

C O R R E S P O N D E N C E 5 . 5

I N S T A L L A T I O N

As always, we advise you to have a complete backup of all of your InView & StockView files before making changes or installing updates.

To Install this new version of Correspondence, be sure to Quit Panorama. Drag both the Correspondence (new) and the HS 5 Resource file from the downloaded folder to the folder containing your current copy of Correspondence. If you drag it to the right place, you should be asked about replacing the existing HS Resource file. You DO want to replace it.

Since you shouldn't have a Correspondence (new) in the folder yet, there should be no message about replacing it.

Launch Correspondence (new). It absorbs all data in your existing Correspondence file, creates a numbered backup of that file, then makes itself the active Correspondence file. Once completed, there should no longer be a Correspondence (new) in the folder.

S E N D I N G E M A I L

New in this release are the new or modified Email functions in the File menu. If these items are not appearing in your File menu, you probably failed to install the new HS Resources as noted above.

E M A I L T H I S M E S S A G E

This choice transfers the current letter to whatever email software is set in your OS as your default email application. It's queued up there, and ready to send to the Contact it has been addressed to.

E M A I L T O S E L E C T E D C O N T A C T S

After confirming your intention, the current letter is duplicated and queued in your email software for every Contact currently selected in the Contacts file whether it is one or one thousand.

Any formulas in the letter are processed individually so that each email can have personalized touches. *Warning!* ⚡

A Mailings notation is offered when the emails have all been processed.

Note: No check is made as to whether or not the Contact has a valid email address. An email is queued for each selected Contact regardless.

E M A I L - C C S E L E C T E D C O N T A C T S

E M A I L - B C C S E L E C T E D C O N T A C T S

CC and BCC gather the email addresses of all the Contacts currently selected in Contacts. Any that lack an email address are simply omitted.

CC addresses are placed in the CC (carbon copy) line of the outgoing email so that each receives a copy. In this case each can also see who else is included in the mailing.

BCC places the email addresses in the BCC (blind carbon copy) line of the outgoing email. This is a much more private mass-emailing since no recipient can see the who else received a copy.

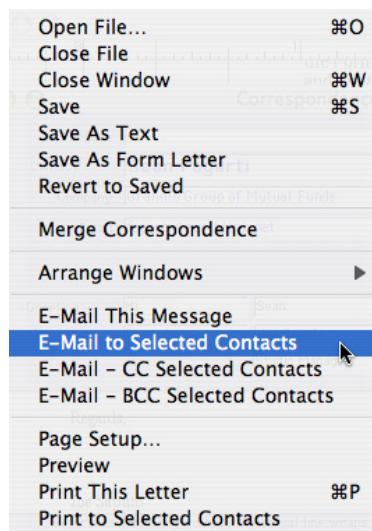
Note: Many SPAM filters block emails sent to large groups of people, especially when BCC is used.

E M A I L C O N F I G U R A T I O N

W I N D O W S

On Windows, it's necessary to download and install the free Eudora email software from <http://www.eudora.com>.

It does not need to be configured to receive email if you have other email software that you prefer to use. Simply enter the settings required to send email in the Getting Started and Sending Mail panels of the Options. To prevent incoming email leave Incoming Mail Server blank in Getting Started and set Check for Mail to Every 0 Minutes.



Warning!

Installing this new Correspondence file resets all Correspondence forms to their original defaults. Any modifications you've made to printed forms are preserved only in backup copies.

See our PDFs and movies on graphics and updates at

<http://hsltd.us/reference/howto/howto.html>

Warning!

Before sending quantities of email be sure your message is right. Otherwise you may be embarrassed or even offensive. Make it a habit to send a single copy to yourself before sending in bulk to give you a chance to not only proof read the result, but also to check what it looks like at the other end of the process.



MACINTOSH OS X

Using Correspondence to send email directly from the program requires a few simple steps to get it working.

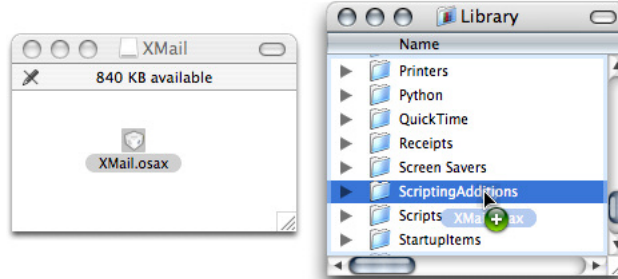
INSTALL XMAIL

Check the downloaded Correspondence folder for the file named XMail.osax.

Drag the XMail.osax, not its enclosing folder, to the Scripting Additions folder on your Macintosh.

Scripting Additions is located within the Libraries folder on your Macintosh hard drive.

An osax is a special mini-program that uses the Apple Script system built into OS X. It's very safe and spends most of its time doing nothing.



XMail can be also downloaded from HindSight's web site at <ftp://ftp.hsldt.us/hindsight/mac/XMail.dmg> or from <http://lestang.org>

SET PREFERENCES

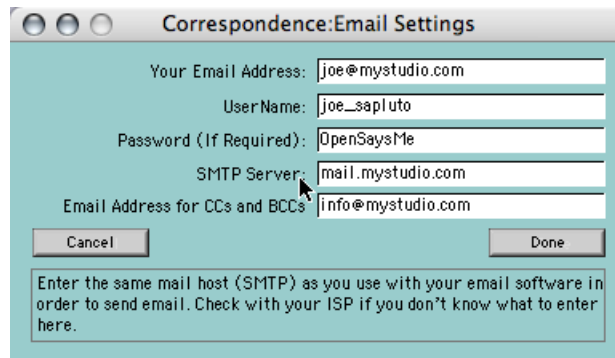
In Correspondence, make sure you're in the Setup Window. Go to the Windows menu and choose Email Settings.

The information to be entered here is the very same information you had to have entered into your regular email software in order to send email.

Start with your email address. This is the address that shows as FROM in emails sent from Correspondence.

Enter your User Name. This is the name assigned by your ISP to access your email account.

Enter your Password. This too is assigned by your ISP for your email account.



Enter the SMTP Server, the mail server, that handles your email.

Note: If you're unfamiliar with these settings, check your email software's preferences or contact your ISP. HindSight has no capability to determine this information for you.

Finally, enter the email address to be used in the TO field when email is sent to groups, using CC or BCC.

Error Checking

When creating an email, especially one that is going to numerous recipients, send a copy to yourself first. If it fails to come through, Correspondence can help you check for errors.

Hold the Option key, then click on the File menu and choose Send Email. After it goes through its processes, the script being sent to XMail is placed on the clipboard.

In your Applications folder, locate Apple Script and from within that folder, launch Script Editor. Paste the script into a new script window. Click on Compile to see if the script is being accepted. Next click on Run to send the email. If there are any errors in your email or in your set up, one of these steps will tell you so.

