Netadvies

Mail merge using Eudora
creating customized messages

Suppose you wanted to send many email messages, but each email message should be a little bit different from the rest. This can be done with Eudora, because of the flexible way Eudora uses email boxes.

Situations where this is useful

There are valid reasons to send customized messages to a group of users. Suppose you have a club and you want to inform each member of the contribution he or she needs to pay. If all members have email, you can send email messages to them.

You have the amount due for each member in your database, but obviously you do not want to send one message to everybody saying Deke owes $23.40, Janet owes $20.19, Dave owes $9.45 and so forth. Rather, you want to send a different messages to everyone. Everyone should receive an email message with the amount due specific to himself. So you use a mailing with customized messages.

Another valid use of customized mailings is what I sometimes need to do: I maintain a list of sites. People submit their site to my list. When they do this they also need to tell me their email address. Every few months I check for broken links. Once I find them I will email the owners and tell them about it. I could send them a general email message, but if I customize they know exactly which URL is involved. If they have moved their site, they will immediately recognize: "heck, the guy still has my old URL!".

If you do not need to customized messages in your mailing

If you plan to send everybody the **same** message then the standard features of Eudora will do the job for you. Within Eudora you create a **nickname** and associate all the email addresses that should receive the message with the nickname. Then you create your message and place the nickname behind **Bcc:**. If you now send the message all the email addresses will be transferred to your SMTP server and it will then start sending the message to all the people on your list. You are done.

If you are sending the message and the SMTP complains about a specific email address not being correct (yep, it happens), then the process terminates. All addresses that have been send to the SMTP server so far, will be discarded by the SMTP server. This is important to know, because only when you know this you realize that you need to resend the email addresses. If you do not resend all email addresses the first part of your list will not receive your message.

Oops, do I need a database program?

Yes, you do. The only way to manage a large collection of records is to use a database. If you do not have a database, you are in for a lot of work. Not because Eudora wants to work together with a database program (it does not), but just because you need to manually customize each message you want to send. If you have just a few messages to send, I suggest you use cut and paste.

Basic structure of your hand-made mailbox

To create a mailing with customized messages we need to create one big text file with a specific structure. We will then place this file in the Eudora directory. Because we have given the file a specific structure, Eudora will recognize the file as being a mailbox. It will take the messages from the text file and present them as individual messages when you open Eudora.

Let's call the file with the custom messages **mailing.mbx**. mbx is the standard extension for a mailbox file. mailing.mbx should have the following structure:

```
Eudora Eudora separator
your email headers
blank line
email body (the actual message)
blank line


Eudora separator
your email headers
blank line
email body (the actual message)
blank line


Eudora separator
your email headers
blank line
email body (the actual message)
blank line
```

And so forth, you repeat this as many times as you have email messages. It would be a good idea to go to your Eudora directory and copy a small mailbox file to another location, then open it with a text editor. Examine the structure of this file, you will find it according to what I am explaining here.

The Eudora separator needs to be something like:

From ???@??? Thu Apr 09 20:07:42 1998

It actually does matter which date you use, but you must use a date.

An email header is a line with the structure: **value: content**. A header gives extra info about the message. An example would be:

Date: Wed, 14 Oct 1998 23:09:49 +0900

This header tells you the content of the value **Date**. Some headers are required to make a sensible email message. They are: **From:**, the content of this header should be your own email address, **To:**, the content should be the address the message should go to. Finally, the header **Subject:** is also essential. You can add other headers if you want, for example: X-Author: The Man HimSelf. Make sure that headers you make yourself start with an X.

The blank line after the headers is really important, it tell the SMTP server that the headers have ended and that now the actual content is coming.

The email body is the actual message you want the recipient to read. The body can also be a base64 encoded binary. You just encode the binary with uuencode.exe and place the resulting text in the spot where the email body would go. You do need to test this (by sending a message to yourself), because I think there is a line needed to tell the receiving email client that a base64 encoded file has arrived. This advanced stuff. The body may contain a signature, it may also contain blank lines.

A blank line follows the body. This only for Eudora. After the blank line the Eudora separator for the next message follows.

Database Basics

You may say: cool dude, but how do I create this mailing.mbx? Well, (dude) here it comes. I hope you know something about databases and mail merge, because you need to. You don't? Well, I will explain it to you. A simple database can be presented in a table. Consider the following table:

Name	Address	City	Country	Email
Mr. J. Max	Shiny Hill 23	Litton, CA 94369	USA	max453445@AOL.com
Ms. Karin Koortjes	Nachtegaalstraat 34b	4548 TG Groningen	The Netherlands	koortjes36656@xs4all.nl
Ms. Anne Wong	44-9, 2-ga, Chung-	Seoul	Korea	awong3459945@koreaXS.co.kr

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Please try to remain calm, these girls do not actually exist. Each **row** in the table is called a **record**, it is a fixed set of data for each person. A collection of records is called a database. A **column** in a table is called a **field** in a database. The field tells you what kind of data you should enter.

Now I will explain mail merge. Mail merge is creating many letters each a little bit different, by combining a standard letter with a database. The standard letter contains special fieldcodes that correspond with the fields in the database. Suppose your database has three records. Then, after you have done mail merge, you will have three letters where each fieldcode will have been replaced by the actual content of each field. The three letters are in one big file.

Your standard letter does not have to be a real letter, it can also be an address label or whatever. It can also be an email message... that is what we are doing now.

Creating an example custom mailing with Excel and Word

I will now demonstrate to you the entire process of making mailing.mbx using Microsoft Excel 95 and Microsoft Word 95. I hate to do this with Microsoft products, because it promotes this company. However, it is important to be concrete. I don't have Wordperfect. Remember, this can also be done with the old Wordperfect 5.1 for DOS, newer versions of WP and other programs!

If you do not have Excel, or you don't want to get complicated, you can use Word to store your database. Please make a table in Word and put your data in it. Note: Word does have a **Convert Text to Table...** facility. To use this facility, you select you text in Word and choose **Table** and then **Convert Text to Table...**. Do not put anything else in this Word document. Then save your table as mailing_database.doc When you need to select a database to associate with your standard letter (see further into this guide), just select mailing_database.doc, rather then mailing.xls. That easy! Of course, with a Word table you can not manipulate your data as easily as you can with Excel.

Open Excel and type your fields in row 1. You can make up the names of the fields. It is a convention to start fieldnames with a capitol letter. Add your records in the next rows. Save your database file as mailing.xls and close Excel.

You may say: hold your horses I thought you just said that working with databases is useful when you have a large amount of data... Well, you see, I do not know in what format you have your data. If you have everything scribbled on little post-it notes and coffee stained envelopes, you will have to type it in. If you have it in another database format, you will very likely be able to convert it to the Excel format. If you have a text file, you can import it into Excel. In this case be careful how you choose your field and record separator. Maybe each fields ends with a hard line return and each record ends with two hard line returns. You have to tell this to Excel. When converting stuff, always be alert not to damage your data. This can easily happen if you don't notice that a few records not quite conform to the rules you thought up. You have been warned.

Open Word and write your email message. You must also put in the Eudora separator and all the headers. Please make the message according to the format explained above. Do not put in any fieldcodes yet. Anywhere where you want to put a fieldcode, just leave it blank for now. Save your Word document as mailing_form.doc. Save it in the same directory where mailing.xls is located. It is good practice to keep your database and form files together. Keep the file mailing_form.doc open.

Now we will associate the database file with the Word document. Select **Tools**, from the menu bar, then select **Mail Merge...** At step 1 you click on **Create** and select **Form Letters...**, then you select the button **Active Window**. Now you have just told Word that your mailing_form.doc is a form letter, to which you can add fieldcodes. In the **Mail Merge Helper** window (still open) click on **Get Data**, then click on **Open Data Source...**. Go to the directory where mailing.xls is located and select mailing.xls. Can't find your mailing.xls? Please select **All Files (*.*)** in the **Files of type:** box. Just respond confirmative to the questions that follow.
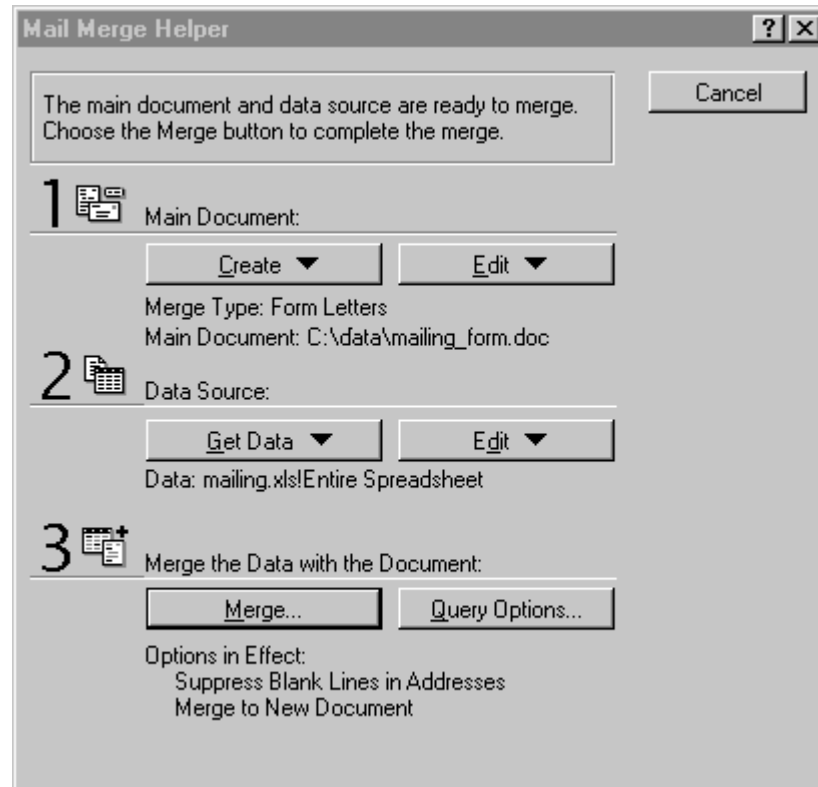
Now you have associated your database with your Word document. Now the **Mail Merge toolbar** has appeared in Word (as you know you can make toolbars visible through **View**, **Toolbars...**). Put your cursor in the spot where you want to place a fieldcode and select the right field by pressing the **Insert Merge Field** button. You can only insert fields that are actually in your database. Want to add other fields? Well, then you have to go back to Excel and add that field to your database first...

Now you press the **Merge to New Document** button on the Mail Merge toolbar (fifth button from the right in Word 95). You have just done mail merge, congratulations! When you scroll down in the document you just created you will see that the fieldcodes have been replaced by actual content. The same form letter is repeated as many time as you have records.

You must now save the big file you just generated as a text file: mailbox.mbx. Yes, this is your Eudora mailbox! You are getting really close now. Pretty exciting, isn't it? You can select the file type **Text Only with Line Breaks**. First you must save your home brewn mailbox as mailing.txt, because Word wants it that way. When you want to close your mailing.txt Word comes with a scary message saying it cannot save all information in text format, just say **no**, you do not want to save it in Word format. After you have closed Word you use the Windows Explorer to rename mailing.txt to mailing.mbx.

You may understand that using mail merge with Excel and Word gives you zillions of possibilities, besides sending custom email messages. This is really powerful stuff. You probably know that Excel is a spreadsheet program, allowing you to calculate with numbers. So you can insert the result of a calculation in your Word document.

Again, mail merge can also be done with Wordperfect.

Importing your mailbox into Eudora

So you have created mailing.mbx. The rest is fairly easy. Make sure Eudora is closed and place mailing.mbx in the directory where all the mailboxes are. Eudora mailboxes have the extension mbx. For those familiar with Eudora: you do not need to create a table of content file (mailing.toc). Eudora will do this for you.

When you now open Eudora it will display your hand-made mailbox along with all the other mailboxes! Congrats! All you need to do now is to place your messages in your Out mailbox. You can do this by dragging the messages to the Out box (Eudora Pro version only, others can use the menu bar). Eudora may remove some headers that are not correct. One of those header is From: if this is not the same as configured in Eudora, then Eudora will replace it. After you have dragged all your messages to the Outbox, you can delete the mailing mailbox.

By using **Send Again** to move the messages to the Out box, you can let another personality send the messages, in stead of the dominant one. This is only for Eudora Pro, though. As an Eudora Pro user you know this is done by holding shift down when you select **Send Again**. Make sure you select only about twenty messages at the time, because Eudora will open the messages when you select **Send Again**. When you queue a message, it will be in your Out box. Of course, this stuff about sending your messages as an alternative personality is extra information, many people will not need to do this.

Sending your customized messages

Eudora will transfer each message separately to the SMTP server. This could take a long time. You are probably using the SMTP server of your own provider, but if you are using a remote SMTP server you may want to temporarily change this into your provider's SMTP server. This increase the transfer speed.