Sn@ilM@iler

for the Palm Computing Platform

Users Guide

Version 2.0
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Introduction

More and more of us are maintaining our Address Book on a PalmPilot. While this information does transfer back to the desktop to HotSync with a variety of desktop PIM (Personal Information Manager) programs, many people don't actually use the desktop program at all, but limit themselves to the PalmPilot handheld unit itself. **SnailMailer** (tm), working in conjunction with our **PalmPrint** printing software (which is required for its use), lets you print envelopes or sheets of mailing labels for names on your list, making your PalmPilot that much more useful. In addition, **SnailMailer** lets you create and save up to eight sets of mailing lists for easy recall. These might be things like your "Christmas Card List," your "Key Customer List," and so on. Note that these lists do not necessarily correspond to Categories within your Address Book. For example, you might have a category "Customers" in your Address Book, but you only want to send periodic mailings to a subset of those people you designate as key customers. **SnailMailer** lets you do that without having to establish new categories within your Address Book. You can also use **SnailMailer** to simply print out the complete information contained in any one Address Book entry, including phone numbers, notes, etc.

And with **SnailMailer** 2.0, there's lots more. **SnailMailer** 2.0 now includes full mail merge capability, letting you create memos with spots for name, address, etc. which are then filled in with information extracted from your address book.

The SnailMailer Main Screen

From the **Applications** window on your **PalmPilot**, look for the icon labelled **SnailMailer** which looks like this:

Tap on the icon and you'll see the main screen of the program.

The main portion of the screen (within the central box) will display names and other information from your Address Book to allow you to select the name(s) whose information is to be printed. This information is controlled by several of the pop-up menus on the screen:

Category Selector: In the upper right of the screen is the same category selector that appears when you run the standard Address Book application. You can display **All** of the entries in your Address Book (as in the example above), or just members of a particular category ("Business", "Personal", etc.)

Display Control: On the left of the second line of the screen is the display selector, which offers you two choices:
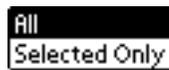
Selecting **All** will display all the names in the current category, while selecting **Selected Only** will display only those names you have selected for printing (to be discussed below). When you are selecting names to be printed, you'll need this to be set to **All**, but before you print a long list, you might want to switch to **Selected Only** to see exactly what will be printed.

City/Company Selector: The names in your address book are always displayed on the left portion of the screen as Last Name, First Name. The right half of each line can display either the city of residence (as in the example above), or the Company name, as controlled by the popup menu on the right side of line two:

Select whichever one helps you to best identify the people in your list; you can switch back and forth as needed. This selector does not affect the information which is printed on envelopes or mailing labels.

At the bottom of the main screen are two buttons and one "Find field." The **Show** button pops up a little window showing you the full name and address of the last name you tapped on in the main list. This is to help you in cases where you might have two entries for the same person (perhaps with their summer and winter address, or their home and work address) and you want to decide which one to print out. The **Print** button does just that, and will be discussed below. And finally, the **Find** field functions just like the "Look Up" function in the standard Palm Address Book application. Enter one or more letter into this field, and the list will scroll to the name of the first person whose

last name begins with that letter(s).

Selecting Names to Print

To select names to print, just tap on them on the screen. The name will be highlighted (changed to reverse video, white letters on a black background) as seen below. If you make a mistake, tap on the same name again, and it will be unselected. You can select multiple names just by tapping on more than one name; if the names you want to select don't appear on the same screen, use the scroll arrows at the lower right of the screen (or the **Find** feature) to scroll down to the name of interest (names which were selected, and which no longer appear on the screen, are still selected).
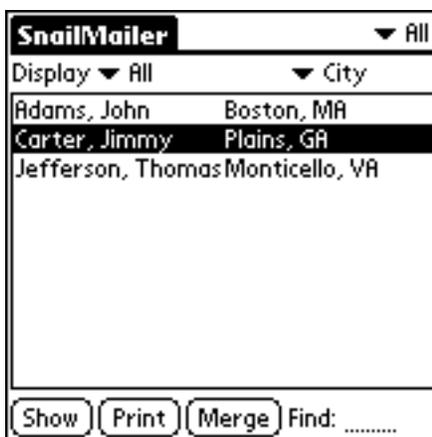
To select a range of names, "tap and drag" (tap the stylus down on one name, leave it down, drag down to the last name you want to select, and then lift the stylus. Tap and drag only works on names on a single screen. If you want to select more, scroll down with the scroll arrow, then tap and drag again.

If you tap the **Menu** button on the lower left of your PalmPilot screen, the first menu is named **Selection**:
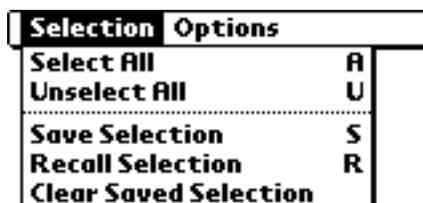

Tap the **Select All** menu item (or enter Command A with Graffiti), and all the names are selected (not just the ones on the current screen). This means if you are displaying **All** names using the Category selector in the upper right, every name in your Address Book is selected; if you are displaying just a single category, then all the names in that category are selected. **Unselect All** clears your current selections.

Configuring the Printout

SnailMailer prints envelopes, mailing label sheets, and complete address book information. You control the configuration of the first two items with the **Options** menu (the address book information prints in a fixed format):

Select **Configure Envelopes** and you'll see this screen:

Envelope Settings

Left margin (characters): 45
Top margin (lines):   12
Orientation: P L
Font: ▼ Helvetica ☑ **Bold**
(OK) (Cancel)
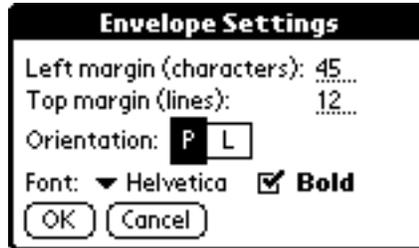
The screen should be self-explanatory. The position of the address (over from the left edge and down from the top) is specified, as is the envelope orientation (the way in which you feed the envelopes into the printer), the font, and whether the address is printed in bold or plain.

Select **Configure Labels** and you'll see this screen:

Mailing Label Settings

#Across: 2-Up 3-Up ☐ **Bold**
Left margin (characters): 6
Top margin (lines):   6
Horizontal offset (chars): 22
Vertical offset (lines): 10
(OK) (Cancel)
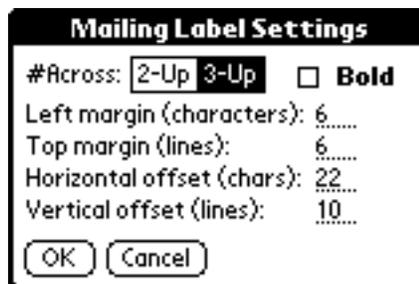
Again, all these things should be self-explanatory. You set the position of the first (upper-left) label and the offset between labels, specify whether the labels are 2-across or 3-across, and whether the names and addresses are printed in a bold or plain font. Note that you cannot specify the font size, which is fixed at 12-pt type, nor can you control the font itself, which are always printed in monospaced (Courier) font. Depending on the lengths of names and addresses, you may find that you cannot "fit" the information in 3-up labels, and will be limited to 2-up labels. Bold printout takes up slightly more space than plain type.

Settings will depend on your printer and type of labels used, but here are two starting points:

Label Type	Size	Left margin	Top margin	Horizontal Offset	Vertical Offset
2-Up (e.g., Avery 5161)	1" x 4"	1	4	42	6
3-Up (e.g., Avery 5160)	1" x 2 5/8"	1	4	28	6

Printing Envelopes or Mailing Labels

Before you do anything with **SnailMailer**, including selecting names, you should have first run

PalmPrint software itself at least once, and configured it for your printer. Using **PalmPrint** is discussed in the **PalmPrint** manual, and is not discussed further here. At this point we'll assume that you have correctly configured **PalmPrint** and are running the **SnailMailer** application.

When you're ready to print, tap on the **Print** button, and you'll see this screen:

```
┌─────────────────────────────────────┐
│           Print Setup                │
├─────────────────────────────────────┤
│  Envelopes  │  Labels  │  All Info   │
│  ☑ All                               │
│  ☐ 10... items starting at # 1.......│
│  ( OK )( Cancel )                    │
└─────────────────────────────────────┘
```

First select what you want to print - envelopes, mailing labels, or "all info" (the complete address book information for that entry or entries). On the bottom of the screen you have two options. Checking **All** will print all the currently selected names. If you are printing a lot of names, though, you might want to print only some at a time. For example, perhaps the envelope tray in your printer only holds 10 envelopes. In this case, you can check the **#items** button, fill in the number of items to be printed and the starting item #. When you print a subset of the items in this way, after the first "print job" is complete the "starting #" is automatically incremented. Using the example above, for example, the next time you tap the **Print** button, the screen will read "10 items starting at #11". So unless something goes wrong, and one batch needs to be reprinted, you won't need to reenter these numbers (the starting item will be reset to 1 when you exit and then re-enter **SnailMailer**. Note that "items" refers to individual addresses, so that a sheet of mailing labels might consist of 20 or 30 "items." This means that you can print one sheet at a time by setting the number of items to the number of labels on a sheet.

Saving and Recalling Groups of Names

SnailMailer lets you save (and recall) up to eight groups of names. In other words you can create eight mailing lists. Once you have selected names, as described in the previous section, tap on **Save Selection** in the **Selection** menu, and you'll see this screen:

```
┌─────────────────────────────────────┐
│         Save Selection As...         │
├─────────────────────────────────────┤
│  ☐ Christmas Card List ..............│
│  ☐ Key Customer List ................│
│  ☐ ..................................│
│  ☐ ..................................│
│  ☐ ..................................│
│  ☐ ..................................│
│  ☐ ..................................│
│  ☐ ..................................│
│  ( OK )( Cancel )                    │
└─────────────────────────────────────┘
```

To save a mailing list, enter a name on the dotted line, check the corresponding box, and tap on **OK** (tap on **Cancel** if you change your mind). When you install the software, the first two names are filled in as examples, but you can change them (just edit them in the usual way). So for example you might check the top box, change the words "Christmas Card List" to "Newsletter Mailing List", and then tap **OK**. The names of your lists can be as long as 31 characters.

To recall a list, tap on **Recall Selection** in the **Selection** menu, and you'll see this screen:

Recall Selection Named...

☐ Christmas Card List
☐ Key Customer List

(OK)(Cancel)

The only difference, as you can see, is that only the "named lists" will be displayed, and you can't change the names by editing them.

If you recall a list, you can then add (or delete) names from the list, and then re-save the list.

A subtle point - you might create a mailing list, and then at some time later delete one or more of those names from your Address Book. **SnailMailer** is equipped to handle this situation; if it finds a name missing from the Address Book, it simply deletes that entry from your mailing list as well.

To clear out a mailing list, select **Clear Saved Selection** from the **Selection** menu, and you'll see this screen:

Clear Selection Named...

☐ **Clear All Saved Selections**
☐ Christmas Card List
☐ Key Customer List

(OK)(Cancel)

You can clear all the names from any of your named mailing lists, or, if you check the top box, you can clear out **all** your mailing lists. Obviously you want to think carefully before doing this. Tap **Cancel** if you change your mind about clearing out a list.

Note that none of the actions you take within **SnailMailer** have any affect on the names in your Address Book itself; they only affect **SnailMailer's** own mailing lists.

Mail Merge/Forms Design

If you select one or more addresses on the main screen, and tap the **Merge** button, you'll be brought to this screen (identical to one from **PalmPrint**):

The difference between printing a memo from **SnailMailer** and printing the same memo from **PalmPrint**, is that **SnailMailer** understands a special notation which allows you to design your own forms and perform mail merge functions, combining the information from the addresses selected on the first screen of **SnailMailer** with the memo selected on this screen.

The heart of this special notation, seen in the figure above, are pairs of "double-less than" symbols and "double-greater than" symbols, surrounding the names of the fields in the Address Book - <<First name>>,<<City>>, etc. These special symbols ARE found on the built-in keyboard of the Palm, but they have no Graffiti equivalent, so to create a memo containing these symbols, you'll need to use the built-in (pop-up) keyboard (or download them from the desktop). Once you do this once, doing it the second time can be done most simply by copying from the first memo and pasting into a new one. **Note carefully:** in this manual, we represent these symbols by two separate one-characters symbols (e.g., "less than, less than") because many web browsers don't display these special characters properly. But the proper character to use are SINGLE characters (characters 171and 187 respectively for those with an interest in the details).

Some examples of what you can do with this capability:

```
Envelope  with  return  address:

My name
My return address

<<First name>> <<Last name>>
<<Address>>
<<City>>, <<State>> <<Zip Code>>

Form  letter:

Dear <<Title>> <<Last name>>,

It was a pleasure visiting you today, and discussing how we can
help <<Company>> with...
```

Note that if you have renamed your custom fields ("Custom 1", etc.) with different names, then those NEW names are what SnailMailer will look for when it tries to extract the information from the address book.

If the requested field is empty, of course it won't be printed; if that information is the ONLY information on a given line, the line will be suppressed (so for example in the envelope example above, if the Address is missing, the City, State, and Zip will appear right below the First and last

names.

Although we describe this feature as "mail merge", it's worthwhile to realize that there is nothing in the software that limits it to "mail." **SnailMailer** combines information in a form (the memo) with information in a database. Although the database is limited to the Palm Address Book, nothing prevents you from storing information other than names and addresses in your address book. For example, suppose you put into your address book a list of drugs, and use the custom fields to contain information about the drug - frequency, side effects, etc. Now with an appropriate form, you could use **SnailMailer** to print out instructions for taking this particular drug. So think "data merge" and not just "mail merge" and the possibilities are endless.

Conditional Mail Merge and other special modes

In addition to the names of the Address fields, there are other special "keywords" which can be used to control the action of the mail merge. These are as follows:

Keyword	Sample usage	Description
Width	`<<Width=32>>`	Sets a fixed with for subsequent information (e.g., name, address, etc.). Without this setting, all information takes up just the space it needs. With this setting, you can create columns of information which will line up. The width setting remains in effect until changed (or cancelled with <<Width=0>>)
NoPage	`<<NoPage>>`	Normally, after each address is processed, a "form feed" will be issued so that information from separate addresses will appear one per page. If this keyword is encountered anywhere in the memo, this action is suppressed, so information from multiple addresses will appear on the same page.

HeaderOn HeaderOff	`<<HeaderOn>>`
	`This is the page header`
	`<<HeaderOff>>`
		When you are printing information from multiple addresses on one page (using the NoPage keyword), you may want information which appears only at the top of the page and is not repeated for each address. To do this, use the <<HeaderOn>> keyword, follow it with the text to be printed on top, and then follow that with the <<HeaderOff>> keyword.

Any label	`<<My form letter>>`	Any thing enclosed in the special pair of symbols which is NOT otherwise recognized (that is, is not the name of an address field nor one of the special keywords in this table) will be ignored. The most useful application of this feature is to have the first line of the memo be a description of what the memo is to be used for. That way you can have many similar form letters, but have each one distinguished even though the first line of the memo (which is what is displayed when you display a list of memos) is the same.

IfZero IfNonZero	`<<City>><<IfZero No city>>`
	
	`<<First name>>`
	`<<IfNonZero>><<Last name>>`
		These keywords refer to the contents of the previous field that has been used, and provide conditional printing of other material. If the keyword is followed by a space and then word or words before the final >>, then the information following the keyword is what will be printed ("No city" in the first example at left, which is printed if the City is zero, i.e., wasn't there). If the keyword is immediately followed by the >>, then this should be followed by another keyword which is a field name, and

Some examples of what you can do with this capability:

```
Phone  list:

<<Phone list>>
<<HeaderOn>>
Last Name First Home Phone Work Phone
<<HeaderOff>>
<<Width=16>><<Last name>><<Width=8>><<First name>><<Width=14>>
<<Home>><<Work>><<NoPage>> [Note that these last two lines are
one continuous line, despite how they appear in this manual]

Form  letter  salutation,  version  1:

Dear <<Title>><<IfZero Mr.>> <<Last name>>,
```

This form prints the title and last name if both are present, but if there is no title entered in the address book, it defaults to printing "Mr." (not necessarily a wise thing to do)

```
Form  letter  salutation,  version  2:

Dear <<NoPrint>><<Title>><<IfZero>><<First name>><<Title>> <<Last
name>>,
```

This form prints the title and last name if both are present, but if there is no title entered in the address book, it prints the first name and last name

```
Print  a  barcode:

<<CODE-39 barcode printing>>
<<27>>Z1<<7>><<100>><<Barcode>>
```

This is an example using a renamed custom field (renamed "Barcode") which will have as its contents a special barcode. SnailMailer could then be used to select not names and addresses, but products, and print out barcodes for the selected product. The various numbers in brackets are the special codes that tell the printer how many characters are in the barcode and the height of the barcode.

For Support

If you have any problems using **SnailMailer**, you can contact **Stevens Creek Software** in one of the following ways:

On the web:	http://www.stevenscreek.com/palm/support.html
By email:	support@stevenscreek.com

If you need this information quickly, you'll find it on the "About" screen in the software.

Licensing the Software

Limited functionality of **SnailMailer** (printing up to three envelopes or mailing labels at once) is provided free of charge to licensed users of **PalmPrint** software. The registration fee for the advanced functionality (creating and managing mailing lists of unlimited size, and using the mail merge capability) of **SnailMailer** is $19.95 (note that **SnailMailer** will not work unless you also have registered a copy of **PalmPrint**). If you haven't yet licensed your copy, you can do so online at https://id41.securedata.net/stevenscreek/palmorderform.html.

Installing SnailMailer in Your PalmPilot

Whether you downloaded the software from our Web site or received it in the mail, you should have a file called `Snail.prc` on your desktop or laptop computer (on the hard disk or on a floppy diskette). If you have a file named `Snail.ZIP`, that is **not** the proper file; that's a compressed or "zipped" file that you must uncompress with standard "unzipping" software (which we do not provide).

If you do not have the file `Snail.prc`, you cannot proceed. If you **do** have `Snail.prc`, here's how to install it on your handheld unit:

From a Macintosh:

Using MacPac Version 1: Run the program **InstallApp**. Click on the **Select** button, set the **List Files of Type** to **All Files**, locate and select the file `Snail.prc`, and click **Open**. Now click on the **Install** button. The next time you HotSync your Palm, the program will be downloaded.

Using MacPac Version 2: Select the **HotSync Manager** from the "Instant Palm" menu on the upper right of your menu bar. In the **HotSync** menu, select **Install**. Click on the **Add To List** button. Locate and select the file `Snail.prc`, and click **Add File**. The next time you HotSync your Palm, the program will be downloaded.

From Windows:

Using current Palm desktop software: Start your Palm desktop software. Click on the **Install** button. Check to make sure the User name displayed at the top of the Palm Install Tool window which appears is the user name of the Palm handheld device on which you want to install the software; if not, select the correct user name. Now click on **Add**. Using the file browser which appears, locate and select the `Snail.prc` file, and click **Open**. Now click on the **Done** button, and then on **OK**. The next time you HotSync your Palm, the program will be downloaded.

Using old Pilot desktop software: Run the program **INSTAPP.EXE** (it may be displayed simply as **INSTAPP**, depending on how you have Windows configured), which is located in the **C:/PALM** folder. Click on the **Browse** button, locate and select the `Snail.prc` file, and click **Open**. Now click on the **Install** button. The next time you HotSync your Palm, the program will be downloaded.

Entering Your Serial Number

If you have registered the software, and have obtained a serial number from **Stevens Creek Software**, tap on the **Menu** button and select **About** in the **Options** menu. This screen will appear:

```
About SnailMailer...
Sn@ilM@iler......🐌
Version 1.0, 27 July 1998
©1998, All rights reserved
Stevens Creek Software
www.stevenscreek.com
1-800-823-4279
sales@stevenscreek.com
Licensed to:   *Unlicensed*

( OK )   Handheld solutions to
         real-world problems
```

Now tap on the word ***Unlicensed*** and you'll see this screen:

```
Enter Serial Number
Name: Steve
Serial Number: ........................
( OK ) ( Cancel )
```
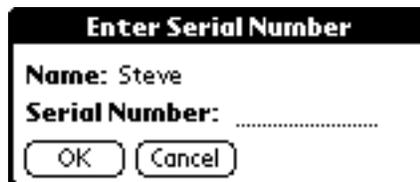
Use Graffiti (or the on-screen keyboard) to enter your serial number (supplied to you by Stevens Creek Software); when you're done, tap on the **OK** button. If you enter an incorrect number, the software will let you know. If necessary, tap on the **Cancel** button to dismiss the Enter Serial Number screen. When you have entered the Serial Number correctly, the word ***Unlicensed*** will disappear from the "About" screen and be replaced by your user name.

If you have a site license copy of **SnailMailer**, the Name field in the Enter Serial Number screen will also be a dotted line in which you can enter information. In this case, you'll need to enter your "site license name" in that field, as well as the Serial Number in the bottom field.

If you run into a problem, this probably means that when you provided your PalmPilot user name to Stevens Creek Software, you did so incorrectly. Check the name in the Enter Serial Number screen shown above, and write it down exactly (including case, i.e., whether the letters are upper-case letters like THIS or lower-case letters like this) and email it to Stevens Creek Software technical support and wait for a new serial number to be provided to you.