Send Individually

User's Manual

Send Individually Quick Start Guide

1) Click the Create New Campaign button.
2) Fill out the email the way you normally would. It's best to practice first by sending to yourself.
3) Click the Send Individually button to send the message.
4) That's it!

Welcome

Thank you for choosing the Send Individually add-in, created by Sperry Software. This add-in sends an email that you create to each recipient you specify, one at a time. It's perfect for sending out newsletters, announcements, and other marketing materials.

How it works:

1) You create an email newsletter or other announcement.
2) Add your recipients to the "To" field.
3) You click the "Send Individually" toolbar button.

Each of your recipients will get an email addressed just to them, in the "To" field, and they will not see any other email addresses, because it's been sent just to them. It's just like if you rapidly typed out all the emails and sent them one at a time.

Alternatively you can choose contacts from any of your contacts folders: starting in one of your Contacts folders, click the menu item Actions…Create…New Message To Contacts button (that's for Outlook 2007; for Outlook 2003 and below, just select the contacts then choose Actions…New Message To Contacts). Compose your email the way you normally would, then click on the *Send Individually* button. It will prompt you for approval of the final review, and then begin sending the email to all the contacts you selected. This topic is discussed in more detail below in the **Using Send Individually** section.

You can also compose your email the way you normally would except leave the "To" field blank, and then click on the *Send Individually* button. It will prompt you for a list of email addresses (from a plain text file with one address per line) and it will then send one copy of the email to each recipient, individually addressed. This topic is discussed in more detail below in the **Import From File** section.

Preventing Mistakes

Send Individually is a powerful tool. In order to avoid mistakes (like accidently hitting the Send button instead of the Send Individually button), it's a good idea to follow these few suggestions.

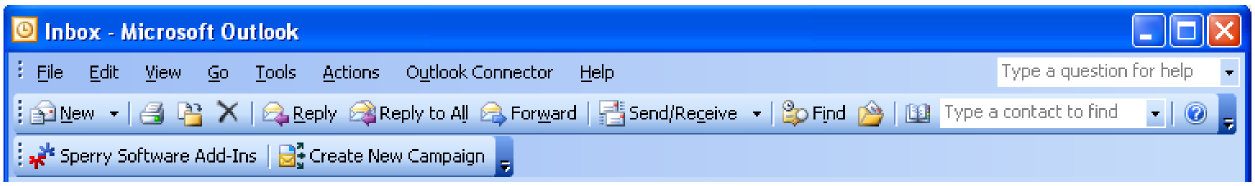
1. You may want to practice using just a few names at first, until you get the hang of it. Use email addresses of colleagues or friends and let them know you're trying out a new tool.
2. Send Individually now accepts and processes the email addresses in the BCC field (in addition to those found in the To and CC fields). The advantage of placing all your addresses in the BCC field is that if there's a mistake and the regular Send button is clicked by accident, effectively preventing the add-in from working, at least no one will see anyone else's email address.
3. Start with the "Create Campaign" button whenever possible – which is every time except when starting with contacts. Doing so allows the add-in to become active and so it will warn you

when you click the regular Send button asking if you're sure you didn't mean to click the Send Individually button. In addition, in Outlook 2003 (and below) it will also disable the regular Send button as an added measure.

4. *Just in case, by default the add-in displays the first email exactly the way it's going to go out. If you're happy with it, just answer Yes to the question of whether you want to send them all out. If you're not happy with it, choose No to the question of whether you want to send them out of not. You can then make any necessary alterations and try it again.*

Configuring the Add-in

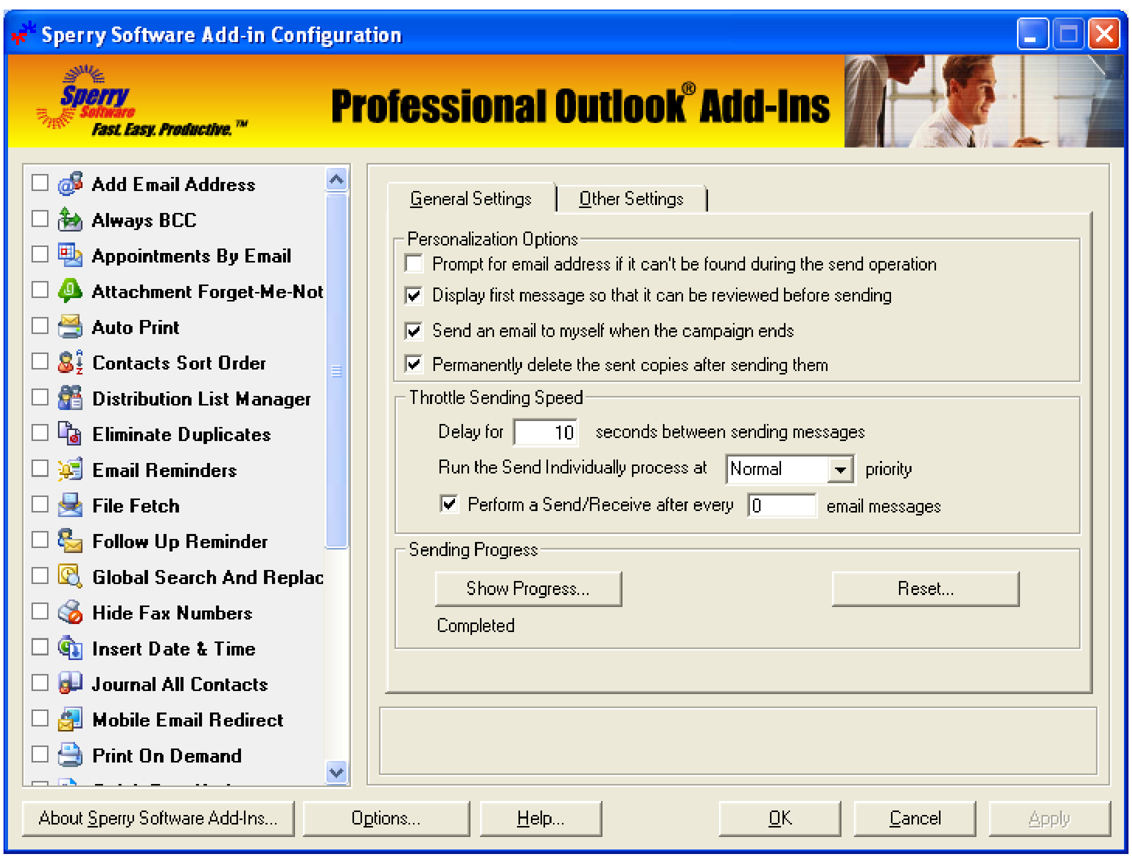
Once the installation is complete, you are ready to use Send Individually. When you open Outlook you will notice a new button “Sperry Software Add-ins” added to the toolbar.



Clicking this button displays the Sperry Software Add-ins configuration screen. It is on this screen that settings are made to control the add-in’s functionality.

Next to the main Sperry Software Add-Ins button is the “Create New Campaign” button. This button is used when starting a new campaign and is discussed below in the **Using Send Individually** section.

Send Individually Configuration Page



Personalization Options

Prompt for email address if it can’t be found during the send operation will cause the add-in to ask you to resolve the email address of the person you are sending to if it cannot figure it out by itself. If this box is unchecked, the send operation will still take place, but it will write any unresolved recipients into the report (see below) instead of waiting on a prompt just in case you kick off a campaign right before you leave for the night.

Display first message so that it can be reviewed before sending causes the first message to be displayed in front of you the way it's going to go out. This gives you a chance to correct any mistakes, and make sure that all substitutions are occurring as expected. Once the email is displayed in front of you, and you are happy with it, just click Yes to send out all the copies, including the one you just reviewed. If you need to make changes, just click no and the emails will not be sent. You will then have a chance to correct the email.

Send an email to myself when the campaign ends is useful for just that – sending an email regarding the status of the campaign when all the emails have been sent.

Permanently delete the sent copies after sending them causes the emails that are sent in the campaign to be deleted. This can be useful if you are sending to a large group and you do not want to clutter your Sent Items folder with copies of the same email. Note however, that some users like to turn this feature off so they can see who has received the email and what it contained.

Throttle Sending Speed

If you are sending to many contacts all at once, you may overwhelm your internet service provider (or ISP, who you get your email service from). Most times, it may be necessary to throttle how quickly the messages are being sent out. The "Pause for N seconds between sends" is used to control how quickly the messages are sent. If a value of zero is specified, the feature is effectively turned off, and the messages go out as they normally would. However, if any other value is specified that is the number of seconds that passes between each send that is performed by the add-in. This allows you to stay within the bounds specified by your ISP. Note that you will have to contact them to find out what your limits are…some will limit you by the number of messages you can send in a day (like Google's Gmail for instance has a limit of 250 messages per day) and some will limit you by how many messages you can per hour or per minute. You will need to do the math to figure out how many seconds you need to allot between sends in order to stay within the confines of your ISP's rules.

In addition to the throttling of the send speed, there is another option to run the campaign at a particular priority. Because previous versions of the add-in took control of the Outlook user interface during the send operation, Sperry Software has relegated that function to an external process. This process allows you to continue using Outlook normally. However it may be the case that if you are sending many emails (roughly 1000 or more) and there is no throttle speed set, then the external process can still hog your CPU time and not allow you work normally. Therefore, you can now set the priority of this process. For most people, leaving it at the default of idle is sufficient.

Another option is the setting of the frequency for a Send/Receive operation. Normally, Outlook does this on its own schedule according to the settings defined at Tools…Options…Mail Setup…Send/Receive. However, it may be necessary for you to increase (temporarily) the number of Send/Receive operations performed. This may be necessary if you notice that emails are "stuck" in the Outbox.

Show Progress

During a campaign, its status can be displayed to let you know how far along it is. A window showing the status will show up when you click this button. However if not, or if you have trouble with a particular campaign, you can use the Reset button to clear out the current campaign.

Reports

After the emails have all been sent, a report is always written. By default, the report contains the names of any recipients that you included who could not be resolved because they either don't have an email address or were ambiguous. This way, you can go back and find those names, make the necessary corrections, and send again.

There is an option to generate a report – it is defaulted to be on so that you get a report for each campaign.

There is another checkbox in the Reports section that controls what goes into each report. As mentioned, any failed email addresses are always included, however if the "*When sending, include successful as well as unsuccessful recipients in the report"* checkbox is checked (which it is by default) then all the names and email addresses that are sent to will be included in the report.

To view the report, just go to the configuration window and click "*View Report*". This report gets overwritten each time you send so if you need to keep the report for any reason, it will be necessary to copy the file to another location.

Reset Send Button

In order to prevent errors, Send Individually disables the regular Send button on a new campaign email. However, sometimes errors beyond anyone's control occur and the Send button remains disabled. If this condition occurs, you can use the Reset Send Button to correct the problem. It is necessary to restart Outlook after this operation. *[Note: This option is for Outlook 2003 and below. We are currently working on disabling the Send button in Outlook 2007 and higher. In addition, please be aware that the add-in will ask you to confirm if you meant to do a regular send when you start an email with the Create New Campaign button. This confirmation occurs in all Outlook versions and also helps to reduce inadvertent sending.]*

Using Send Individually with Personalization

In order to really raise response rates of your newsletters, announcements and other material, it's better to individually address each recipient in the body of your email. Doing so also lowers the probability of your email being classified as spam since it's no different than if you were to craft the email yourself.

There's more than one way to start a new campaign email with personalization, and it depends on whether you are going to send to people that are in your Contacts folder, people that are in your address book, or whether you are sending to people contained in a list that is stored in a text file.

Regardless of which way the email is started, just add the keyword phrase '[Substitute: First Name, Default: "Customer"]' (without the single quotes, *but with the double quotes*) and it will be substituted with each person's name on the fly. Some examples are:

A) [Substitute: First Name, Default: "Customer"]
B) [Substitute: Last Name, Default: "Client"]
C) [Substitute: Company Name, Default: "your company"]

Note that there are no first names in a distribution list, or when using names from an address book. In these cases, you will need to use the keyword phrase '[Substitute: Name, Default: "Customer"]' (without the single quotes, *but with the double quotes*). This will grab the entire "display" name for the recipient, regardless of whether it's a company name or not, or whether the name is in last name first name order or first name last name order.

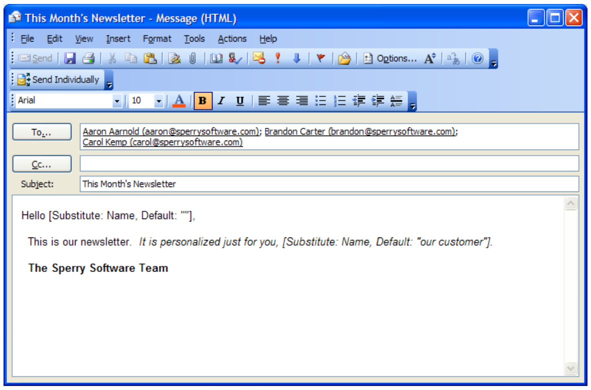
The Substitute keywords are not case sensitive, and can be used in the body or the subject of the email.

How To Personalize and Send An Email To People In Your Contacts Folder

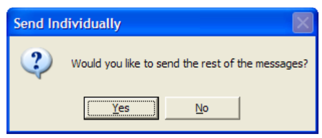
To send to people in your Contacts folder:

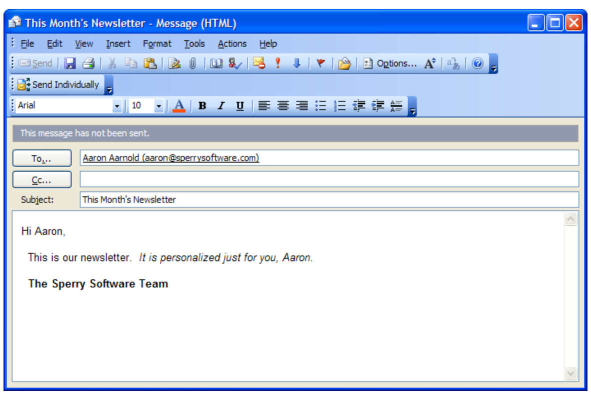
1. Start in any of your contacts folders.
2. Select the ones that you would like to send to, or press Ctrl-A to select them all (or view by Categories, then select all the contacts that belong to particular category, etc).
3. Once they are highlighted, click on the Actions menu, then Create, then New Message To Contact. *Note: The New Message To Contact appears directly under the Actions menu in Outlook 2003 and below.*
4. This will bring up a new email. Fill it out as normal, adding the substitution text keywords as described above wherever you need it. Remember that the Substitute keywords are not case sensitive, and can be used in the body or the subject of the email.
5. When you're ready, click the Send individually button.

Remember: Click the Send Individually button instead of the regular Send button to send the message.



When you click on the “Send Individually” button, three separate emails will go out, one to Aaron Arnold, one to Brandon Carter, and one to Carol Kemp. By default, the first message is shown with substitutions to allow you to inspect the email and make sure that everything is spelled correctly. When the first message is show, the prompt comes up to ask if it’s ok to begin sending them out (the one for Aaron is shown below):





If you like it, just click Yes, and it will send all the messages including the one you’ve inspected.

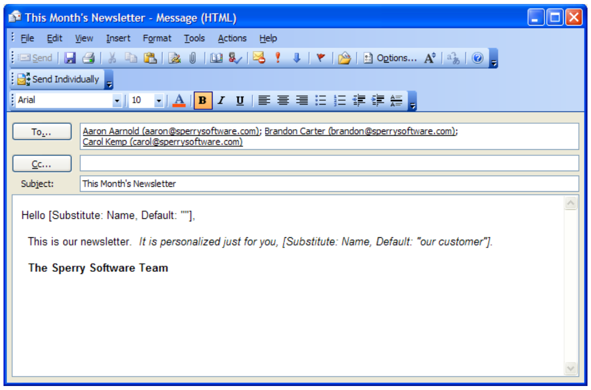
You can use the following substitutions when using Contacts:

- First Name
- Last Name
- Title
- Nick Name
- Company Name

All of the substitutions have the following format: *[Substitute: First Name, Default:”my customer”]*. This example uses the First Name of the contact in question. If a contact lacks the correct field, it uses the default value if you’ve specified one. This is to allow your newsletter to sound natural even if you’re missing a first name of one of your contacts. For instance, in the example above, if we were missing Mr. Aarnold’s first name, it would read “It is personalized just for you, our valued customer.”

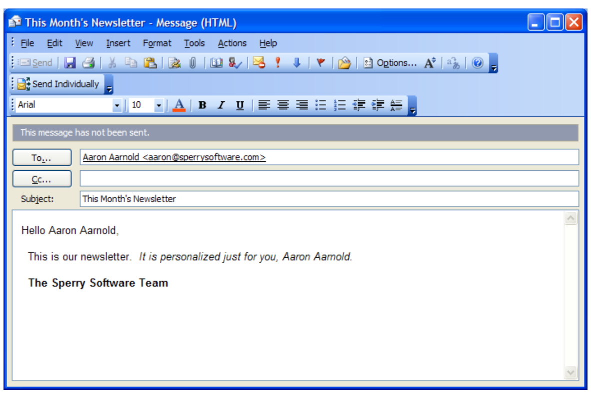
To Send To People That Are In Your Address Book

To send to people that are in your address book, compose a new email by clicking on the “Create New Campaign” button. Click the To button the way you normally would. For example, if you compose this email:



Note: the Substitute keywords are not case sensitive, and can be used in the body or the subject of the email.

Three separate emails will go out, one to Aaron Arnold, one to Brandon Carter, and one to Carol Kemp (the one for Aaron is shown below):



This is what the first recipient will see.

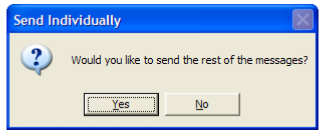
You will then be prompted to review this first copy, and you can click Yes to send them out or No to make other changes. Note that the substitution keywords can be used in the body or the subject of the email. This may further help your email be read.

How to Send To People That Are In a File

Sometimes, it’s easier to have a list of email address in a plain text file. This is especially true if the people you’re sending to aren’t in your address books or they aren’t already contacts in your Contacts folder.

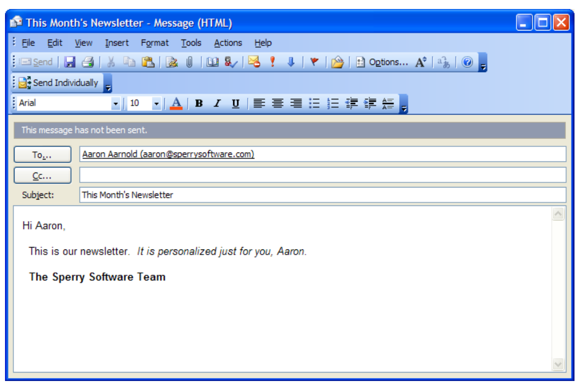
For these cases you can import the file by creating your newsletter or business announcement just like before except you leave the “To” field blank, then click on the *Send Individually* button.

When you do this, a window will pop up asking you for the file that contains the list of email addresses to send to. The file contains a list of email addresses, one per line. Adding a few names to our list above, for example:



For the best results however, each line can contain the email address and the name of the person you are sending the email to, with each field separated by tabs. For example:

aaron@sperrysoftware.com	Aaron
brandon@sperrysoftware.com	Brandon
carol@sperrysoftware.com	Carol
Darren@sperrysoftware.com	
ed@sperrysoftware.com	Ed



Note how Darren@sperrysoftware.com has no name, this is accepted as well, the default value for that substitution will simply be used instead.

Concerning substitutions, if the default field is blank (e.g. “[Substitute: Name, Default: “”]”) substitutions will be blank.

Although not shown, the file with the list of email addresses can have up to six columns, each separated by a tab. You can then make substitutions by using the following syntax:

[Substitute: Address, Default: “”]
[Substitute: Name, Default: “”]
[Substitute: Column 3, Default: “”]
[Substitute: Column 4, Default: “”]
[Substitute: Column 5, Default: “”]
[Substitute: Column 6, Default: “”]

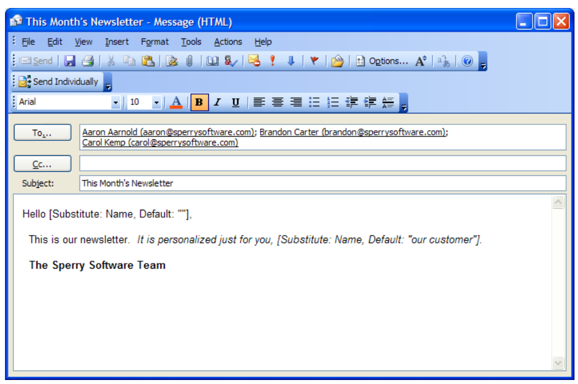
Columns 3, 4, 5, and 6 can be any data you would like. Just be sure to separate out each column with a tab so that, for example, if you had a unique coupon code for each of your recipients, you could place it into Column 4, and make the substitutions on the fly.

How To Create An Import File For Send Individually From Your Outlook Contacts

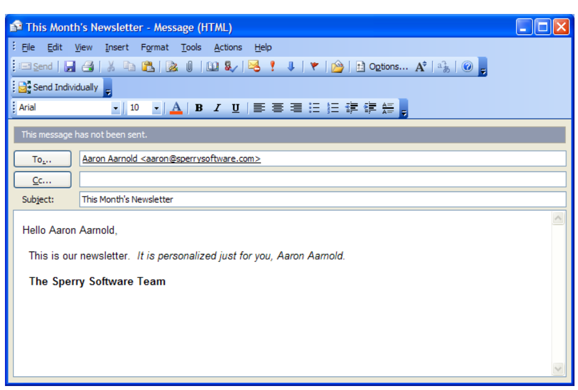
You can create a file from your contacts that can be used with Send Individually. You might want to do this if there are fields in your contacts that you would like to have in your newsletters but that are not currently exposed by the add-in. If you run into this problem, please notify us at TechSupport@SperrySoftware.com and let us know the fields you need so that we can add these items in future releases. In the meantime, here are instructions for creating a file from your contacts that can be used with Send Individually.

To cause Send Individually to prompt you for a file, simply create the email, but leave the To field blank. Note that you will need to recreate this file if you add contacts that you want to email with Send Individually, i.e., the file is not synchronized with your Contacts folder.

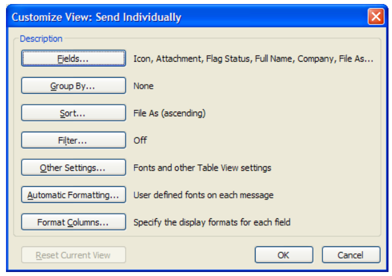
In Outlook, go to View…Arrange By…Current View…Define Views to pull up a window that looks similar to this:



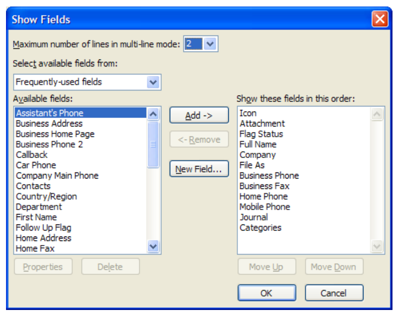
Click on "New…", and name it (here you can see the new view is called "Send Individually" – but there's nothing stopping you from creating a view based on a marketing campaign, project name, or any other relevant name). Choose a table view, then click "All Contact folders" so that you can use this view and generate an import file for any of your Contact folders:



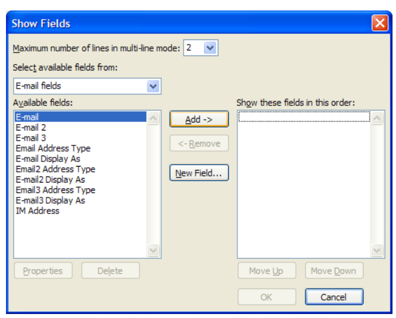
Click Ok to bring up the table view customize window:



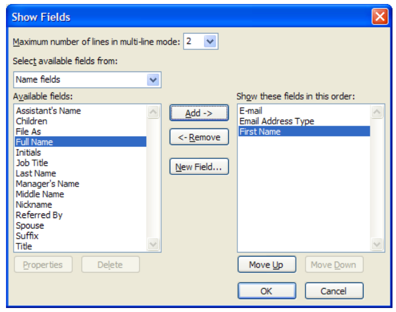
Here, we only want to import three fields. When you click on Fields you'll see this:



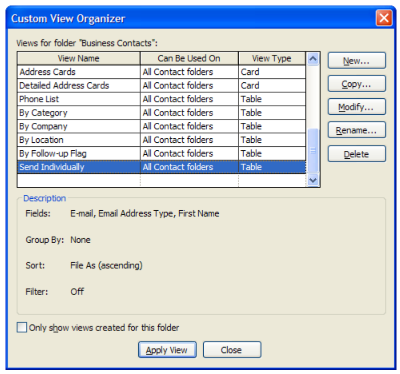
We want to highlight all the items in the right hand column by holding down the Ctrl key as we select each one and finally clicking "Remove". We then want to find the email addresses. We do this by pulling down the Frequently-used fields combo box and selecting "E-mail fields":



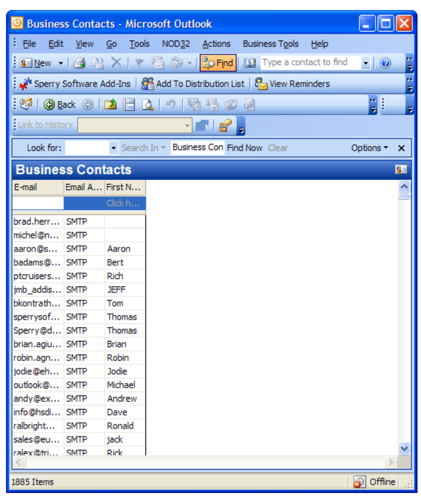
From here we pick the "E-mail" field. We then go back to the combo box and pull down the "Name" fields. This is so that we can get the person's first name, or their title followed by their last name, etc. In this case, we will use the first name:



Click ok twice and then you should be at this window:

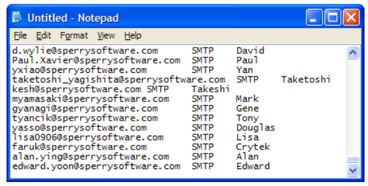


Click Apply View, and you will be presented with a window that looks similar to this:



We're almost done. Now all you have to do is select Edit…Select All…Copy.

Then go to (back out into Windows) Start…Run…Notepad. Click Edit…Paste and you will be left with a file that looks similar to this:



Note that your email addresses will look different than the ones above.

Finally, go to File…Save to save the file. This is the file that you will select when you run the Send Individually Add-in with a blank "To" field, so be sure to take note of where you save it.

Note: You may want to put your contacts view back to normal after creating the file. To do so, just go back into Outlook and click on View…Arrange By…Current View…Address Cards.

After you have created this view, you don't need to create it again in order to generate the file again. You can just view your Contacts through it and then follow the steps above starting from Edit…Select All…Copy. This is useful because the contacts file you created for Send Individually does not automatically stay synchronized with your contacts folder.

Troubleshooting

In general, be sure to reference our Knowledge Base at http://www.SperrySoftware.com/KB - we keep the most current information there.

Q. The "Sperry Software Add-ins" button is not visible.
A. The add-in may have become disabled.

For Outlook 2002, 2003 users:
On the Outlook Menu, click Help…About Microsoft Outlook
Click the "Disabled Items" button
If "Sperry Software" is listed, enable it and restart Outlook

For Outlook 2007 users:
On the Outlook Menu, click Help…Disabled Items
If "Sperry Software" is listed, enable it and restart Outlook

The Sperry Software toolbar may not be set to "Visible"
On the Outlook Menu, click View…Toolbars and make sure that Sperry Software is checked.

Q. The "Sperry Software Add-ins" button does not respond.

A. Run the add-in Reset tool.

The add-in reset tool can be downloaded from
http://www.sperrysoftware.com/outlook/tools.asp

Q. How can we contact you for more help?

A. For help on more in-depth issues, check out our Knowledge Base.