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**Intelliquis Mass Mailer User Guide**

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## **GETTING STARTED**

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Welcome to Mass Mailer - an innovative and easy-to-use software solution for effectively managing mass emails. This unique program enables you to automatically send mass emails to thousands of recipients with the click of a button.

Whether you are a system administrator, or a newcomer to computers, Mass Mailer will make sending mass emails to thousands of recipients a simple task. With Mass Mailer, all the work has been done for you, you can import and manage your own database of mail recipients without having to pay the high fees to have a service perform this task for you.

With its easy-to-use interface, Mass Mailer walks you through the process of mailing thousands of email addresses. By simple clicking on the tool bar and filling in the appropriate information, you will be able to send your email to thousands of recipients. Once you have prepared your email, Mass Mailer will send your email to all the individuals in your database.

No other mass mailing program lets you have the easy of updating your database, with an exclusion list that allows the user the option of who not to send mail to. Likewise, Mass Mailer allows you to use multiple users and mail servers making the program user friendly to any user. Features like these make Mass Mailer the easiest to use mass mailing program on the market.

## About this Manual

This Mass Mailer *User Guide* is intended to provide users quick access to the necessary information to successfully install and begin using Mass Mailer. It also provides users with useful information regarding Mass Mailings. Most of the information contained in this manual is also accessible in the extensive on-line help file that accompanies Mass Mailer. To find answers to questions that may arise as you work with Mass Mailer, we encourage you to consult the on-line help file as well as the user guide.

## Installing Mass Mailer

This section describes how to install Mass Mailer for the Microsoft Windows 95, 98, and NT operating systems.

Before beginning the setup procedure, exit all windows programs. This frees up memory for installation and prevents possible conflicts between the Mass Mailer installation program and other applications.

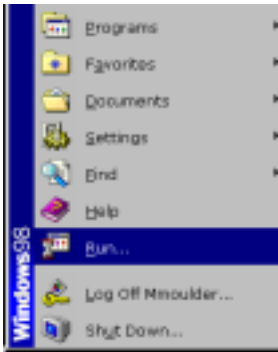
To install Mass Mailer, insert the Mass Mailer CD in your CD-ROM drive. Wait for several seconds and the following Mass Mailer setup window should automatically appear on your screen.



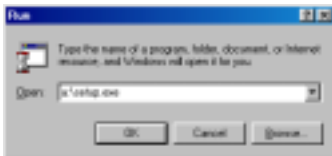
To install Mass Mailer proceed to page 6 for detailed instructions.

**Note:** If the Mass Mailer setup window shown on the previous page does not appear automatically when you insert the Mass Mailer installation CD into your CD-ROM drive, or if Mass Mailer came on diskette, follow the procedure below to manually open the Mass Mailer setup window. (If the Mass Mailer setup window appears automatically as it should when you insert the Mass Mailer CD into your CD-ROM drive, skip this procedure and go on.)

## Manually Opening the Setup Wizard



1. If the Mass Mailer setup window shown on the previous page does not appear automatically, click on our Windows Start Menu button and choose **Run**.

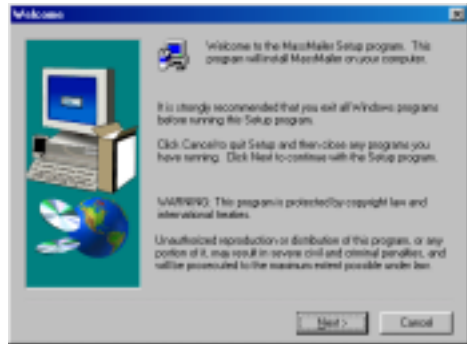


2. The **Run** dialog box pictured here will appear. In the **Open** window, type **A:\setup.exe**, where **A** is the letter of your CD-ROM drive or floppy drive. Click **OK** and the Mass Mailer setup window will appear.

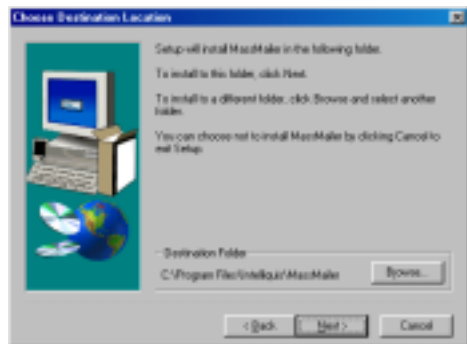
## The Mass Mailer Setup Wizard

Once you have launched the installation program for Mass Mailer from the setup window, follow the procedure outlined here to successfully install Mass Mailer on your computer.

1. The **Welcome** dialog box is the first one you will see after launching the installation program for Mass Mailer. Make sure that you have exited all programs and click the **Next** button to continue the setup procedure. If you want to exit setup during the installation procedure, click the **Cancel** button.

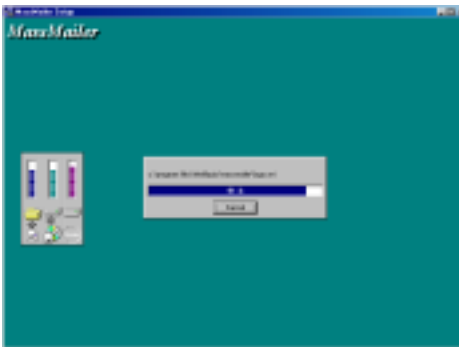


2. The **Choose Destination Location** prompt displays the path of the folder to which the Mass Mailer program files will be copied. If you would like the program files installed to a different folder, click the **Browse** button to specify another folder. Click **Next** button to continue the setup procedure.





3. Next Mass Mailer will ask for the location of the program file group. The default location is Mass Mailer, we suggest keeping this location as the default. If you want to change the program group location, click on the program group displayed below that you want Mass Mailer to be added to.



4. The **Start Installation** dialog box will appear next indicating that the Mass Mailer installation program has gathered the necessary information for installation and is now ready to begin copying files to your computer's hard drive. Click the Next button to continue. When the installation is complete you will get a screen showing the installation has completed. Click the **Finish** button to finish the installation.

## Using Mass Mailer

This chapter is intended to provide you with an overview of the basic features and functions of Mass Mailer.

### Features of Mass Mailer

This section provides a brief overview of the basic program features of Mass Mailer

### User Information

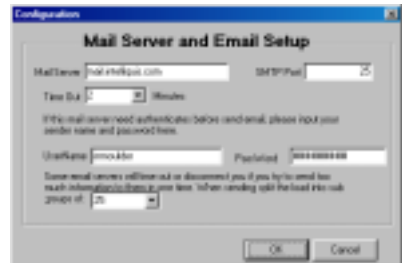
Unlike so many other mass mailing programs on the market today, Mass Mailer is capable of using multiple users. An example of this would be if you send mass emails for your company and for yourself, you can set Mass Mailer to send the user information of only your company or individual. Mass Mailer makes it easy to allow multiple user information to be kept in the program. To add users:

1. Right-click on **Users**, in the left window.
2. Click on **New User**.
3. Fill in the fields you wish to include.
4. Click on **OK**.

### Mail Server Information

As with Sender Information, Mass Mailer is capable of storing information on multiple mail servers. This feature is included in case the sender has multiple mail servers that they would like to send mail from. To enter information about a mail server follow the directions below:

1. Right-click on **Mail Servers**.



2. Click on **New Mail Server**.
3. The first field is for the SMTP address of your mail server. If you are unsure of this information contact your computer administrator or Internet Service Provider to find out this information.
4. Next is the box for SMTP port, the default on most mail servers is 25. If you are unsure, contact your computer administrator or ISP.
5. Next is the amount of time before a time out. A time out occurs when Mass Mailer can not connect to the mail server that the information is being sent to.
6. The next two boxes are your user name and password for that particular mail server. This is your user name and password that you use to get your email.
7. The last box is for the numbers of subgroups to send the mail out in, this feature enables the sender to determine how many emails to send at one time. Some mail servers will time out if you send to many emails at the same time. This function breaks the emails into subgroups allowing the server time to process the emails before the next batch is sent.
8. Click **OK** to save these settings.

### **Creating Groups**

This function enables you create and maintain multiple groups quickly and easily. Now you can import to different mailing groups and send to these groups with just a few clicks of the mouse. To create a group:

1. Right-click on **Group**.
2. Click on **New Group**.
3. Enter the name of the group in the space provided. We suggest naming the group to correlate with the group that you are setting up.
4. Click on **OK** to continue.

To import users into a group see page 14 of the User Guide.

### Out Box

This screen allows you to see all mail that is waiting to be sent. With Mass Mailer you are capable of creating multiple emails and saving them to be sent at a later date. This is where the failed emails are stored.

### History

The History folder shows all mail that has been sent. This makes viewing previously sent messages quick and simple.

### Deleted Emails

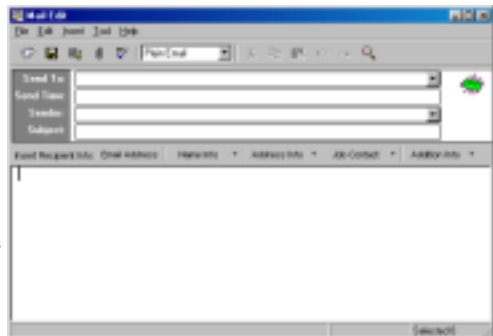
Emails that were deleted are sent to this folder. Emails that are sent to the **Deleted emails** folder can be moved to either the Out Box or the History folder. In this way, you can manage emails that were accidentally deleted, or that need to be resent later.

## Creating New Emails

To create a new email message click on the New Mail button.

This will launch the email editor screen, where you can create new messages. Mass Mailer is capable of either text messages or html messages. To start a new email follow the steps below:

1. First, choose whether you are going to send a text email or a html format message. When you decide which format to send click on the down arrow on the




tool bar and choose the appropriate format.

2. Once you have chosen the format, choose which group to send the message to. To do this click on the down arrow to the right of the **send to:** field, this bring up a drop down box with a list of all available groups. Choose the group that you would like to send the message to.


3. Next choose which sender information to send. To choose a sender click on the down arrow at the end of the sender box, this will display a list of all senders available.

4. Next is the subject of the email. A subject is not required, but a prompt will ask if you want to send anyway with no subject. This will pop-up when you click the send button.

5. Next is the email text that you want to send. You can either type a message in the box or import a message from either a text

file or a html file.  To import from a text file click in the import html or text file into mail. This will open a file search screen. Here you will browse your computer until you find the location of the file to import. Once you have selected the file click **Open** to import the file. This will automatically display the message in the text field.

6. Mass Mailer gives you the ability to add your information with the click of a button. Along the top of the text box are buttons that you can click on which will automatically add the parts of your information which you decided to include. By clicking one of these buttons, Mass Mailer will add the corresponding information from your sender information, to where the cursor is located. This makes adding a digital signature quick and easy.

7. Now you are ready to send the message, to do this click on the send button. 

8. After you have clicked the send button, the **send to:** screen will appear. This screen has sending choices that you can choose

who is sending the email.

If you choose to send the email using HTML, you are able to use full color and pictures in your email.

## Send Email To Screen

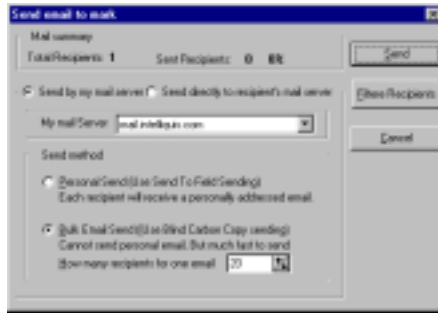
### Sending Through Your Mail Server

1. The first choice is how to send the email. There are two ways in which to send the email, the first is to send the email through you email server. This option takes longer, but has some advantages.

One advantage is when sending the email, it sends the email from a valid domain name. Some email servers will not allow emails to be received unless they come from a valid domain name. This could cause you to have higher unsuccessful rate. However, if you do send through your email server the email will have a valid domain name, thus you will have more successful emails sent.

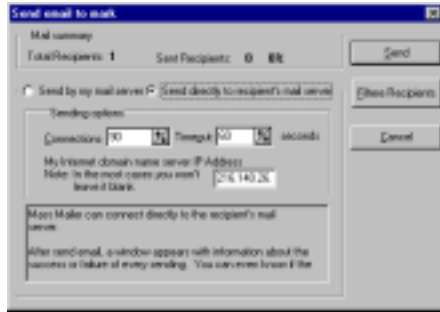
2. The next you will need to choose which server to send from.

3. Next is send method. With this option when you send the email, the email is sent as a personal email. This means that your full email address will be included when sent. The other option send as a bulk email, does not include your email address when it sends out the emails, speeding up the process of sending.



## Sending Directly

1. The send directly to recipients email server option is the quicker of the two sending options. The problem with this option is there is no valid domain name associated with the email causing many email servers to decline reception.



One advantage though, is that you do not slow down your email server processing all the emails. Send directly skips your email server altogether and goes directly to the recipients mail server. For this option you will need to have configured your DNS settings under network neighborhood. If you are unsure of these setting please contact your systems administrator or your Internet Service Provider.

5. Next, choose how many connections to allow at one time to the other email servers. The default number of connections is 90. Next, you will also need to decide how long until a time out occurs. A time out occurs when Mass Mailer cannot connect to the mail server on the other end, and the number of connections is how long Mass Mailer should keep trying before disconnecting from the other server.

## Filter Recipients

1. The send email to screen also allows you to filter recipients quickly and efficiently. To get to the filter screen simple click on

the **Filter Recipients** button on the right.

**2.** This will launch the **input filter conditions** screen. Here you can add and remove conditions to filter. This is a handy tool if there is one person that you would like to exclude for this particular email. Filter recipients will tell Mass Mailer the name or whatever filter you would like to use, and add this filter to the filter list to exclude that particular individual.

**3.** The first box is a list of filters that have been previously imputed. This should be empty if you have not added any.

**4.** The next box is the condition that you want to filter. Here you have several choices to choose from. You can choose name to address, these are the fields that are included in the address book.

**5.** Next is the action to take on the field you have chosen. You can choose equals to, ends with, starts with, or contains.

**6.** Next is the what you want to filter. You can put anything here from a letter to an email address.

**7.** Next is whether to add the filter to the filter inputs. To add the filter click on the **add filter condition** button on the bottom. To have no filter conditions click on the **no filter conditions** button, click on **Next** to continue on

**7.** Next a list of all the email addresses that Mass Mailerl is going to send email to.

**8.** On this screen you can also view those excluded, included, or all. To do this click in the corresponding radio button and the appropriate list will appear.

**9.** On this screen you can also enable or disable people to send the email to. To do this, highlight the individual that you would like to enable or disable and click on the corresponding button. This will cause the person to either become able to receive emails or unable to receive emails.

**10.** When you have finished filtering individuals you can click **OK**

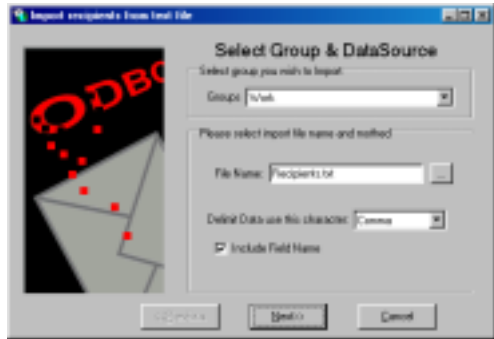
to continue sending. You will now go back to the send screen, and click on **Send** to begin sending.

## Importing Recipient Lists

Mass Mailer allows the user to import multiple recipients from a text file. This makes managing your contacts quick and simple.

To begin the import follow the instructions below:

1. To import a recipient list, right-click on the group you would like to import the recipients into. This will open the import screen, where you can choose the location of the file to import.



2. Next you will need to choose which group you would like to import to, by default the group that was highlighted will be the chosen group. You can change this by clicking on the down arrow next to the Groups box. This will show a list of all available groups to import to.

3. Next is the location and name of the file that you would like to import. If you know the location of the file, simply type the location in the Location box. If you are not sure of the location,



click on the three dots to open a browse window where you can browse to the file location. Once you have found the location of the file, click on the file and then click on **Open**. This will pull the location of the file into the Location box on the Import screen.

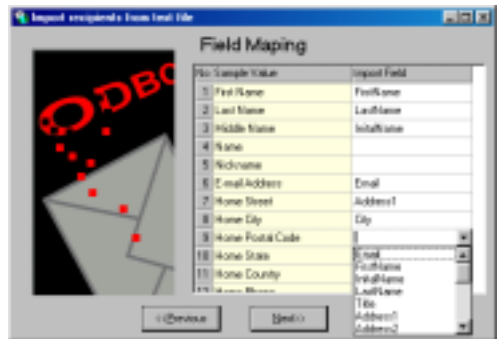
**4.** Next is how the fields are delimited (separated). There are a couple of options for delimiting, the most common is a comma delimited form.

**5.** Next is the **Include Field Name** check box. This grabs the field names so when you try to map the different fields in the field mapping screen, it makes it easier to match these fields up.

**6.** Click on the **Next** button to continue to the Field Map screen.

**7.** Next is the **Import Field Map** screen. Here is where you match-up the different fields of the recipients that you are importing. When the **Import Field Map** first appears on the left column will be the field names that Mass Mailer was able to import. The right column is the fields that are capable of being imported by

Mass Mailer. You will need to match these fields up with each other so that Mass Mailer can import the fields to the correct fields in Mass Mailer. Once you have all the fields mapped, click the **Next** button to continue with the import.



**8.** The Last screen is the Import Data screen. On this screen Mass Mailer shows you how many records are going to be imported. To begin the import click on the **Start Import** button

on the bottom middle of the screen. The recipients should start to import now. If any errors occur, this is where you will get any messages concerning the errors. When Mass Mailer is finished importing a message stating how many were successful will appear.

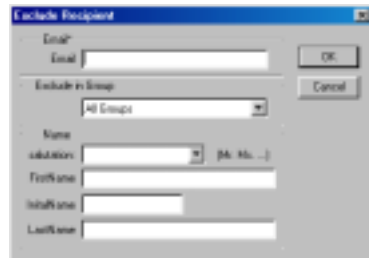
### Importing to the Exclusion List

An **Exclusion List** allows the user to add people who wish not to be emailed to a list where they will no longer receive emails. To import to the exclusion list simply right-click on the exclusion list group under groups. Next click on the Import exclusion list. From this step forward, the import process is the exact same as importing a group (explained on page 15).

### Adding an Individual to the Exclusion List

Mass Mailer allows the user to add a single individual to the exclusion list, follow the steps below:

1. First, right-click on the group that you wish to add the individual to; this will bring up a pop-up menu. On the pop-up menu you will choose the **New Excluding List Recipient** by clicking on it when it is highlighted.
2. Next a **Exclude Recipient** box will appear. Choose the appropriate information in the corresponding boxes. When you have finished entering the information click on **OK** to add the individual.

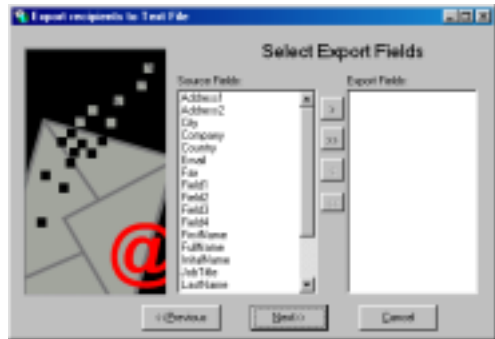


## Exporting Groups

Mass Mailer is capable of exporting groups to text files. This makes it easy import into another program for further tracking. To export a file follow the directions below:

1. First, right-click on the group that you would like to export. This will open a pop-up menu where you will choose to **Export Recipients**.
2. Next a window will appear that looks exactly like the import window. In this window you will choose name and location to save the file to, how the file is delimited, and if to include the field names. Click **OK** to continue on to the next screen.
3. Next the **Select Export Fields** screen will appear.

On this screen you will choose which fields to have exported to the text file. To move the file to the export fields, highlight the field you would like to export and then click



on the > button. This will move the fields to be exported to the export field window; continue this procedure until the fields desired to be exported are in the export window. When you have done so click the **Next** button to continue to the next screen.

4. Next the **View Recipients** window will appear. This window will give you a view of what fields will be exported and what order they will be exported in. If you are satisfied with the results click **Next** button to continue on. If for some reason you want to change some of the fields, click the **Previous** button to go back

and change these fields.

**5.** The last screen that will appear is the **Export Results** screen. To start the export, click on the **Start Export** button. If an error occurs during exporting you will get an error message on this screen, prompting you for action. When the import is complete, Mass Mailer will open a window giving information about how many records were exported.

## Getting Help

### Getting Help With Mass Mailer

Intelliquis tries to develop reference and utility software that enables computer users to save time and money while achieving greater success in their business and personal lives. We are committed to helping you get the most out of this software product.

If you have questions, or find that you need help while working with Mass Mailer, the best place to find answers is in this manual or in the on-line help file provided with the software. To access the Mass Mailer on-line help file, press the F1 function key or click on the **Help** menu when using Mass Mailer.

Mass Mailer users are also encouraged to check the Intelliquis web site at **[www.intelliquis.com](http://www.intelliquis.com)** to find answers to frequently asked questions.

In the unlikely event that you have a problem which you are unable to solve after having consulted this user guide, the Mass Mailer on-line help file, or Intelliquis web site, we offer technical

support to registered users of Mass Mailer. You can address questions to our technical support service via email by sending a message to **support@intelliquis.com**. You can also ICQ our technical support at 45224513. You can also call our technical support service at (801) 990-2600 extention 2999 from 8:30 AM to 5:30 PM MST Monday through Friday to speak to a support technician.

### Frequently Asked Questions

The following is a list of answers to frequently asked questions about troubleshooting problems with Mass Mailer:

**Note:** If you are having a problem of any kind with Mass Mailer, the first thing you'll want to do is make sure you have the latest version. The newest edition of the product can always be found in the **Updates** section of the Intelliquis Web site.

**Q:** How do I convert the file in my database to a text file in order import it into Mass Mailer?

**A:** The easiest way to do this is to open the file in the program associated with it. Next you will either want to export the file to a text file, or save as... the file to a text file. Which option you choose depends on the program you are using, whichever will allow you to create the file as a text file is the one you need to use.

**Q:** What is a SMTP server?

**A:** A SMTP server is the type of protocol your mail server uses to send the email message. To find out the proper settings for your SMTP server contact either your systems administrator or your ISP.

Q: What is considered SPAM email.

A: SPAM is considered all unsolicited email. Mass Mailer is designed for use with solicited emails only. Intelliquis provides Mass Mailer for customers to keep in contact with contacts, whether personal or business.

Q: When I insert a HTML file, the images do not show up?

A: Right now the only way to solve this problem is to copy the images to a location on the internet. Next, you will have to enter the url of the location of the images in the HTML code of the where the images are located on the internet. When the email is sent, the email program will automatically grab the images off the internet and load them into the email, displaying the images in the email. We are currently working on a solution to this problem. Look for updates for Mass Mailer coming soon to solve this problem at our web site **[www.intelliquis.com](http://www.intelliquis.com)**.

Q: How many emails can I send in a session?

A: Mass Mailer is able to handle as many emails as you would like to send out.





