to Group Metrics data, access the Accounts and Signature Managers, and request a Read Receipt from the recipients.



Message Editor TOOLS Menu To do this...	Select this menu...	Keyboard Shortcut...	Message Editor Icons
Check spelling	Spelling	F7	
Check merged fields	Check Merge Fields		
Read about Group Metrics	Web Services		
Retrieve Group Metrics data	Group Metrics		
Access the Account Manager	Account Manager		
Access the Signature Manager	Signature Manager		
Request a Read Receipt	Request Read Receipt		

View Menu

The View menu, shown opposite, includes three options: Message, Source/HTML (if Rich Text is selected), and Preview.

Message Editor VIEW Menu To do this...	Select this menu...
View the current message from Preview tab	Message
View the HTML source code in the current message	Source / HTML
Preview the current message	Preview

Message Editor Toolbars

The Message Editor Toolbar provides quick access to many of the menus and also lets you set a priority level for your message. When you select Rich Text (HTML) format, an additional formatting toolbar opens.

Table A-1: Message Editor Toolbar Icons

Task	Toolbar Icon	See also ...
Send message		File Menu > Send
Save message		File Menu > Save
Cut text		Edit Menu > Cut
Copy text		Edit Menu > Copy
Paste text		Edit Menu > Paste
Check spelling		Tools Menu > Spelling
Merge fields		Insert Menu > Merge Fields
Signature manager		Insert Menu > Signatures

Table A-1: Message Editor Toolbar Icons (Continued)

Task	Toolbar Icon	See also ...
Attach file		Insert Menu > Attachments
High priority		
Low priority		
Message format		Format Menu > Plain Text
Group Metrics data		Tools Menu > Group Met-rics
Mail To Link Builder		

Formatting Toolbar for Rich Text (HTML)

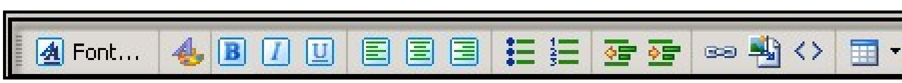


Table A-2: Message Editor Rich Text Toolbar Icons

Task	Toolbar Icon	Comments
Select font properties		Highlight the text, then click and select properties
Select font color		Highlight the text, then click and select color

Table A-2: Message Editor Rich Text Toolbar Icons (Continued)

Task	Toolbar Icon	Comments
Set text to bold		Highlight the text, then click
Set text to italics		Highlight the text, then click
Set text to underline		Highlight the text, then click
Align text - Left		Insert cursor into a single paragraph or highlight all paragraphs to align
Align text - center		Insert cursor into a single paragraph or highlight all paragraphs to align
Align text - right		Insert cursor into a single paragraph or highlight all paragraphs to align
Add bullets to text		Highlight all paragraphs in series, then click
Number text		Highlight all paragraphs in series, then click
Decrease indent		Insert cursor into the paragraph or highlight all paragraphs
Increase indent		Insert cursor into the paragraph or highlight all paragraphs

Table A-2: Message Editor Rich Text Toolbar Icons (Continued)

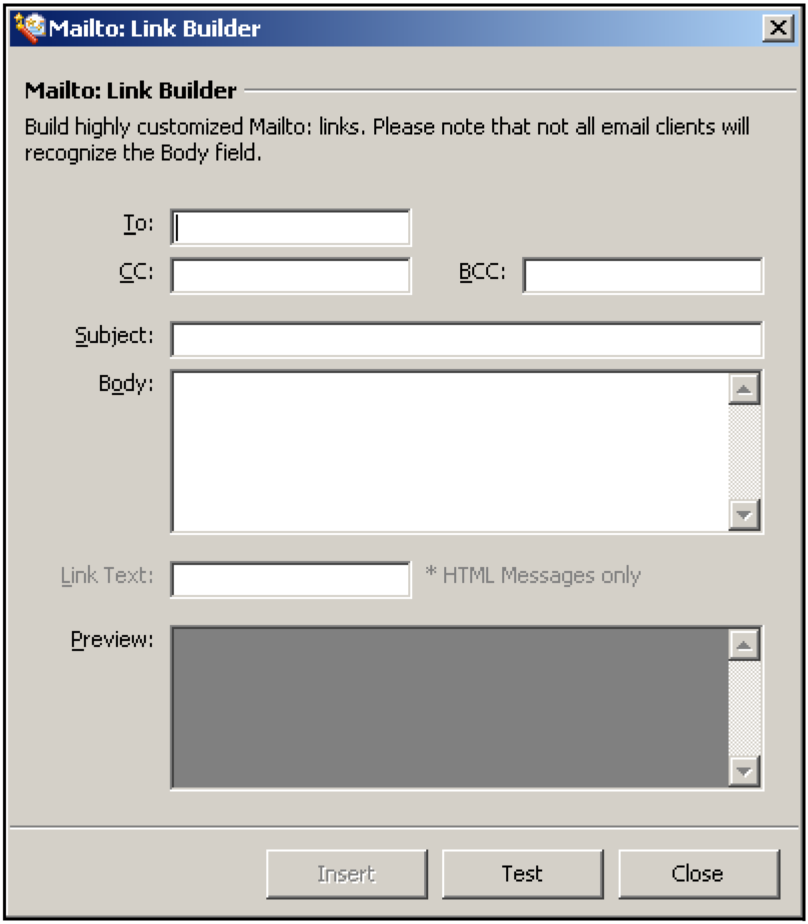
Task	Toolbar Icon	Comments
Insert hyperlink		Place cursor at insertion point
Insert image		Place cursor at insertion point
Insert HTML		Place cursor at insertion point
Insert table		Place cursor at insertion point

APPENDIX B Add-ons

Add-ons provide additional functionality to GroupMail. The following descriptions are for currently available add-ons. Check the Infacta Ltd. site for future add-ons.

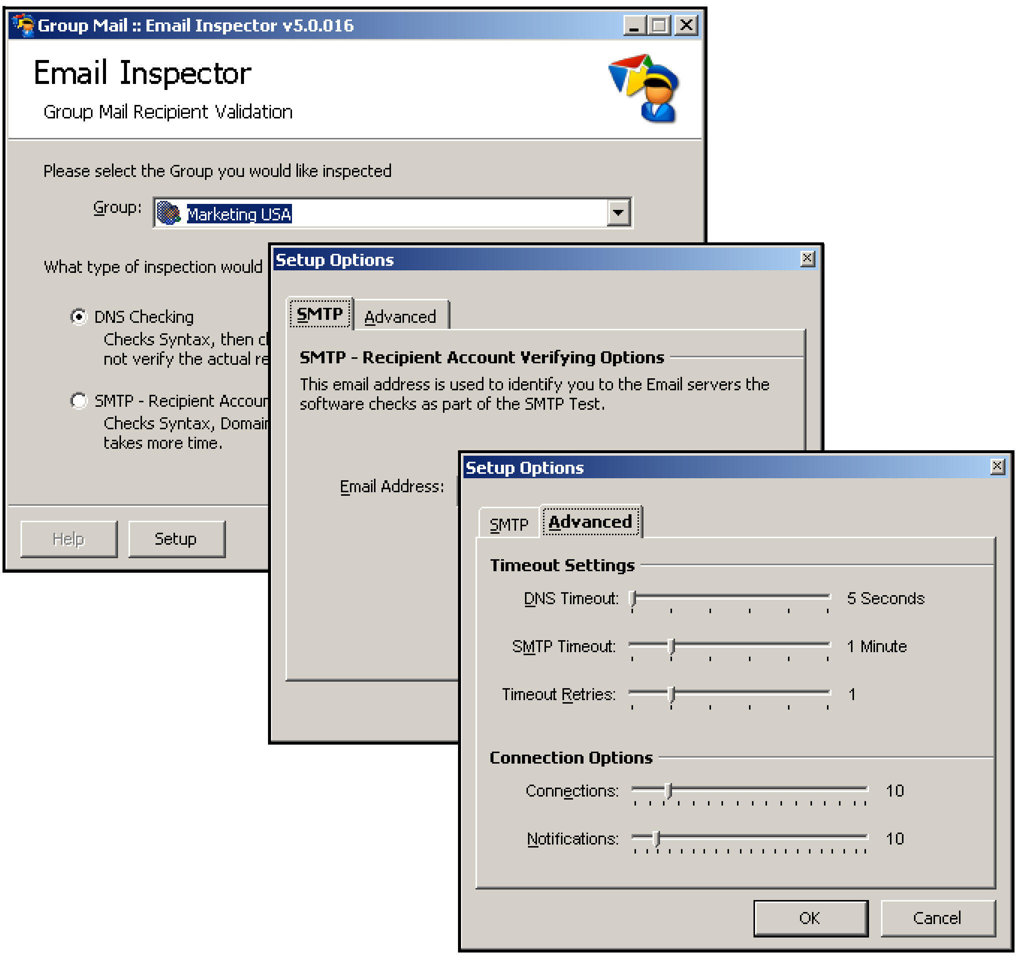
Mailto: Link Builder

Builds highly customized Mail To: links.



Email Inspector

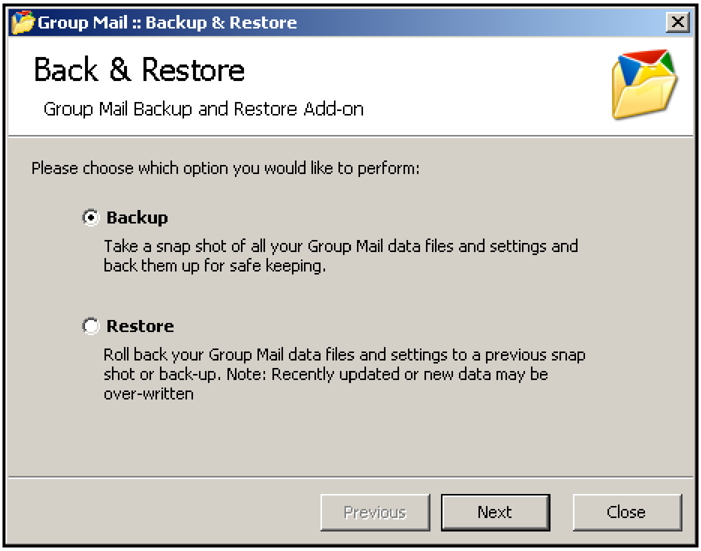
Checks and validates recipient information before sending. DNS checking is quicker, but does not verify actual recipient address. SMTP takes longer, but will check recipient address.



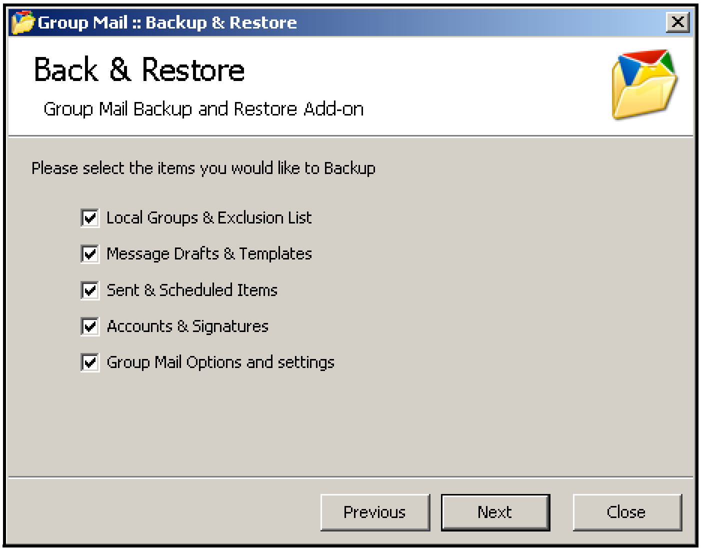
Backup

Backs up and restores GroupMail data files and settings.

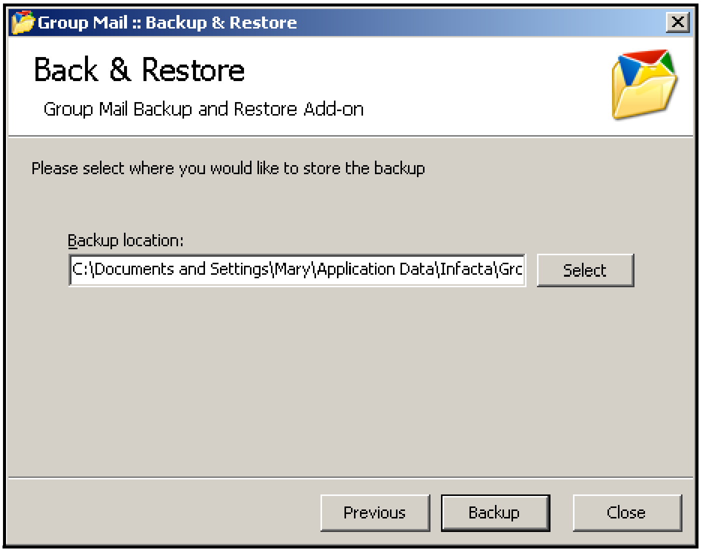
1. Select Backup or Restore.



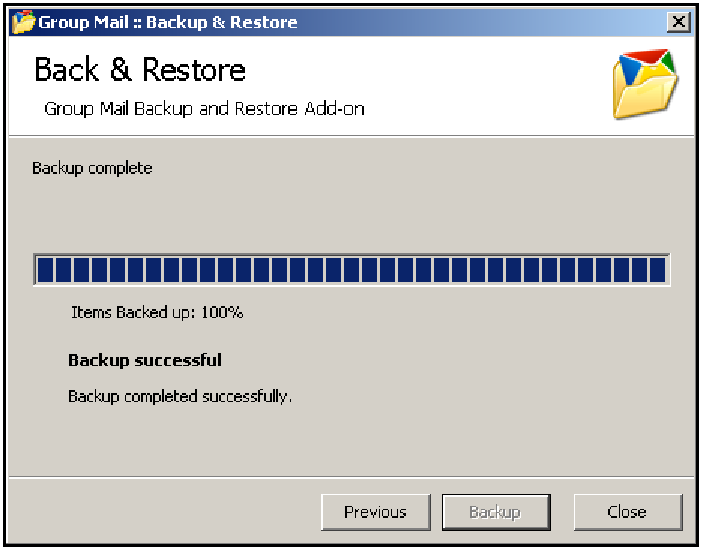
2. Select the items you want backed up or restored.



3. Enter location for backup or retrieval.

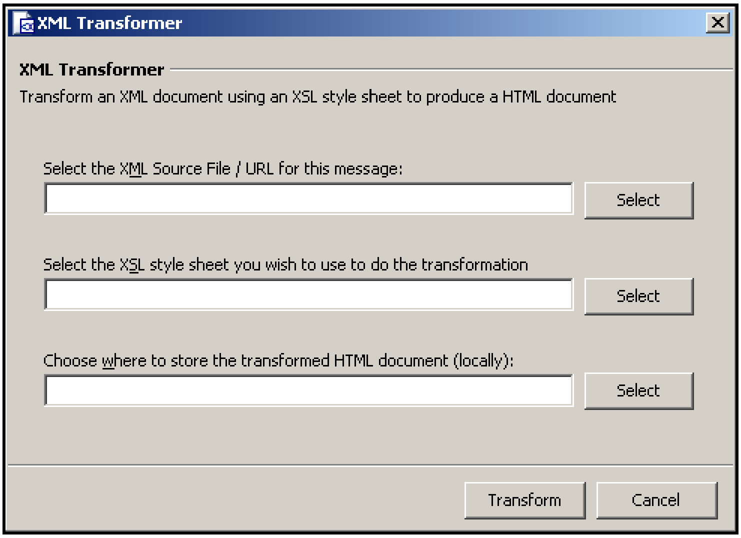


4. Window informs you of successful operation.



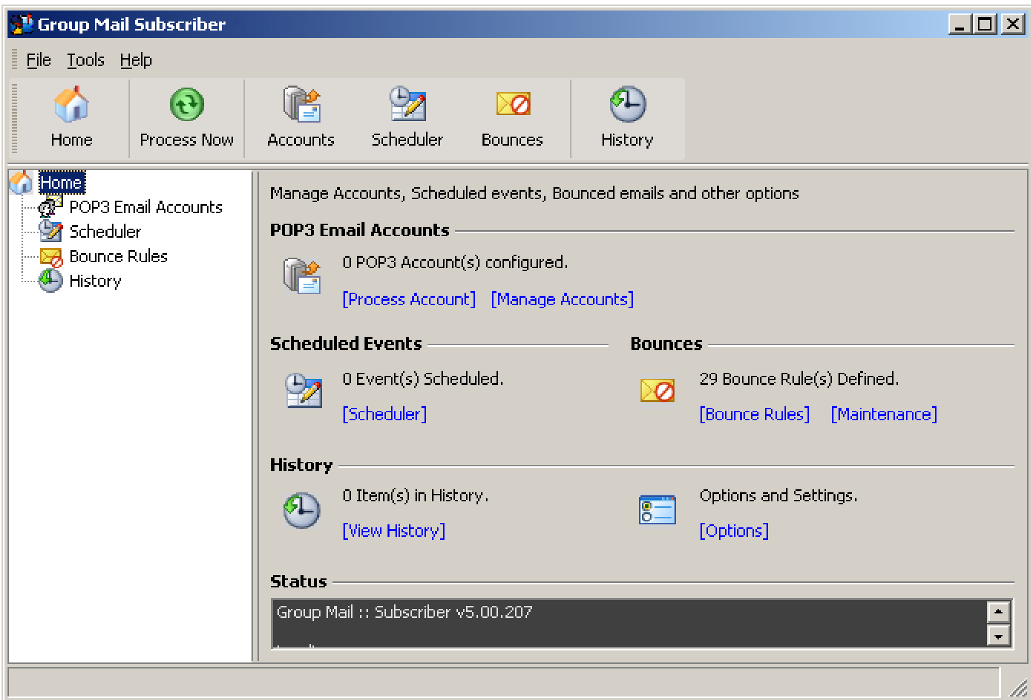
XML Transformer

This add-on is only available through the Message Editor/Tools menu. It takes a valid XML document and transforms it, using an XSL Style Sheet, into an HTML document that you can send in e-mail.



Subscriber

Manages POP3 e-mail accounts, Scheduled Events, Bounces, and History.



Glossary

account
An account contains sender information. You can have more than one account, modify existing accounts, remove accounts, and set an account as the default. See Accounts Manager.

add-ons
Add-ons provide additional external functionality to GroupMail.

bulk e-mail
E-mail sent to more than one recipient. Using GroupMail, recipients are hidden from one another.

delivery console
GroupMail's delivery console provides information about the status of messages in the delivery queue.

encoding
GroupMail's MIME encoding options include Base64 and Printed Quotable. *Base 64* - Although mostly irrelevant to human readers, this is a more efficient algorithm for sending messages. *Printed Quotable* - With this option, data that has lost its original formatting may still be largely readable.

exclusion list
A list of certain e-mail addresses, taken from a group, that will not receive an e-mail.

groups
A GroupMail group is a list or a series of recipient details.

groups, merging
Merging groups physically combines them into a single group.

groups, linking
Linking groups connects them, but the groups maintain their own integrity.

header, custom
An e-mail header that is created when the sender enters specific information about the e-mail.

header, e-mail
An e-mail header is a section of an e-mail message that contains detailed information about the origination of the message. This information is usually hidden by most e-mail programs.

MIME
Multipurpose Internet Mail Extensions. MIME is used to delineate and describe the different parts of an e-mail message, such as images, audio files, and other attachments. See also encoding.

NTLM
NT LAN Manager (NTLM) authentication scheme for HTTP. This protocol uses encryption for secure transmission of passwords.

Plug-ins
These are small applications or utilities that allow you to extend the core functionality of an application. See also add-ons.

POP3
Post Office Protocol Version 3. Used by mail readers to retrieve mail from a mail server. POP3 is the most recent version of a standard client-server protocol for receiving e-mail. POP3 mail servers listen for mail requests and forward mail to the requesting party. The default port on which the POP3 server listens for these requests is 110.

SMTP
Simple Mail Transport Protocol. This is the standard protocol used on the Internet to send mail to and between mail servers and clients. This is the protocol GroupMail uses to send and route its mail messages.

spam
Junk or unsolicited e-mail. Please review Infacta's policy on sending spam using GroupMail or any other Infacta products. http://www.infacta.com/spam.asp.

SSL
Secured Sockets Layer is a protocol that transmits your communications over the Internet in an encrypted form. SSL ensures that the information is sent, unchanged, only to the server you intended to send it to. GroupMail's SSL option is in the Email Accounts Advanced screen.

template
In GroupMail, you can create an e-mail that is formatted and set up just as you want other e-mail messages to be. After saving this message as a template, use it as a basis for future messages to ensure consistency.

web services
In GroupMail, the following web services are provided by Group Metrics: *Tracking Manager* - helps you gauge which mailings are of interest to your customers and which are not by track your mailings, getting reports on open rates, and clicking through rates. *Poll Manager* - creates polls to send with your mailing or place on your website. *Opt-In Manager* - maintain your mailing lists by creating an opt-in form, and placing it on your website. When users sign up for your newsletter, this service e-mails them and asks them to confirm their e-mail subscription. This form of "double opt-in" subscription helps eliminate false subscriptions. Opt-In Manager can also handle remove requests.

X-header
X-header is the generic term for headers starting with a capital X followed by a hyphen. The convention is that X-headers are nonstandard and are provided for information only.

Index

H

I

L