

# **BookMine Basics BoldInfo –Web site**

## BoldInfo Output for Email Attachments

An important element of marketing using BookMine is the ability to quickly email specific lists of inventory items to specific groups of customers. The lists can be sent in any format you wish but the most effective is sending them as HTML attachments that contain links to the corresponding items on your BoldInfo website (a BoldInfo web site is required).

The Boldinfo output for email attachments enables you to send an html formatted file that has clickable links with images that lead customers directly to the corresponding inventory item on your BoldInfo website. This has the important added benefit of bringing more people to your website and thereby generating more sales. Please note that this feature will only work if you use BookMine to upload to a BoldInfo website.

## How to Send an Email with a BoldInfo Attachment

There are 2 principal methods:

- (i) As an integrated part of attaching a catalogue/list to an email. You select the catalogue and tick the BoldInfo option. The catalogue is output and automatically attached to the email.
- (ii) The catalogue is output to a disk folder using the standard output interface and attached as a standard file.

The result is exactly the same in both cases. Method (i) is simpler and recommended.

In both cases you do the following:

**Create a catalogue or list** in the usual manner by adding the items you wish to include in the BoldInfo attachment. **Add this catalogue to the Standard Online Catalogue and refresh the Online Bookstores** (which includes your website).

This is processed from the Refreshing Online Bookstores Tab on the Main Output Form (Alt P from most forms). When the upload to the Online Bookstores is completed go to the Admin section of your website and parse the file (BoldInfo will provide you with the URL and password to access this restricted area on your website).

## Method (i) – Output and attach from within the email interface (Recommended)

- Compose your email to be sent
- Enter any explanatory text to be included (DbClick to use the glossary inserts is the most efficient way to insert standard text to accompany regular lists)
- Add the recipients (single or multiple contacts and/or distribution lists can be added as recipients. See email basics for details).
- Click the **Attachments and Inclusions** button (F6). The Attachments interface is displayed.
- Click the **Add Cat/Dlist** button
- Now follow the instructions to output a standard catalogue (See Outputting Basics). In summary, select, from the drop down list, the output Template to be used for this attachment (it must be one of your Catalogue to HTML templates – the name need not include these but the source of records specified in the template should be Catalogue and the destination HTML)
- Select the catalogue to be attached from the drop down list.

- Tick the **Send as a BoldInfo attachment** box (essential for BoldInfo email)
- Click **Accept** button
- You are presented with a confirmation screen which has a summary of the output.
- Click the **Proceed with Output** button.

The catalogue is now attached as an HTML document to the email and you are returned to the attachment interface. It is a good idea to check the attachment by clicking on the F3 View button adjacent to it. Check that links are correct and images are being displayed etc. If not see possible causes at the end of this document.

At this stage you can add other attachments as required from any source.

Send the email.

## **Method (ii) – Output the catalogue separately and manually attach it to an email (Not recommended – see method (i))**

In BookMine return to the **Main Output Form** but this time do not proceed to the Online Bookstores Tab.

From the drop down box marked **Select an Output Format** select the name of the output template you wish to use – see **output templates** for more information on setting up and editing output formats. Any stock template can be used for the BoldInfo output but it is best to use one designed for output in HTML format.

From the drop down box marked **Select a Catalogue/List** select the catalogue that you wish to attach to the email.

### **Click Start Output**

The **Confirm/Set Output Options** window appears in which you can check that the name of the output and the catalogue or list that you have selected are correct. This window also gives you the opportunity to publish or lock the catalogue and to select the BoldInfo style of output. It is important that you read the information in this window carefully. Is the name of the output and catalogue or list correct? If not, click cancel output or AltC to return to the previous screen and correctly enter which catalogue/list or output format you wish to use.

**Do you wish to publish/lock this catalogue?** If this catalogue or list has not already been published you will be asked if you wish to publish it. Unless this is a draft or trial run with outputting this catalogue or list it is highly advisable that you publish or lock this catalogue. Publishing/locking the catalogue means that items cannot be easily removed from the catalogue or list, thus preserving the history of which items were included in which catalogue and also enabling you to run accurate financial reports on the catalogue in the future. If you have already published or locked this catalogue you will be asked if you wish to republish the catalogue but unless you have made changes to the items in the list you will not need to do this.

**Choose the Output Style.** To output in BoldInfo style you must click the radio button beside **BoldInfo Email Output** in the choose output style section of the Confirm/Set Output Options window. If you do not the format will not be correct and will not then interact with your Boldacious website. The other setting in the Confirm/Set output options refers to whether or not you wish to output the catalogue/list in single or multiple files. We recommend that you leave this setting at the

default of Single File, at least at the beginning, until you are more familiar with this process. Multiple file output will create a separate file for each category rather than producing one file. However as everyone's needs are different, you may find that you wish to experiment with the multiple file output as you can more conversant with the Boldinfo output format and what you can use it for.

When you have checked and made the choices above click **Proceed with Output** or **AltP**.

A window titled **Enter or Select a File to Save To** will then be shown on the screen. This is a system wide window which enables you to navigate to anywhere on your computer or network. Choose the location to save this file to. Remember this file will be saved outside of Bookmine and you should name it so that you can navigate back to it easily when you want to attach it to your email. A good idea is to have a central networked folder called List Attachments; Email Attachments or some similarly clear folder name that is saved centrally (such as on your server under a folder called Shared Documents) that can be accessed from all workstations. When you have navigated to the place you wish to save this file to enter the file name in the file name box at the foot of the **Enter or Select a File to Save To** box and click save.

A **progress bar** will display while the file is saved.

As soon as the file has been successfully saved a **confirmation window** will appear advising you how many records have been output and where the file has been saved. Note the location. When you are satisfied that you know where the file is click okay to close this window.

Following a brief pause **the completed file** showing your catalogue or list in BoldInfo style will be displayed **on the screen**. Take time to review this file. If the computer you are using is connected to the internet you will be able to click on the links at the foot of each description and any images that are shown. This will take you directly to the details of this book on your website, if the corresponding item is currently online.

Your Boldinfo output file is now complete. Typically you will send this file out to your customers by attaching it to an email. To do this, create an email in the usual way in Bookmine, click on the **Attachments/Inclusions button** on the left hand side of the email text and choose **Add a Disk File** from the buttons at the foot of the screen. You will then navigate to where you have saved this file (see 10 above). When you have found the correct file, to add the file, double click on it and you will notice that the file name, its size etc will appear in the Attachments/Inclusions window. If you have another file to attach to your email just repeat this process.

## Possible causes of bad links and images not rendering

**What should I do if the links do not take me to the book on the website?** It is likely that either the computer you are sitting at is not connected to the internet at this time or that you have not yet uploaded the corresponding records to your website. To add this item/s online, add the item or items to the Standard Online Catalogue, refresh the Online Bookstores (and thus your website) and go to the Admin area of your website and then parse the file. The item will then work correctly through the BoldInfo output.

**What is wrong if instead of an image in the left hand section of the output there is a box saying *Image for this Item*?** There two likely reasons for this. The first and most common is that this item has not been loaded on your website yet – to confirm that this is the reason click on the *Click to Display Full Details link* at the foot of the book. This will take you to your website and if

the book is not yet on line the book's details will not be displayed. To fix add this item/s online, add the item or items to the Standard Online Catalogue, refresh the Online Bookstores (and thus your website) and go to the Admin area of your website and then parse the file. The image will then appear correctly through the BoldInfo output.

**Is the image format correct?** The other not uncommon reason for the image not to show in the BoldInfo output is if the image is not in a correct format. Ideally all images should be in .jpg format. However if you wish to use .gif images you need to attach both a thumbnail image and a full image otherwise the image will show on the website but not in the BoldInfo email. To check and see if the format of the image is causing the image not to appear go to the full stock record in Bookmine via the main stock/inventory interface. Click on the images button in the upper right hand section of the screen if the image does not show here there is a problem with it. It could be in the wrong format .tif or a gif without a thumbnail or it might be that the image's file name is incorrect. For instance FileName.jpg.jpg or FileName..jpg (two full stops in it). Careful naming and review of images names pays dividends. To review the file name itself click on the button marked Continue/Esc at the foot of the Link Images with Stock Records window and the next window will show you the image/s file names. If there is a problem with the image you may need to remove the image and reattach a correctly formatted image.