ABOUT iMailer™

Introduction

Thank you for your interest in iMailer™. With this software, FileMaker Pro users can send email messages that will look exactly like their existing printouts. The received emails will be in full-color, with all text formatting and layout effects faithfully preserved. Even high quality graphics and photographs can be included in the transmitted printouts. Most email programs will receive and display these messages right inside the usual message body window, most often without any additional effort on the part of the person reading the email.

With iMailer, the recipient(s) of these messages will see exactly what the sender intended them to see, by simply reading their email in the usual manner. An iMailer message delivers many of the benefits that would otherwise require additional software and procedures, such as creating files from other applications like Adobe Acrobat (PDFs) or Microsoft Word, and attaching them to plain text emails. Sending a PDF or a Word doc as an email file attachment can be problematic for the recipient, and can easily end up looking and printing differently than the original. Compared to these other methods, a FileMaker system that uses iMailer results in less cost and effort for the sender, and less effort for the email recipient, with a "what you see is what you get" (WYSIWYG) transfer from sender to recipient.

While iMailer also offers most of the same functionality as many email applications, including plain text messaging, file attachments, CC and BCC, it is not intended to replace a full-featured email program in your everyday use. On the contrary, the modern email application, which is arguably the single most important and central tool in the office, is an indispensable partner in the iMailer experience. Indeed, without the native capabilities of today's email programs, sending iMailer messages would not be possible.

An iMailer enhanced FileMaker Pro system will add a powerful new dimension to your business communications, that stand-alone email applications were not designed to produce. Your email application is still the best tool for sending, receiving and managing the steady stream of plain text messages that make up most of your correspondence -- messages that may or may not have anything to do with your FileMaker-managed concerns.

FileMaker is a great tool for organizing complex information into powerful printed reports. iMailer brings the power of FileMaker's printed reports to the email message, as a new "Layout to email" option.

ABOUT

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iMailer
1.5 v1

System Requirements:

Sender Environment

Macintosh PowerPC+, or Pentium-class PC, with 96 MB RAM (min)
FileMaker Pro 5.0 (or later) installed
QuickTime 5.0 (or later) installed *(the free version for Mac & Windows)*
A live internet connection
eMail service provider (SMTP server) and your privileges (account and password).

Software Compatible with iMailer Messaging:

Sender Environment

Windows 95 / 98 / NT / 2000 / XP
Mac OS 9.x
Mac OS X (Jaguar or later)
FileMaker Pro 5.0 / 5.5 / 6.0 / 7.0
FileMaker Pro Developer Edition 5.5 / 6.0 / 7.0
FileMaker Pro Unlimited 5.0 / 5.5 / 6.0
FileMaker Runtime 5.0 / 5.5 / 6.0 / 7.0
FileMaker Server 5.x / 7.0 can also be used to Host your solution
(No email software is required to be setup on sender machine)

Recipient Environment

Windows 95 / 98 / NT / 2000 / XP
Mac OS 9.x
Mac OS X (Jaguar or later)
MS Outlook (2000 or later)
MS Outlook Express (5.02 or later)
MS Entourage
Mac OS X Mail
CE QuickMail (2.1 or later)
Qualcomm Eudora Pro (4.0 or later)
IBM Lotus Notes (R6 or later)
Open Text FirstClass 7.1 (service pack 4 or later)
America Online 7.0 or later (Windows), X (OSX), 5.0 (OS9)
Most email application versions after 2000

If your email application is not listed above, please send us a short email with the brand, name, and version number of any email application you use, or have read iMailer *messages with, and let us know how it looked and behaved.*
We will be updating the above list, as we receive more customer feedback.

Getting Prepared

Adding the iMailer capability to your FileMaker solution requires some familiarity with basic FileMaker operations, especially the ScriptMaker feature. You will probably need to add at least one layout somewhere, and depending on the type of iMailer job you wish to implement, you may need a few new fields and a relationship or two, as described in the iMailer instruction manual. In more advanced FileMaker Pro solutions, some or all of these "needed" resources may already be present.

We have provided a variety of pre-programmed, scripted FileMaker Pro sample files, to meet the needs of most situations. In most cases, all you need to do to add iMailer functionality to your FileMaker system is to import one of our scripts into your file(s). We have designed the scripts to be as short as possible, and to be imported with as few steps needing attention as possible. In most cases, with a few preparatory steps, you can import our scripts without any incomplete steps, though it is always a good practice to check for missing or unknown objects after importing any script. You may also use these sample files as is, and simply modify them to suit your needs.

The first step is to evaluate what your needs are, to help determine which of our Script Models best meets your needs. We have tried to provide a sample for most of the common printing jobs that a typical FileMaker system might use or require. We have also designed iMailer to be flexible and open-ended, so that even if you need to create and send iMailer jobs that are more complicated than our samples, you will have all of the basic parts that will be combined or modified to meet those needs. From our years of experience, both as custom developers of FileMaker solutions for business, and also as problem-solvers for our FaxTool customers, we have dealt with a wide variety of printing needs from FileMaker. If you have a question about sending a report or any other business correspondence out of FileMaker, chances are great that we've encountered a similar situation in the past, and can suggest an appropriate iMailer script design for you.

What is iMailer doing, anyway?

First, a little background information. There is a hidden feature in FileMaker, that we call "Preview Capture". Anytime a layout is viewed in Preview Mode, you can "capture" the current (viewed) page of the Preview to the clipboard, by simply doing a Copy command (manually, or by script). Using FileMaker Pro 6.0 and earlier, what is captured is a high definition metafile (a page description) of the layout elements, with all of the objects and their formatting information, along with the ASCII values for all the text that occurs on that page. A FileMaker Pro 5.x/6 Preview Capture is not a screenshot, but rather a digital description of the printed page using your selected PageSetup (PrintSetup), that is normally sent to a printer. Under FileMaker Pro 7, Preview Capture is still available, but is now a bitmap /screenshot.

SIDEBAR: You may be familiar with PostScript™ technology, which is another page description protocol used by many high-end printers. FileMaker does not create a PostScript page description, but instead creates its output for all printers (including PostScript and non-PostScript devices) by "rasterizing" each page of the job in sequence, and sending those raster images on to the printer.

A rasterized page description is essentially a detailed set of dots, like those you see in old newspaper photographs, and takes a little more time to build than a PostScript page which contains only coded descriptions of the page elements, that a PostScript printer can decode to rapidly process the print job.

As with all printing, the more information on a page — including quantity of text, amount of formatting, and most importantly, quantity, size and type of graphics — the longer it will take to print. In FileMaker's case, the need to build raster images will add additional time, as can be witnessed by the time it takes to flip through the pages of a complex layout in Preview mode. Switching to Preview mode causes FileMaker to rasterize the needed pages, just like it would if you printed directly from Browse Mode, with the Preview giving you a "proof" of the page description intended for the printer.

Try It Yourself

To test how Preview Capture works, you can manually copy any FileMaker Pro previewed page with the keyboard shortcut for Copy [cmd-C for Mac, ctrl-C for PC], and paste the result into a variety of applications by using the keyboard shortcut for Paste [cmd-V, ctrl-V]. Try pasting the copied Preview into MS Word, or directly to a blank FileMaker layout. As you can see, the "image" that is pasted looks exactly like the original Previewed page, especially noticeable if the original FileMaker layout had sub-summary parts and/or sliding objects configured.

Note that the copied object only contains what would be inside the PageSetup [PrintSetup for PC] boundaries, and does not include other items that are part of the screen view, such as the Main Menu, your desktop, the FileMaker application window, and FileMaker interface tools like the flipbook or scrollbars. In other words, if your Page Setup is a portrait view of a 8.5" x 11" page, your copied/pasted Preview will also measure 8.5" wide by 11" tall. Always set an appropriate PageSetup before entering Preview Mode.

If you paste the capture to a FileMaker Pro layout, remember to check the Graphics formatting for the pasted image (ctrl-click or right-click on it), and set it to "Crop"; otherwise, the image may become distorted as it "Reduces/Enlarges" to conform to the size, boundaries and aspect ratio of the graphic object.

Now that you have seen the Preview Capture feature in action, you can begin to grasp the ramifications of its use, and should at least now be familiar with the basic concept. Unlike our test, above, to implement iMailer in your FileMaker system, you only need to copy these captures to the clipboard; they don't need to be pasted anywhere. There are other considerations for the Preview Capture process, that will apply for your particular situation, that are covered in the iMailer instruction manual.

The iMailer Process

An iMailer message is the result of a process that has two main parts:

1. Message Content and Creation
2. Transmission of the Message

In short, you send one or more preview "captures" to iMailer (part 1). Then, when you send iMailer the email destination data (part 2), the message is transmitted. The entire process can easily be scripted (and we have included many different samples), so that a single mouse-click can capture *and* send a many page report to a recipient (or many recipients). But, you could also allow for the pages to be compiled extemporaneously, from a variety of user selected sources, then sent later.

We have tried to consider many possible applications where iMailer messaging could be beneficial to you and your clients, and have built this product to be as flexible and open-ended as possible, to meet many different needs.

But at its core, iMailer is as basic as "Send a Capture, send an Address". It's that simple. In practice, you may need to send many Captures or many Addresses, or a combination of both. In some instances you will need to implement one of our suggested designs to manage and/or preserve your current set. That's because iMailer may need to "isolate" the current record before going to Preview Mode, which would cause your current set to be disturbed (don't worry, those records are merely temporarily omitted - not deleted). As described in the following table, it all depends on what you need to send, and to whom.

Outline of iMailer™ 1.5 Script Models

CATEGORY ONE "SINGLE -Basic iMail samples"

Single email recipient, single message from single file

Template Name (.fp5 or .fp7)	FMP Pgs Capt'd	Batch Type	No. of Recips	Found Set	Position	Sorted	Restores	Comments
1.0 Basic 1-Page iMail	1	one-off	1	1	1st	n/a	n/a	sends first previewed page; assumes 1 record in set
1.1 Basic Multi-Page iMail	Multiple	one-off	1	1	1st	n/a	n/a	sends all previewed pages; assumes 1 record in set
1.2 Basic 1-Page +RS	1	one-off	1	1 or more	any	Yes	FS, P S	sends first previewed page of current rec, retains set & sort
1.3 Basic Multi-Page +RS	Multiple	one-off	1	1 or more	any	Yes	FS, P S	sends all prev'd pages of current rec, retains set & sort

CATEGORY TWO "BATCH -Same to Many"

Multiple email recipients, exact same message/image to each (as repeated messages), from single file

Template Name (.fp5 or .fp7)	FMP Pgs Capt'd	Batch Type	No. of Recips	Found Set	Position	Sorted	Restores	Comments
2.0 Same 1-Page to Many	1	same to many	multiple	1 or more	any	no	no	sends first previewed page to all addresses in set
2.1 Same Pages to Many	Multiple	same to many	multiple	1 or more	any	no	no	sends all previewed pgs for 1 rec to all addresses in set
2.2 Same 1-Pg to Many +RS	1	same to many	multiple	1 or more	any	Yes	FS, P S	sends 1st previewed pg to all addresses in set, retains found set, sort and position in set
2.3 Same Pgs to Many +RS	Multiple	same to many	multiple	1 or more	any	Yes	FS, P S	sends all prev'd pgs for 1 rec to all addr in set, retains found set, sort and position in set

CATEGORY THREE "BATCH -Different to Each"

Multiple email recipients, different /personalized message/image to each (as many discrete messages), from single file

Template Name (.fp5 or .fp7)	FMP Pgs Capt'd	Batch Type	No. of Recips	Found Set	Position	Sorted	Restores	Comments
3.0 Different 1-Pg to Each	1	diff to each	multiple	1 or more	any	no	no	sends 1st prev'd page of each rec in set, sequentially
3.1 Different Pages to Each	Multiple	diff to each	multiple	1 or more	any	no	no	sends all prev'd pgs for each rec in set, sequentially
3.2 Diff 1-Pg to Each +RS	1	diff to each	multiple	1 or more	any	Yes	FS, P S	sends 1st prev'd pg of ea rec in set, sequentially, w/restored found set, sort & position in set
3.3 Diff Pages to Each +RS	Multiple	diff to each	multiple	1 or more	any	Yes	FS, P S	sends all prev'd pgs for ea rec in set, sequentially, w/restored found set, sort & position in set

CATEGORY FOUR

Using Multiple or Related Files, and advanced techniques

Single Record, External File as iMailer Processor
Invoices & LineItems, printing from the LineItems file
Plain Text emails using iMailer, single / batch / attachments
(more to come...)

These are by no means the only types of jobs you can iMail. But almost anything you need to send can be accomplished using one of these models, or by combining or modifying various parts of the basic schemes shown therein. We will be adding more sample templates, as demand warrants, for other more advanced schemes. Feel free to contact us, if you need help selecting an appropriate script model, or if you think you have a scheme that is not fully addressed by our models.

iMailer vs the PDF: An Overview

Getting information out of FileMaker: A Brief History

The typical FileMaker system is designed to allow users to enter all kinds of data, which can then be managed, retrieved, sorted, displayed, evaluated, summarized, and ultimately output in some fashion to be read somewhere beyond the internal office/network. Originally, the only output available from a FileMaker database was a printout, which could be stuffed in an envelope and "snail" mailed out to interested parties.

The same hardcopy printout could also be hand-fed into a fax machine, and transmitted anywhere in the world. In 1997, DATA DESIGNS introduced FaxTool, which integrated fully automated, paperless faxing directly out of any FileMaker database, that added a second output mode for anything printable in FileMaker Pro. With a single mouse click, FileMaker users could produce hardcopy printouts, or create and transmit a so-called "desktop" fax to anyone with a fax machine.

Later, as email usage began to dominate the workplace, FileMaker added a "SendMail" scripting step, which offered limited functionality and was less than fully automatic in many cases. The SendMail script capability worked by delivering plain text email messages to certain third-party email applications, leaving all the connection, internet protocol, account/service access issues to the email client software.

At about the same time, FileMaker Inc introduced its application plug-in (API) capabilities, aimed at extending the feature set of FileMaker through third-party innovation, as demand warranted.

Shortly thereafter, the first FileMaker Pro plugins that could send email -- without involving an external email program -- were introduced to the market. They provided a simple way to create and send plain text emails (with or without file attachments) directly from FileMaker Pro. These plugins became very popular add-ons to many FileMaker Pro solutions, though they required some degree of technical sophistication to implement, and could only mimic the same basic messaging capabilities of full-featured commercial email programs.

Soon, the limitations of plain text messaging gave rise to the need for other ways to send more complex documents out of FileMaker. Adobe Acrobat files, called PDFs (portable document format), have become widely used in the Internet Age, thanks to the availability of free Acrobat "reader" applications for both Macintosh and Windows users. While it has become a relatively simple task to read or print a PDF that was sent as an email attachment, creating a good PDF "on-the-fly" from any application (including FileMaker) is a somewhat involved process. Attempting to automate the process of attaching these "on-the-fly" PDFs to new email messages, and sending them out over the internet poses other challenges, and incurs additional costs.

Generally, PDFs are created by printing out of an application, in a "print to file" mode. There are two approaches to making PDF documents:

A. For maximum quality and portability of the resulting PDF, the print job should produce a PostScript file output ("MyFile.ps" on the Mac, or "MyFile.prn" on the PC). On a Mac, this can be done from the standard LaserWriter dialog box, or with the free AdobePS driver instead. On the PC, a free AdobePS printer driver should be used. In either case, there are 3 settings that need to be made in the "Save As File" page of the Print dialog, to ensure your PDF will have the correct resources. The resulting PostScript file then needs to be processed through Adobe Distiller (usually by dragging and dropping the PostScript file onto the Distiller icon/alias/shortcut), to make the final PDF output. There are currently 3 types of PDF output options from Distiller, offering 3 levels of quality: "Screen Optimized", "Print Optimized" and "Press Optimized". File size increases slightly with each level.

B. For simple layouts or less critical uses, the original print job can be performed with an alternate print driver selected that directly converts a print job into a PDF. Some shareware print drivers can take any incoming print job and produce a basic PDF file as output. Adobe also provides a "PDFWriter" driver as part of its full-featured Acrobat software package ($349), which can also be used for "quick and dirty" PDF creation from any application. But, merely printing to one of these "print-to-PDF" printer drivers can produce a PDF document of lesser quality, that may look or print differently on other computers or operating systems.

With either approach, the PDF that is created is comprised solely of the pages specified by the original print job, and only for a single document. While it is possible to manually add in pages from other PDFs, using the full Acrobat application, those kinds of edits are almost impossible to automate, and would rule out using FileMaker printing of multiple layouts for on-the-fly automated composite PDFs.

It is important to note that PDFs created from FileMaker will only contain the contents (pages) from a single print job, from a single layout in a single file. If you need to send forms or reports from more than one FileMaker layout or file, you will need to attach a separate PDF from each file to your email. For example, if you wish to send an invoice along with a "Terms and Conditions" document from another file, plus a merge-letter from another file, you will end up with 3 separate PDFs. Separate PDF documents may be acceptable in some instances, but this will require the user to keep track of multiple print jobs, possibly resulting in composite printout that has missing pages or has some pages in the wrong order. And, since separate PDFs will each have their own page numbering sequence, it will be difficult to determine and maintain an overall page order.

Another concern is the name of the sent PDF, since by default, all PDFs carry the name of the original file it was derived from. In the context of an automated FileMaker system designed to send many different PDFs to many different recipients, it becomes necessary to devise a method to rename these on-the-fly PDFs dynamically, from FileMaker field data, so they end up named in a manner that is more meaningful to the recipient. "Invoice20993.pdf" is more useful than the generic "LineItems.pdf" that would otherwise result.

Files can be dynamically renamed using a variety of additional technologies, including AppleScript, WinBatch or VBA, or by purchasing various other FileMaker plugins which can rename files based on FileMaker field data.

In certain situations, a good PDF is the best way to send a complex high-quality document (via email) to another distant location, in spite of the extra overhead required to do so. In cases where the recipient is highly computer-literate, or otherwise deals with PDFs frequently, this option has even more merit. But a lot of business communications get sent to users with less computer proficiency, who are often only using the most basic email software functions. Up until now, plain text emails were the best choice for those types of correspondence.

With the introduction of iMailer, there is now another way to get information out of FileMaker Pro, one that combines the simplicity of basic email (or faxing) with the power of a full-color, formatted document. Compared to creating and sending a PDF file attached to an email, iMailer is less costly and much easier to implement. For the recipient, an incoming iMailer message is as easy to read as a plain text email, while delivering the same impact -- with less effort -- as the more cumbersome attached PDF file.

COMPARISON

Sending an on-the-fly PDF from a FileMaker file:

1. requires purchase of plugins and shareware (from several vendors)
2. requires learning and programming of plugins via scripting and the "External" function
3. very limited control over PDF settings, may result in different output on different machines
4. limited to a single FileMaker layout or file per PDF
5. requires email recipient to take additional steps in order to read the PDF:
   - -download, locate, decode file attachment
   - -must have correct version of Acrobat reader to open the file
   - -may also need matching fonts on recipient machine

Sending iMail from a FileMaker file:

1. requires purchase of iMailer software only
2. import simple scripts provided by Data Designs
3. no PDFs to create, rename or attach
4. can include pages from many FileMaker layouts or files, plus other sources
5. no PDFs to download, locate or open
6. recipient simply reads email message as usual.
7. uniform appearance and print output on any recipient's computer

Pricing and Ordering

Licensing is based on the number of **concurrent users** of the same copy of iMailer.fp5 (or iMailer.fp7), on the same network. The license is cross-platform, so the concurrent user workstations can be running any combination of Macintosh or Windows operating systems. Please check the System Requirements and Software Compatibility table shown on Page 3 for more information on operating environments supported by iMailer.

All Prices are shown in US Dollars. Prices, specifications and features subject to change without notice.

iMailer Single User $99.95
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iMailer 5-User $399.95
iMailer 10-User $599.95
iMailer 15-User $799.95
iMailer 25-User $999.95
iMailer 50-User $1399.95

Please check our website for the latest information on how to order iMailer.

If you have questions about any of the following:

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- Custom Site Licenses (any number of users)
- Bulk or quantity discounts
- OEM or Distributor Licenses
- FileMaker Runtime solution integration
- Support for legacy systems, including Mac OS 8.x, and FileMaker 4.x

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If you are a current FaxTool licensee, or have been the beneficiary of any past promotion involving FaxTool or iMailer, you may be eligible for a discount. Please contact us.

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