

MarshallSoft Client Mailer

Tutorial

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TABLE OF CONTENTS

1	Introduction	Page 3
1.1	Introductory Remarks	Page 3
1.2	Why Choose Us	Page 3
1.3	Documentation Set	Page 4
2	Example 1	Page 5
2.1	The Recipient List	Page 5
2.2	The Header File	Page 5
2.3	The Letter	Page 6
2.4	Actual Letters Sent	Page 6
3	Example 2	Page 7
3.1	The Recipient List	Page 7
3.2	The Header File	Page 7
3.3	The Letter	Page 8
3.4	Actual Letters Emailed	Page 8
4	Client Mailer Features	Page 10
5	Client Mailer Program Logic	Page 11
5.1	Sending Logic	Page 12
5.2	Receiving Logic	Page 12
6	Client Mailer Versions	Page 12
7	Consulting	Page 12
8	Spam and Spam Laws	Page 12

1 Introduction

1.1 Introductory Remarks

With the push of a button, send **personalized** email to your clients or customers **directly** from your application program, programmable database or spreadsheet!

The **MarshallSoft Client Mailer (MCM)** is designed for software developers and database programmers. MCM consists of two DLLs (MCM32.DLL and MCM64.DLL) and several example programs written in one of the supported programming languages. The **MarshallSoft Client Mailer** works with:

- Programmable databases such as Visual FoxPro, dBase, and XBase++.
- All Visual Basic for Applications (VBA) programs such as Microsoft Access and Excel.
- Application programs written in C/C++, Visual Basic, Delphi, and COBOL (Fujitsu and Micro Focus)

The current version of the MarshallSoft Client Mailer can be downloaded at <http://www.marshallsoft.com/mcm.htm>.

The **MarshallSoft Client Mailer** comes with **fully functional** example programs (with **source code**) that:

- Send personalized letters to a list of clients or customers.
- Check for returned email that could not be delivered.
- Check for replies (REMOVE, CONFIRM, OPT-OUT, etc.) from clients and customers.

The example programs can be used without change or easily modified to suit particular requirements.

Examples of how the **MarshallSoft Client Mailer (MCM)** can be used are:

- An online retailer wants to email notices of sales and new products.
- A local retailer wants to email sale promotion notices to his customers.
- A stockbroker wants to email a weekly newsletter to her clients.
- A software developer wants to email notices of new product releases.
- A bridge club wants to email notices of upcoming tournaments.
- A doctor wants to send appointment reminders.
- A professor wants to send grades to his students taken from his spreadsheet.
- A business wants to send invoices to customers.
- A church wants to email notices of upcoming events.

1.2 Why Choose Us

The **MarshallSoft Client Mailer** is designed for users who want to control the email process from their own application program. There are several very significant advantages to this approach.

1.2.1 Compared to Using an End-User Program

Unlike an end-user program, you control the emailing process, choosing letters and recipient lists under program control. Emails can be sent and replies checked directly from your application program.

1.2.2 Compared To Using an Email Service

Unlike an email service, your cost is not dependent on the number of emails you send or how often emails are sent. Furthermore, you don't have to share your client list with those who work at the email service.

1.3 Documentation Set

There are five manuals in Adobe PDF format for the **MarshallSoft Client Mailer**.

- **Tutorial Manual:** Introduces the basic functionality and overview of the **MarshallSoft Client Mailer**.
- **Servers Manual:** Covers background information on SMTP & POP3 servers.
- **User Manual:** Covers information that is not programming language specific (letter & list preparation, program logic, purchasing, performance, SSL, etc.).
- **Reference Manual:** Contains details for each individual MCM function specific for each programming language (C/C++, VB, etc.).
- **Programmer Manual:** Contains programming language (C/C++, VB, etc.) specific information such as compiling and running example programs.

The Tutorial Manual ([mcm tutorial.pdf](#)) should always be read before reading the other manuals. The manuals can be found in the DOCS subdirectory/folder in the **MarshallSoft Client Mailer** file structure when it is installed. Note that for clarity purposes some information may have been provided in more than one manual.

The best way to become familiar with the capabilities of MCM is to run the example programs that can be found in the APPS sub-directory/folder of the MCM installation. Three sets of example data are provided.

2 Example 1

In the "Meeting" example, a simple text email is sent to everyone taken from a list of recipients. Three text files are used:

- **Recipient List:** `List(Meeting).txt` List of all recipients to receive the email.
- **Header File:** `Letter(Meeting).hdr` Contains "To:" and "Subject:" headers.
- **Letter:** `Letter(Meeting).txt` The text letter to be sent.

2.1 The Recipient List

In this example there are three recipients. Such a list is a normal ASCII text file and might look like:

```
EmailAddress
mike.marshall0610@yahoo.com
paula.marshall0610@yahoo.com
lacy.marshall0610@yahoo.com
```

The first line of the recipient list contains the substitution string(s) (also known as "macros") while the remainder of the recipient list contains the actual email addresses to be used.

2.2 The Header File

In this example the header text file consists of two lines:

```
To: `EmailAddress`
Subject: Meeting Tomorrow
```

Note that the backquote character ` is the macro delimiter.

2.3 The Letter

In this example the actual text letter (to be sent) is:

```
Dear Member,

There will be a meeting tomorrow at noon. See you there!

-Tom
```

Before a letter is emailed to the recipient, the substitution macros are replaced by the actual data. In this example, the macro `EmailAddress` (in the header file) would be replaced with the client's email address taken from the recipient list file.

2.4 Actual Letters Emailed

In this example three letters will be emailed since there are three lines after the macro line in the recipient list file "List (Meeting) .txt".

2.4.1 First Letter Emailed

The first letter (of the three) would be addressed to

`mike.marshall0610@yahoo.com`

with the subject

`Subject: Meeting Tomorrow`

and with the body

`Dear Member,`

`There will be a meeting tomorrow at noon. See you there!`

`-Tom`

2.4.1 Second Letter Emailed

Similarly, the second letter emailed would then be addressed to

`paula.marshall0610@yahoo.com`

with the same subject and body as the first.

2.4.3 Third Letter Emailed

Lastly, the third letter emailed would then be addressed to

`lacy.marshall0610@yahoo.com`

with the same subject and body as the first two.

3 Example 2

In the second example, a dentist wants to email appointment reminders to his patients. Those that confirm their appointments won't have to be called. Three text files are used:

- **Recipient List:** List(Dentist).txt List of recipients to receive the email.
- **Header File:** Letter(Dentist).hdr Contains "To:" and "Subject:" headers.
- **Letter:** Letter(Dentist).htm The HTML letter to be sent.

3.1 The Recipient List

In this example assume that the dentist is running a programmable database such as FoxPro or is using text files containing patient information that includes the time and date of the next appointment.

Each morning the dentist (or office assistant) will generate the list of patients who have appointments the next day.

In this example assume that there are three patients in the patient list. Such a list is a normal ASCII text file and might look like:

```
EmailAddress,      AppointmentTime,  FullName
mike.marshall0610@yahoo.com,  10:00 a.m.,      Mike Marshall
paula.marshall0610@yahoo.com,  Noon,             Paula Marshall
lacy.marshall0610@yahoo.com,   2:30 p.m.,       Lacy Marshall
```

The first line of the recipient list contains the substitution strings (also known as "macros") while the remainder of the recipient list contains the actual patient data that will be used in the email letter.

3.2 The Header File

The letter header text file consists of two lines:

```
To: `EmailAddress`
Subject: Your Dental Appointment at `AppointmentTime`
```

Note that the backquote character ` is the macro (substitution string) delimiter.

3.3 The Letter

The actual text letter (to be sent) is:

```
Dear `FullName`,

Your dental appointment is tomorrow at `AppointmentTime`.

To confirm your appointment, please reply to this email with
"CONFIRM `EmailAddress`" as the subject.

Sincerely,
Dr. John H. Holliday
```

Before a letter is emailed to the patient, the substitution macros are replaced by the actual patient data. In this example, the macros (substation strings) `EmailAddress`, `FullName`, and `AppointmentTime` would be replaced with the actual values taken from the recipient list file.

3.4 Actual Letters Emailed

In this example, three letters will be emailed since there are three lines after the macro line in the recipient list file "List (Dentist) .txt".

3.4.1 First Letter Emailed

The first letter (of the three) would be addressed to

`mike.marshall0610@yahoo.com`

with the subject

`Subject: Your Dental Appointment at 10:00 a.m.`

and the body

`Dear Mike Marshall,`

`Your dental appointment is tomorrow at 10:00 am.`

`To confirm your appointment, please reply to this email with
"CONFIRM mike.marshall0610@yahoo.com" as the subject.`

`Sincerely,
Dr. John H. Holliday`

3.4.2 Second Letter Emailed

Similarly, the second letter emailed would then be addressed to

`paula.marshall0610@yahoo.com`

with the subject

`Subject: Your Dental Appointment at Noon`

and the body

`Dear Paula Marshall,`

`Your dental appointment is tomorrow at Noon.`

`To confirm your appointment, please reply to this email with "CONFIRM paula.marshall0610@yahoo.com " as the subject.`

`Sincerely,
Dr. John H. Holliday`

3.4.3 Third Letter Emailed

Lastly, the third letter emailed would then be addressed to

`lacy.marshall0610@yahoo.com`

with the subject

`Subject: Your Dental Appointment at Noon`

and the body

`Dear Lacy Marshall,`

`Your dental appointment is tomorrow at 2:20 pm.`

`To confirm your appointment, please reply to this email with "CONFIRM lacy.marshall0610@yahoo.com " as the subject.`

`Sincerely,
Dr. John H. Holliday`

4.0 Client Mailer Features

Features of the **MarshallSoft Client Mailer** (MCM) include:

- Send personalized email **directly** from an application, programmable database or spreadsheet.
- Uses macro substitution strings to personalize outgoing letters (Also called email merge).
- Can send plain text, rich text, or HTML formatted letters.
- Supports multiple attachments.
- Can handle arbitrarily large lists of recipients.
- Detects duplicate email addresses.
- Supports multiple lists of recipients that should always be skipped.
- Supports ASCII, UTF8, and ISO_8859 character sets.
- Supports WIN_1250, WIN_1252, and WIN_1255 character sets.
- Can use up to 32 connections simultaneously for fast email delivery.
- Can process "undeliverable mail" replies.
- Can process multiple user replies ("REMOVE", "CONFIRM", etc).
- Has extensive error detection and logging capability.
- Includes **SendMail** example program (with source) to send email.
- Includes **GetReply** example program (with source) to read replies.
- Supports 32-bit and 64-bit Windows through Windows 10.
- Royalty free distribution with your compiled application.
- License includes one year of technical support and software updates.
- The license can be used with all supported computer programming languages.

Unlike standalone executables, the Client Mailer example programs **can be modified** to work seamlessly with your database of clients and customers.

5 Client Mailer Program Logic

5.1 Sending Logic

Sending email from your application program with Client Mailer is very straight forward. The basic send logic is:

```
Start Client Mailer [mcmAttach]
Open letter headers [mcmOpenHeader]
Open letter to be sent [mcmOpenLetter]
Open list of recipients [mcmOpenList]
Open skip files (recipients to be excluded) [mcmOpenSkip]
Connect to the SMTP server [mcmSmtpConnect]
LOOP
    Merge letter with next recipient [mcmMergeNext]
    Send letter to this recipient [mcmSendMail]
END-LOOP
Close connection to server [mcmSmtpClose]
```

Refer to the **SendMail** example program.

5.2 Receiving Logic

The logic to check for replies to your previous sent email is:

```
Start Client Mailer [mcmAttach]
Specify file for bounced email addresses [mcmOpenBounce]
Specify 1st reply string & file [mcmOpenReply]
Specify 2nd reply string & file [mcmOpenReply]
. . .
Specify last reply string & file [mcmOpenReply]
Connect to the POP3 server [mcmPop3Connect]
LOOP
    Read next reply [mcmReadReply]
END-LOOP
Close connection to server [mcmSmtpClose]
```

Refer to the **GetReply** example program.

In the above logic, the addresses for undeliverable email are appended to the 'bounced' file of addresses, and the address of client replies matching one of the specified reply strings (such as "CONFIRM" or "REMOVE") are appended to the corresponding reply file of addresses.

The bounced and reply files of addresses can be used as skip (exclusion) files the next time that email is sent.

6.0 Client Mailer Versions

Previous versions of MCM supported four "editions": Personal, Professional, Professional-Plus, and Unlimited. Starting with Version 5.0, editions are no longer used. The current version is "unlimited". There are no limits on the number of recipients.

7.0 Consulting

Consulting is available for those who would like help:

- Customizing the example programs.
- Developing custom applications that use MCM.
- Special enhancements to MCM

For more information and pricing, email us at info@marshallsoft.com with subject

MCM CONSULTING

8.0 Spam and Spam Laws

Spam is a huge problem on the Internet. As a result it is considerably more difficult for legitimate businesses to send email to their customers. Internet Service Providers (ISPs) enforce limits on the number of emails that can be sent through their servers. Many businesses also run aggressive antispam programs that sometimes delete legitimate email.

The **MarshallSoft Client Mailer** is designed to send email to your existing clients and customers with whom you have an existing business relationship. Sending unsolicited email to those with whom you do not have an existing business relationship is prohibited. To this end, the **MarshallSoft Client Mailer** can **not** send anonymous email since the sender is always identified in the outgoing email.

8.1 U.S. CAN-SPAM Act

The US Anti-Spam law can be found at <http://www.ftc.gov/bcp/edu/pubs/business/ecommerce/bus61.shtm>

8.2 European Anti-Spam Laws

European Anti-Spam laws can be found at http://ec.europa.eu/information_society/policy/ecommerce/todays_framework/privacy_protection/spam/index_en.htm.