



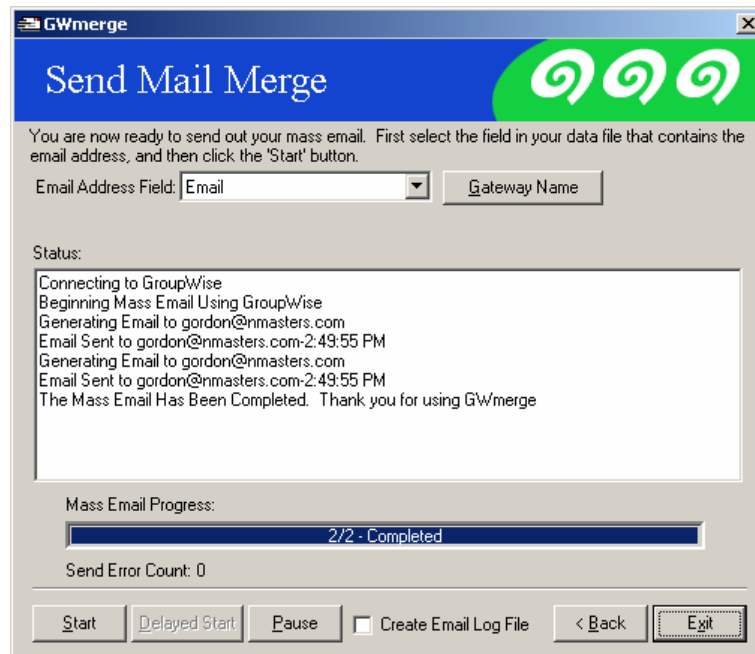
# GWMerge

## (GroupWise Email Merge Utility)

### Setup and User Guide

## This Guide

Welcome to GWMerge, a GroupWise email merge utility. GWMerge allows GroupWise users to complete an e-mail merge by selecting two files: a text file containing the "to be merged" e-mail content and a file with the customer data. This utility is most useful in environments that need to send customized e-mails to users based on the contents of a web-based "request for information" or based on their customer relationship management database records. GWMerge supports several formats for input data files including comma-separated value (.CSV) and excel spreadsheet (.XLS). Users are limited to a text only format for email but can include attachments to the email.



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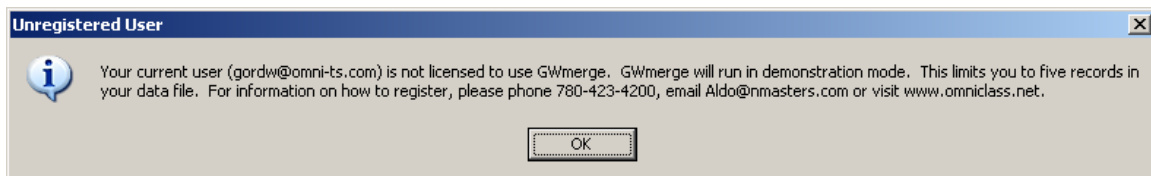
## Installing GWMerge

### Requirements:

- Microsoft Windows 9.x/ME, NT4, 2000 Professional, XP Professional. GWMerge can also run on Windows NT4, 2000 and 2003 server desktops.
- GroupWise client software for one of the following GroupWise versions:
  - GroupWise 5.5, and / or GroupWise 5.5 Enhancement Pack
  - GroupWise 6.0, and / or GroupWise 6.5
  - GroupWise 7.0
- GroupWise email account.
- GWMerge licence file.

### Installation steps:

1. Download and save the GWMerge installer file **gwmmerge-install.exe** to a temporary directory.
2. Run **gwmmerge-install.exe** and follow the default prompts to complete the installation.
3. GWMerge normally installs into C:\Program Files\Omni\GWMerge. Copy your **gwmreg.dat** licence file into the GWMerge installation directory. If you do not copy in a licence file, you will see the following window when you run GWMerge.



Demo mode in GWMerge limits you to an input file with a maximum of five records.

4. After the installation, you should have the following menu structure:



## Building Input Files

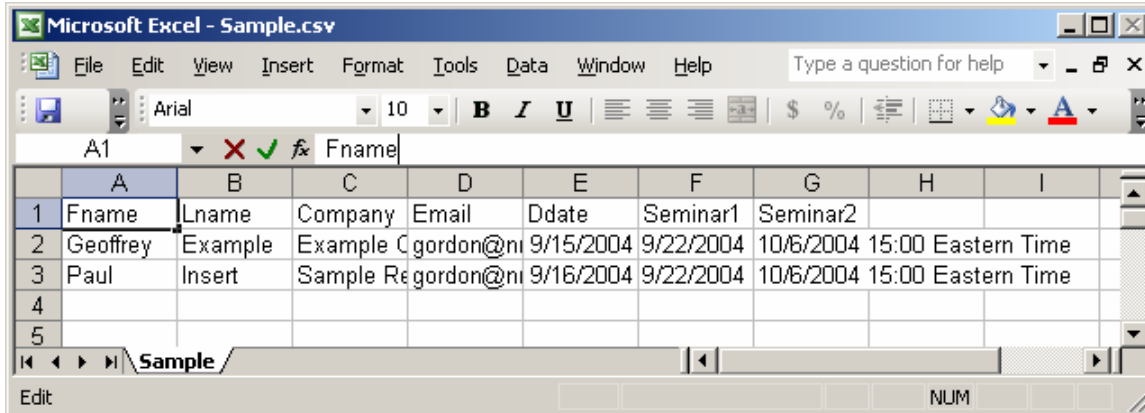
GWMerge needs two input files:

- A data input file containing information about who the email is being sent to.
- An email merge file that contains the text of the email including variables used by the merge process

Both files will be used to address and correctly format the content of the email to be sent.

### The Data Input File

The data input file is normally a .CSV file that can be managed using an electronic spreadsheet program. In this file, the first row must identify column headers.

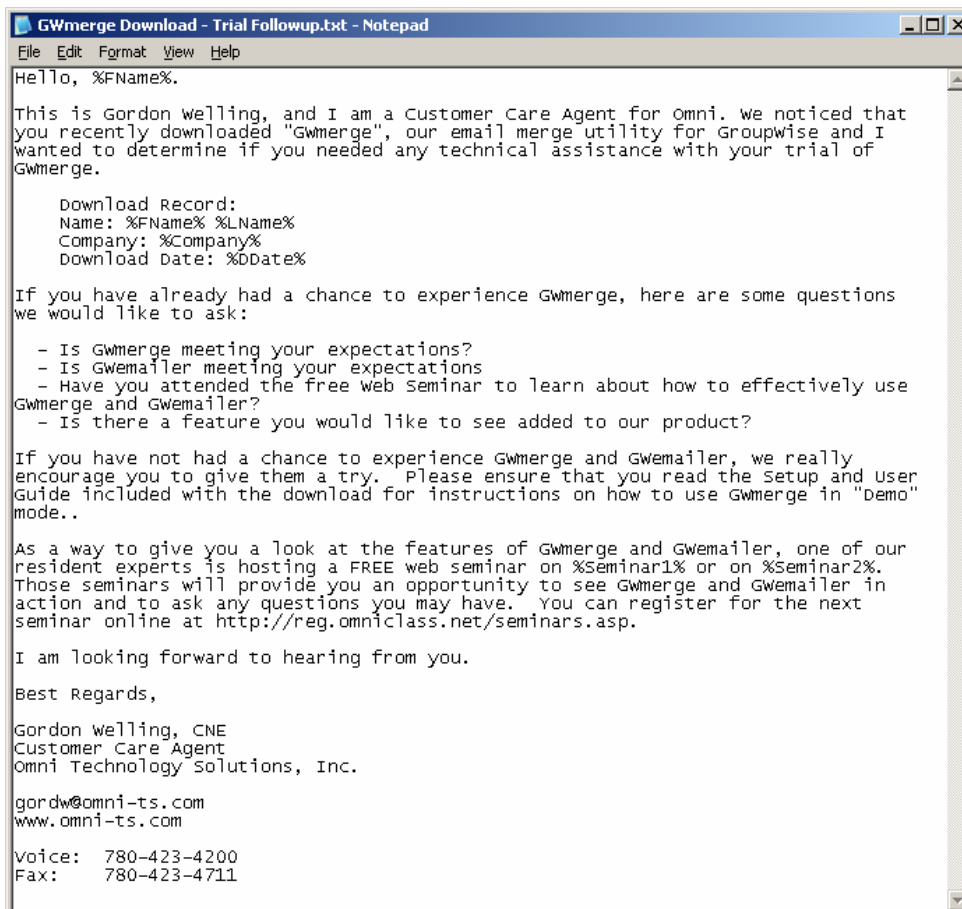


	A	B	C	D	E	F	G	H	I
1	Fname	Lname	Company	Email	Ddate	Seminar1	Seminar2		
2	Geoffrey	Example	Example C	gordon@ni	9/15/2004	9/22/2004	10/6/2004	15:00 Eastern Time	
3	Paul	Insert	Sample Re	gordon@ni	9/16/2004	9/22/2004	10/6/2004	15:00 Eastern Time	
4									
5									

Each column contains data that will be merged into the email. As such, you will associate the variables from the email merge file to the column headers in the data input file. It is **critical** to ensure that there are **no blank cells** in the range of data, otherwise email will be created that will display the variable name instead of actual data.

### The Email Merge File

You create the email merge file using a standard text editor.



```

File Edit Format View Help
Hello, %FName%.

This is Gordon welling, and I am a Customer Care Agent for Omni. We noticed that you recently downloaded "Gwmerge", our email merge utility for Groupwise and I wanted to determine if you needed any technical assistance with your trial of Gwmerge.

Download Record:
Name: %FName% %LName%
Company: %Company%
Download Date: %Ddate%

If you have already had a chance to experience Gwmerge, here are some questions we would like to ask:

- Is Gwmerge meeting your expectations?
- Is Gwemailer meeting your expectations
- Have you attended the free web Seminar to learn about how to effectively use Gwmerge and Gwemailer?
- Is there a feature you would like to see added to our product?

If you have not had a chance to experience Gwmerge and Gwemailer, we really encourage you to give them a try. Please ensure that you read the Setup and User Guide included with the download for instructions on how to use Gwmerge in "Demo" mode..

As a way to give you a look at the features of Gwmerge and Gwemailer, one of our resident experts is hosting a FREE web seminar on %Seminar1% or on %Seminar2%. Those seminars will provide you an opportunity to see Gwmerge and Gwemailer in action and to ask any questions you may have. You can register for the next seminar online at http://reg.omniclass.net/seminars.asp.

I am looking forward to hearing from you.

Best Regards,

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www.omni-ts.com

Voice: 780-423-4200
Fax: 780-423-4711
    
```

In this particular sample, you will notice %Name% variables. Each of these variables will be linked to a column header in the data input file, for example:

- %FName% will be linked to the 'FName' column in the input data file
- %DDate% will be linked to the 'DDate' column in the input data file

When you create your email merge file, remember the following simple rules:

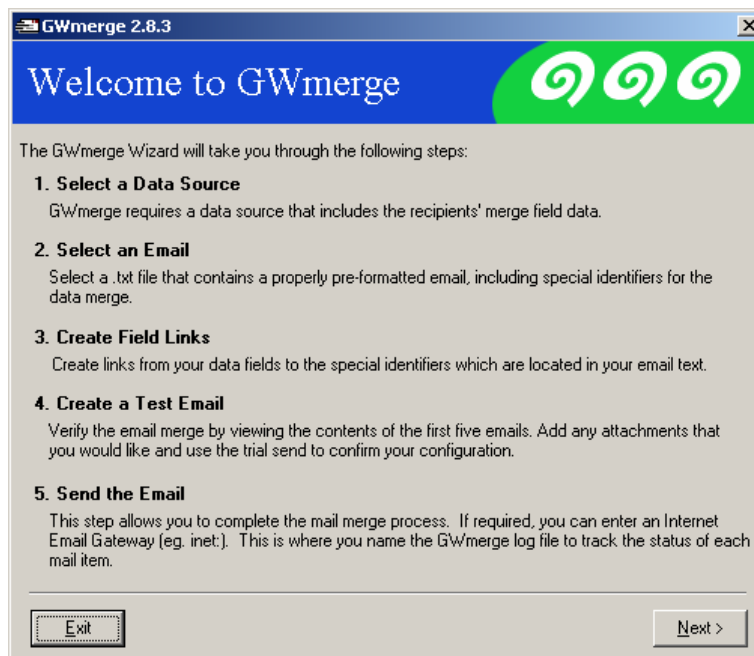
- The variable name must begin and end with a '%'.  
• There can be no spaces in the variable name.
- The variable name and the column header name do not have to be spelled the same.
- Do not use "%" in the actual text of the email, e.g. "20%". GWMerge will parse that "%" as part of a variable name and distort the email that is sent. Use the word "percent" in place of "%" in the text, e.g. "20 percent" in place of "20%".
- You must have a column in the input file for each variable that you put into the email merge file.

**Please Note** - You must include the signature block information as GWMerge cannot make use of preconfigured GroupWise signature block of the sending user.

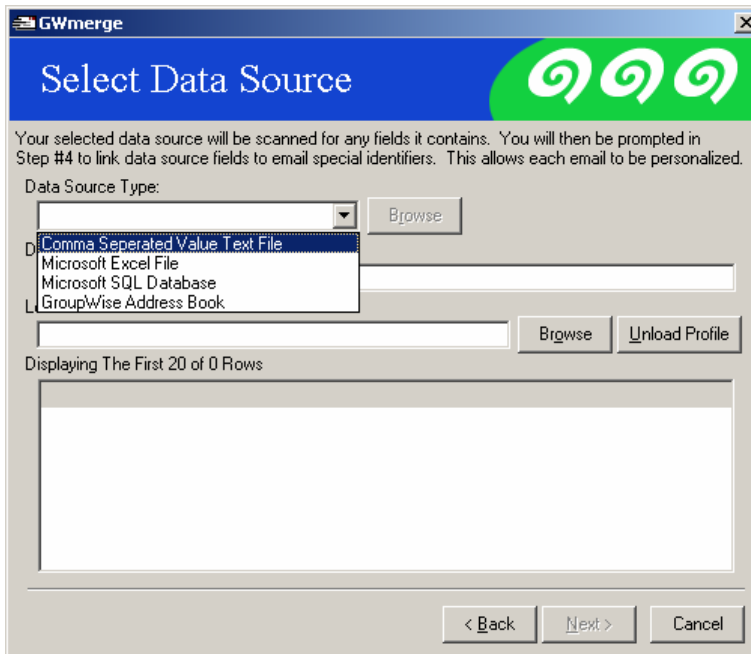
## Sending Email Using GWMerge

With GWMerge, producing customized mail merges is a cinch using a five-step wizard.

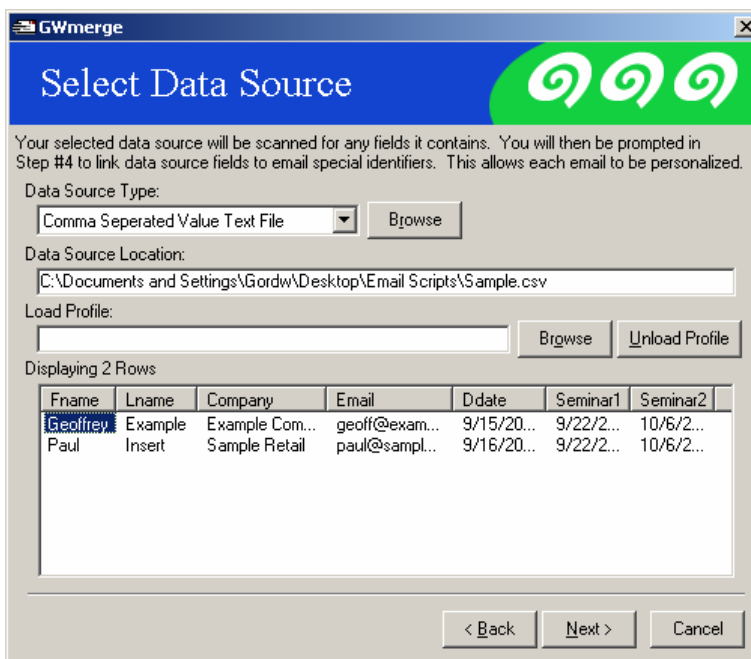
1. Just start GWMerge and click "Next >".



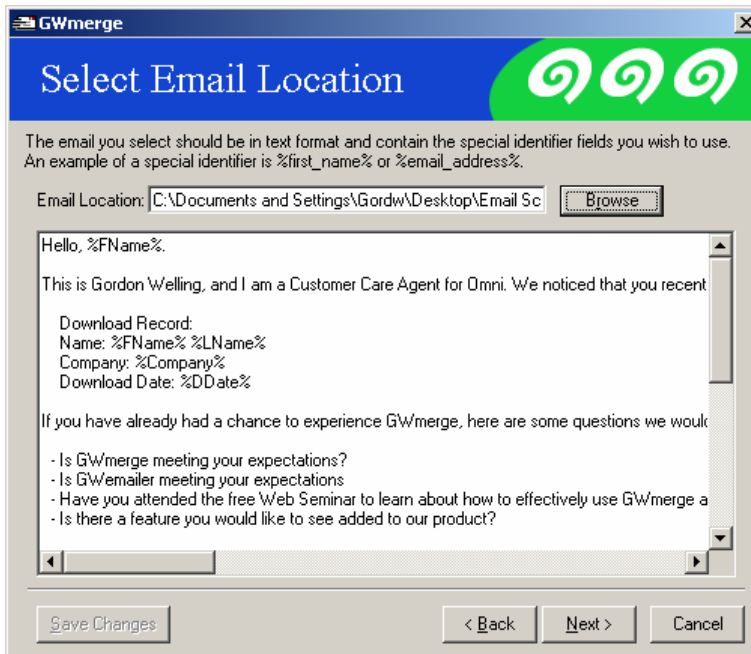
2. Select the data source type from the drop down list.



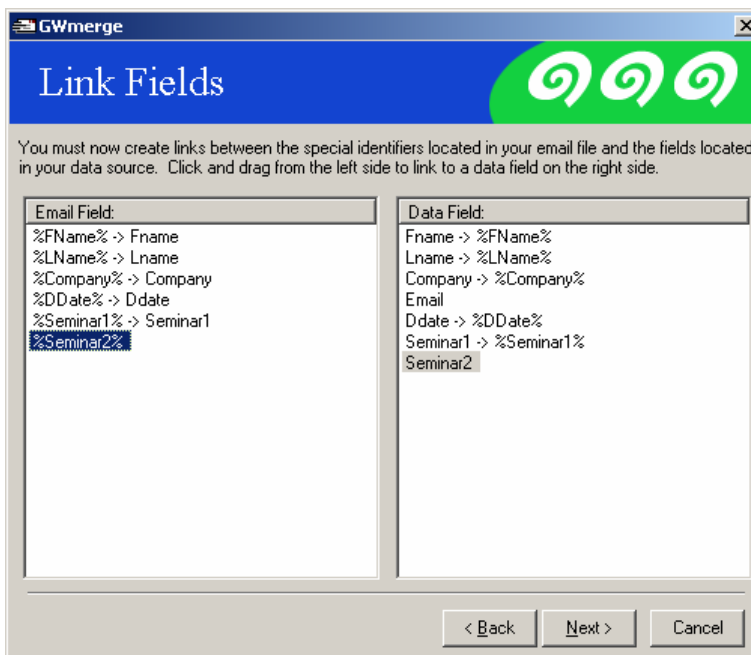
3. Click "Browse" and select the input data file. You can also load a pre-existing profile file saved during a previous use of GWMerge. Click "Next >".



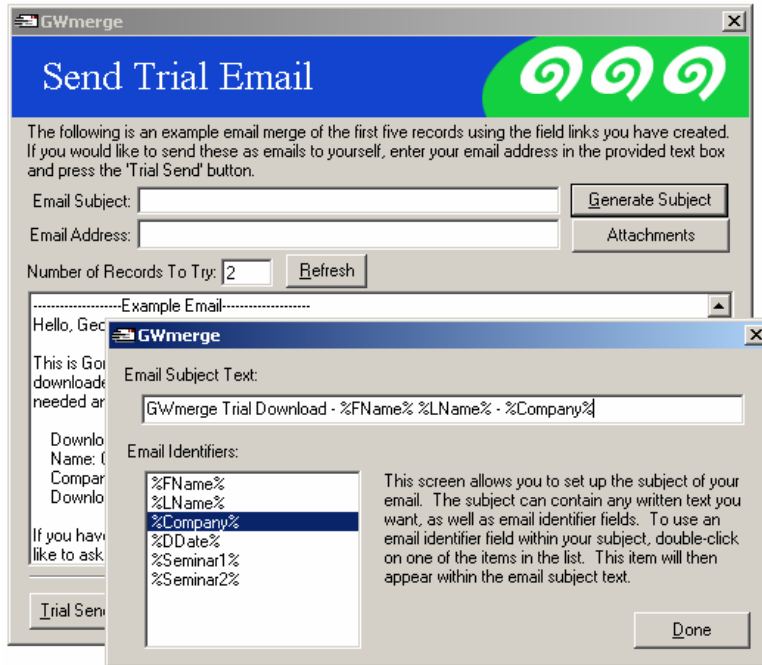
- Click "Browse" and select the email merge file and click "Next >".



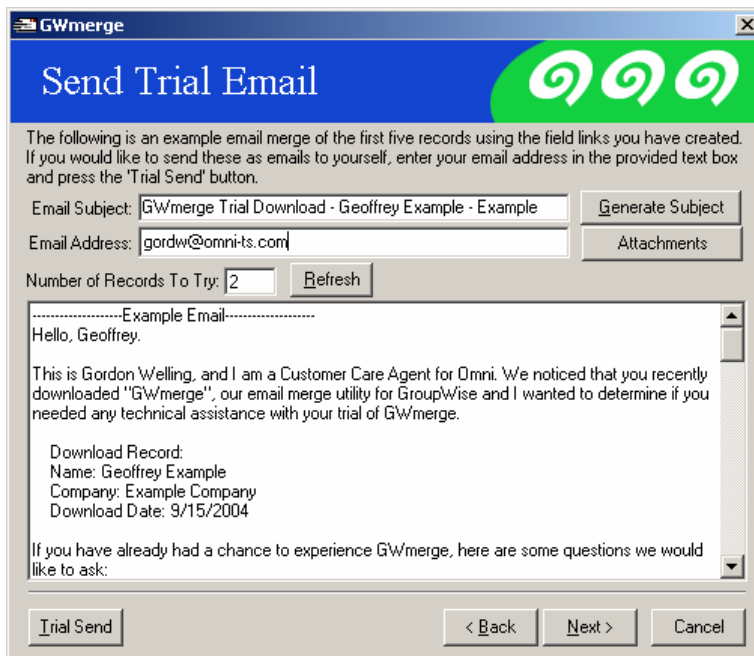
- Using drag and drop, link each "Email Field" (variable name) to the "Data Field" (column header name), then click "Next >".



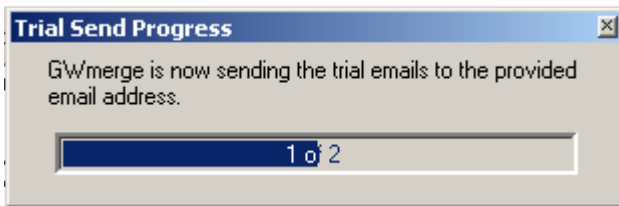
- Click "Generate Subject" and enter your desired subject. You can use a mix of plain text and variable names. In insert a variable name, double-click the desired variable in the "Email Identifiers" column. When you are finished, click "Done".



- You can fill in an appropriate email address in the "Email Address" field and click "Trial Send" to send trial copies that can be checked for errors.



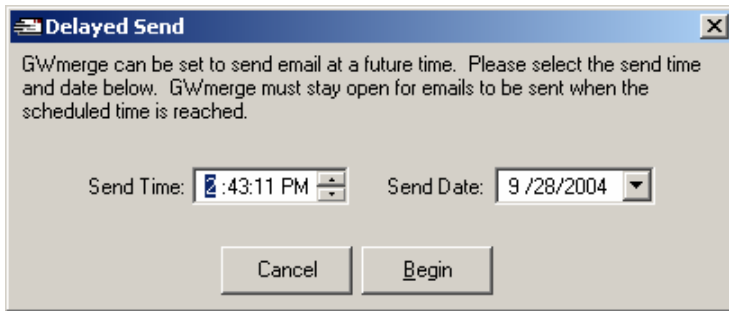
- Once the "Trial Send Progress" window closes, you can proof read the trial emails in your GroupWise client.



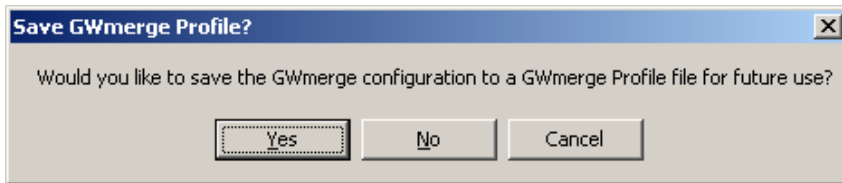
- In the "Send Trial Email" window click "Next >".
- In the "Send Mail Merge" window link the correct column header name from your input data file that contains the email addresses. You can also choose to create an email log file for future reference.



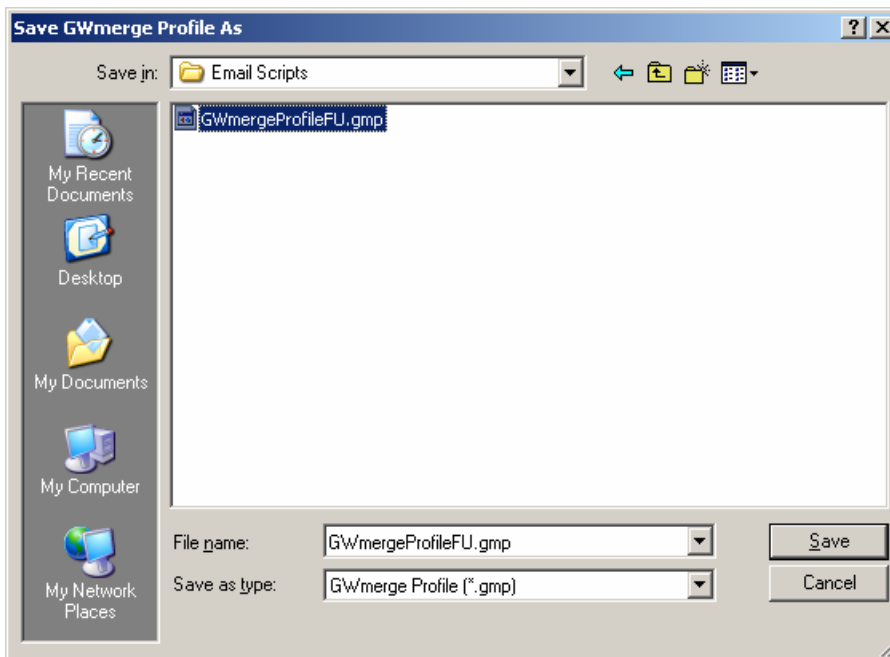
- Click **Create Email Log File** to save a log file showing status of each email sent (optional).
- If you wish, you can select "Delayed Start" which will open a "Delayed Send" window to allow you to schedule the send time.



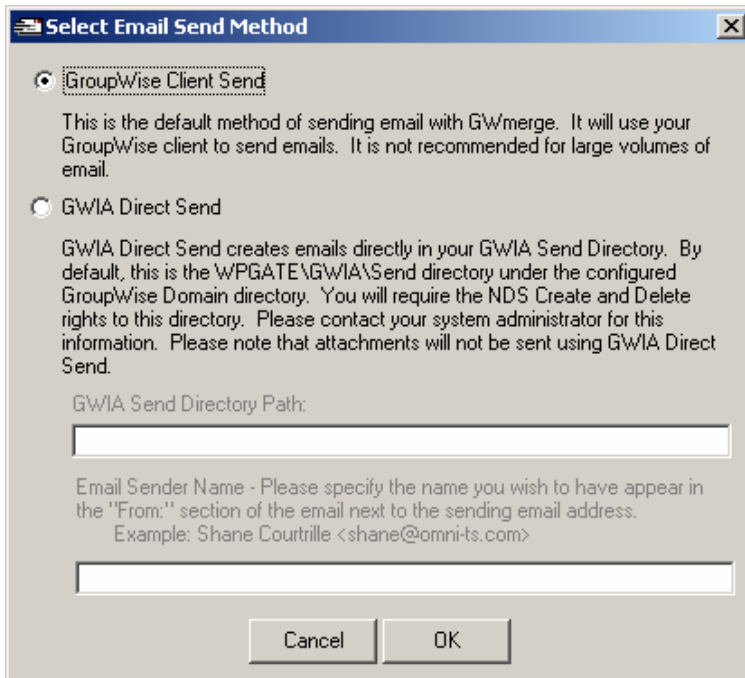
13. When you click the "Start" button, you will be prompted to save a GWMerge profile.



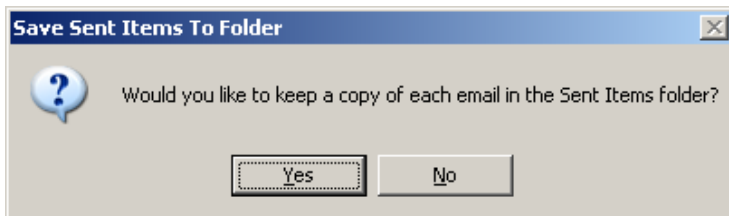
If you select yes, you will be provided the opportunity to save the profile as a .gmp file.



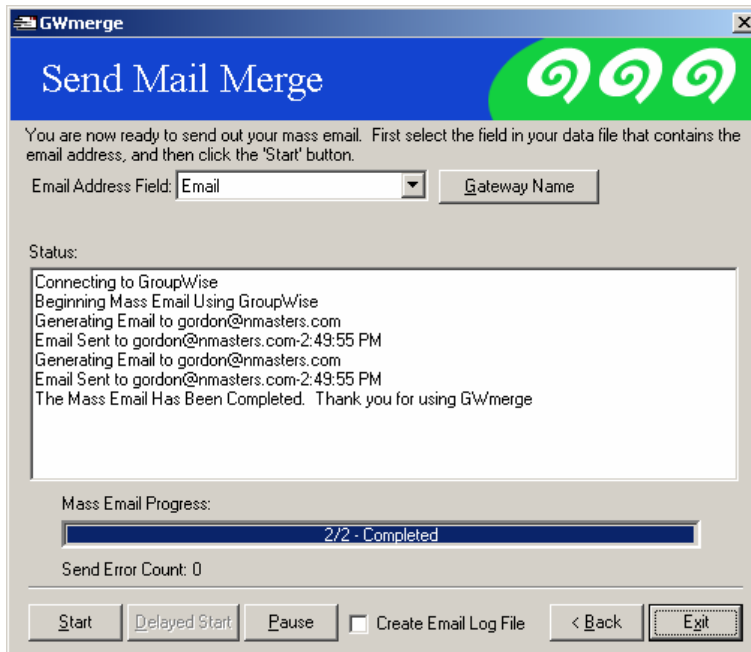
- Next you must select an email send method. Choose the GWIA Direct Send method if you have a large volume of email that will adversely affect the Post Office Agent for the originating GroupWise email account. Click "OK".



- You will be prompted to save files in the "Sent Items" folder.



16. When GWMerge has finished, you will see the results before you exit the wizard.



17. Click the **Exit** button.

## Uninstalling GWMerge

Use the Add/Remove Programs from the Windows Control Panel to select and remove GWMerge.

## Evaluate GWemailer

Many customers who try GWMerge also try our GroupWise bulk email tool called GWemailer. For more information, go to [www.omni-ts.com/groupwise-emailer](http://www.omni-ts.com/groupwise-emailer).

## Support for GWMerge

Most problems result from either improperly formatted input data files and email merge files, or from corrupted licence files. Please record any error message that may appear and refer to the online web forum for GWMerge before contacting Omni technical support.

## Support and Maintenance Agreements

Full email and telephone support is available Monday to Friday between 8:30 a.m. and 6:00 p.m. Mountain Time (UTC -7) for customers who have a valid support and maintenance agreement. Limited email support may be available during extended hours. Email and telephone support is also available to customers who are evaluating GWMerge. If required, support will be provided to resellers, then customers with valid support and maintenance agreements, and finally to customers evaluating products.

### Contacting Support

You can contact support using any of the following methods (please make sure you provide as many details as possible so we can better help you):

Technical Support Email: [support@omni-ts.com](mailto:support@omni-ts.com)

License Support Email: [licensing@omni-ts.com](mailto:licensing@omni-ts.com)

Phone: **1-780-423-4200**

Fax: 1-780-423-4711

### Online Resources

Online resources for GWMerge include:

- Product Documentation: Go to [www.omni-ts.com](http://www.omni-ts.com) select **Support** and follow the link for **Documentation** and select **Messaging Documentation**
- GWMerge Flash Tutorial: Go to [www.omni-ts.com/quicktours](http://www.omni-ts.com/quicktours) and choose:
  - "Personalize Bulk Emails with GWMerge" (4 min)
- Product FAQ: Go to [www.omni-ts.com](http://www.omni-ts.com) select **Products** and select **Messaging**. Choose **Email Merge Utility** and click **Frequently Asked Questions**.
- Support Forum: Go to [www.omni-ts.com/Forum](http://www.omni-ts.com/Forum) and select **GroupWise Email Merge Utility (GWMerge)** forum

### Free Help

Free support is available for customers who purchase licences without support and maintenance agreements and for customers using a freeware product distributed by Omni. Free support is limited to information available from the product documentation in .pdf format that is available for public download, online documentation at the GWMerge product website, and the online GWMerge web forum. Telephone and email support can be provided on a fee per incident or fee per hour basis, whichever is greater.