CONTACT Sage Pro Group Mail Free Manual

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Introduction:

The Contact Sage Pro can export a list that is compatible with group email programs such as Group Mail Free. This manual will explain how to use Group Mail Free to send out personalized emails to your contacts.

You should use Group Mail Free or Pro if you send out bulk email to your clients or contacts. If you use bulk email (BCC), some email account providers will automatically put the emails you send to contacts into the bulk mail folder, where it will probably not get read. Additionally, you cannot personalize the email to include the contact's name, etc. Programs like Group Mail Free solve this problem by sending each email out one at a time, and by letting you personalize each email by putting merge fields into the emails. (Exactly like form letters in Microsoft Word.)

Group Mail Free is a no cost software package. (Please go to www.contactsagepro.com and click the Group Mail link at the bottom of the page.) There are 2 major limitations of this free program which are both addressed in Group Mail Pro (currently $79.) The first limitation is that only 100 emails can be sent out at a time. If you are going to export lists larger than 100 emails from the Contact Sage Pro, it will be difficult to break up the lists into 100 email sections; therefore you should seriously consider purchasing Group Mail Pro. The second limitation is that Group Mail Free must use an SMTP mail server (from your ISP, or domain host) to work. The Group Mail Pro can send emails directly without the SMTP server. If your ISP or domain host restricts access to their SMTP server, you should purchase Group Mail Pro.

For specific Group Mail requirements, please see the Group Mail software manuals.

Our systems interface with programs from Microsoft Office, Microsoft Outlook, Email Programs, Group Mail Programs, Image Viewer Programs, and PDA sync programs and applications. Many of our users also set up our systems on networks so that multiple users can use the same system at the same time. We **cannot provide support** for **software** that we did not create, even if our systems can interface and use that software. Further, we **cannot provide support** for setting up **network systems**. Our systems are designed to only pass data to outside programs. Please **direct all support questions** about **outside programs** to the developers of those programs.

Creating Emails:

We recommend that you first create your email in Microsoft Word. You can use all word formatting, fonts, and styles. You can also personalize the email by inserting:

Symbol in email	Contact Field	Column in Email List
!*EMAIL*!	email	1
!*FIRST_NAME*!	first name	2
!*LAST_NAME*!	last name	3
!*ADDITIONAL_FIELD1*!	next appointment date	4
!*ADDITIONAL_FIELD2*!	next appointment time	5

After you have finished the email, you should save the email as an html file by clicking File - > Export To - > Compact HTML. (Figure 1)

Figure 1:
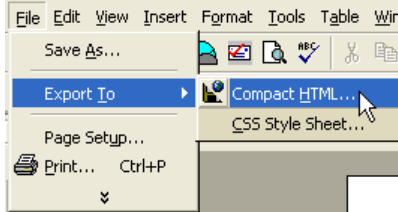
If you are using Microsoft Word 2000, you must download and install a Microsoft Update to have the Export To -> Compact HTML choice. You can download the update from www.bandisoftware.com/msohtmf2.exe

Exporting Lists:

To export an email list, create a list of contacts by:
1) click Search on the Contact Information screen
2) enter search criteria
3) click Search on the Find Contacts Screen
4) click Turn List Function On to turn on the List Function
5) select the desired contacts
6) click Email List (Figure 2)
7) choose whether you want to add a note to the contacts who will receive the email
   a. if you choose to add a note in 7), edit the note
8) Verify that the email list is correct
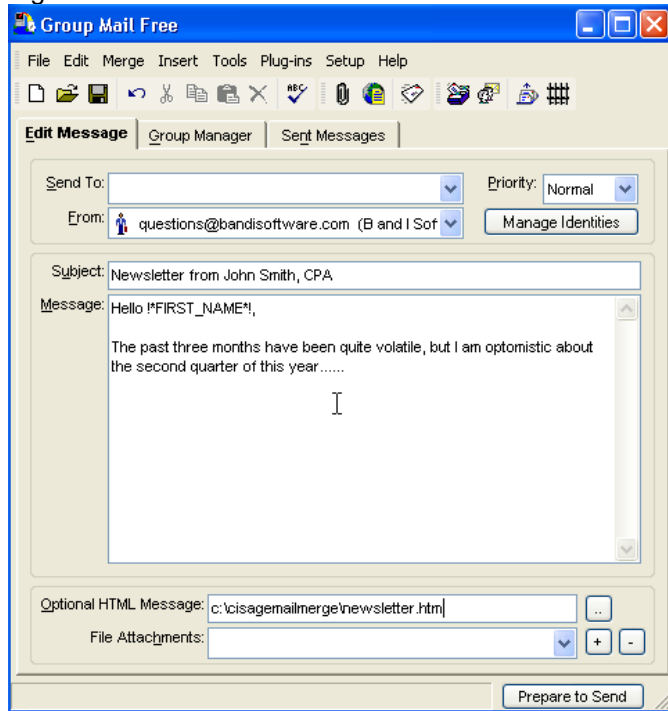9) Open the Group Mail Free program

Figure 2:
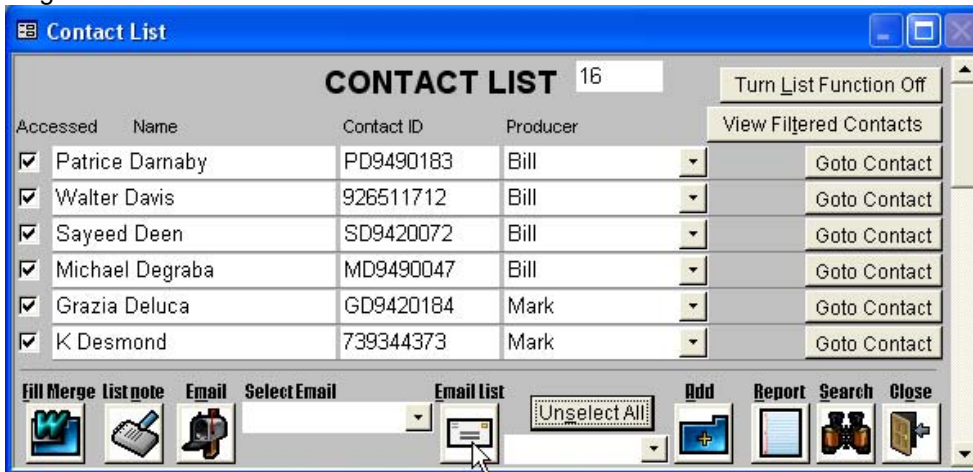
When you first run the Group Mail Free program, you will be asked to enter your email address, reply to address, and SMTP server. Once these are set up, you can begin to setup emails.

Setting up emails:
These are our recommendations on how to send personalized individual emails using the Group Mail Free program:
1) enter in the Email subject
2) enter in the Email Message- If you previously created the html file in Microsoft Word, you should open the Word or *.doc version of that email, copy all of the text and paste that text into the Message Area.
3) link to the HTML file created from your Microsoft Word email in the Optional HTML Message box.

Figure 3:

Importing Email Lists:

Once you export the email list from the Contact Sage Pro, you must import it into the Group Mail Free program. To do this:
1) click on the Group Manager tab (Figure 4)
2) click New
3) type in a group name (Figure 5)
4) click Import and then Import from File or Clipboard (Figure 6)

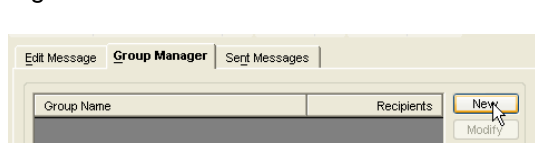Figure 4:   Figure 5:   Figure 6:
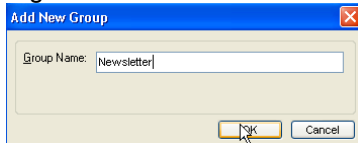

5) on the File Importer, click Select (Figure 7)
6) choose cisageemaillist.txt from the Contact Sage Pro mailmerge directory (cisagemailmerge) (Figure 8)
7) click Next
8) select Input Field 2 for firstname, Input Field 3 for lastname, Additional Field 1 for Appointment Date…. (Figure 9)
9) click Next until you are on the File Importer Screen
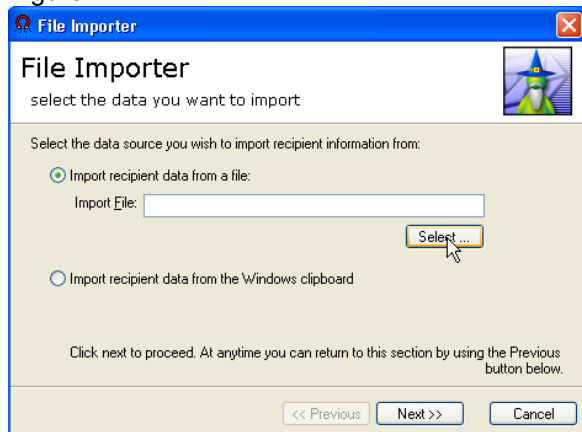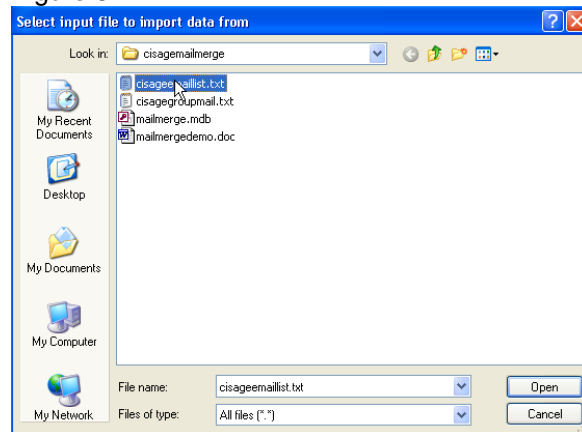10) click Start (Figure 10)

Figure 7:

Figure 8:

Figure 9:

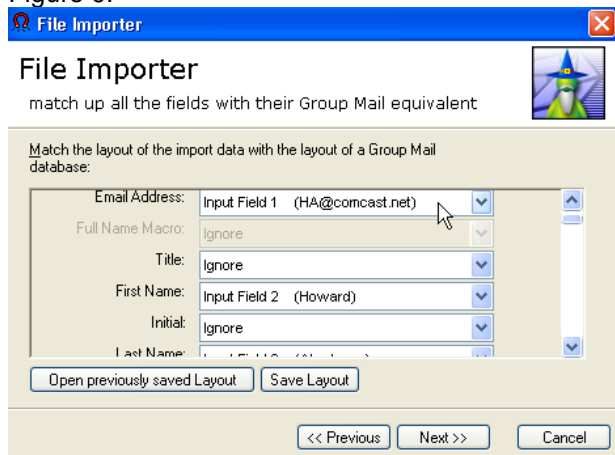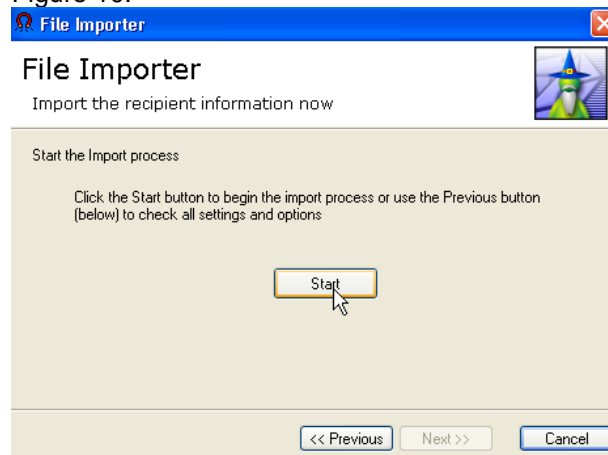Figure 10:

You have now imported the email list.

11) click on the Email Message Tab (Figure 11)
12) click Prepare to Send (Figure 12)
13) click Send

Figure 11:

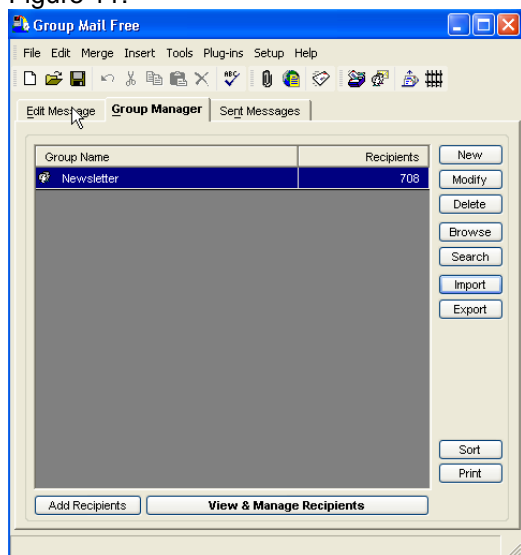Figure 12: