



Newsletter - User Guide

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1 Introduction

Nowadays, a newsletter is one of the effective ways of reaching your existing and prospective customers as well as a great tool to maintain a community around your products and services. Keeping your clients updated with your latest information ensures that they will not miss what you want them to be aware of.

The **Composite.Community.Newsletter** add-on allows you to prepare and regularly send newsletters to your customers and subscribed users informing them of your news, upcoming events and other activities.

The user-friendly administrative tools for managing newsletters are directly integrated into the CMS console.

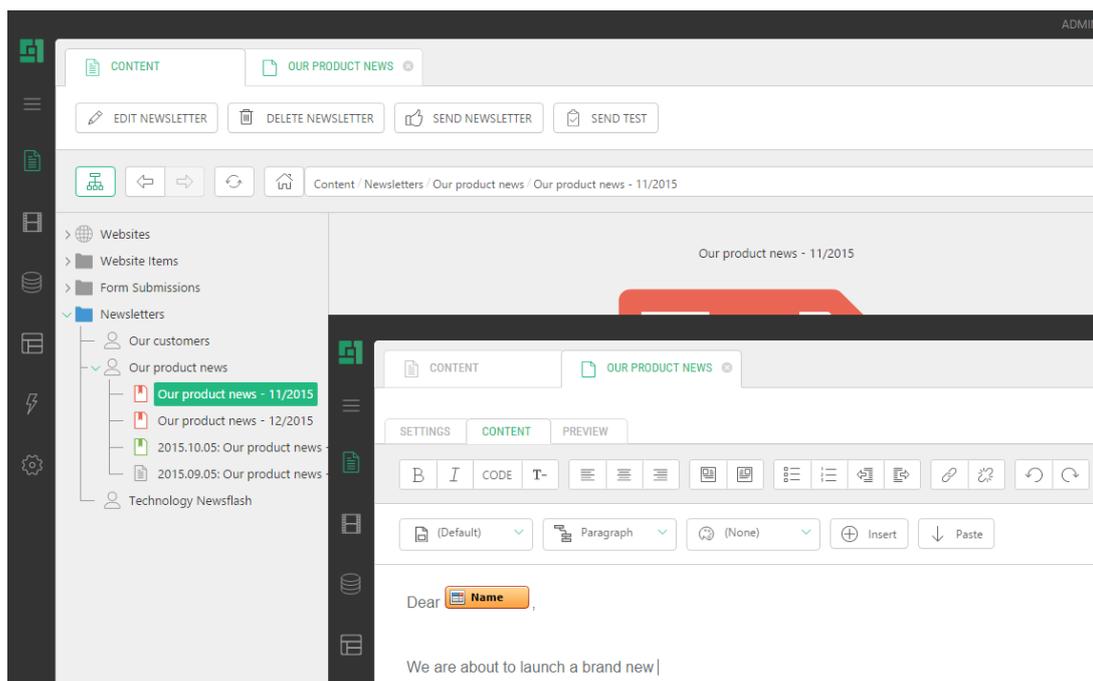


Figure 1: Newsletter

The **Composite.Community.Newsletter** add-on keeps track of all your mailing campaigns and provides you with statistics for a specific newsletter or a recipient.

Besides, if you want your website users to subscribe or unsubscribe from your mailing lists directly from your website, you can easily add these possibilities to your website using a number of XSLT-based and easy-to-redesign functions.

1.1 Who Should Read This Guide?

This guide is intended for editors who will create mailing lists and newsletters as well as send these newsletters and keep track of mailing statistics.

We assume that you know how to work with the Content and Layout perspectives of C1 CMS. We also assume that you have an idea of what mailing lists and newsletters are in terms of the Web and how the subscription works.

As an editor, you will primarily work within the Content perspective, creating and sending newsletters.

To personalize newsletters, you should know how to add fields to web pages.

To add the Subscribe and Unsubscribe forms to your website, you will also need to know how to add functions to web pages,

You should have access to the Content and Layout perspectives to create and edit newsletters, modify web pages and create and edit newsletter templates.

1.2 Getting Started

To get started with the Newsletter add-on, you are supposed to take a number of steps.

Getting Started		
Step	Activity	Chapter or section
1	Install the Composite.Community.Newsletter add-on.	
2	Create a subject-based mailing list and add members to this list.	Creating and Managing Subject-Based Mailing Lists
3	Add members to subject-based lists	Adding and Managing Members
4	Create a datatype-based mailing list	Creating a datatype-based mailing list
5	Create a function-based mailing list	Creating a function-based mailing list
6	Create a newsletter template	Creating and Managing Newsletter Templates
7	Create a newsletter	Creating and Managing Newsletters
8	Send the newsletter either immediately or scheduled for a specific date and time	Sending Newsletters Immediately Scheduling Sending Newsletters
9	View statistics of your newsletter campaigns	Viewing Statistics
10	Add the subscription form to a page	Adding Subscribe Form to Web Page

In the following few chapters, you will learn more about these and other activities.

1.3 Terms and Definitions

The following is the list of terms and their definitions used throughout this guide.

Terms and Definitions	
Term	Definition
Mailing list	A collection of names and email addresses used for sending newsletters to multiple recipients
Mailing list (subject-based)	A mailing list in the Newsletter add-on based on a subject. Members are added manually to this list.
Mailing list (datatype-based)	A mailing list in the Newsletter add-on imported from a datatype that contain email addresses. Members are imported automatically to this list.
Mailing list (function-based)	A mailing list in the Newsletter add-on imported from an XSLT or Razor function that lists email addresses in its output. Members are imported automatically to this list.
Newsletter template	A template that used to create newsletters. It usually includes a number of defaults that newsletters reuse.

Newsletter confirm template	A template that used to create emails sent to subscribers to explicitly confirm their subscription.
Newsletter	An electronic publication regularly distributed via email. It usually covers one main topic that is of interest to its subscribers. It may include but not limited to news, event announcements, or new feature descriptions.

1.4 Important Notes

To be able to send newsletters, make sure that you have configured an email host by editing `~/web.config` and including the `/configuration/system.net/mailSettings` section. For information about configuring the e-mail host in `web.config`, please refer to <http://docs.c1.orkestra.com/ConfiguringEmailHost>.

2 Managing Mailing Lists and Newsletters

In this chapter, we will consider the steps to prepare mailing lists and newsletters.

First, you will learn how to create and manage mailing lists. Then, you will find out how to create a newsletter template. Finally, you will learn about creating a newsletter itself.

Before you start creating mailing lists, mailing lists and newsletters, you need to know the difference between three types of mailing lists provided by Composite.Community.Newsletter – subject-based, datatype-based and function-based.

2.1 Mailing Lists

A mailing list is a collection of names and email addresses you use to send your newsletters to multiple recipients.

In Composite.Community.Newsletter, the mailing list is represented by three list types:

- Subject-based
- Datatype-based
- Function-based

The **subject-based** mailing list has no members when created. It is based on the subject common to newsletters to be created for this list. You should add members manually to this list. If you allow your website visitors to subscribe to your mailing lists, all these lists will be subject-based.

A member of the subject-based mailing list can unsubscribe from the list via an unsubscribe form.

The **datatype-based** mailing list is created by importing its members from an existing datatype. The datatype to import from must have a field called “Email” that contains email addresses.

The **function-based** mailing list is created by importing its members from a specific XSLT or Razor function. The function to import from uses a <Member> element to list members. The element must include an attribute called “Email” that contains a valid email address and can include any number of custom attributes to provide additional information about a member.

To be able to import a mailing list from a datatype or a function, you must have the Administrate permission.

You cannot add members to these two lists directly. These mailing lists cannot be available via a form on your website for subscription.

The members of such mailing lists cannot unsubscribe via an unsubscribe form. However, if the member opens the form by clicking the Unsubscribe link in the received newsletter, she or he will be able to unsubscribe from all mailing lists he may a member of. In terms of the Newsletter add-on, she or he will be [added to the Never Mail Me list](#).

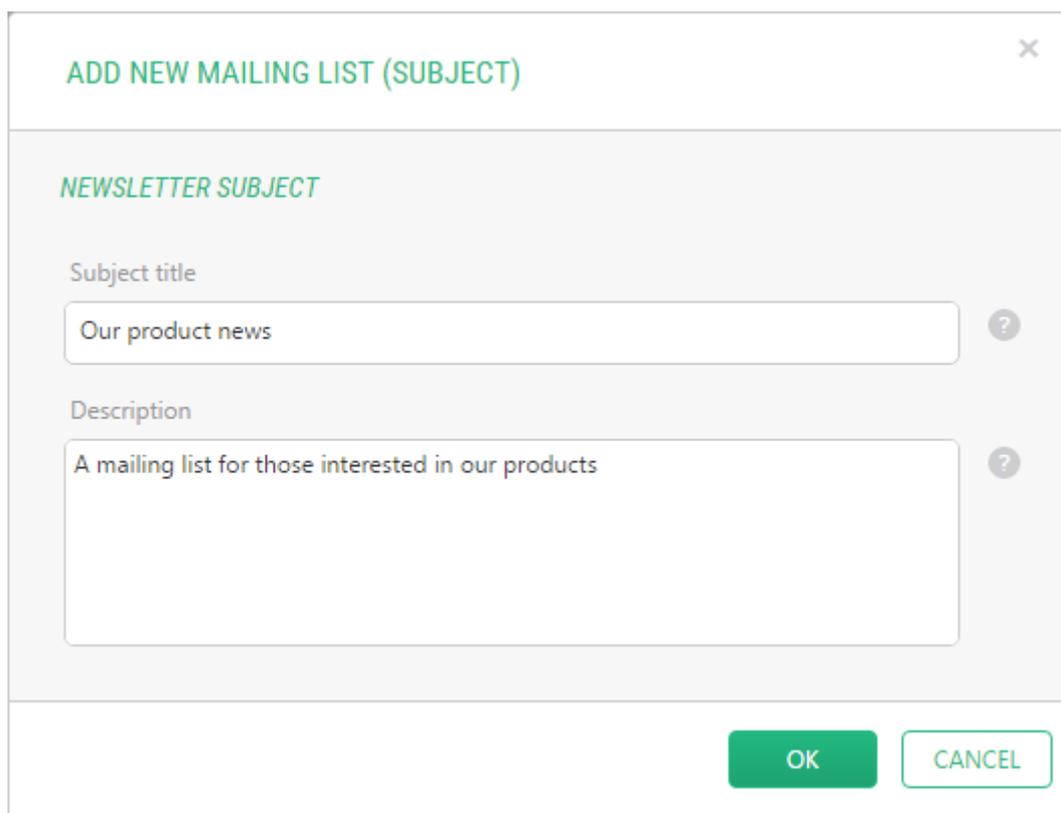
Creating a subject-based mailing list is different from creating a datatype-based or function-based mailing list in that it requires an additional step – adding members manually.

2.2 Creating and Managing Subject-Based Mailing Lists

To create a subject-based mailing list, you should specify its title and, optionally, its description. Then you should add members to this subject.

To create a subject-based mailing list:

1. In the **Content** perspective, right-click **Newsletters** and click **Add New Mailing List (Subject)** in the context menu. The **Add New Mailing List (Subject)** dialog appears.
2. In this dialog, specify the *title* and, optionally, the *description* for your mailing list subject in the corresponding fields.



The screenshot shows a dialog box titled "ADD NEW MAILING LIST (SUBJECT)". Inside the dialog, there is a section labeled "NEWSLETTER SUBJECT". Under this section, there are two input fields. The first is labeled "Subject title" and contains the text "Our product news". The second is labeled "Description" and contains the text "A mailing list for those interested in our products". Both input fields have a small question mark icon to their right. At the bottom right of the dialog, there are two buttons: "OK" and "CANCEL".

Figure 2: Creating a mailing list

3. Click **Finish**. The mailing list appears under **Newsletters**.

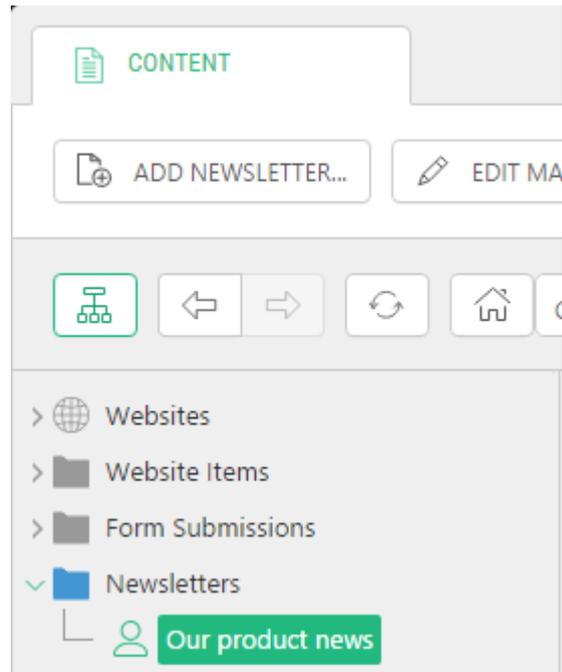


Figure 3: A mailing list added

You can create as many mailing lists as you need – simply repeat the above steps.

Now that you have created a mailing list, go on to [add members to it](#).

2.2.1 Editing Subject-Based Mailing Lists

To edit a mailing list:

1. In the **Content** perspective, expand **Newsletters**.
2. Right-click the mailing list you want to edit and click **Edit Mailing List** in the context menu. The mailing list opens in the right pane.
3. Change the title and the description where necessary and click **Save**.

2.2.2 Deleting Subject-Based Mailing Lists

To edit a mailing list:

1. In the **Content** perspective, expand **Newsletters**.
2. Right-click the mailing list you want to delete and click **Delete Mailing List** in the context menu. The mailing list disappears from the **Content** perspective.

2.3 Adding and Managing Members

Once you have created a subject-based mailing list, the next step is adding members to it in order to complete the mailing list setup.

To add members to the mailing list, you should specify email addresses and, optionally, names. If the email address has been specified for the mailing list before, it will be filtered out and will not be added to the list twice.

To add members to the mailing list:

1. In the **Content** perspective, expand **Newsletters**.
2. Right-click the mailing list you want to add members to and click **Add Members** in the context menu.
3. In the **Members** wizard, type one or more email addresses and names in the **New Members** text area.
 - Separate the address from the name with a comma.
 - Start each address-name pair on a new line.

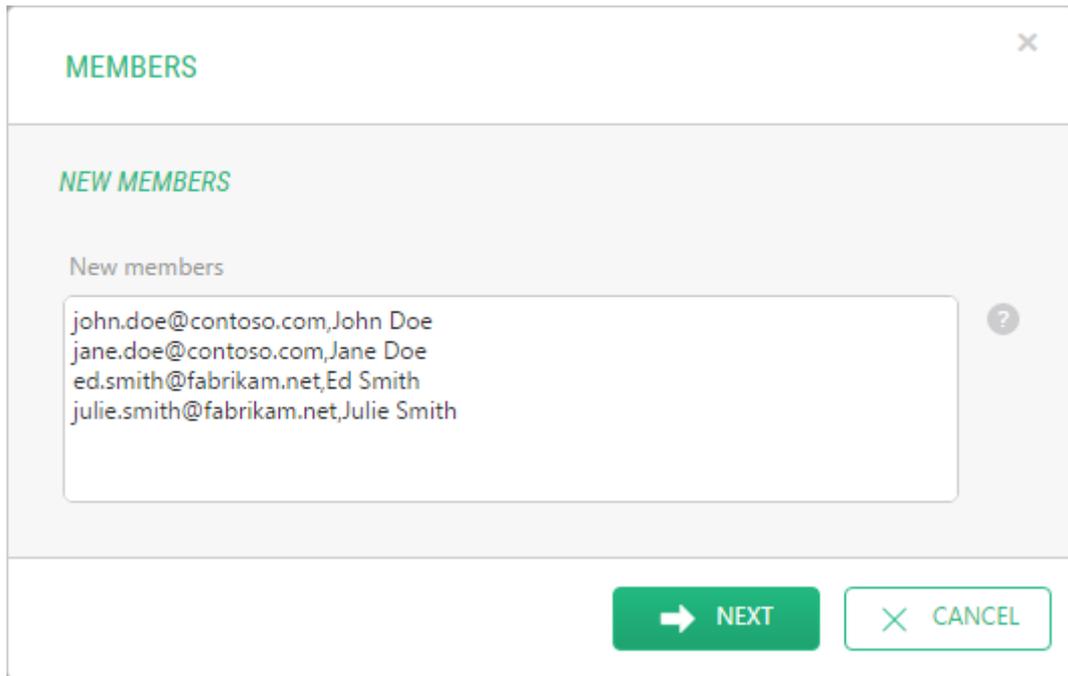


Figure 4: Adding members to a mailing list

4. Click **Next**. The wizard will check the email addresses against those already specified for this mailing list and will present the new ones in the **New members** list and the earlier added members (if any) in the **Already members** list.

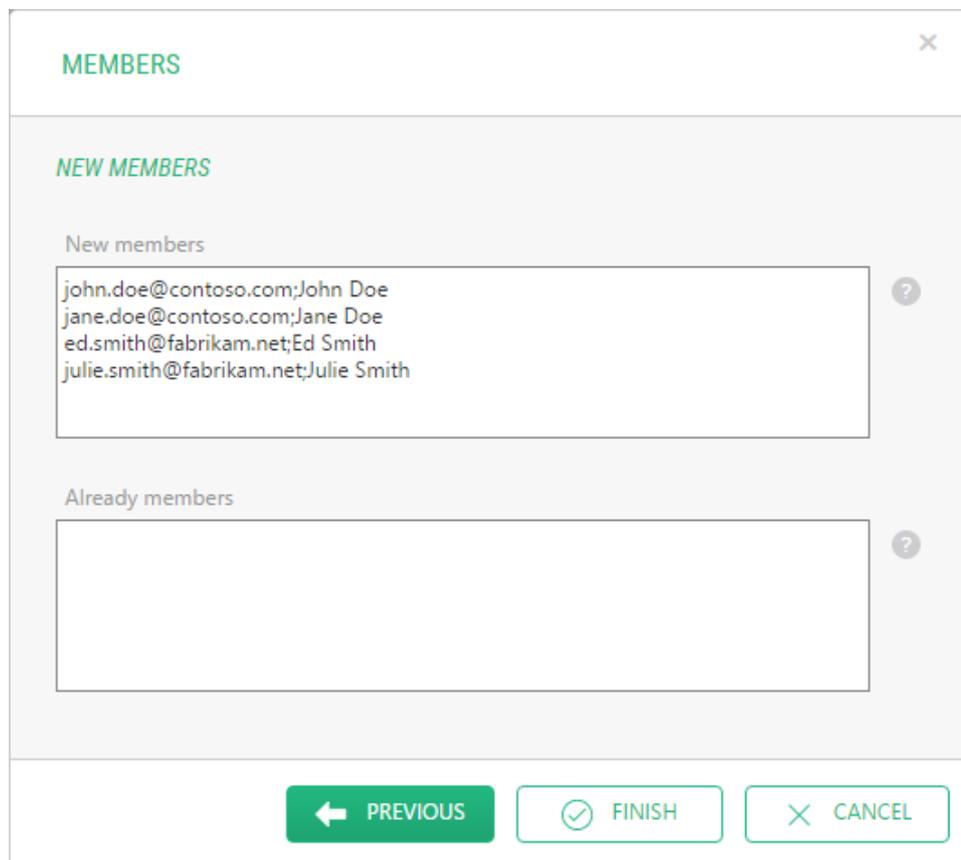


Figure 5: Only new members presented

5. Click **Finish**. This adds the specified new members to the mailing list.

Later, you can add more members to the subject by repeating the above steps.

You can also leave the mailing list empty and allow the visitors to your website to subscribe to it via a [subscription form](#).

Now that you have completed a mailing list setup, proceed to [creating a newsletter template](#).

2.3.1 Deleting Members from Subject-Based Mailing List

To delete members from a subject-based mailing list:

1. In the **Content** perspective, expand **Newsletters**.
2. Right-click the mailing list you want to add members to and click **Delete Members** in the context menu.
3. In the **Delete Members** wizard, type one or more email addresses you want to delete in the **Members** text area.
 - Start each address on a new line.
4. Click **Next**. The wizard will check the email addresses against those already specified for this subject and, in the next step, will present the existing members in the **Members** list and non-existing ones in the **Not Members** list.
5. Click **Finish**. This deletes the specified members from the mailing list.

2.4 Creating a Datatype-Based Mailing List

An alternative way of creating a mailing list is importing the member list from an existing data type. In this way, you will create a datatype-based mailing list.

Composite.Community.Newsletter can create a mailing list based on:

- [a global data type](#)
- [a static data type](#)

The type must contain a field called "Email" with email addresses.

Besides, all other fields in this data type - apart from the name and email address - will become available for the body of your newsletter. You can thus mention, for example, the recipient's company, and this will be dynamically set for each individual recipient in the newsletter.

Thus, you can create lists of recipients as data types and then use these data types for setting up your mailing lists.

As to the static data types, you can create a mailing list from, for example, the [Extranet](#) users or the CMS Console users.

When importing the list from a data type, you should specify the title and description (as you do when [creating a mailing list](#)) and select one of the data types with email addresses.

To create a datatype-based mailing list:

1. In the **Content** perspective, right-click **Newsletters** and click **Import List from Data Type** in the context menu. The **Import List from Data Type** wizard appears.
2. In the wizard, specify the *title* and write the *description* if necessary in the corresponding fields.

3. Select one of the datatypes to base a mailing list on. Only the datatypes with email addresses are available in the list.

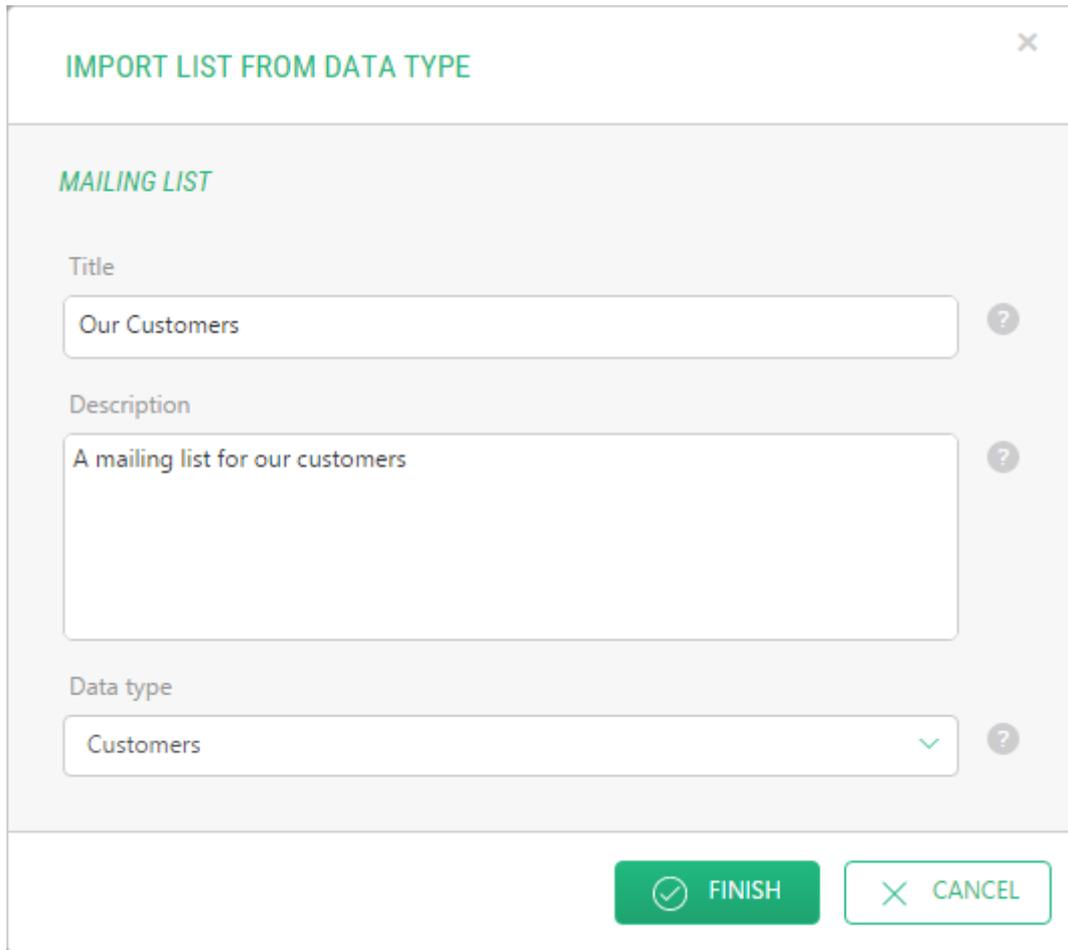


Figure 6: Importing a list from a data type

4. Click **Finish**. The mailing list appears under **Newsletters**.

You do not need to add members to this subject manually. The newsletter created for this mailing list will target the members existing in the data type behind this mailing list.

Once you have completed a mailing list setup, proceed to [creating a newsletter template](#).

2.4.1 Editing and Deleting Datatype-Based Mailing Lists

The steps to edit or delete datatype-based mailing lists are similar to the steps to [edit](#) or [delete](#) subject-based mailing lists.

2.5 Creating a Function-Based Mailing List

Still another way of creating a mailing list is importing the member list from a specific function. In this way, you will create a function-based mailing list. Two types of functions are currently supported:

- [XSLT functions](#)
- [Razor functions](#)

Composite.Community.Newsletter can create a mailing list based on such a function that outputs a number of <Member/> elements that include an attribute called "Email" with email addresses and, optionally, a number of other attributes.

```
<Members>
  <Member Name="John Doe" Email="john.doe@contoso.com" />
  <Member Name="Jane Smith" Email="jane.smith@contoso.com" />
</Members>
```

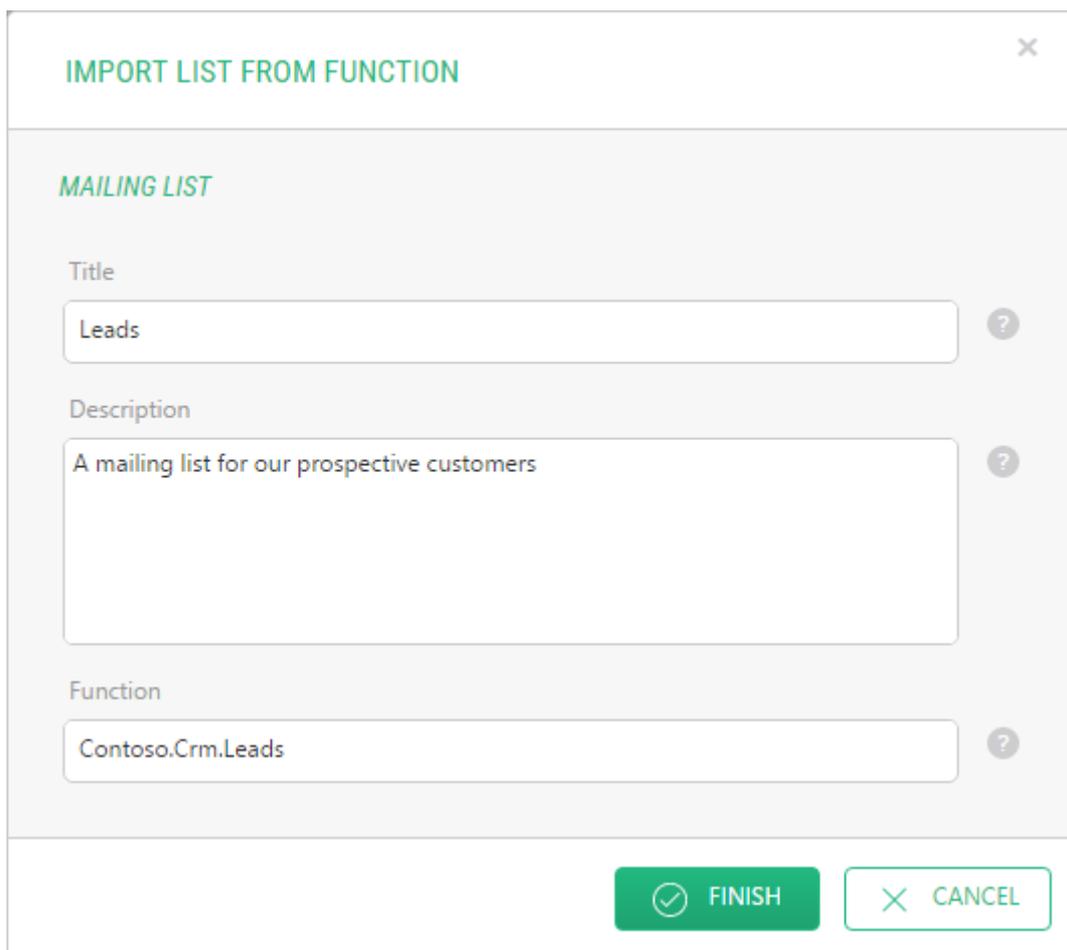
As is the case with datatype-based mailing lists, all other attributes - apart from the email address ("Email") - will become available as fields for the body of your newsletter.

Please note that you cannot use an attribute named "Id" because it is reserved and used internally.

When importing the list from a function, you should specify the title and description (as you do when [creating a mailing list](#)) and specify the proper function.

To create a function-based mailing list:

1. In the **Content** perspective, right-click **Newsletters** and click **Import List from Function** in the context menu. The **Import List from Function** window appears.
2. In the window, specify the *title* and write the *description* if necessary in the corresponding fields.
3. Type in the name of the function (including namespaces).



The screenshot shows a dialog box titled "IMPORT LIST FROM FUNCTION". Inside, there is a section labeled "MAILING LIST" with three input fields: "Title" (containing "Leads"), "Description" (containing "A mailing list for our prospective customers"), and "Function" (containing "Contoso.Crm.Leads"). Each field has a question mark icon to its right. At the bottom of the dialog are two buttons: "FINISH" (green with a checkmark) and "CANCEL" (white with a red X).

Figure 7: Importing a list from a function

4. Click **Finish**. The mailing list appears under **Newsletters**.

You do not need to add members to this subject manually. The newsletter created for this mailing list will target the members returned by the function behind this mailing list.

Please note that if you change the output of this function later (for example, a new attribute named "Company" has been added to <Member/> elements), you must re-save the mailing list based on this function (edit the mailing list, change something in it and save it). You don't need to re-save the list if you have only added new members.

Once you have completed a mailing list setup, proceed to [creating a newsletter template](#).

2.5.1 Editing and Deleting Function-Based Mailing Lists

The steps to edit or delete function-based mailing lists are similar to the steps to [edit](#) or [delete](#) subject-based mailing lists.

2.6 Creating and Managing Newsletter Templates

Now that you created a mailing list, you can create your newsletters and send them to recipients.

Before you create an actual newsletter, make sure you have at least one newsletter template created. The template will include a number of defaults such as the sender's name, email, reply-to email and the email subject.

You will use templates to conveniently create a number of related newsletters, for example, monthly news about your product or company. The newsletter will use the defaults specified in the template.

2.6.1 Default Templates

The Newsletter add-on comes with 2 default templates:

- "2 columns, content and aside"
- "Full width"

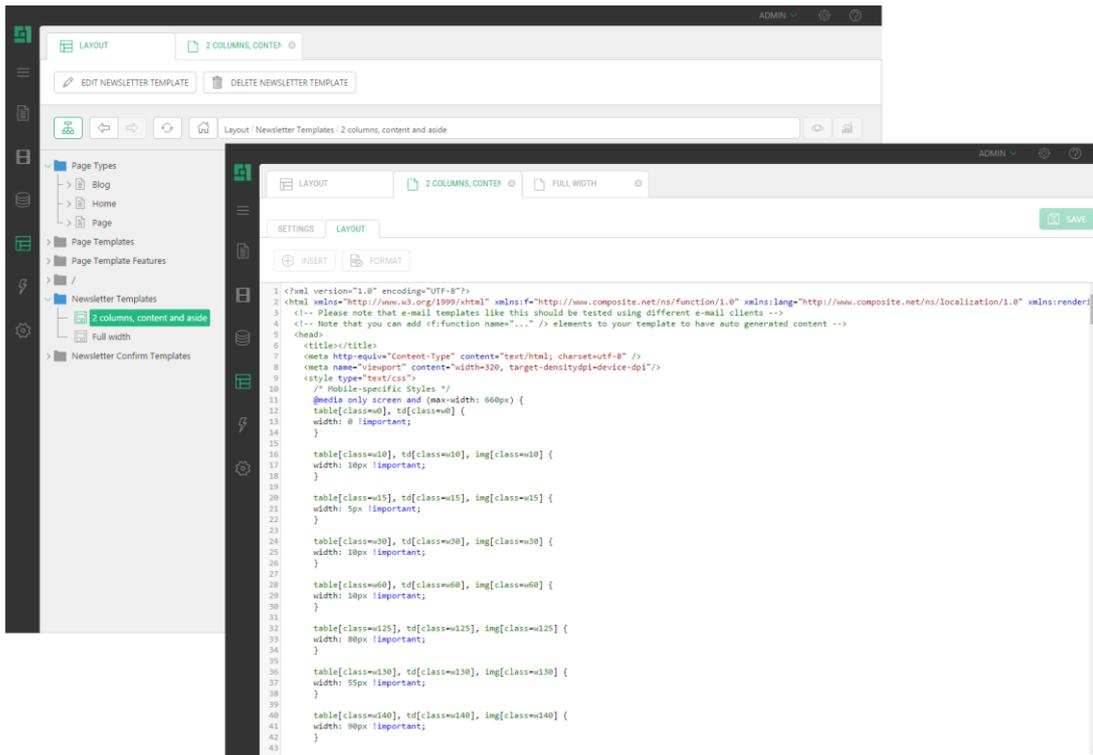


Figure 8: One of the default newsletter templates

Please note that the default templates only include the newsletter layout markup. The defaults such as the sender's email addresses, the subject and the unsubscribe page URL are not specified out-of-the-box.

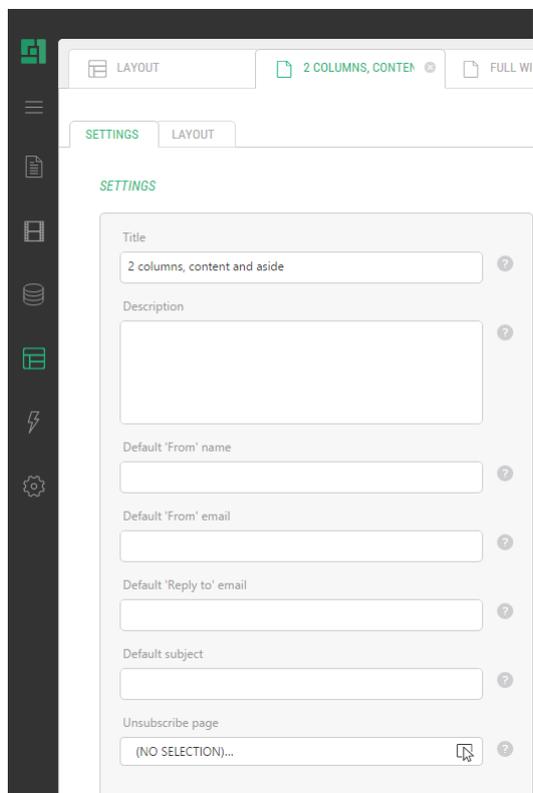


Figure 9: Default templates without the default values

If you want these specified in the template, you should edit the template and add the corresponding defaults on your own.

You can reuse the default templates for your newsletters or create new ones as described further on.

2.6.2 Creating Newsletter Templates

To create a newsletter template:

1. In the **Layout** perspective, expand **Newsletter Templates**.
2. Click **Add Newsletter Template** in the toolbar. The **Add New Newsletter Type** dialog appears.
3. In the dialog, specify the *title* and *description* in the corresponding fields. This information will not be used in the newsletters based on this newsletter template.
4. Supply defaults for your newsletters such as:
 - **Default From name:** The sender's name
 - **Default From email:** The sender's email address
 - **Default Reply-To email:** The email address to receive responses to
 - **Default subject:** The subject of the newsletter

This information will be used by default in the newsletters you will create based on this newsletter template.

5. In the **Unsubscribe Page** dropdown list, select a page where a recipient will be directed to when he or she clicks the **Unsubscribe** link in the newsletter. If you do not have such a page, you should create it before creating a newsletter template. This value is required.

ADD NEW NEWSLETTER TEMPLATE ×

SETTINGS

Title
Monthly Newsletter ?

Description
A monthly newsletter for those interested in our product ?

Default 'From' name
Contoso Info ?

Default 'From' email
newsletter@contoso.com ?

Default 'Reply to' email
info@contoso.com ?

Default subject
Our product news - <Month> 2016 ?

Unsubscribe page
UNSUBSCRIBE... ?

OK **CANCEL**

Figure 10: Creating a newsletter template

6. Click **OK**. The newsletter template appears under **Newsletters** in the **Layout** perspective and opens in the right pane.

7. In the working area, edit the contents of the newsletter template on the **Layout** tab if necessary.

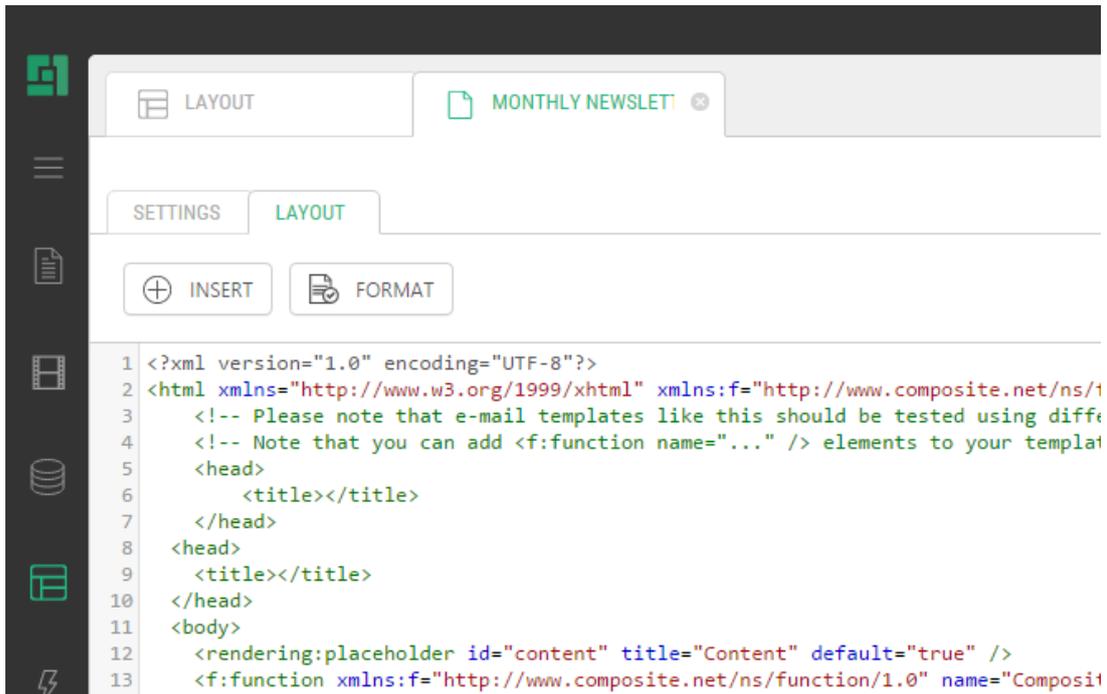


Figure 11: Editing a newsletter template

8. Click **Save**.

Now that you have created a newsletter template, you are ready to [create a newsletter](#).

2.6.3 Editing Newsletter Templates

Editing a newsletter template implies both changing its settings you have specified when creating it and editing its content. Editing a newsletter template's content is similar to editing a website template.

To edit a newsletter template:

1. In the **Layout** perspective, expand **Newsletters**.
2. Select the newsletter template you want to edit and click **Edit Newsletter Template** in the toolbar. The newsletter template opens in the right pane.
3. On the **Settings** tab, change the settings where necessary.
4. On the **Layout** tab, change the contents of the template.
5. Click **Save**.

2.6.4 Deleting Newsletter Templates

To delete a newsletter template:

1. In the **Layout** perspective, expand **Newsletters**.
2. Select the newsletter template you want to delete and click **Delete Newsletter Type** in the toolbar.
3. Click **OK** in the confirmation dialog. The newsletter template disappears from the **Layout** perspective.

You cannot delete a template used in one of the existing newsletters and you will be informed accordingly if you try to.

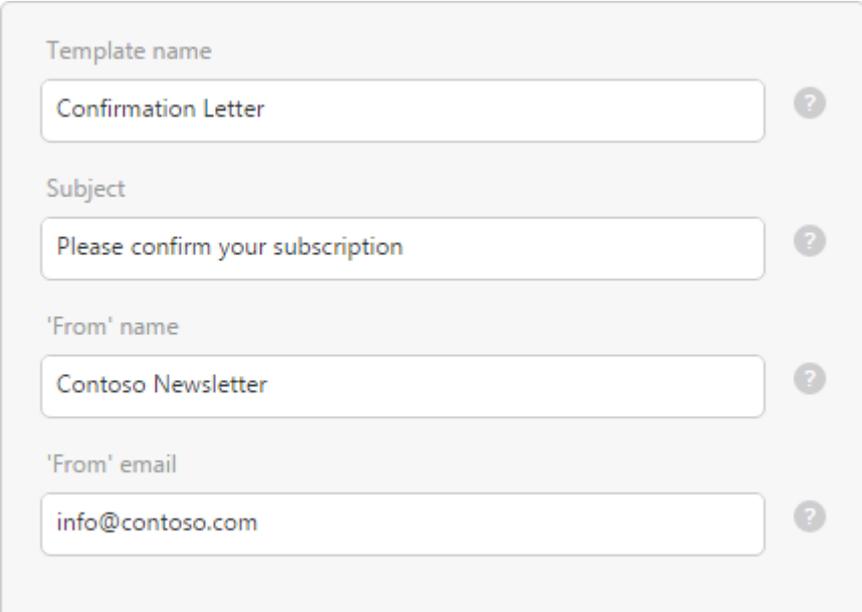
2.7 Creating and Managing Newsletter Confirm Templates

If you want your subscribers to explicitly confirm their subscription, you can create and use the confirmation templates.

Every time the user subscribes to a mailing list, he or she will receive a confirmation email based on this template. The user will be added to the list only when she or he clicks the specifically generated confirmation link in the email.

To create a newsletter confirm template:

1. In the **Layout** perspective, select **Newsletter Confirm Templates** and click **Add** on the toolbar.
2. On the **Template Info** tab, supply data in the **Template Name** as well as **Subject**, **From name**, and **From email** fields.

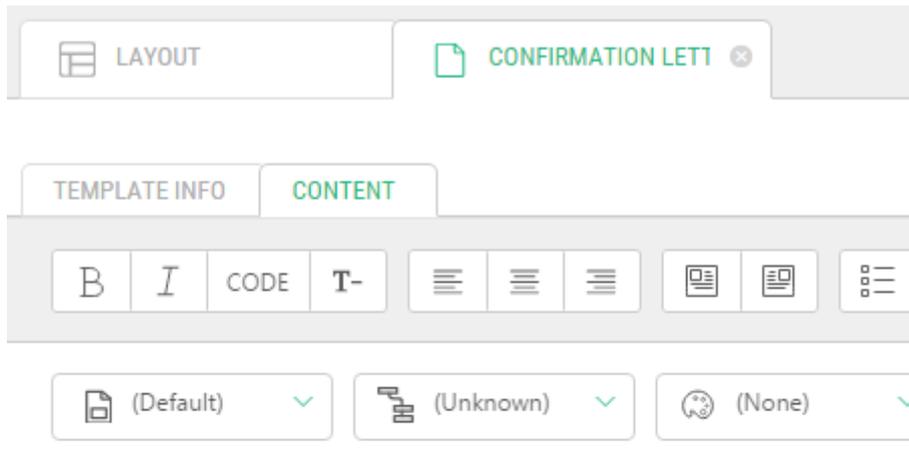


The screenshot shows a form titled 'Template Info' with four input fields, each with a question mark icon to its right:

- Template name:** Confirmation Letter
- Subject:** Please confirm your subscription
- 'From' name:** Contoso Newsletter
- 'From' email:** info@contoso.com

Figure 12: Creating a newsletter confirm template

3. On the **Content** tab, edit the content of the newsletter confirm template if needed.



Hi, Name .

Please confirm your subscription by clicking this link:

 Confirm Link

<http://contoso.com/Newsletter.ashx/Link/4CBFBF8A>

Figure 13: Editing the newsletter confirm template

4. Click **Save**.

Editing a newsletter confirm template is similar to editing a website template.)

You can choose what confirm template to use in the [SubscribeForm](#) function.

2.7.1 Editing and Deleting Newsletter Confirm Templates

The steps to edit or delete newsletter confirm templates are similar to the steps to [edit](#) or [delete](#) regular newsletter templates.

2.8 Creating and Managing Newsletters

Once you have created a newsletter template, go on to create a newsletter.

To create a newsletter, you should specify its subject, the sender's name and address, the reply-to address as well as write its content.

To create a newsletter:

1. In the **Content** perspective, expand **Newsletters**.
2. Select the mailing list within which you want to create your newsletter and click **Add Newsletter** in the toolbar. The **Add New Newsletter** wizard appears.
3. First, select the *newsletter template* from the dropdown list.

ADD NEW NEWSLETTER [X]

SETTINGS

Newsletter template

Monthly Newsletter [v] [?]

[NEXT] [CANCEL]

Figure 14: Creating a newsletter - Selecting a template

4. Then, change the fields filled with defaults where necessary.
 - **Subject:** The subject of the newsletter
 - **From name:** The sender's name
 - **From email:** The sender's email address
 - **Reply-To email:** The email address to receive responses to

ADD NEW NEWSLETTER [X]

SETTINGS

Subject

Our product news - 12/2015 [?]

'From' name

Contoso Info [?]

'From' email

newsletter@contoso.com [?]

'Reply to' email

info@contoso.com [?]

[OK] [CANCEL]

Figure 15: Creating a newsletter – Setting up required values

5. Click **OK**. The newsletter appears under the mailing list and opens in the right pane.
6. Add the content on the **Content** tab. [Make use of the custom fields](#) to make the newsletter personalized.
7. Preview your newsletter on the **Preview** tab if needed.
8. Click **Save**.

The newsletter icon  in the **Content** perspective indicates that this newsletter has not been sent yet.

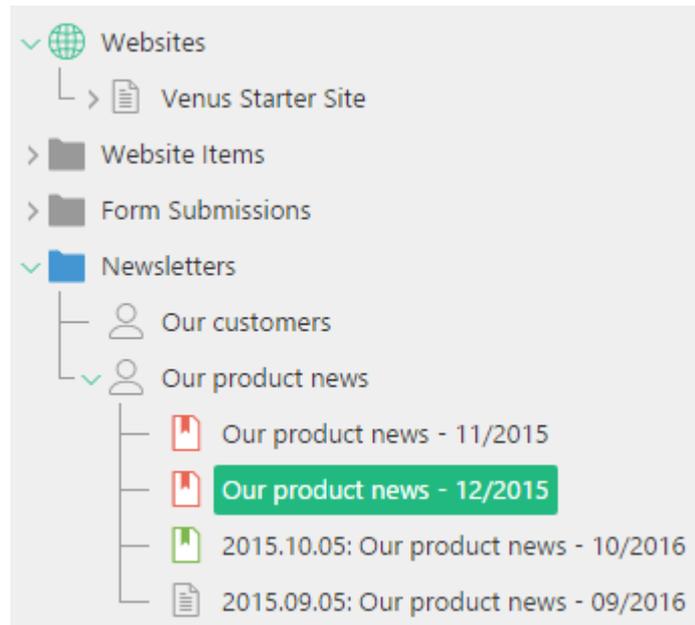


Figure 16: The newsletter indicated as unsent

Now that you have created a newsletter, you are ready to [send it to your recipients](#).

2.8.1 Editing Newsletters

Editing a newsletter implies both changing its settings you have specified when you created it and editing its content. Editing a newsletter's content is similar to editing a page for your website.

To edit a newsletter:

1. In the **Content** perspective, expand **Newsletters** and the mailing list that includes the newsletter you want to edit.
2. Select the newsletter you want to edit and click **Edit Newsletter** in the toolbar. The newsletter opens in the right pane.
3. On the **Settings** tab, change the settings where necessary.
4. On the **Content** tab, change the contents of the newsletter. [Make use of the custom fields](#) to make the newsletter personalized.
5. Preview your newsletter on the **Preview** tab.
6. Click **Save**.

2.8.2 Adding Custom Fields to Newsletters

Each newsletter in the subject-based mailing list can be personalized with the **Name** and **Email** fields in its content.

The data type behind the members of a datatype-based mailing list might have fields other than a member's email address or name, for example, the company name or the person's title. You can thus personalize the newsletter with specific values of these custom fields.

You can insert the fields into a newsletter you are editing in the same way as you do with the *Visual Functions*.

To add a field to the newsletter:

1. Open to edit a newsletter.
2. Place a cursor in the content where you want to insert a field.
3. On the **Contents** tab of the newsletter, click **Insert**, and then **Field**. The menu with the field names appears to the right.
4. Select the field you want to insert. The field's graphic with its name on it appears in the content.

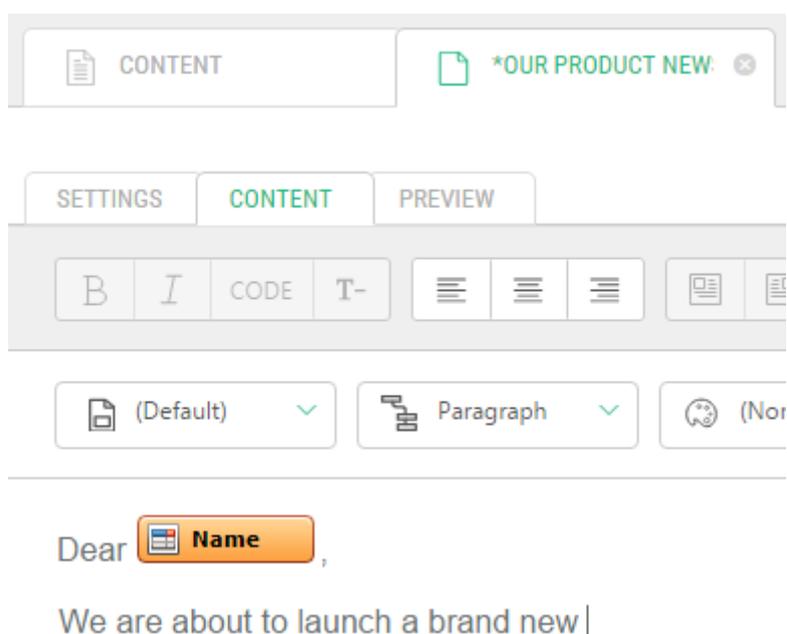


Figure 17: Inserting a field in the newsletter

When you send the newsletter, the field's graphic will be replaced with the value specific to a concrete recipient.



Figure 18: The newsletter personalized

2.8.3 Deleting Newsletters

To delete a newsletter:

1. In the **Content** perspective, expand **Newsletters** and the mailing list that includes the newsletter you want to delete.
2. Select the newsletter you want to delete and click **Delete Newsletter** in the toolbar.
3. Click **OK** in the confirmation dialog. The newsletter disappears from the **Content** perspective.

2.9 Managing Never Mail Me List

If a person does not want to receive any newsletters from you, you should add this person's email address to the Never Mail Me list.

Although the person can be on one of your mailing lists, he or she will never receive newsletters as long as he or she is on this list.

To add a member to the Never Mail Me list:

1. In the **Content** perspective, right-click **Newsletters** and click **Add to Never Mail Me List** in the context menu.

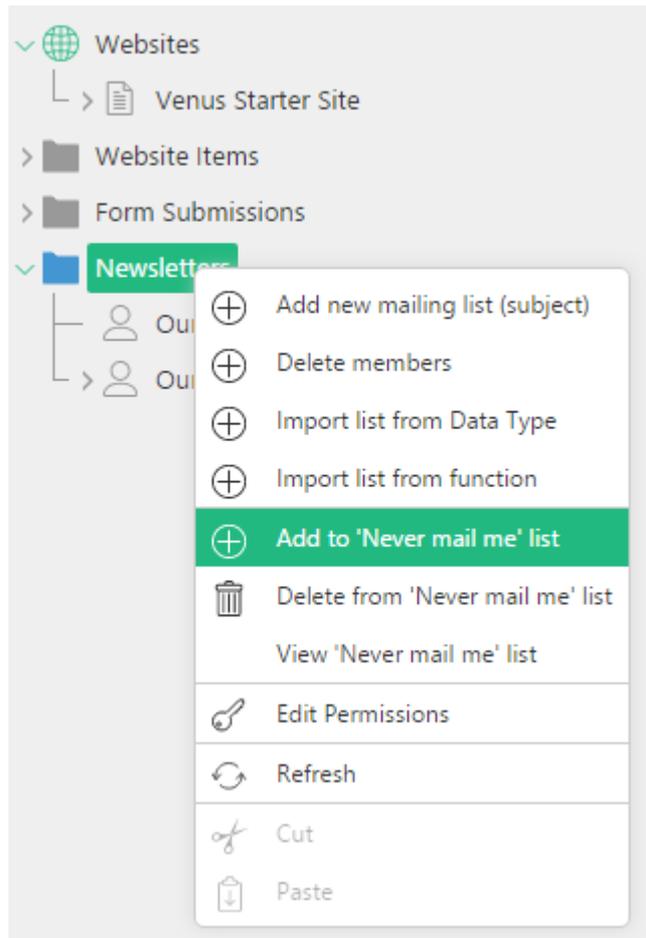


Figure 19: Launching the wizard to add members to the Never mail Me list

2. In the **Emails** wizard, type one or more email addresses in the **Emails** text area. Start each address on a new line.

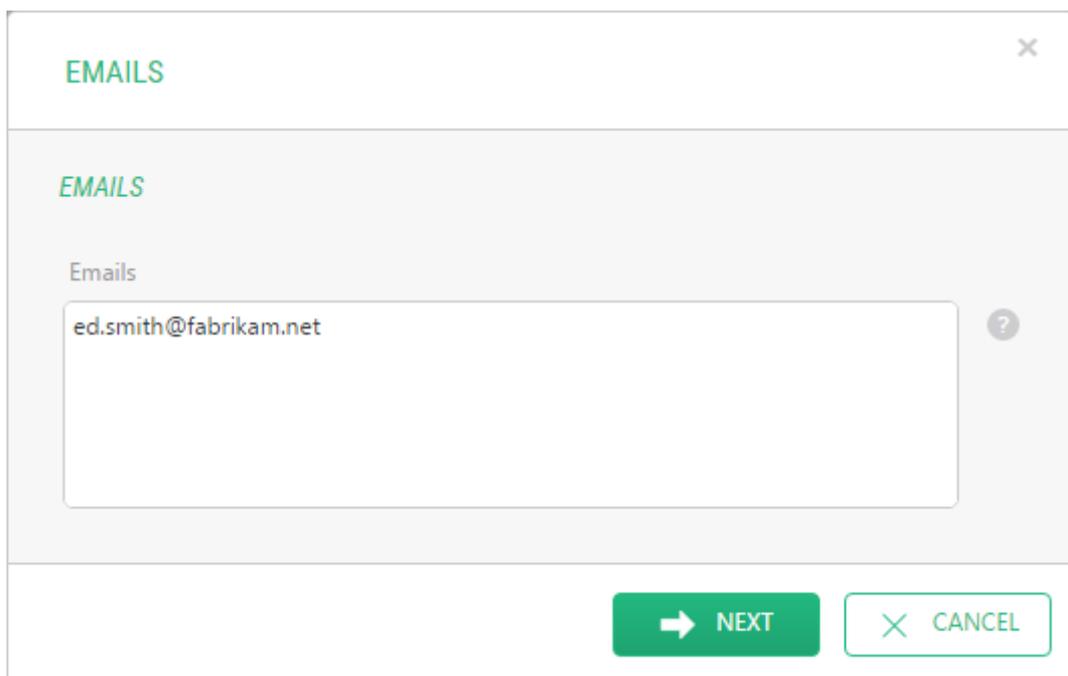
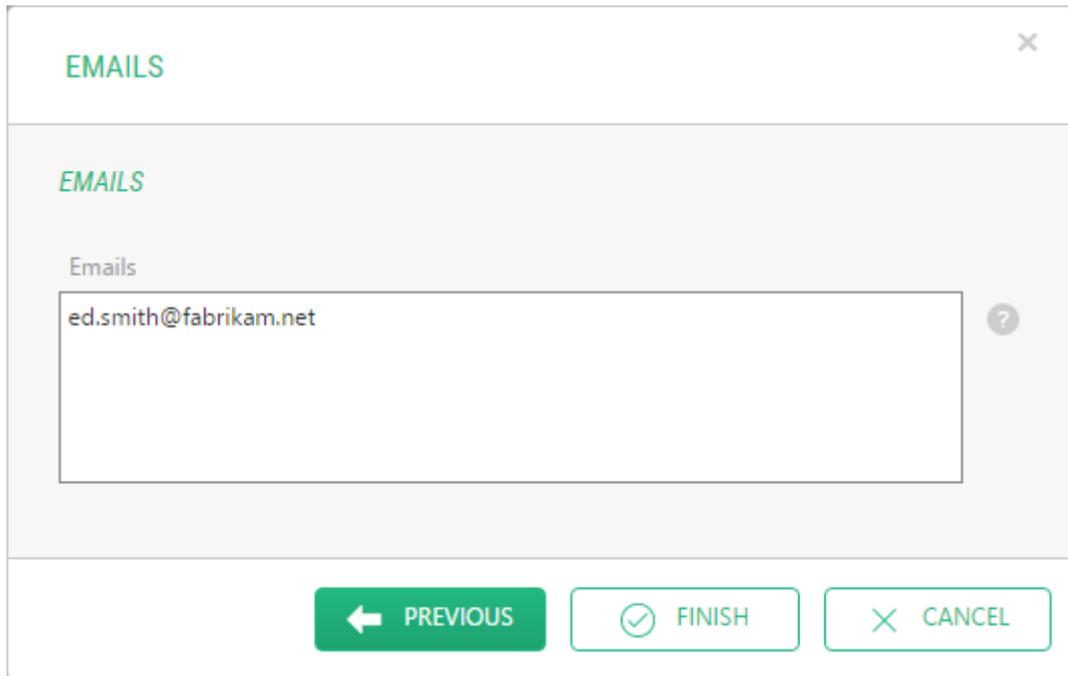


Figure 20: Adding members to the Never Mail Me list

3. Click **Next**. The wizard will check the email addresses against those already specified for this list and will present you only new ones.



The screenshot shows a window titled "EMAILS" with a close button (X) in the top right corner. Inside the window, the word "EMAILS" is displayed in green. Below it, the label "Emails" is followed by a text input field containing the email address "ed.smith@fabrikam.net". A small question mark icon is visible to the right of the input field. At the bottom of the window, there are three buttons: a green "PREVIOUS" button with a left arrow, a "FINISH" button with a checkmark icon, and a "CANCEL" button with an X icon.

Figure 21: Only new members presented

4. Click **Finish**. This adds the specified members to the Never Mail Me list.

2.9.1 Viewing members in Never Mail Me List

You can view members already added to the Never Mail Me list:

1. In the **Content** perspective, right-click **Newsletters**.
2. Click **View Never Mail Me List** in the context menu.

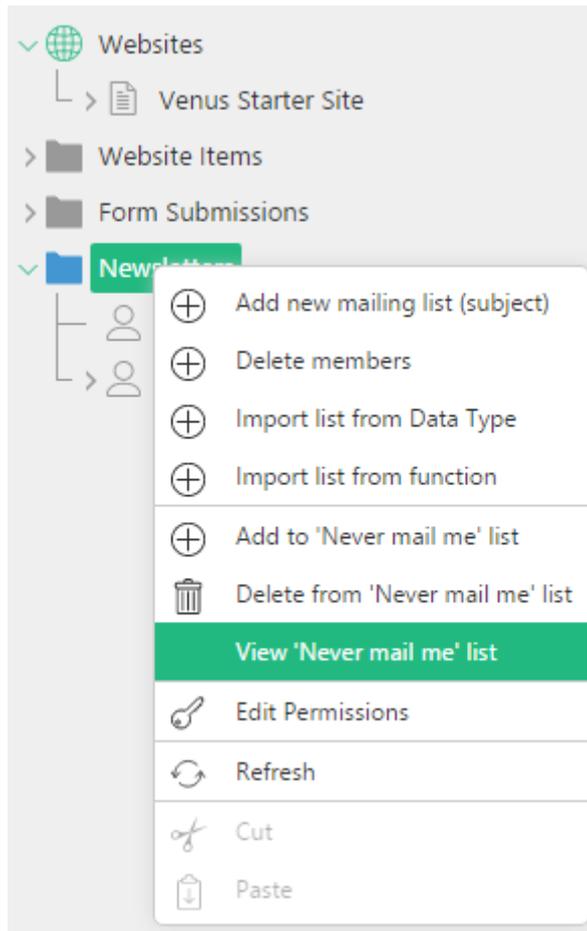


Figure 22: Opening the Never Mail Me list

The list will open in the right pane.

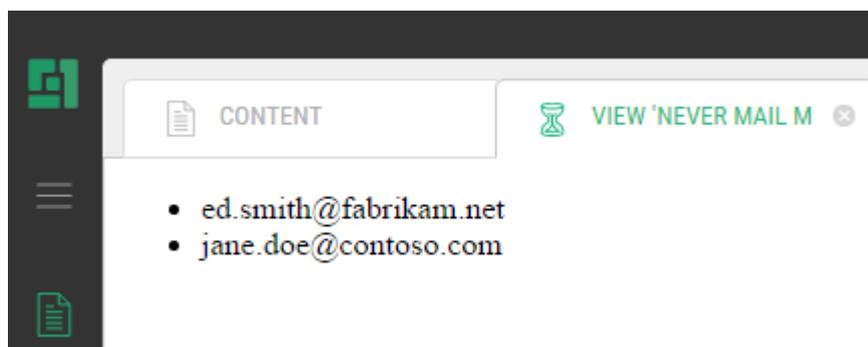


Figure 23: The Never Mail Me list opened

2.9.2 Deleting members from Never Mail Me List

To delete members from the Never Mail Me list:

1. In the **Content** perspective, right-click **Newsletters** and click **Delete from Never Mail Me List** in the context menu.
2. In the **Delete from Never Mail Me List** wizard, in the **Members** text area type one or more email addresses you want to remove from the list. Start each address on a new line.

3. Click **Next**. The wizard will check the email addresses against those already specified for this list and will present you only existing ones in the next step.
4. Click **Finish**. This removes the specified members from the Never Mail Me list.

2.10 Exporting Members

You can export the list of members of a mailing list to an external file.

To export members:

1. Right-click a mailing list whose members you want to export and click **Export members to XML** in the context menu.
2. If the browser prompts you to select whether you want to open or save the file, select **Save**.
3. In the **Save As** dialog, browse to the folder where you want your member list saved and click **Save**.

The list saves as an XML file and you can view it in any compatible application.

3 Sending Newsletters

Once you have created a newsletter, you can send it to all the recipients in your mailing list.

You have several options when sending the newsletter.

- **Test-sending a newsletter:** You can test-send the newsletter to a specific testing email address before sending the newsletter to actual recipients.
- **Sending a newsletter immediately:** You can send a newsletter immediately to the recipients in the mailing list.
- **Scheduling sending a newsletter:** You can schedule sending a newsletter on a specific date and time.
- **Resending a newsletter to new recipients:** Once the newsletter has been sent, you can only resend it to new recipients in your mailing list.

Besides, while sending a newsletter, you can also choose to *cancel* it if necessary.

In the following few sections, you will learn more about these options.

3.1 Test-Sending Newsletters

Before sending the newsletter to actual recipients, you may want to test-send the newsletter to a specific testing email address.

To test-send a newsletter:

1. In the **Content** perspective, expand **Newsletters** and the mailing list that includes the newsletter you want to test-send.
2. Select the newsletter you want to test-send and click **Send Test** in the toolbar.
3. In the **Sending Test** dialog that appears, enter the testing email address.

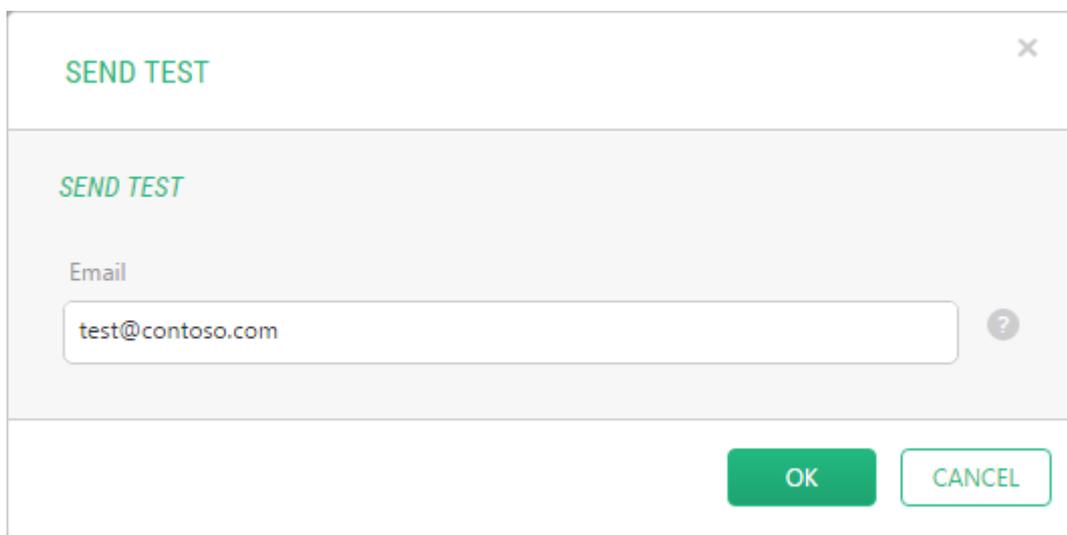


Figure 24: Test-sending the newsletter

4. Click **OK**. The message will inform you that the newsletter has been sent.

Test-sending does not change the status icon of the newsletter in the **Content** perspective.

3.2 Sending Newsletters Immediately

To send a newsletter immediately:

1. In the **Content** perspective, expand **Newsletters** and the mailing list that includes the newsletter you want to send.
2. Select the newsletter you want to send and click **Send Newsletter** in the toolbar.
3. In the **Send Newsletter** dialog that appears, select the **Send Immediately** option.

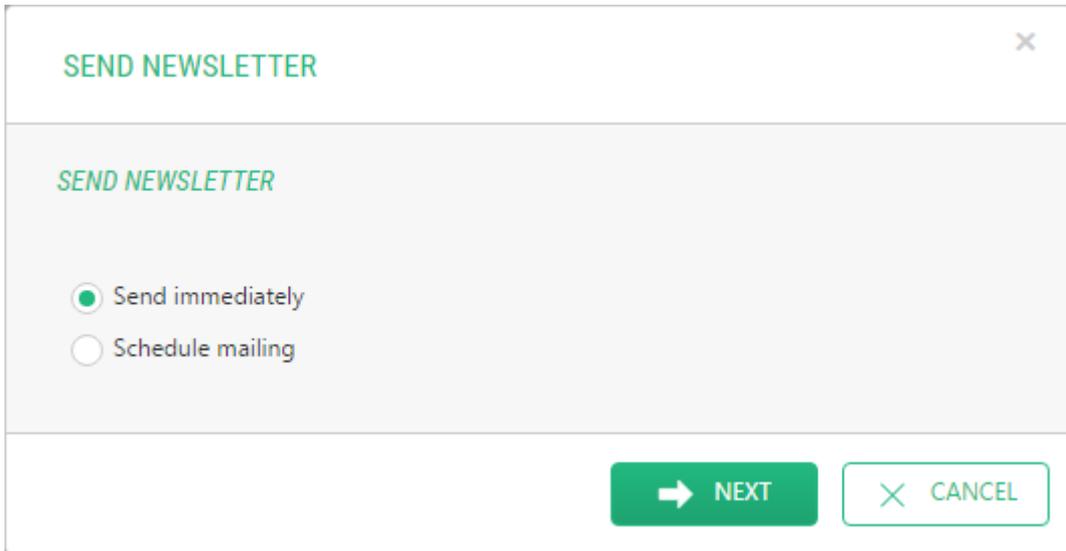


Figure 25: Selecting the Send Immediately option

4. Click **Next**. The icon of the newsletter in the **Content** perspective will change to indicate that the newsletter is being sent at the moment (📧).

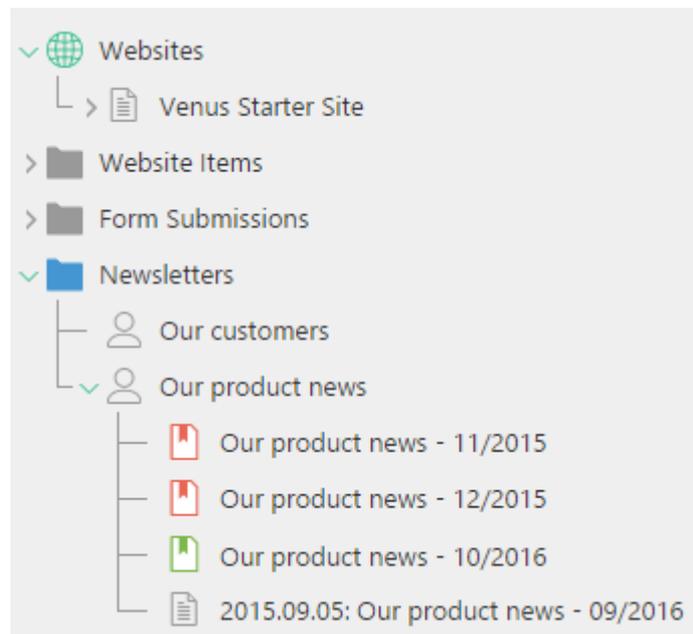


Figure 26: The newsletter indicated as being sent at the moment

- Once the newsletter has been sent to all the recipients from the mailing list, the icon of the newsletter in the Navigation pane will change to indicate that the newsletter has been sent (📄).

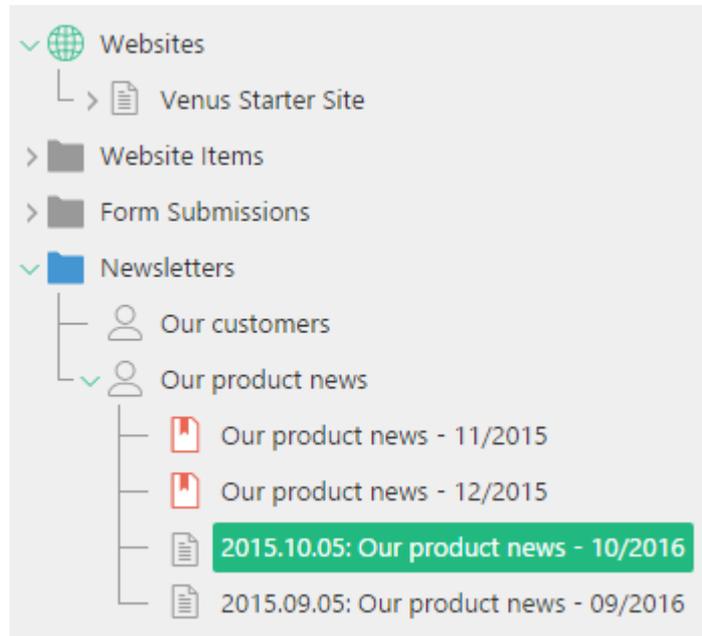


Figure 27: The newsletter indicated as already sent

3.3 Scheduling Sending Newsletters

To schedule sending a newsletter:

- In the **Content** perspective, expand **Newsletters** and the mailing list that includes the newsletter you want to schedule sending.
- Select the newsletter you want to schedule sending and click **Send Newsletter** in the toolbar.
- In the **Send Newsletter** dialog that appears, select the **Schedule Mailing** option.

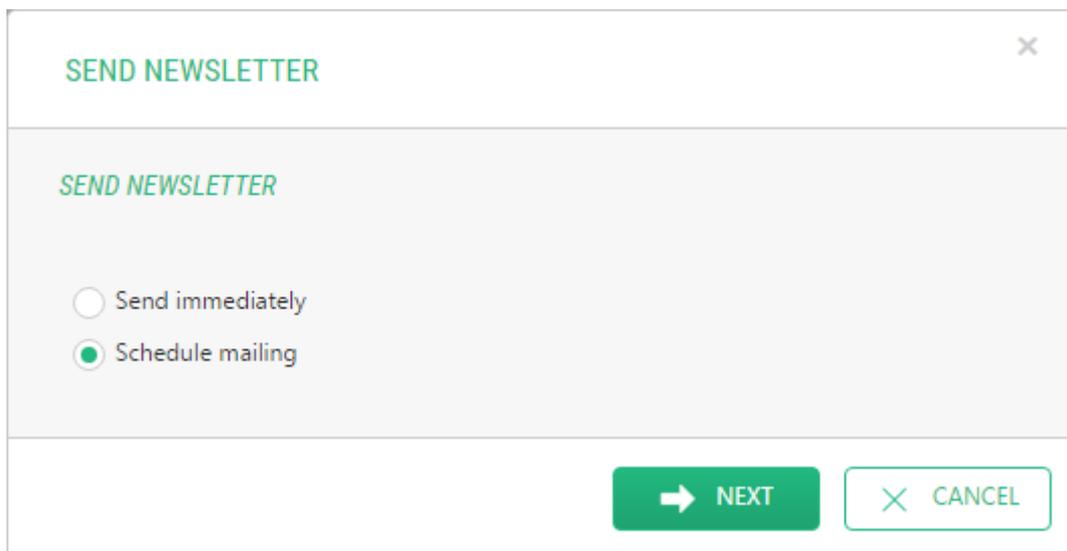


Figure 28: Selecting the Scheduling Mailing option

4. Click **Next**.
5. In the **Date** field, select the date and time.

The screenshot shows a dialog box titled "SEND NEWSLETTER". Inside the dialog, there is a sub-header "SEND NEWSLETTER". Below this, there is a "Date" label and a text input field containing "11/5/2015 4:10 PM". To the right of the input field are a calendar icon and a help icon. At the bottom of the dialog, there are three buttons: "PREVIOUS" with a left arrow icon, "FINISH" with a checkmark icon, and "CANCEL" with an X icon.

Figure 29: Selecting the date and time

6. Click **Finish**.

The icon of the newsletter in the **Content** perspective will change to indicate that the newsletter is scheduled for sending (the same as the icon for a newsletter being sent at the moment.)

Once the newsletter has been sent to all the recipients from the mailing list, the icon of the newsletter in the **Content** perspective will change to indicate that the newsletter has been sent.

3.4 Resending Newsletters

Once the newsletter has been sent, you can only resend it to new recipients in your mailing list. If no new recipients have been added to the mailing list, the newsletter will not be resent.

If the newsletter has been already sent, the **Send Newsletter** button on the toolbar and the menu command in the newsletter's context menu are replaced with **Send to New Members**.

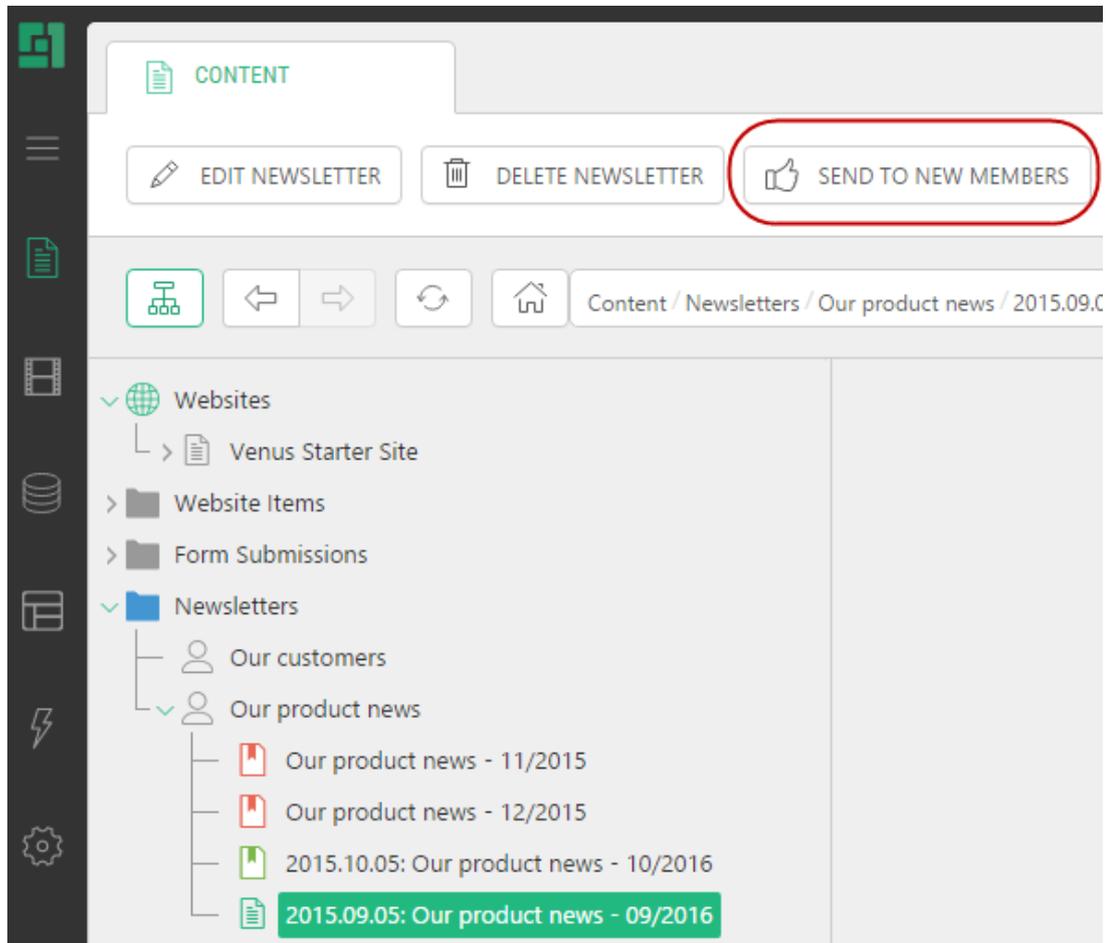


Figure 30: Send Newsletter replaced with Resend Newsletter

The steps to resend a newsletter are the same as the steps to send a newsletter.

3.5 Canceling Sending Newsletters

While a newsletter is being sent to recipients, you can cancel it if necessary.

To cancel sending a newsletter:

1. In the **Content** perspective, expand **Newsletters** and the mailing list that includes the newsletter you want to cancel sending.
2. Select the newsletter you want to cancel sending and click **Stop Sending Newsletter** in the toolbar.

When a newsletter is being sent, the **Send Newsletter** or **Resend Newsletter** button on the toolbar and the menu command in the context menu are replaced with **Stop Sending Newsletter**.

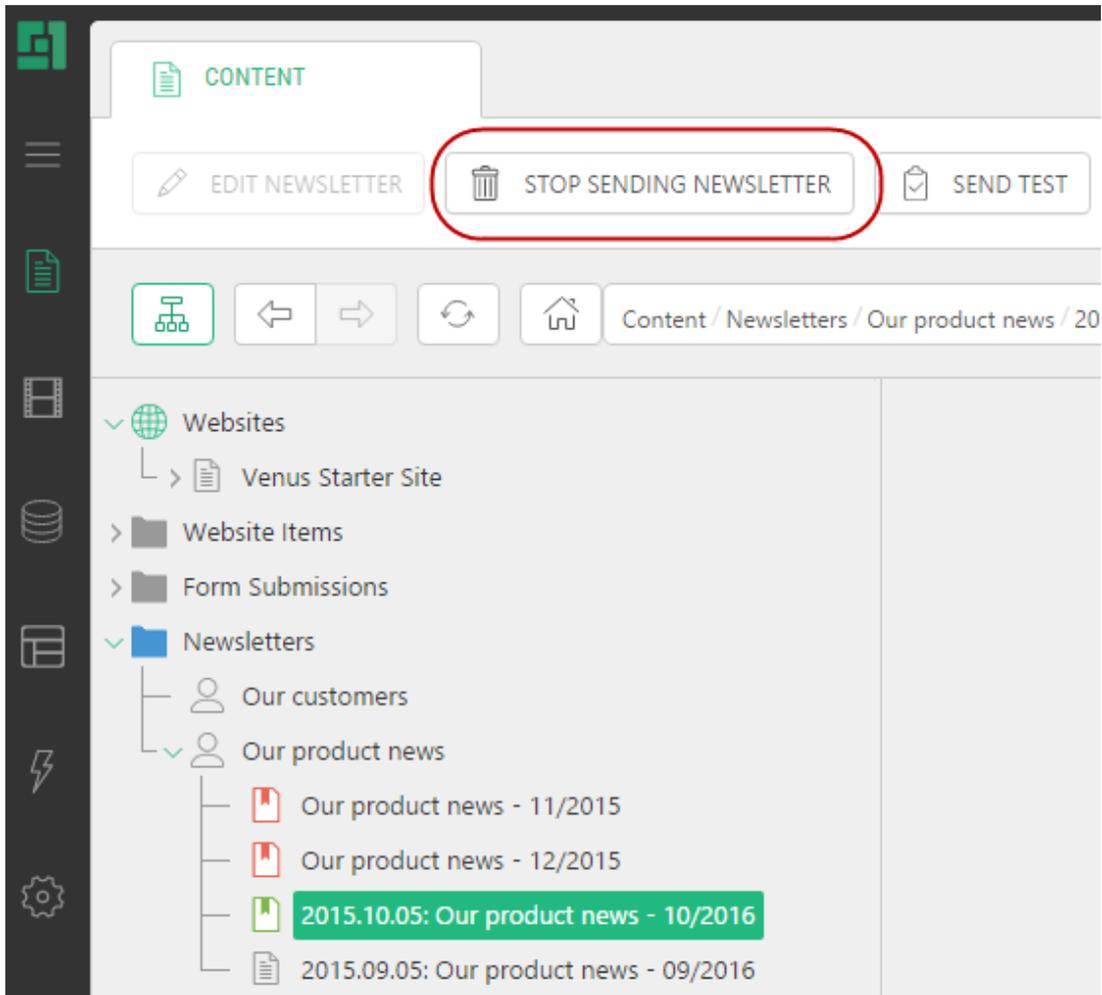


Figure 31: Send Newsletter replaced with Stop Sending Newsletter

In this manner, you can also cancel sending a scheduled newsletter.

4 Viewing Statistics

The Statistics functionality in the Newsletter add-on allows you to monitor trends in your newsletter campaigns analyzing them in various aspects such as the number of recipients who have received your newsletter, the number of recipients who have opened it, or what links the recipients have clicked in the newsletter.

To view the statistics:

- Right-click the newsletter you want to view statistics for and click **Statistics** in the context menu.

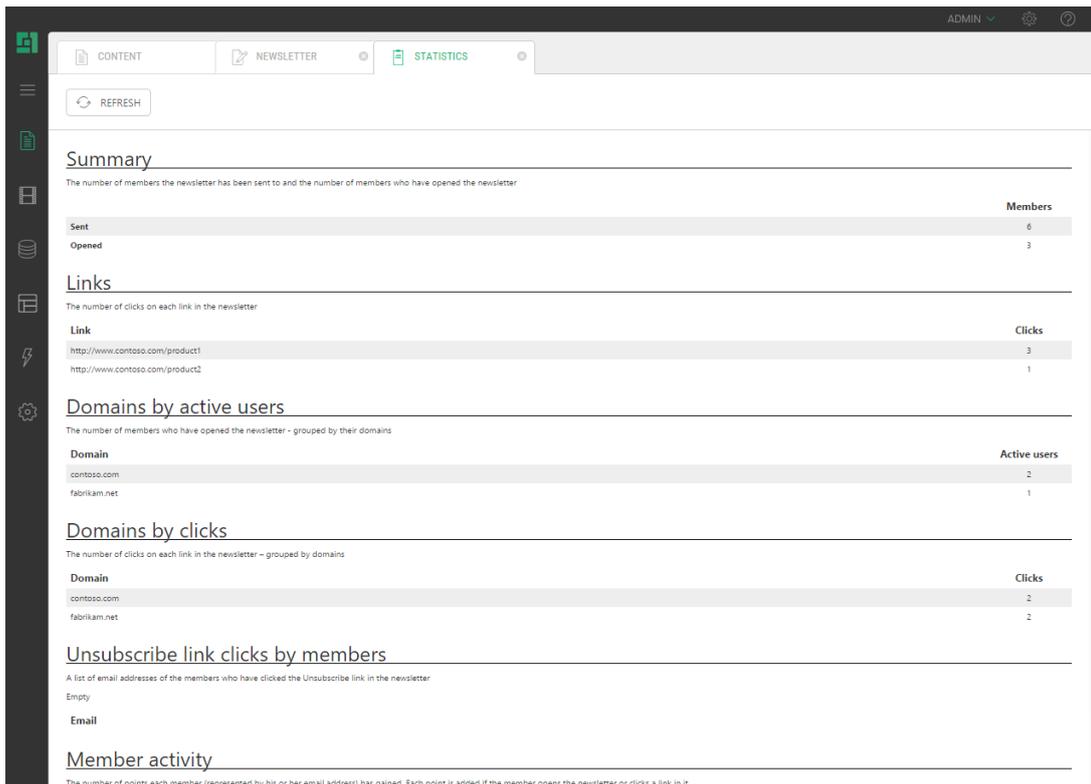


Figure 32: Statistics

The Statistics command is disabled in the context menu if a newsletter has not been sent yet.

In the right pane, on the **Statistics** tab, you can see the newsletter's and members' summary information.

Statistics	
Aspect	Description
Sent / Open	How many members the newsletter has been sent to and how many members have opened the HTML or clicked links to the site
Links	What links have been clicked and how many times in total
Domains by active users	The most active e-mail domains by the number of active users
Domains by links	The most active e-mail domains by the number of link clicks
Unsubscribe link clicks by members	A list of email addresses of the members who have clicked the Unsubscribe link in the newsletter
Member activity	Email addresses of people whom the newsletter has been sent to with indication of whether a person has opened the HTML mail and the number of point the person has gain. Each point is added if a member opens a newsletter or clicks a link in it.

5 Using Subscription Forms on Website

Your website visitors can subscribe to your mailing lists or manage their subscription directly from your website.

The Newsletter add-on allows you to easily add this feature to your website.

All your website visitor will have to do is type in his or her name and email address, select mailing lists to subscribe to and click **Subscribe**.

If your newsletter recipients want to cancel their subscription to one of your mailing lists, they can make use of the **Unsubscribe** form you can set up on your website.

In the following few sections, you will learn how to:

- Add the **Subscribe** form to a web page
- Add the **Unsubscribe** form to a web page
- Add the **Unsubscribe** link to a newsletter

5.1 Adding Subscribe Form to Web Page

You can use an existing page to add the **Subscribe** form to or create a new one. Alternatively, you can add this form to the template in the **Layout** perspective to have it on all the pages based on this template.

Only subject-based mailing lists will appear on the form. The user will not be able to subscribe to a data type based list.

To add the **Subscribe** form to a web page:

1. In the **Content** perspective, edit a page where you want the subscription form to appear.
2. Insert the **Composite.Community.Newsletter.SubjectBased.SubscribeForm** function into the page.
3. If necessary, specify the optional parameters:
 - a. Select a specific [subject-based mailing list](#) in the **Subject** list. If no list is selected ("**<NONE>**"), all the list will be displayed.
 - b. Uncheck the **Include Name Field** option if you want your form to display only the 'Email' field. By default the option is checked and, therefore, the 'Name' field is shown on the form in addition.
 - c. Select a [confirm template](#) in the **ConfirmEmailTemplate** list to send confirmation emails to subscribers. If no template is selected ("**<NONE>**"), the subscription will be immediate without confirmation.

Figure 33: Specifying the SubscribeForm parameters

4. Save and publish the page.

Figure 34: The subscription form with a single (default) mailing list

The Subscribe area on the page shows two fields: **Email** and **Name** for the user to enter her or his email address and name. (The Name field is optional.)

If a specific mailing list is not specified and there are more than one subject-based lists, the form will also show all those available for public subscription. The user can select which mailing lists to subscribe to by placing a check mark in a corresponding check box.

Figure 35: The subscription form with multiple mailing lists

Once the user clicks Subscribe, he or she will be added to the selected mailing lists and will receive all the related newsletters.

If the confirmation template is selected, the user will first receive an email to confirm her or his subscription. Without the confirmation, the user will not be added to the mailing list(s).

If you want your new subscribers receive the newsletters you have already sent to the existing subscribers, you may want to consider [resending these newsletters to the new subscribers](#).

5.2 Adding Unsubscribe Form to Web Page

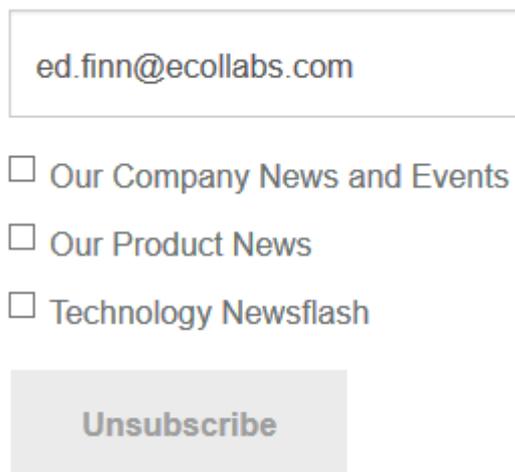
Each newsletter has an unsubscribe link.

If users choose to unsubscribe from a newsletter, they can click this link and be redirected to a Web page where they can cancel their subscription using the Unsubscribe form.

You can use an existing page to add the Unsubscribe form to or create a new one.

To add the Unsubscribe form to a web page:

1. In the **Content** perspective, open to edit a page.
2. Insert the **Composite.Community.Newsletter.UnsubscribeForm** function into the page.
3. Save and publish the page.



The image shows a screenshot of an unsubscribe form. At the top is a text input field containing the email address "ed.finn@ecollabs.com". Below this are three radio button options for selecting a mailing list to unsubscribe from: "Our Company News and Events", "Our Product News", and "Technology Newsflash". At the bottom of the form is a large, light gray button labeled "Unsubscribe".

Figure 36: The Unsubscribe form

The Unsubscribe area on the page shows the **Email** field where an email address is entered.

It also specifies the mailing list the user has chosen to unsubscribe from.

Once the user clicks Unsubscribe, he or she will be removed from the specified mailing list and will receive no related newsletters.

If the user opens the page not from the Unsubscribe link in her or his newsletter (e.g. while browsing the website), the form will specify no mailing list to unsubscribe from. In this case, if the user enters her or his email address and clicks Unsubscribe, she or he will be [added to the Never Mail Me list](#) and will receive no newsletters from any mailing lists.

5.3 Adding Unsubscribe Link to Newsletter

The default newsletter template you use to create your own newsletters includes the unsubscribe link. The link is auto-generated by the rendering function embedded within the template.

If your newsletter has no unsubscribe link, you can add it in the following way:

1. Select the newsletter you want to add the unsubscribe link to and click **Edit Newsletter** in the toolbar.
2. In the working area, on the **Content** tab, insert the **Composite.Community.Newsletter.UnsubscribeLink** function.
3. Save the newsletter.

Alternatively, you can edit a newsletter template and add the unsubscribe link there. All the newsletters created from this template will include the link.

6 Test Your Knowledge

6.1 TASK 1

1. Create a mailing list. Call it “*Company News*”.
2. Add members to this list.
3. Create a mailing list by importing from a data type. Call it “*Product News*”.

6.2 TASK 2

1. In the Content perspective, create a web page called “*Unsubscribe*”.
2. Create a newsletter template for the “*Company News*” mailing list. Call it “*Weekly News*”. Use the Unsubscribe page for the Unsubscribe link.
3. Create another newsletter template for the “*Product News*” subject. Call it “*What’s New*”. Use the Unsubscribe page for the Unsubscribe link.

6.3 TASK 3

1. Create a newsletter based on the “*Weekly News*” template. Call it “*Company Weekly News (Aug 25-30, 2009)*”.
2. Use the *Name* field in the newsletter’s content.
3. Create another newsletter based on the “*What’s News*” template. Call it “*What’s New in Version 1.2*”.

6.4 TASK 4

1. Send the “*Company Weekly News (Aug 25-30, 2009)*” newsletter.
2. Add a few more members to the “*Company News*” mailing list.
3. Resend the newsletter.
4. Schedule sending the “*What’s New in Version 1.2*” on the following day.

6.5 TASK 5

1. In the Content perspective, open to edit the Unsubscribe page.
2. Add the *UnsubscribeForm* function to the page and save the page.