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# Opt In Email 5.1

User Guide

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# 1 INTRODUCTION

The Opt In Email module allows administrators to create 'Opt In' distribution list(s). Users of the system can easily select which distribution list(s) they would like to Opt In/Out of. Maintenance and reports are available for administrators, and an enhanced version of 'Newsletters' is included so you can easily distribute to your Opt In lists.

- Setup as many Opt In Lists as you would like
- Settings for each Opt In module can select display all of the Opt In Lists, or a selected few (Nice if you like to have different areas of your site(s) to have different opt in categories/lists)
- Settings to also optionally collect the users First/Last name besides their email address
- Settings to optionally verify the users email address after Opting In.
- Allow existing users to manage their Opt In settings. After they enter their email address, it will send them a link to the system
- Manage Users/Lists along with ability to easily administrator and maintain users and their opt in preferences
- Each area of the site and each email distributed through the system are customizable within the system. Additionally you can include parameters within the emails send to users -i.e. Dear \$(FirstName), ...
- Reports for Opt In List(s) including ability to export Opt In Lists/Users to Excel
- Settings for email subject lines, email messages, and mail SMTP settings
- New expanded features in V2.1 including extended fields, previous newsletters, simple opt in email modules, and more customization!
- New expanded in v2.6 include the ability to scheduler newsletters. Now you can schedule newsletters to send out 'X' number of emails per 'X timeframe'. For example, send out 400 emails per hour and run every hour until completion.
- New features in 3.0 include:
  - Email Tracking – Now track the success of your newsletter. Distribution reports show the number emails that go out to users and which of those users have actually read the newsletter! Email tracking includes tracking how many times they have read the newsletter, their IP Address, and their browser type.
  - New feature to hide help icons within main Opt In Email module
  - New feature to 'auto' load authenticated users Opt In Email subscription

## 1.1 What's new? Enhancements in 5.1

- Ability to create "Template Sets" for newsletters. Template Sets allow you to setup a dynamic set of variables to collect from the end user (which is an admin / user sending the newsletter) that would then be "Plugged Into" the newsletter. For example, instead of the user now having full "HTML" access to the newsletter, the admin can define maybe 5 text box areas, two headlines, and two images. Then... When the user starts to fill in the data for the newsletter, the system can replace those specific areas of text with the FULL WYSIWYG template.
- New "TABS" interface to quickly navigate within sending a newsletter through a wizard experience. As features are enabled/disabled the tab would no longer appear (such as if you did not offer things such as a text-only newsletter etc.)
- Ability to test the opt in email verification emails with a new "Send Email Test" within the main Opt In Email module configuration control panel
- **Minor Enhancements / Fixes:**
  - First / Last Name can now be visible but optional when collecting the subscribers information
  - Optional watermark features for first name, last name, and email address within main Opt In Email and Simple Opt In Email module
  - Ability to send BCC now to the entire distribution list

## 2 INSTALLATION PROCEDURE

The “Opt In Email” module consists of 4 separate modules. You should follow these instructions to install all modules before you start using them. The module installation process has been streamlined to only include one single module installation file:

Included in your download are two module zip files plus the source zip file (if you have purchased the source)

- **DataSprings\_OptInEmail50\_DNN6PLUS\_PAINSTALL.zip**– installation file for installing “Opt In Email” module.

**Note:** For versions of DNN 6.x plus, you should navigate to Host, Extensions, and Install Module Extension.

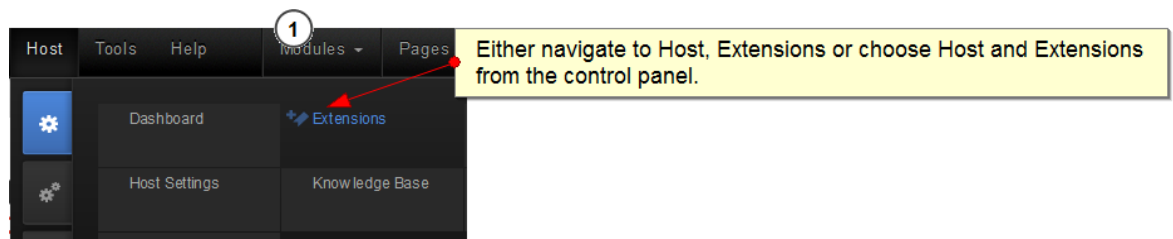


Figure 1: Installation procedure (step 1/5)

The following screen will be displayed.

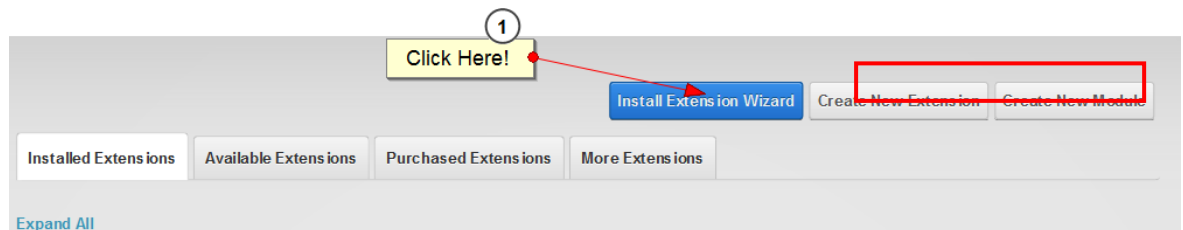


Figure 2: Installation procedure (step 2/5)

Click on the “Install New Module” to continue installing “Opt In Email” and the following screen will be displayed.

### Upload New Extension Package

DotNetNuke can be extended in many ways. This wizard helps you upload and install DotNetNuke extension packages.

Use the Choose File button to browse your local file system to find the extension package you wish to install, then click Next to continue.

**DataSprings\_OptInEmail50\_DNN61PLUS\_PAINSTALL\_StandardEdition.zip**

Your site is configured with a maximum file upload size of 12 MB.

**Next** Cancel

Figure 3: Installation procedure (step 3/5)

Click on the “Browse” button and the dialog window for locating the installation file “**DataSprings\_OptInEmail.zip**” will be displayed.

Locate the “**DataSprings\_OptInEmail.zip**” and click on the “Open” button. The following screen will be displayed.

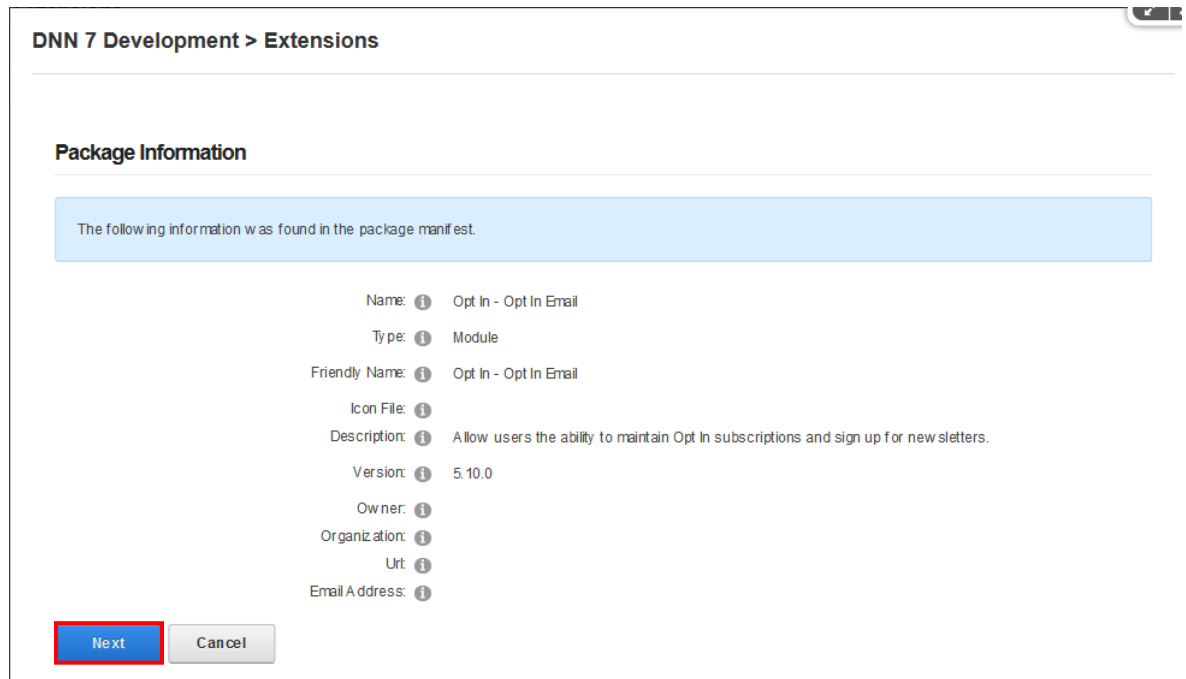


Figure 4: Installation procedure (step 4/5)

Click “Next” and the installation will begin. In a couple of moments the screen informing you on successful completion will be displayed. You must agree to the license agreement and follow the wizard.

**StartJob Registering DesktopModule**

Info Registering Definitions

Info Registering Controls

**EndJob Registering finished**

**EndJob Installation successfull.**

[Return](#)

Figure 5: Installation procedure (step 5/5)

**Note:** please keep track of any errors that appear during the installation. These errors can be helpful if your module has problems.




### 3 OPT IN EMAIL MODULE

This section will give detailed instructions for all options available for “Opt In Email” module.

#### 3.1 Adding Opt In Email module to a page

In order to add “Opt In Email” module to a desired page follow these steps:

1. Select the “Add New Module” radio button
2. Choose “Opt In Email” from the “Module” pull down menu
3. Click on the “Add” link (or the arrow icon .

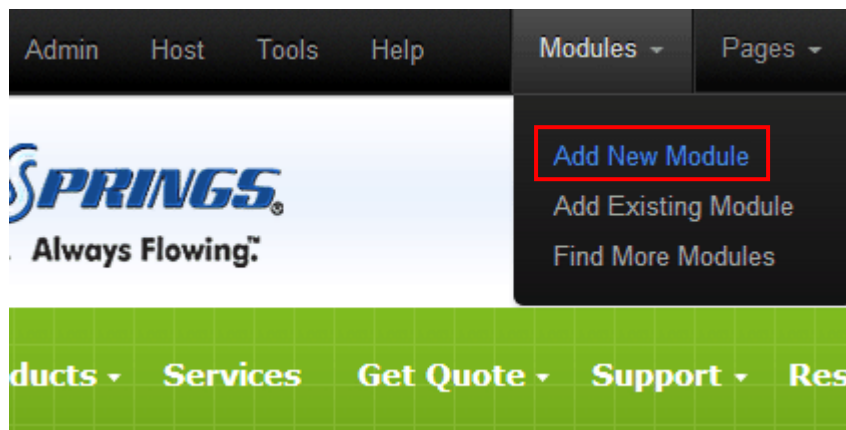


Figure 6: Adding a module to a page (step 1/3)

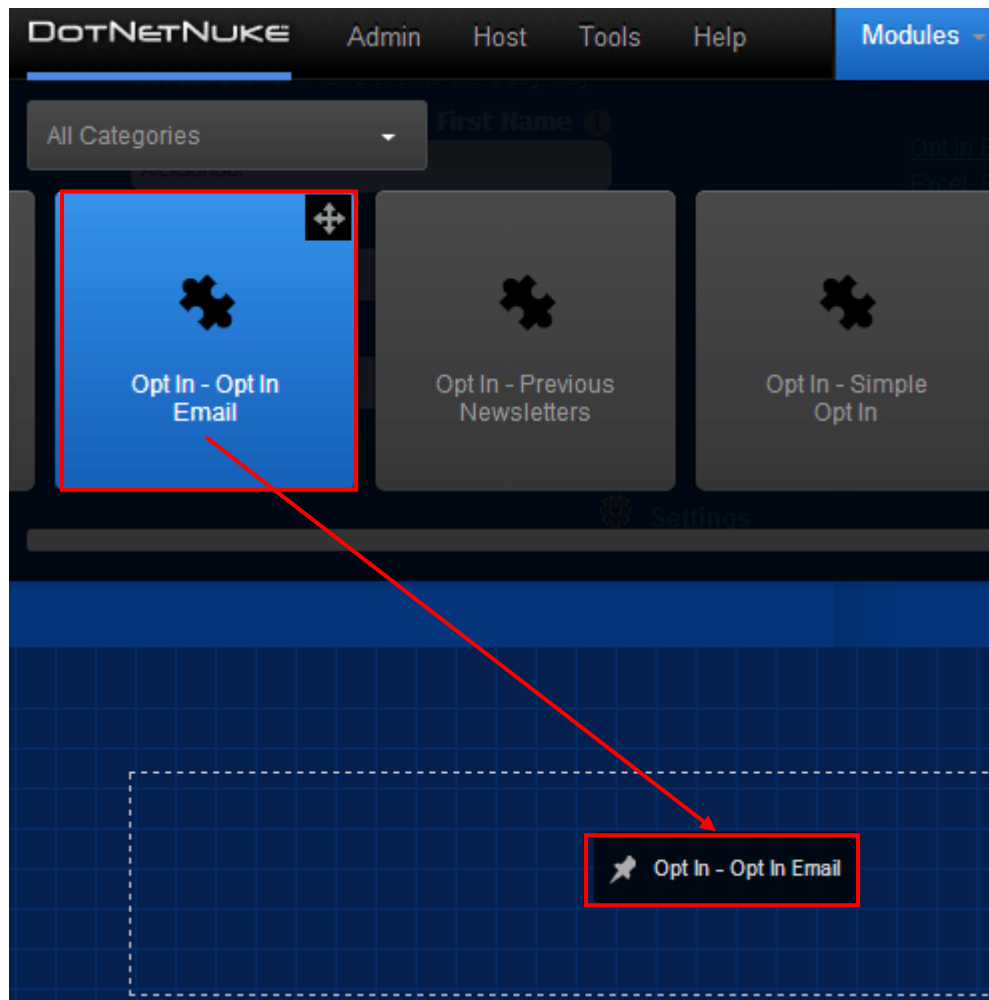


Figure 7: Adding a module to a page (step 2/3)

The “Opt In Email” module will be added to the page. Click on the arrow next to the title of the module in order to open the main menu.

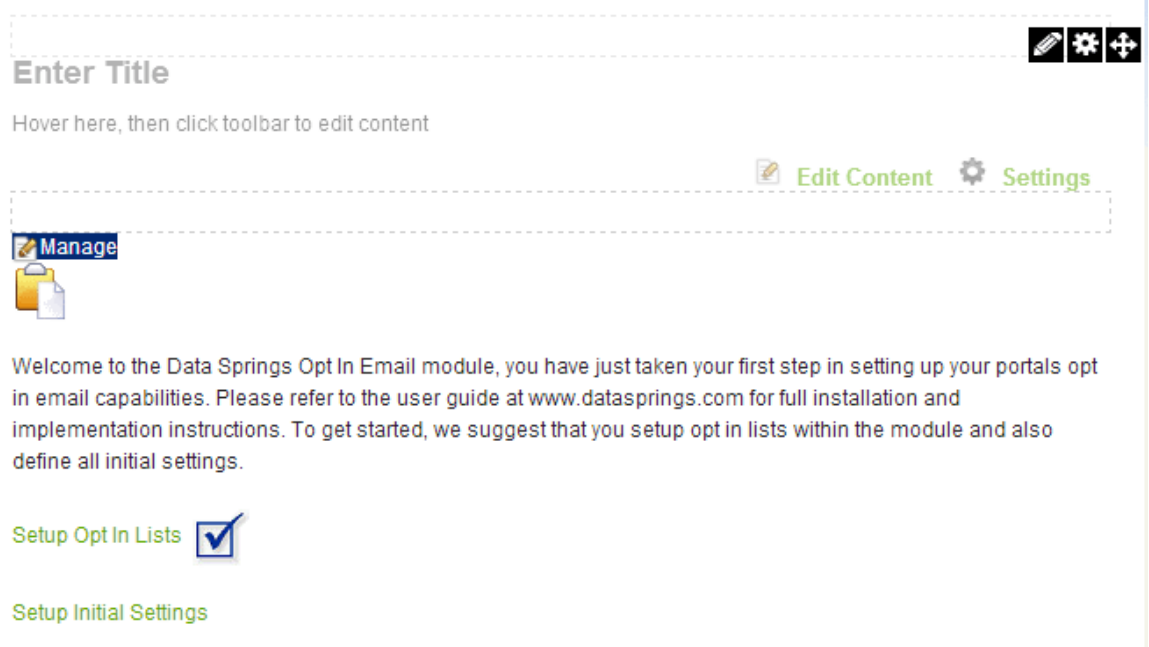


Figure 8: Opening the module main menu

**Note:** see section 3.2 for further information on main menu options.

### 3.2 Opt In Email Quick Menu

In order to start using the quick menu to access the most important settings for the module, click on one of the available icons.

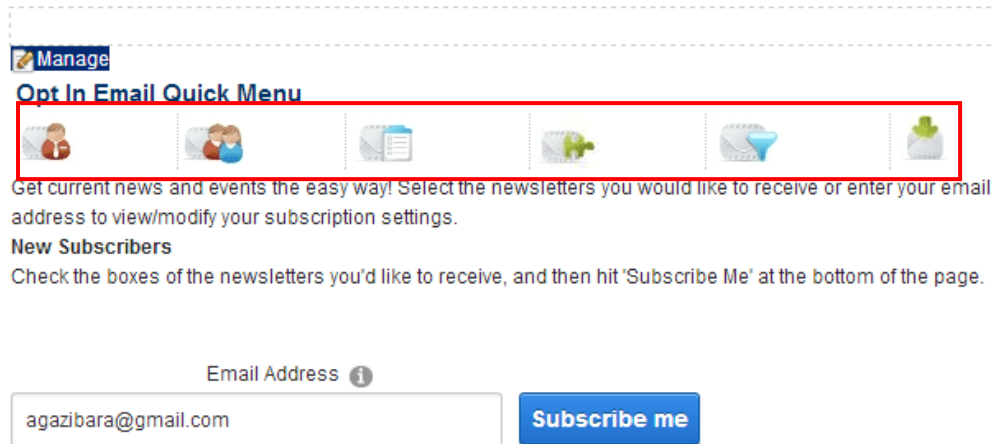









Figure 9: Opening the quick menu

The following options are available:

-  - click this icon to access the dashboard, i.e. the control panel (see section 3.3)
-  - the option for managing subscribers (see section 3.5)
-  - the option for managing the opt in email lists (see section 3.6)
-  - the option for configuring the module settings (see section 3.7)
-  - the option for setting up the extended fields (see section 3.8)
-  - the option for importing the subscribers from an existing list (see section 3.9)

### 3.3 Using the Control Panel

In order to start using the Opt In Email Control Panel, click on this icon  in the quick menu.

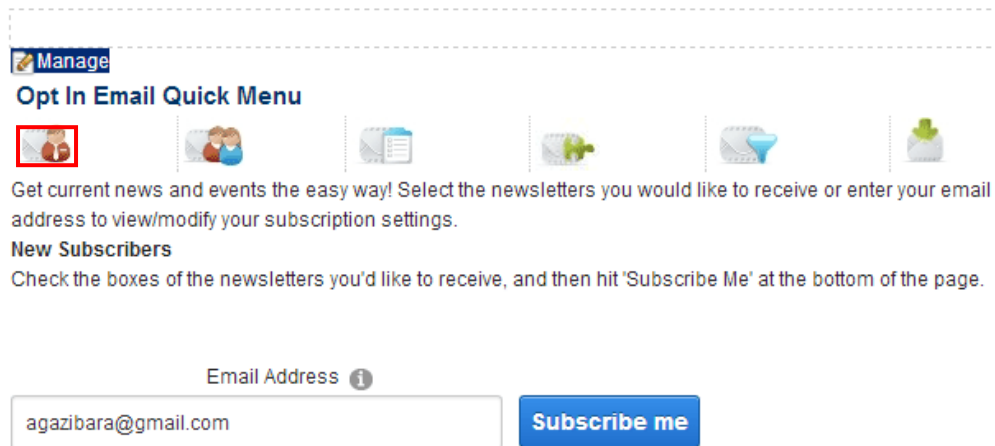


Figure 10: Choosing the "Control Panel" option

The following screen will be displayed.

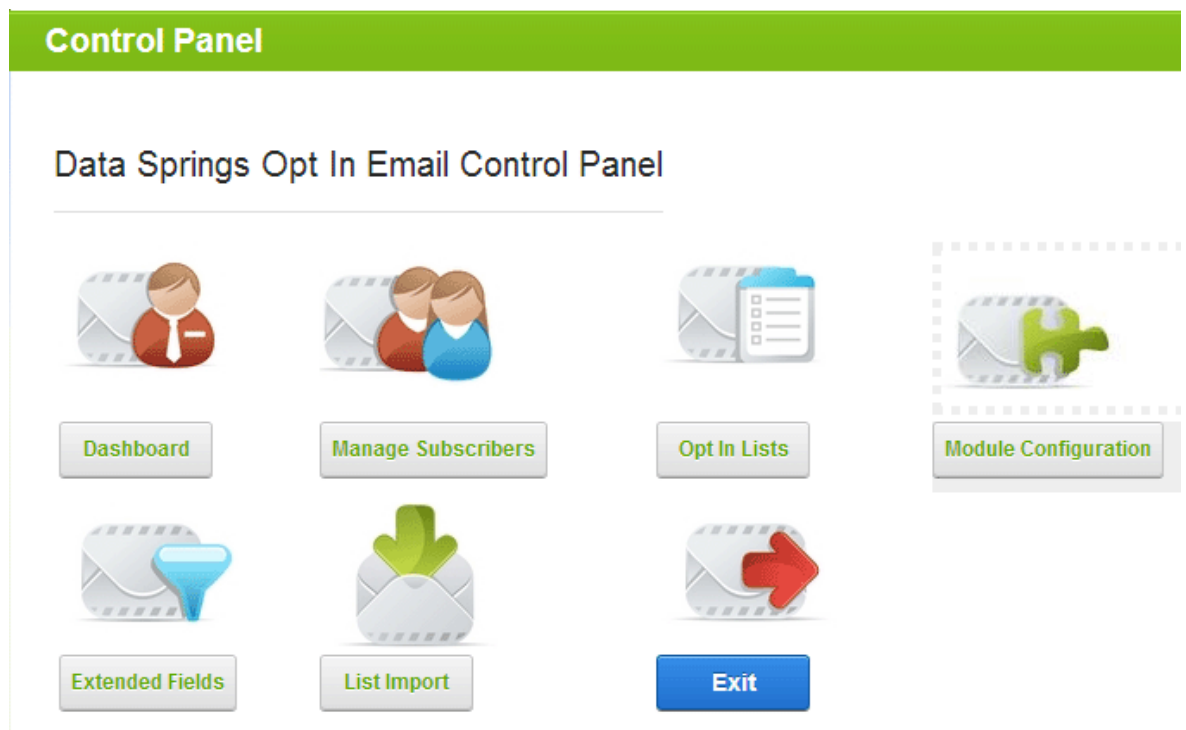


Figure 11: Options inside the control panel

The following options are available:

- **Dashboard** – the option for viewing module version, recent subscribers, statistics, etc (see section 3.4)
- **Manage Subscribers** – the option for managing your subscribers (see section 3.5)
- **Opt In Lists** – the option for managing the opt in lists/ categories (see section 3.6)
- **Module Configuration** – the option for configuring the module (see section 3.7)

- **Extended Fields** – the option for managing the extended fields (see section 3.8)
- **List Import** – the option for importing the list (see section 3.9)
- **Exit** – use this option to exit the Control Panel

### 3.4 Viewing the dashboard


The purpose of the dashboard is to provide the administrator with a central resource to display the module version, recent subscribers and statistics on the opt in lists, and specific warnings that are determined based on the module configuration and setup.

It is displayed by default when you choose the “Control Panel” option from the main menu.


**Control Panel**

Visibility:


**Data Springs Opt In Email Control Panel**




**Dashboard**




**Manage Subscribers**




**Opt In Lists**




**Module Configuration**



**Extended Fields**



**List Import**



**Exit**

**Opt In Email Dashboard**

**Version** 4.4.2.15633 / 7.0.5

**Info / Stats:**

- Bridges Test List (9 Subscribers)
- COLL6 TRNGPROMO (9 Subscribers)
- Connections 2010 (401 Subscribers)
- DNN Module Updates (24407 Subscribers)
- DS Test List (1 Subscribers)
- Interactive User Import Trial Download (156 Subscribers)
- Data Springs Active Forum Subscribers (88 Subscribers)
- Sales Promotions (3251 Subscribers)
- SharePoint Web Parts (753 Subscribers)
- Dynamic Forms Invalid Trial (88 Subscribers)
- Module Testing (0 Subscribers)
- Tailored Text Trial Download (64 Subscribers)

**Recent Subscribers:**

farida youness  
 faridayouness@yahoo.com  
 5/19/2013 1:22:07 AM

Ghani Khan  
 ghanikhan512@gmail.com  
 5/18/2013 1:53:25 AM

Mohamed Elkhateeb  
 mohamedelkhateeb196@yahoo.com  
 5/18/2013 1:12:22 AM

**Warnings:** Your currently do not have any warnings.

**Exit Control Panel**

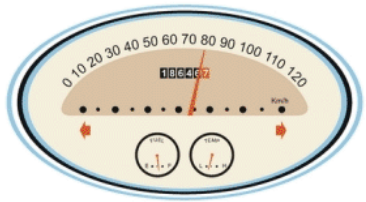


Figure 12: Viewing the dashboard

The following options are available:

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- **Version** – this will display the current module build version including any incremental versions; the version is useful when contacting support or to determine if an upgrade is available
- **Info/Stats** – statistics will appear within the dashboard for each opt-in list setup; the statistics will display each opt in list setup within the system and also the number of subscribers within that list
- **Recent Subscribers** – the most recent subscribers will be displayed within this area of the dashboard; the information will include the subscriber information and the date/time they subscribed
- **Warnings** – warnings will be displayed based upon any specific configuration concerns or recommendations for your module instance
- **Exit Control Panel** – exit out of the control panel

### 3.5 Managing the Subscribers

In order to start managing the subscribers, choose option “Manage Subscribers” from the main menu.

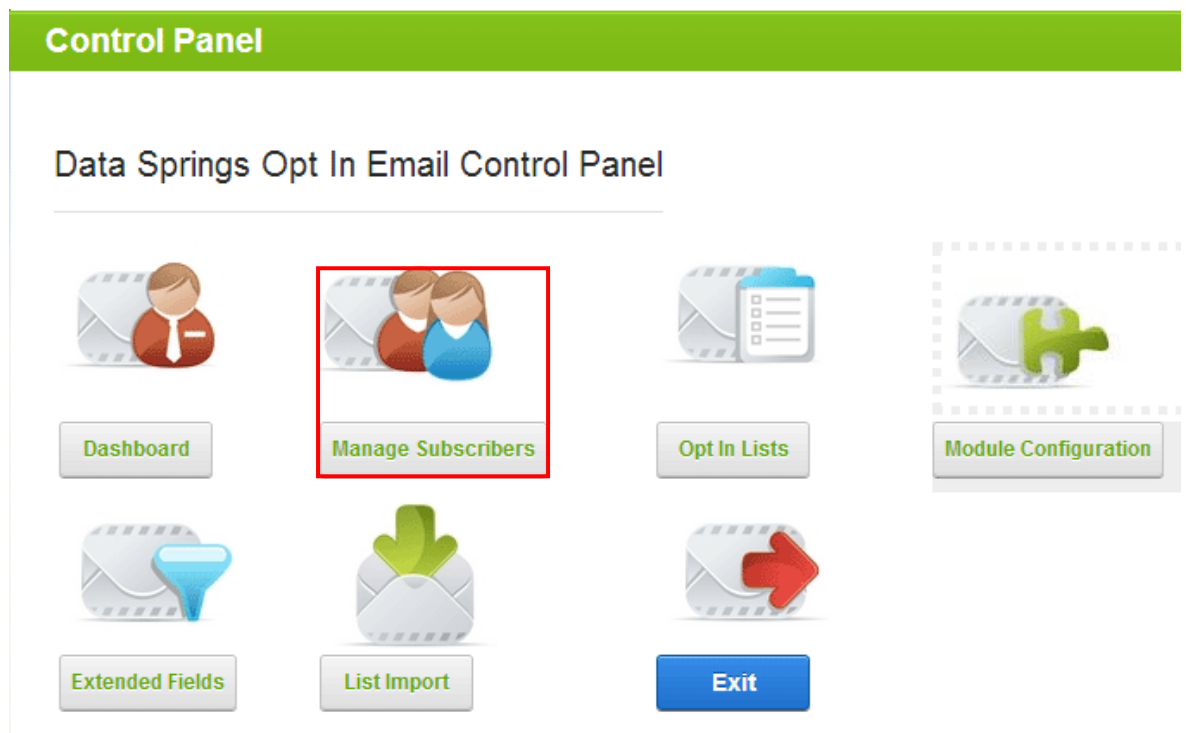


Figure 13: Choosing option "Manage Subscribers"

The following screen will be displayed.

Manage Opt In List(s) / Users

Reports by List

Display Options: ☒ Display Names ☒ Display Extended Fields

Page Size: 10

Search Users/Emails: Email Address

Search Term: Search

	First Name	Last Name	Email Address	Enter TEST here	Verified	Subscription Date/Time	Lists
<input type="checkbox"/>			test@domain.com		Yes	9/5/2011 8:44:44 AM	
<input type="checkbox"/>			test@domain.com		Yes	7/20/2011 4:29:50 PM	
<input type="checkbox"/>			test@domain.com		Yes	9/3/2011 2:34:30 AM	~ - Opt In Module Upd

Number of results: 33306  
Page 1 of 3331

Select / De-Select All

Global Actions: - Select Action -

Export to Excel

Exit Control Panel

Figure 14: Managing subscribers

The following information and options are available inside this screen:

- **Manage Opt In List(s) /Users** – this screen is displayed by default and contains all users
- **Reports by List** – choose this option to display users by the category (see section 3.5.1)
- **Display names** – choose this option to display names of the subscribers
- **Display extended fields** – choose this option to display extended fields (see section 3.8)
- **Search users/emails** – use this option to search for the users based on name or email address
- **Search term** - enter the search term that you would like to query against the opt in email list database for
- **Page size** – use this pull down menu to specify the size of the page based on the number of users displayed per page
- **First name** – field displaying user's first name
- **Last name** - field displaying user's last name
- **Email address** - field displaying user's email address
- **Verified** – field displaying information about whether the user has been verified or not
- **Subscription Date/Time** – field displaying information about the categories users belong to
- **Select / De-Select All** - select an action to perform to all selected subscribers from the grid of subscribers; the action will be executed against all selected subscribers (see section 3.5.5)
- **Global actions** – select the desired subscriber and then choose the desired action from this menu
- **Export to Excel** – option for exporting user list to an excel file (see section 3.5.6)



### 3.5.1 Viewing reports by List

In order to view user by list they belong to, choose “Reports by List” radio button. The screen with the pull down menu for choosing the desired Opt In List will be displayed.

Manage Opt In List(s) / Users

**Reports by List**

Display Options: ☒ Display Names ☒ Display Extended Fields

Page Size: 10

**Opt In List** **Search**

Select / De-Select All

Exit Control Panel

Figure 15: Viewing reports by Opt In List

Choose the desired Opt In List from the pull down menu and click on the “Search” link. The screen with the users belonging to the chosen Opt In List will be displayed.

### 3.5.2 Adding a new subscriber

In order to add a new subscriber, choose option “Manage Subscribers” from the main menu. The following page will be displayed.

<input type="checkbox"/>			axelq@libero.it		Yes
<input type="checkbox"/>			iakpaca@hotmail.com		Yes
<input type="checkbox"/>			yun58711@yahoo.ie		Yes
	John	Smith	johnsmith@email.com		

< >

Number of results: 33307  
Page 1 of 3331

Select / De-Select All

Global Actions: - Select Action -

Export to Excel

Exit Control Panel

Figure 16: Adding a new subscriber

Use the input fields at the bottom to enter the following information about the new subscriber:

- **First name** – enter the subscriber's first name in this field
- **Last name** – enter the subscriber's last name in this field
- **Email address** – enter the subscriber's email address in this field
- **Multiple select list** – choose the list you wish to add the subscriber to (**note:** you can select more than one list by clicking the CTRL key for each item or shift for multiple items)

After entering these parameters inside the input fields, choose the action of adding the subscriber to the list from the **Global Actions** menu.

### 3.5.3 Editing a subscriber

In order to edit a subscriber, choose option “Manage Subscribers” from the main menu. The screen with the list of current subscribers will be displayed.

Display Options: ☒ Display Names ☐ Display Extended Fields

Page Size:

Search Users/Emails:

Search Term:

Click the edit icon to edit each record individually

	FirstName	LastName	Subscription Date/Time	Lists		
<input type="checkbox"/>	Chad	Nash	2/14/2012 11:15:13 AM		<input type="checkbox"/>	
<input type="checkbox"/>	Chad	Nash	3/27/2011 4:24:43 PM	* -DNN Module Updates * -RESX Translation Tool	<input type="checkbox"/>	
<input type="checkbox"/>	Christopher	Nash	8/6/2011 1:25:04 PM	* -DNN Module Updates	<input type="checkbox"/>	
<input type="checkbox"/>	Dora	Avinash	12/11/2010 2:11:17 PM	* -DNN Module Updates	<input type="checkbox"/>	
<input type="checkbox"/>	Joseph	Nashat	11/10/2010 8:16:22 AM	* -DNN Module Updates	<input type="checkbox"/>	
<input type="checkbox"/>	Laurence	Nash	4/23/2006 7:39:17 AM	* -DNN Module Updates	<input type="checkbox"/>	
<input type="checkbox"/>	Mom & Dad	Nash	10/27/2007 9:56:00 PM	* -DNN Module Updates	<input type="checkbox"/>	
<input type="checkbox"/>	Nash	Nash	9/11/2012 9:00:57 AM	* -DNN Module Updates	<input type="checkbox"/>	
<input type="checkbox"/>	Nitish	Nash	8/8/2012 10:38:09 PM	* -DNN Module Updates	<input type="checkbox"/>	
<input type="checkbox"/>	Satoshi	Inashima	2/19/2011 12:03:17 AM		<input type="checkbox"/>	
				Bridges Test List COLL6 TRNGPROMO Connections 2010		

Number of results: 12  
Page 1 of 2

Global Actions:

Check multiple boxes to kick off a global action such as adding all users to a specific list, or removing all users, etc...

Figure 17: Editing a subscriber (step 1/2)

The following page will be displayed.

## Edit User Information

First Name:

Last Name:

Email:

Subscription Date: 3/7/2011 8:59:06 AM

Select Opt In List:

- ☐ Bridges Test List
- ☐ COLL6 TRNGPROMO
- ☐ Connections 2010
- ☒ DNN Module Updates

Verified: Yes

Email Format Preference: HTML

Figure 18: Editing a subscriber (step 2/2)

The following parameters can be edited inside this screen:

- **Email Format Preference** – select the desired email format for this subscriber (HTML or text)
- **First name** – field for editing subscriber's first name
- **Last name** - field for editing subscriber's last name
- **Email** - field for editing subscriber's email address
- **Subscription Date** – the date the user has subscriber to the list
- **Select Opt In List**– checkboxes for adding or removing a subscriber from the desired list (see section 3.5.2 or 3.5.4)
- **Verified** – use this pull down menu to verify the user)
  - **Note:**
    - only verified email address's will be distributed an email in the Advanced Newsletter Module
    - use the "Resend Verification Email" to send the verification email to the subscriber once again, this will be the exact same email as when they originally opted into the system
- **Extended fields** – the part of the page listing all defined previously defined extended fields (see section 3.8)

After editing the desired parameters, click "Save" button in order to save the changes.

### 3.5.4 Deleting a subscriber

In order to delete a subscriber, choose option “Manage Lists/Users” from the main menu. The screen with the list of current subscribers will be displayed.

Delete individual subscribers here, or select and check each subscriber on the left and choose the global actions feature.









	FirstName	LastName	EmailAddress	Company	Enter TEST here	Verified	Subscription Date/Time	Lists	
<input type="checkbox"/>	Chad	Nash	datasprings1			Yes	2/14/2012 11:15:13 AM		
<input type="checkbox"/>	Chad	Nash	spellcheck@datasprins.com			Yes	3/27/2011 4:24:43 PM	* -DNN Module Updates * -RESX Translation Tool	
<input type="checkbox"/>	Christopher	Nash	chris@cmolecule.com			Yes	8/6/2011 1:25:04 PM	* -DNN Module Updates	
<input type="checkbox"/>	Dora	Avinash	avinash.dora@gmail.com			Yes	12/11/2010 2:11:17 PM	* -DNN Module Updates	
<input type="checkbox"/>	Joseph	Nashat	joseph_nashat@hotmail.com			Yes	11/10/2010 8:16:22 AM	* -DNN Module Updates	
<input type="checkbox"/>	Laurence	Nash	lnash@scoredesigns.com			Yes	4/23/2006 7:39:17 AM	* -DNN Module Updates	
<input type="checkbox"/>	Mom & Dad	Nash	nashrv@gmail.com			Yes	10/27/2007 9:56:00 PM	* -DNN Module Updates	

Figure 19: Deleting a subscriber (step 1/2)

Click on the delete button  next to the desired subscriber and the following confirmation dialog will be displayed.

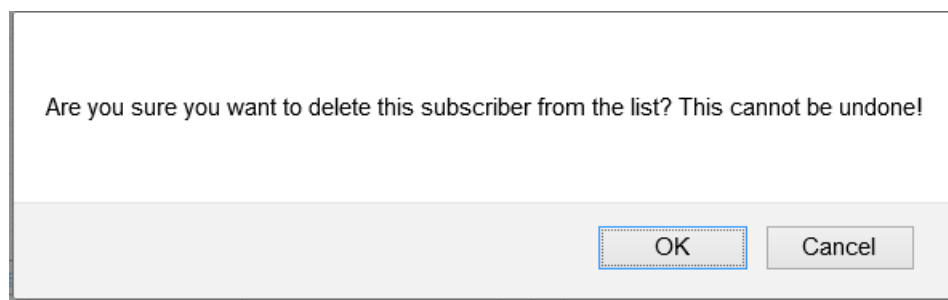


Figure 20: Deleting a subscriber (step 2/2)

Click “OK” and the subscriber will be deleted.

### 3.5.5 Performing Global Actions

The “Global Actions” menu is used for performing actions to all selected subscribers, i.e. multiple subscribers at once. It is used in combination with the “Select All” option.

<input checked="" type="checkbox"/>			iakpaca@hotmail.com		Yes	12/17/2011 7:25:19 AM	
							Bridges Test COLL6 TRNG

< >  
 Number of results: 33183  
 Page 1 of 3319  
Select / De-Select All

Export to Excel  
Exit Control Panel

Global Actions: ⓘ
 

- Select Action -  
 - Select Action -  
 Set Subscriber to Verified  
 Add (Opt In) Subscriber to Opt In ListBridges Test List  
 Remove (Opt Out) Subscriber from Opt In ListBridges Test List  
 Add (Opt In) Subscriber to Opt In ListCOLL6 TRNGPROMO  
 Remove (Opt Out) Subscriber from Opt In ListCOLL6 TRNGPROMO  
 Add (Opt In) Subscriber to Opt In ListConnections 2010  
 Remove (Opt Out) Subscriber from Opt In ListConnections 2010  
 Add (Opt In) Subscriber to Opt In ListDNN Module Updates  
 Remove (Opt Out) Subscriber from Opt In ListDNN Module Updates  
 Add (Opt In) Subscriber to Opt In ListDS Test List  
 Remove (Opt Out) Subscriber from Opt In ListDS Test List  
 Add (Opt In) Subscriber to Opt In ListInteractive User Import Trial Download  
 Remove (Opt Out) Subscriber from Opt In ListInteractive User Import Trial Download  
 Add (Opt In) Subscriber to Opt In ListData Springs Active Forum Subscribers  
 Remove (Opt Out) Subscriber from Opt In ListData Springs Active Forum Subscribers  
 Add (Opt In) Subscriber to Opt In ListSales Promotions  
 Remove (Opt Out) Subscriber from Opt In ListSales Promotions  
 Add (Opt In) Subscriber to Opt In ListSharePoint Web Parts  
 Remove (Opt Out) Subscriber from Opt In ListSharePoint Web Parts

Figure 21: Performing global actions

In order to perform a global action, click “Select All” and then choose the desired action from the menu, e.g. *Add (Opt In) subscriber to Opt In List: Sales Promotions*, which will automatically add all selected subscribers to the list called “Sales Promotions”.

The following actions are available:

- **Set Subscriber to Verified** – use this option to verify multiple subscribers at once
- **Add (Opt In)** – use this option to add multiple subscribers to a list
- **Remove (Opt Out)** – use this option to remove multiple subscribers from a list
- **Delete Subscriber** - use this option to delete multiple subscribers from a list

### 3.5.6 Exporting subscribers to Excel

In order to export subscribers to an Excel file, choose option “Manage Lists/Users” from the main menu. The screen with the list of current subscribers will be displayed. Scroll down to the bottom of the page and locate the “Export to Excel” link.

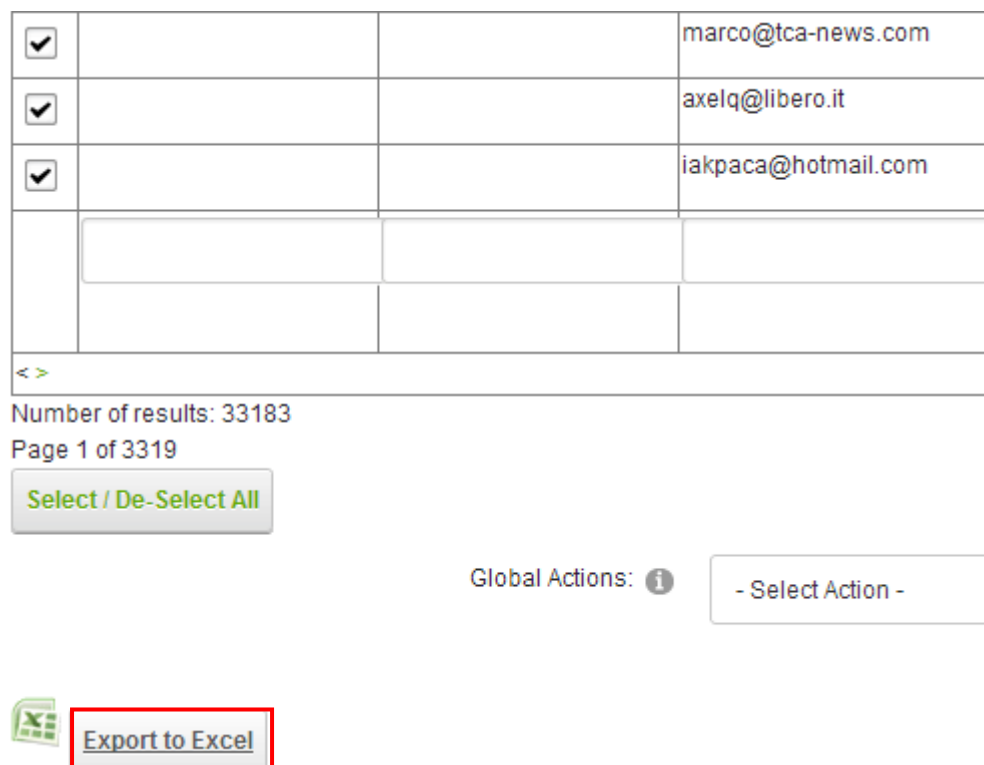


Figure 22: Exporting to Excel (step 1/2)

Click the “Export to Excel” link and the dialog window for saving the file with exported information will be displayed.

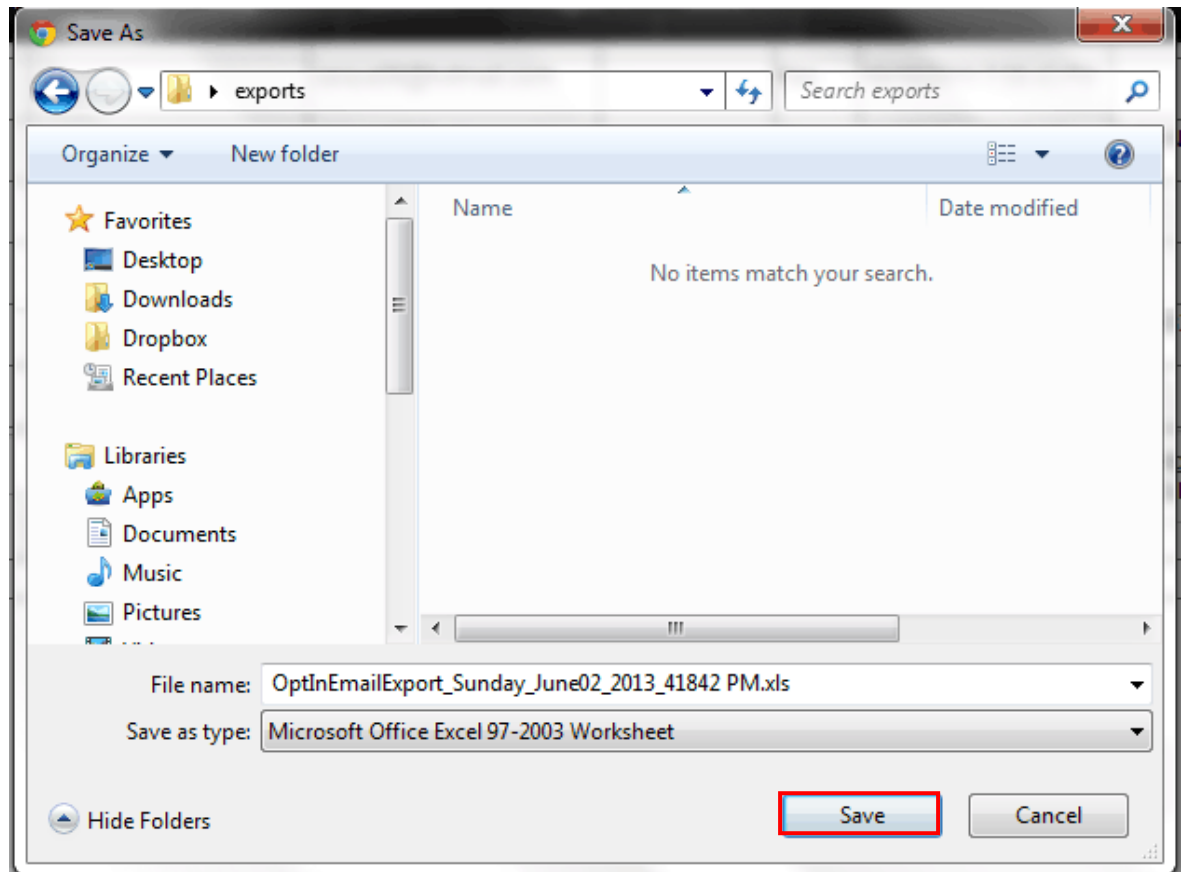


Figure 23: Exporting to Excel (step 2/2)

Choose the desired location on your PC and click **Save** to save the file.

**Note:** the file name of the exported file but is based on date/time.

### 3.6 Managing Opt In Lists

In order to start managing Opt In Lists, choose option “Opt In Lists / Categories” from the main menu.

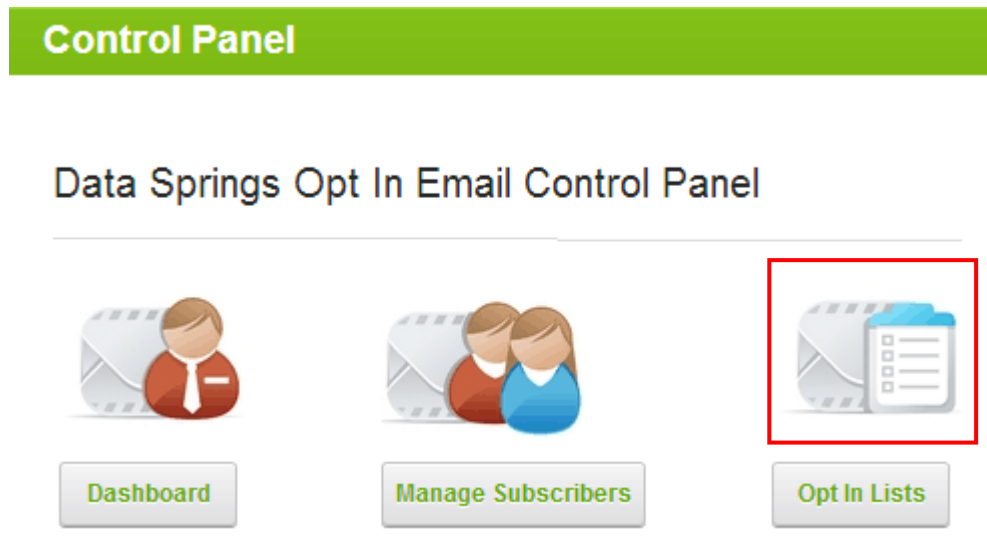


Figure 24: Choosing option Opt In Lists / Categories

The following screen will be displayed.

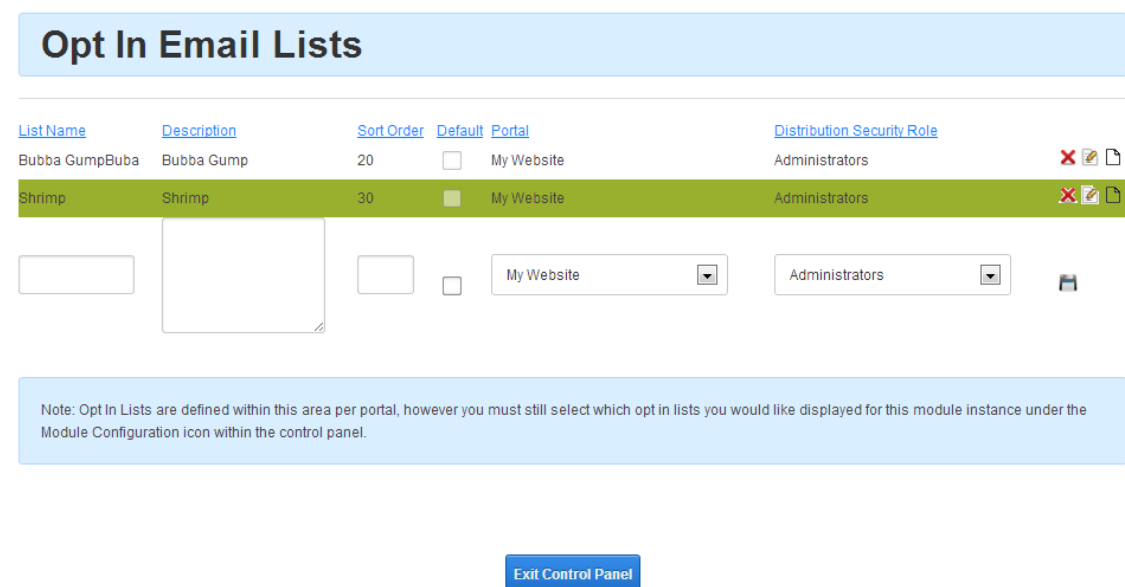



Figure 25: Managing categories




The following options are available inside this screen:

- - the option for deleting a Opt In List (see section 3.6.1)
- - the option for editing a Opt In List (see section 3.6.2)
- - to add a new list, fill in the desired fields and click the save icon (see section 3.6.3)
- - the option for adding a teaser (see section 3.6.4)

### 3.6.1 Creating a new Opt In List

In order to create a new Opt In List, enter the Opt In List name, description and the desired sort order inside the respective fields and click on this icon .

## Opt In Email Lists

List Name	Description	Sort Order	Default	Portal	Distribution Security Role	
Bubba GumpBuba	Bubba Gump	20	<input type="checkbox"/>	My Website	Administrators	✕ 
Shrimp	Shrimp	30	<input type="checkbox"/>	My Website	Administrators	✕ 
<input style="width: 100px;" type="text"/>	<input style="width: 150px;" type="text"/>	<input style="width: 50px;" type="text"/>	<input type="checkbox"/>	<div style="border: 1px solid #ccc; padding: 2px;">My Website</div>	<div style="border: 1px solid #ccc; padding: 2px;">Administrators</div>	

Note: Opt In Lists are defined within this area per portal, however you must still select which opt in lists you would like displayed for this module instance under the Module Configuration icon within the control panel.

[Exit Control Panel](#)

Figure 26: Creating a new Opt In List

After you click on the add icon () , the new Opt In List will be added.




**Note:**

- The “Distribution Security Role” parameter can be used in order to limit access to the newsletter based on the user role. In other words you can set the security role for users that are allowed to distribute newsletters. This parameter can be setup during the procedure of editing a Opt In List (see section 3.6.2)
- A newly added list will not automatically be shown in the lists displayed to subscribers. To display this list, you will need to go to Module Configuration, General Settings where you check the Opt In Lists Displayed. (see 3.7.1).

### 3.6.2 Editing a Opt In List

In order to edit a Opt In List, click on this icon  next to the Opt In List name.

## Opt In Email Lists

List Name	Description	Sort Order	Default	Portal	Distribution Security Role	
Bubba GumpBuba	Bubba Gump	20	<input type="checkbox"/>	My Website	Administrators	✕ 
Shrimp	Shrimp	30	<input type="checkbox"/>	My Website	Administrators	✕ 
<input style="width: 100px;" type="text"/>	<input style="width: 150px;" type="text"/>	<input style="width: 50px;" type="text"/>	<input type="checkbox"/>	<div style="border: 1px solid #ccc; padding: 2px;">My Website</div>	<div style="border: 1px solid #ccc; padding: 2px;">Administrators</div>	

Note: Opt In Lists are defined within this area per portal, however you must still select which opt in lists you would like displayed for this module instance under the Module Configuration icon within the control panel.

[Exit Control Panel](#)

Figure 27: Editing an Opt In



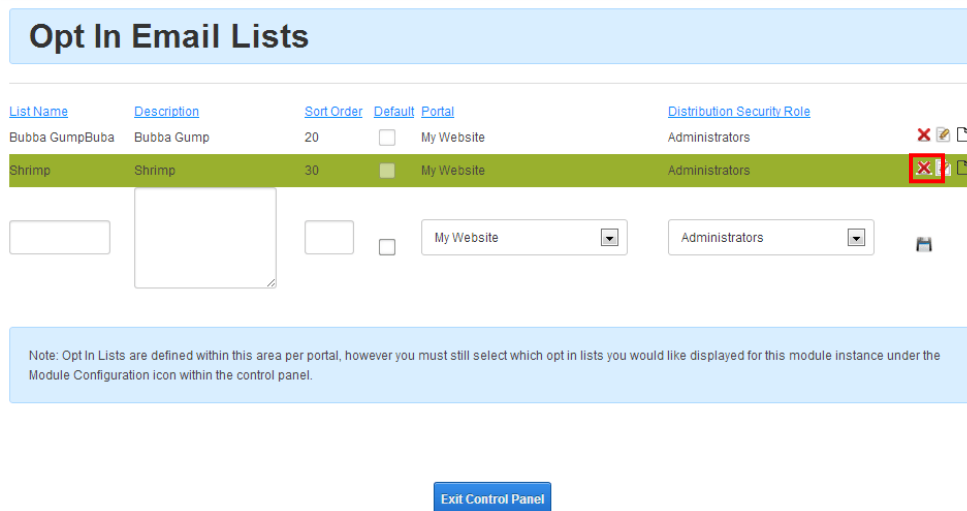
After clicking “edit” the fields for changing the desired parameters will be displayed. Inside this screen you can change any of the parameters for the Opt In List:

- **List Name** – use this field to set a different name for the Opt In List
- **Description** – use this field to set a different Opt In List description
- **Sort Order** – input field for setting the desired sort order
- **Default** – select this checkbox to make the list a default one (**note**: this checkbox is automatically checked when a subscriber is initially subscribing)
- **Distribution Security Role** – pull down menu for choosing the desired distribution security role; i.e. choosing the role which will be allowed to distribute the specific newsletters



After changing the desired parameters, click on the “Update” link in order to save the changes.

### 3.6.3 Deleting a Opt In List

In order to delete Opt In List, click on the delete icon  next to the name of the desired Opt In List.



**Opt In Email Lists**

List Name	Description	Sort Order	Default	Portal	Distribution Security Role	
Bubba GumpBuba	Bubba Gump	20	<input type="checkbox"/>	My Website	Administrators	
Shrimp	Shrimp	30	<input checked="" type="checkbox"/>	My Website	Administrators	

Note: Opt In Lists are defined within this area per portal, however you must still select which opt in lists you would like displayed for this module instance under the Module Configuration icon within the control panel.

[Exit Control Panel](#)

Figure 28: Deleting an Opt In List (step 1/2)

The following confirmation dialog will be displayed.

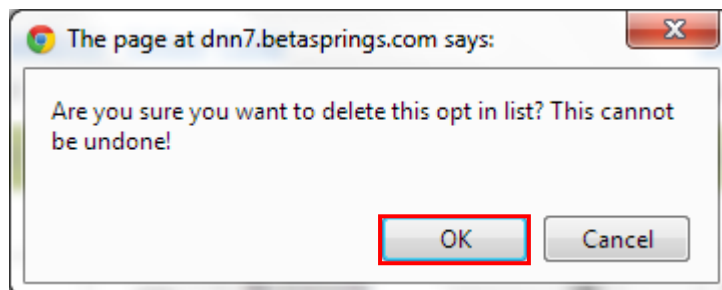


Figure 29: Deleting an Opt In List (step 2/2)

Click “OK” and the Opt In List will be deleted.

### 3.6.4 Creating a teaser


Opt-In Email Teasers allow for extended functionality when distributing newsletters or email campaigns.

Teasers (also referred to as issues, periodicals, or content snippets) can allow you to easily create content within newsletters and email campaigns by using the \$(Teaser) token within the email content.



Teasers themselves can also use the token \$(TeaserDetails) to generate a hyperlink for the user to click on which will display the full detailed teaser.

#### Tips:

- You can have as many teasers per opt in list, however only a single teaser can be set to active. Only the active teaser will be showcased within the email when utilizing this feature.
- If the user belonged to multiple opt in lists, and these additional opt in lists also had teasers, then the distribution system would generate a line break and separate the two teasers.

In order to create a new teaser, click the teaser icon  next to the desired list within the Opt In Email Lists.

## Opt In Email Lists

List Name	Description	Sort Order	Default	Portal	Distribution Security Role	
Bubba GumpBuba	Bubba Gump	20	<input type="checkbox"/>	My Website	Administrators	✕ 
Shrimp	Shrimp	30	<input checked="" type="checkbox"/>	My Website	Administrators	✕ 

My Website



Administrators


Note: Opt In Lists are defined within this area per portal, however you must still select which opt in lists you would like displayed for this module instance under the Module Configuration icon within the control panel.


Exit Control Panel


Figure 30: Creating a teaser (step 1/3)


The following page will be displayed.


Select Teaser:  - Select Teaser - 










Teaser Name: 







Teaser Title: 








Teaser Date: 






Draft Mode:  ☐

Teaser (HTML Subscribers): 










Custom Links








B
I
U
S
x<sup>2</sup>
x<sub>2</sub>

A

Arial, Helvetica
2





p

Apply CSS Cla



f

Design
HTML
Preview
Words: 0 Characters: 0

Figure 31: Creating a teaser (step 2/3)

The following options and parameters are available inside the first part of the page:

- **Select Teaser** – select “Create New Teaser (Blank)” to create a new teaser
  - **Note:** once you create a teaser or several teasers, you will be able to edit them by selecting the desired teaser from this menu; you can also use this menu to copy the existing teaser and thus use it as a template for creating a new one
- **Teaser Name** – enter the name of the teaser which will help you differentiate this teaser from all other teasers; in other words this name is not visible to the subscribers
- **Teaser Title** – enter the title of the teaser
  - **Note:** the teaser title will only appear to the users if they click the 'Teaser Detail' link which will lead them to the title and body text of the teaser
- **Teaser Date** - select the date for this teaser; the teaser date will only appear if the user clicks the 'Teaser Detail' link
- **Draft Mode** - select this checkbox to make the teaser a draft i.e. not visible to the subscribers until you finish it
- **Teaser (HTML Subscribers)** – enter the HTML version of the teaser text that will appear if you use the teaser token within a newsletter or email campaign; teasers can include the token **\$(TeaserDetails)** or **\$(TeaserDetails\_Full)** which will represent the hyperlink for the full teaser body

Teaser (Text Subscribers): ⓘ

Teaser Body: ⓘ Preview

abc
Ω
⌂
↶
↷
🔗
📄
🔗
🔗
Custom Links

Ω
📄
⌂
🔗
🔗
🔗
🔗
🔗
🔗
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🔗
Font Name
Size
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🔗

Paragraph Style
Apply CSS Cla
🔗

Design
HTML
Preview
Words: 0 Characters: 0

Figure 32: Creating a teaser (step 3/3)

The following parameters are available in the second part of the page:

- **Teaser (Text Subscribers)** – enter the text version of the teaser
- **Teaser Body** - enter the full teaser body for this teaser; the teaser body will appear within the main Opt In Email module in case the subscriber clicks the detailed link within a teaser

After setting the desired parameters, click "Save" to complete the procedure of creating a new teaser.

### 3.6.5 Activating a teaser

Since only one teaser can be active per list, you can use the pull down menu to select the teaser you wish to be active for a list.

Select Teaser: ⓘ

discount

Teaser Name: ⓘ

- Select Teaser -  
 - Create New Teaser (Blank) -  
 - Create New Teaser (Copy from Active Teaser) -  
discount

Teaser Title: ⓘ

Our new product discount

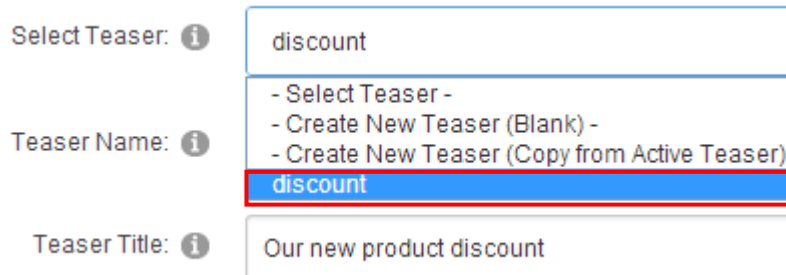
Figure 33: Activating a teaser

Select the desired teaser from the menu and click **Save** to save the changes. This teaser will from that point on be active for that list.

**Note:** you can always select a different active teaser.

### 3.6.6 Deleting a teaser

In order to delete a teaser, select the desired teaser from the “Select Teaser” menu.



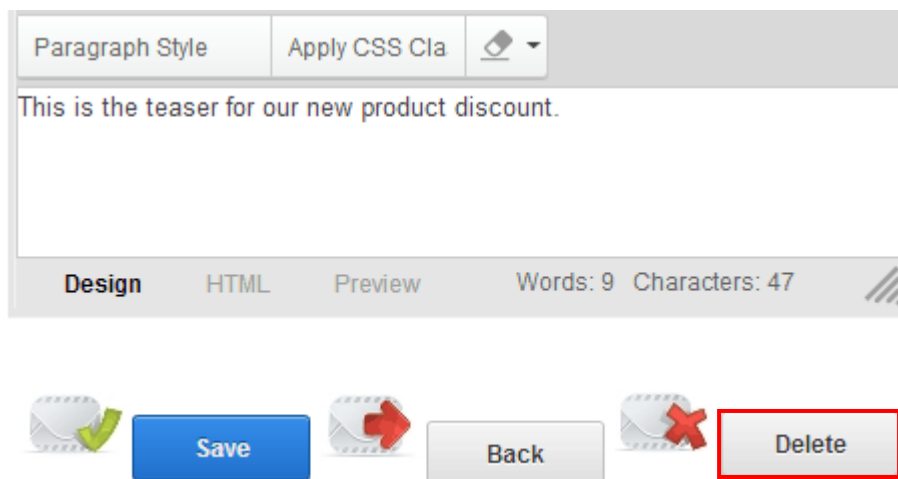
Select Teaser: ⓘ discount

Teaser Name: ⓘ - Select Teaser -  
- Create New Teaser (Blank) -  
- Create New Teaser (Copy from Active Teaser) -  
discount

Teaser Title: ⓘ Our new product discount

Figure 34: Deleting a teaser (step 1/2)

The page with the selected teaser will be displayed.



Paragraph Style Apply CSS Cla

This is the teaser for our new product discount.

Design HTML Preview Words: 9 Characters: 47

Save Back Delete

Figure 35: Deleting a teaser (step 2/2)

Click “Delete” and the teaser will be deleted.

### 3.7 Configuring the module

In order to use more advanced options for configuring the module, choose “Module Configuration” from the main menu.

## Data Springs Opt In Email Control Panel

Visibility

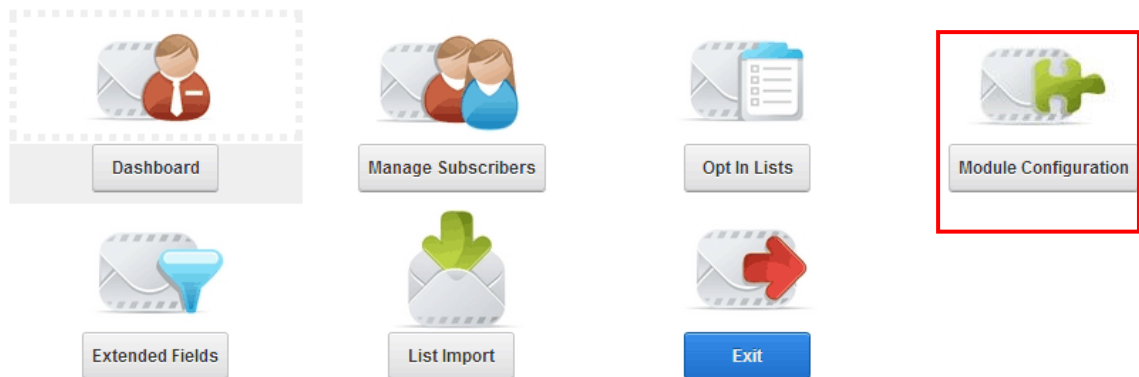


Figure 36: Choosing option "Module Configuration"

The following page will be displayed.

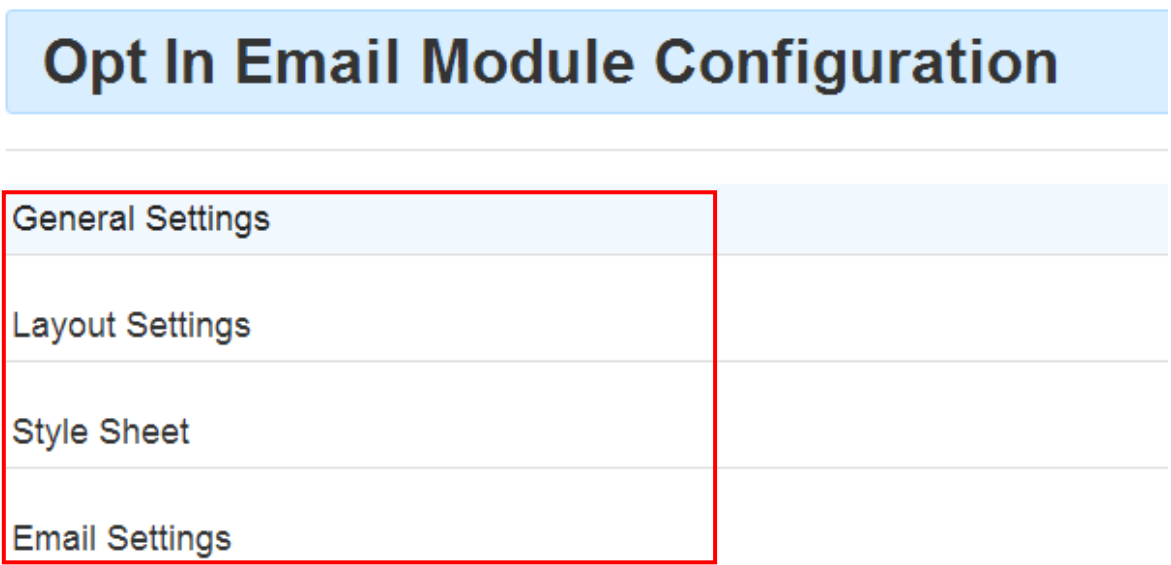


Figure 37: Options for configuring the module

The following options are available:

- **General Settings** – see section 3.7.1
- **Layout Settings** – see section 3.7.2
- **Style Sheet** – see section 3.7.3
- **Email Settings** – see section 3.7.6

### 3.7.1 Managing General Settings

In order to start managing general “Opt In Email” module settings, choose “Module Configuration” from the main menu and click the “General Settings” label.

#### General Settings

Opt In Lists Displayed (at least one required) i ☒ Bubba GumpBuba ☒ Shrimp

Extended Fields i You do not currently have any Extended Questions setup for this portal.

Request First/Last Name i ☒

Require user first / last name i ☒

Enable jQuery Watermark feature i ☒

Enable preferred email format i ☒

Auto Verify Users Email i ☐

Make name/email fields read only for updates i  ▼

Initially Hide Lists For New Subscriptions i ☐

Always send verification email i ☐

Hide Opt-In Management Feature i ☐


Notify staff of new subscriptions? i ☐


Figure 38: Managing general “Opt In Email” module settings (step 1/2)



The following parameters are available inside this screen:



- **Opt In Lists Displayed (at least one required)** – fields displaying available newsletter lists; select the list in order to enable it (see section 3.6)
  - **Note:** use the language menu to specify the list you wish to display for various languages, i.e. language versions of the site
- **Extended Fields** – select this checkbox in order to enable extended fields (see section 3.8)
- **Request First/Last Name** – use this option in order to enable first name and last name fields inside the subscription form
- **Enable preferred email format** - select to allow the subscribers to choose their preferred email format (text or html)
- **Auto Verify Users Email** – check this checkbox if you want to skip the step of verifying subscriber’s email; otherwise users will need to click on the ‘Verify Email’ link that is sent to them upon initial registration.
- **Initially Hide Lists For New Subscriptions** - select this option and the opt in lists will initially be hidden when the user chooses to subscribe
- **Hide Opt-In Management Feature** - select this option if you would like to hide and disable the feature for a subscriber to manage their subscription
- **Always send verification email** – select this checkbox if you want to use the verification email functionality


- **Notify staff of new subscriptions** – select this option if you wish to enable notifications to staff members about new subscription signup


Notification Email Address 


Hide Help Icons  ☐


Email Settings  Standard EMAIL 


Display a check all lists option within opt in / opt out subscription process?  None 


Automatically load authenticated users opt in subscription.  ☐


Disable in-line editor  ☐


Remove subscriber from system if Opted Out from all lists?  ☐

Validate subscriber is new  ☐

Disable AJAX  ☐

Disable AJAX for Control Panel  ☐

Label Suffix 

Display labels/textbox on separate lines  ☐


Force SSL within generated hyperlinks  ☐

Figure 39: Managing general “Opt In Email” module settings (step 2/2)

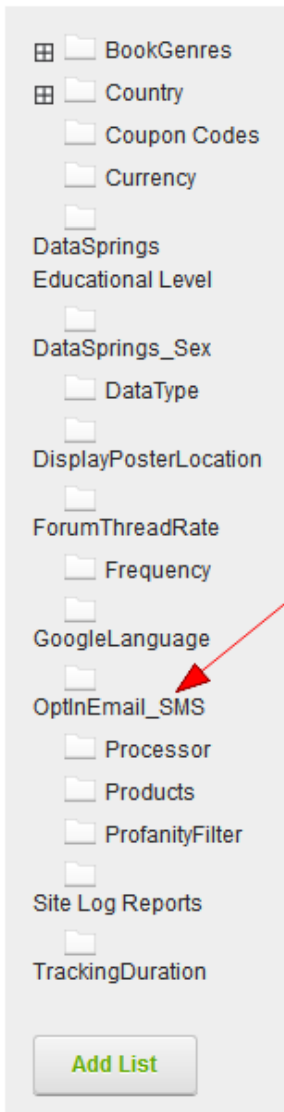
- **Notification Email Address** – enter the email address notifications should be sent to
- **Hide Help Icons** – select this checkbox in case you wish to hide the help icons that are by default displayed next to each field label
- **Email Settings** - expand the email settings to setup a “from email” and “from email name” within the module. This from email will be used when emails are distributed based on the work flow settings for initial and updated subscriptions
- **Display a “check all” lists option within opt in / opt out subscription process** – select if you would like the system to display a checkbox above or below the opt in lists. This checkbox would allow the use to either select or deselect all of the opt in lists.
- **Automatically load authenticated users opt in subscription** – select this option in case you wish to automatically load authenticated users opt in email subscription. There will automatically put the module in ‘update mode’ when the user has signed into DotNetNuke® portal
- **Disable in-line editor** – select this checkbox if you would like to disable the in-line editing ability for the administrators. The in-inline editing feature is the ability to change the layout of the opt in list by clicking on the pencil icons directly on the user-facing page
- **Remove subscriber from system if Opted Out from all lists** – select this option to automatically remove the subscriber if he has opted out of all lists
- **Validate subscriber is new** - select this option to validate that the subscriber is a new subscription; the feature should be enabled if you only have a single module instance



throughout your portal, or a single opt in list; the feature should be disabled if you want the user to be allowed to subscribe to multiple opt in lists on multiple pages of your portal

- **Disable Ajax** - select this option to disable AJAX within the user-facing portions of this module
- **Disable Ajax for Control Panel** - select this option to disable AJAX within the control panel and module configuration portions of this module
- **Label Suffix** – enter the desired label suffix in case you wish to display one
- **Display labels/textbox on separate lines** – choose this option in order to display label for the input field (First name) and input field in two different lines
- **Force SSL within generated hyperlinks** – select this option if you would like to force hyperlinks generated within the module for verification and subscription management to be HTTPS instead of HTTP
  - **note:** the list of accepted SMS carriers can be edited in Host, Lists

## Lists



BookGenres

Country

Coupon Codes

Currency

DataSprings

Educational Level

DataSprings\_Sex

DataType

DisplayPosterLocation

ForumThreadRate

Frequency

GoogleLanguage

OptInEmail\_SMS

Processor

Products

ProfanityFilter

Site Log Reports

TrackingDuration

[Add List](#)

SMS Text List

**Note:** Starting in Opt In Email 5.1, the SMS Texting feature has the optional feature to send the data to the “**Data Springs Opt In Text**” service. You can find out more information and get setup with “Opt-In Text” at [www.datasprings.com/OptInText](http://www.datasprings.com/OptInText)

In order to start managing “Opt In Email” module layout settings, click on the “+” symbol next to the “Layout Settings” label.

### 3.7.2 Managing the Layout Settings

In order to start managing the layout settings, click the “Layout Settings” label.

#### Layout Settings

Figure 40: Managing “Opt In Email” module layout settings (1/2)

The following parameters are available inside the first part of the screen:

- **Manage Layout Text** – select this radio button and choose the desired option from the pull down menu in order to define **messages that will be displayed to the users on the website** throughout the procedure of subscription and managing subscription (see section 3.7.3)
- **Manage System Emails** – select this radio button and choose the desired option from the pull down menu in order to **define email messages** that will be sent to the user throughout the procedure of subscription and managing subscription (see section 3.7.4)
- **Basic Text Box** – choose this option in order to define website messages and email messages in TXT format
- **Rich Text Editor** - choose this option in order to define website messages and email messages in HTML format and with advanced formatting features (WYSIWYG editor)

Subscription Link Button Type: ⓘ

☒ Use Subscribe Link Button☐ Use Subscribe Image Button

Subscribe Text: ⓘ

Subscribe Image Button: ⓘ

File Location:



File Name:



:

Update Subscription Image Button: ⓘ

File Location:



File Name:



Manage Subscription Link Button Type: ⓘ

☒ Use Manage Subscription Link Button☐ Use Manage Subscription Image Button

Manage Subscription Image Button: ⓘ

File Location:



File Name:



Manage Text: ⓘ

Email Subject (New Subscribers) ⓘ

Email Subject (Existing Subscribers) ⓘ

Figure 41: Managing “Opt In Email” module layout settings (2/2)

The second part of the screen allows you to setup the desired text and layout (whether it will be an image button or a text link) for the following actions:

- **Subscription Link Button Type** – choose if you wish to display text or image button for the “Subscribe” option
- **Update Subscription Image Button** – choose if you wish to display text or image button for the “Subscribe” option
- **Manage Subscription Link Button Type** – choose if you wish to display text or image button for the “Subscribe” option
- **Manage text** – specify the text for the subscription link button
- **Email Subject (New Subscribers)** – use this field to specify the email subject for the new subscribers
- **Email Subject (Existing Subscribers)** – use this field to specify the email subject for the new subscribers

After setting the desired parameters, click on the “Update Message” button in order to save the changes.

### 3.7.3 Managing Layout Text

In order to start setting up layout of the email messages sent to the subscriber throughout the procedure of subscription and managing subscription as well as header and footer inside the page, choose the desired option from the pull down menu.

## Layout Settings

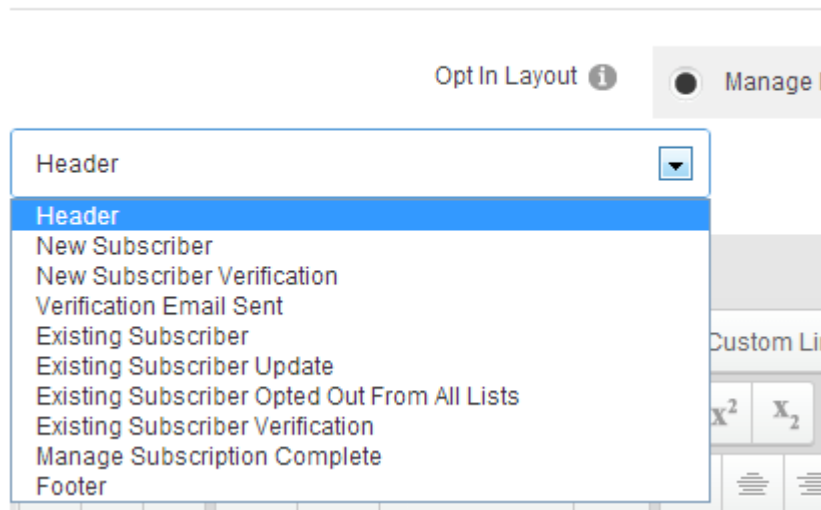


Figure 42: Managing layout of the email messages

The following email messages are available inside the pull down menu:

- **Header** – option for defining header for the “Opt In Email” module as seen by the end users on the website (see section 4.5.2)
- **New Subscriber** – instructions for the new subscriber displayed inside the page (see section 3.7.3.1)
- **New Subscriber Verification** – message displayed inside the web page after the user submits his email address (see section 3.7.3.2)
- **Verification Email Sent** – option for defining text displayed on the website after the user follows the verification link inside the email sent after submitting email address (see section 3.7.3.3)

- **Existing Subscriber** – option is used for defining text displayed on the website and instructing the user to enter his email address and click on the “Go” link in order to start managing his subscription (see section 3.7.3.4)
- **Existing Subscriber Update** - option used for defining text displayed inside the page on the website that the user visits after following the link for managing subscription (see section 3.7.3.5)
- **Existing Subscriber Opted Out From All Lists** - option used for defining text displayed inside the page on the website that the user opts out of all lists (see section 3.7.3.6)
- **Existing Subscriber Verification** – option is used for defining text displayed on the website immediately after the user enters his email address and clicks on the “Go” button (see section 3.7.3.7)
- **Manage Subscription Complete** – option is used for defining text displayed on the website immediately after the user updates the subscription information (see section 3.7.3.8)
- **Footer** – option for defining footer for the “Opt In Email” module as seen by the end users on the website (see section 4.5.4)

### 3.7.3.1 Defining “New subscriber” website text

The “New Subscriber” option is used for defining text displayed inside the website which contains instructions for the new subscribers, such as “Check the boxes of the newsletter and hit the ‘Subscribe me’ button”.

In order to define the contents of this message, select “Manage Layout Text” radio button and choose option “New Subscriber” from the pull down menu.

New Subscriber

Basic Text Box

Rich Text Editor

abc

Custom Links

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X<sub>2</sub>

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→A

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A

Arial, Helvetica

2

Normal

Apply CSS Cla

**New Subscribers**

Check the boxes of the newsletters you'd like to receive, and then hit 'Subscribe Me' at the bottom of the page.

Design

HTML

Preview

Words: 23 Characters: 123

Update message

Figure 43: Defining "New Subscriber" message

Define the desired text inside this field and click on the “Update Message” link in order to save the changes.

### 3.7.3.2 Defining “New Subscriber Verification” website text

The “New Subscriber Verification” option is used for defining text displayed on the website immediately after the user submits his email address and clicks on the “Subscribe me” button.

This is a message informing the user that he will receive an email message containing verification link he must follow in order to complete the subscription procedure.

In order to define the contents of this message, select “Manage Layout Text” radio button and choose option “New Subscriber Verification” option from the pull down menu.

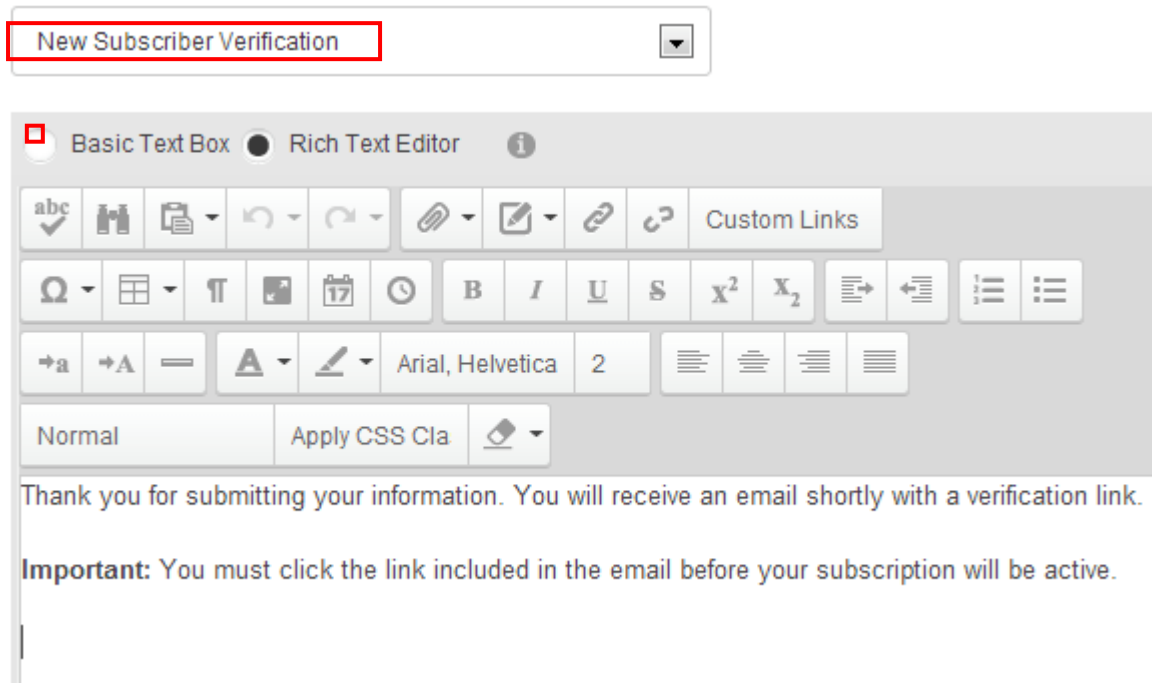


Figure 44: Defining "New Subscriber Verification" message

Define the desired text inside this field and click on the “Update Message” link in order to save the changes. The following screenshot demonstrates the location of this text inside the website.

### 3.7.3.3 Defining “Verification email sent” website text

The “Verification email sent” option is used for defining text displayed on the website after the user follows the verification link inside the email sent after submitting email address.

This is a message informing the user that the email address verification has been completed successfully.

In order to define the contents of this message, select “Manage Layout Text” radio button and choose option “Verification Email Sent” option from the pull down menu.

Verification Email Sent

Basic Text Box

Rich Text Editor

i

abc ✓

Font Name

Size

Paragraph Style

Apply CSS Cla

Verification Complete!

Thanks for signing up!

Figure 45: Defining "Verification Email Sent" message

Define the desired text inside this field and click on the “Update Message” link in order to save the changes. The following screenshot demonstrates the location of this text inside the website.

#### 3.7.3.4 Defining “Existing Subscriber” website text

The “Existing Subscriber” option is used for defining text displayed on the website and instructing the user to enter his email address and click on the “Go” link in order to start managing his subscription.

“Opt in Email” module will send the email message containing link the user should follow in order to open a page on the website where he will be able to manage their subscription information.

In order to define the contents of this message, select “Manage Layout Text” radio button and choose option “Existing Subscriber” option from the pull down menu.

Existing Subscriber Update

Basic Text Box

Rich Text Editor

abc

Custom Links

B

I

U

S

X<sup>2</sup>

X<sub>2</sub>

→a

→A

=

A

Font Name

Size

Paragraph Style

Apply CSS Cla

### Update Subscriptions

Check the boxes of the newsletters you'd like to receive, then hit 'Update Subscription' at the bottom of the page.

Figure 46: Defining "Existing Subscriber" message

Define the desired text inside this field and click on the “Update Message” link in order to save the changes. The following screenshot demonstrates the location of this text inside the website.

### 3.7.3.5 Defining “Existing subscriber update” website text

The “Existing Subscriber” option is used for defining text displayed inside the page on the website that the user visits after following the link for managing subscription.

This “Manage” link is sent to the user in an email message after he enters his email address and clicks on the “Go” button (**note:** see section 3.7.4.2 for further instructions on defining this email message).

In order to define the contents of this message, select “Manage Layout Text” radio button and choose option “Existing Subscriber Update” option from the pull down menu.

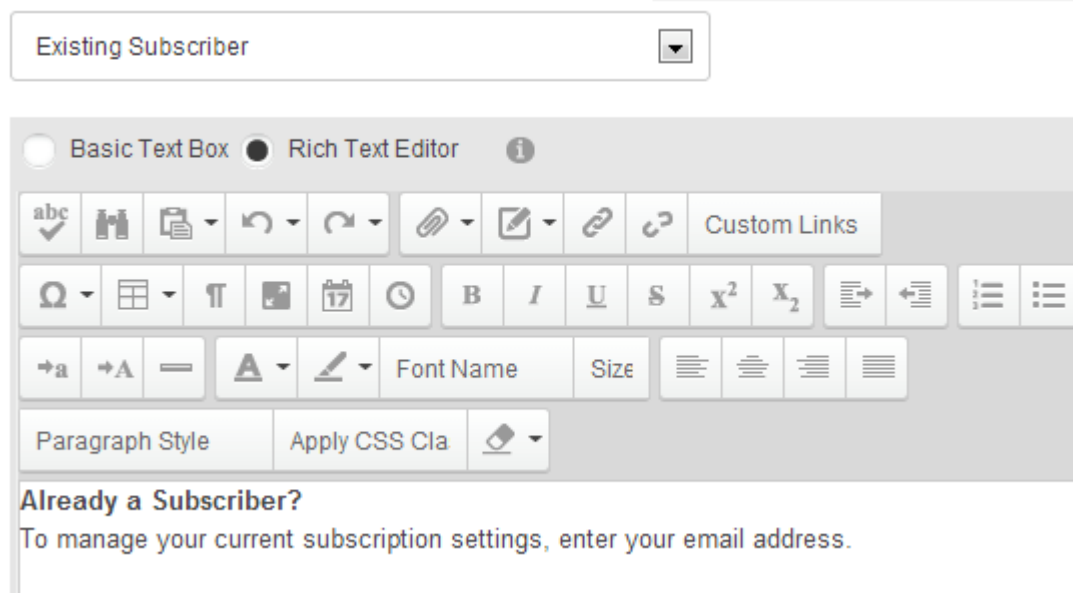


Figure 47: Defining "Existing subscriber update" message

Define the desired text inside this field and click on the “Update Message” link in order to save the changes. The following screenshot demonstrates the location of this text inside the website.

### 3.7.3.6 Defining the Text in Case the Subscriber Opted Out From All Lists

The “Existing Subscriber Opted out from All Lists” option is used for defining text displayed to the users after they choose to opt out of all lists.

In order to define the contents of this message, select “Manage Layout Text” radio button and choose option “Existing Subscriber Opted out from All Lists” option from the pull down menu.



[illegible]

Figure 48: Defining the Text in Case the Subscriber Opted Out From All Lists

### 3.7.3.7 Defining “Existing subscriber verification” website text

The “Existing Subscriber Verification” option is used for defining text displayed on the website immediately after the user enters his email address and clicks on the “Go” button.

This text informs the user that he will receive an email message containing link that he is supposed to follow in order to visit the page on the website where he will be able to manage his subscription information (**note:** see section 3.7.4.2 for further information on how to define this email message)

In order to define the contents of this message, select “Manage Layout Text” radio button and choose option “Existing Subscriber Verification” option from the pull down menu.

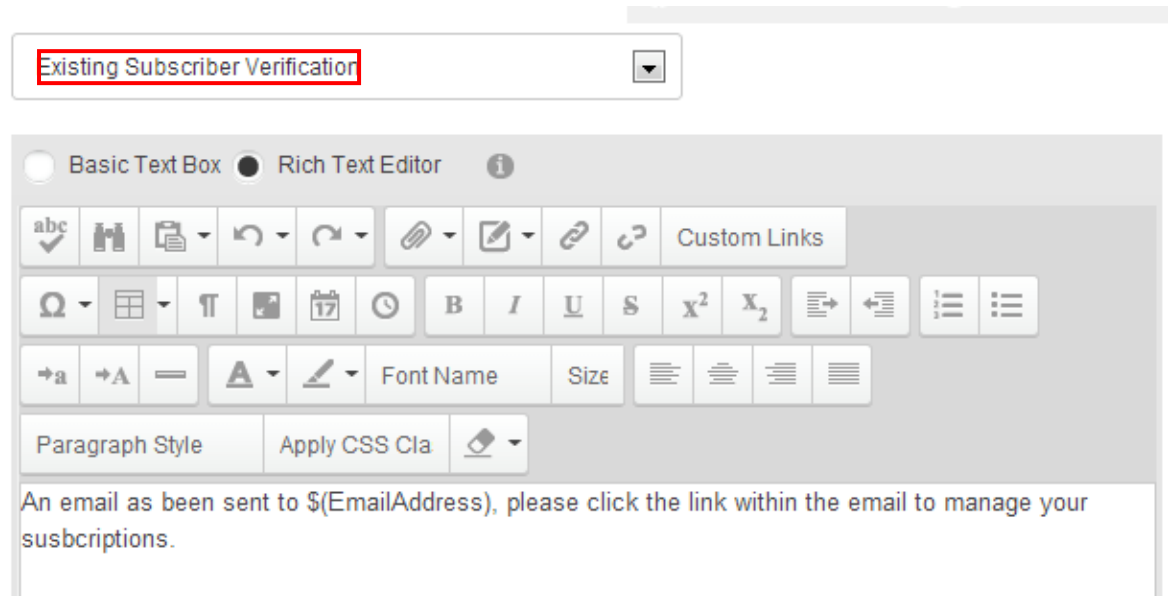


Figure 49: Defining "Existing Subscriber Verification" message

Define the desired text inside this field and click on the “Update Message” link in order to save the changes.

**Note:** you can use the variables in order to personalize this message by using parameters user supplied during the subscription process.

The following is the list of parameters which can be used:

- **\$(FirstName)** – enter this parameter in the email in order to address the user by his first name (e.g. “Dear **\$(FirstName)**” would be “Dear John”)
- **\$(LastName)** - enter this parameter in the email in order to address the user by his last name (e.g. “Dear Mr. **\$(LastName)**” would be “Dear Mr. Smith”)
- **\$(EmailAddress)** - enter this parameter in order to display user’s email address inside the email message (e.g. “ **\$(EmailAddress)**” would be “johnsmith@address.com”)
- **\$(DateTime)** – enter this parameter in order to display date and time
- **\$(Subscription)** – enter this email in order to display the newsletter categories this user is already subscribed to (see section 0 for further information)

The following screenshot demonstrates the location of this text inside the website.

Define the desired text inside this field and click on the “Update Message” link in order to save the changes. The following screenshot demonstrates the location of this text inside the website.

### 3.7.3.8 Defining “Manage Subscription Complete” website text

The “Manage Subscription Complete” option is used for defining text displayed on the website immediately after the user updates the subscription information.

This text informs the user that the updates to his subscription have been saved successfully.

In order to define the contents of this message, select “Manage Layout Text” radio button and choose option “Manage Subscription Complete” option from the pull down menu.

Figure 50: Defining "Manage Subscription Complete" message

### 3.7.4 Managing System Emails

System emails are sent to the user during the course of subscription procedure as well as when the user verifies his email address and manages his subscription settings.

In order to start managing system emails for “Opt In Email” module, select option “Manage System Emails” and choose the desired email from the pull down menu.

## Layout Settings

Figure 51: Setting up system emails

The following system emails are available inside the pull down menu:

- **New Email Verification Message** – email sent to the user after he supplies his email address on the website and clicks on the “Subscribe” link; this email contains verification link user is supposed to follow in order to verify his email address and complete the subscription (see section 3.7.4.1)
- **Existing Email Verification Message** – email sent to the already subscribed after he supplies his verified email in order to receive a link for managing his subscription; this email contains a link which the user has to follow in order to visit the page on the website where he can manage his subscription information (**e.g.** modify newsletter categories) – see section 3.7.4.2
- **Existing Subscription Updated Message** – email sent to the user as a confirmation that his subscription information has been updated successfully (**e.g.** that the user successfully modified newsletter categories he is subscribed to); this email sent after the user follows the link for managing subscription information and saves the changes (see section 3.7.4.3)
- **Existing Subscriber Opted Out From All Lists** – email sent to the user as a confirmation that he has successfully unsubscribed from all lists (see section 3.7.4.4)
- **Staff Notified of New Subscription** – email sent to the staff notifying them about the new subscription (see section 3.7.4.5)
- The second part of the screen allows you to setup the desired text and layout (whether it will be an image button or a text link) for the following actions:
  - **Subscribe** – choose if you wish to display text or image button for the “Subscribe” option (see Figure 52)
  - **Update Subscription** – choose if you wish to display text or image button for the “Subscribe” option (see Figure 53)
  - **Manage Subscription** – choose if you wish to display text or image button for the “Subscribe” option (see Figure 54)


## Join Our Mailing List...


Get current news and events the easy way! Select the newsletters you would like to receive or enter your email address to view/modify your subscription settings.


### New Subscribers

Check the boxes of the newsletters you'd like to receive, then hit 'Subscribe Me' at the bottom of the page.

- ☒ **DNN Module Updates** Get the latest on DNN Modules updates and promotions
- ☒ **Sales Promotions** Get the latest scoop on the promotional sales and discounts
- ☐ **SharePoint Web Parts** Get the latest on our SharePoint Web Part release information

First Name 

Last Name 

Email Address 

**Subscribe Me**

Figure 52: Example of the "Subscribe me" button

### Update Subscriptions

Check the boxes of the newsletters you'd like to receive, then hit 'Update Subscription' at the bottom of the page.

- ☐ **DNN Module Updates** Get the latest on DNN Modules updates and promotions
- ☐ **Sales Promotions** Get the latest scoop on the promotional sales and discounts
- ☐ **SharePoint Web Parts** Get the latest on our SharePoint Web Part release information

First Name ⓘ

Chad

Last Name ⓘ

Nash

Email Address ⓘ

cnash@datasprings.com

**Update Subscription**

Figure 53: Example of the "Update Subscription" button

Email Address ⓘ

**Subscribe Me**

Already a Subscriber?

To manage your current subscription settings, enter your email address.

**We value your privacy.** We will never rent, sell, or otherwise use your email address for anything other than the services you specifically request. Period.

Users can submit their email address here to receive an email with a hyperlink to update their subscription and manage the opt in lists that they are subscribed to.

Figure 54: Example of the "Go" button

#### 3.7.4.1 Defining "New Email Verification Message" email message

The "New Email Verification Message" is an email sent to the user after he supplies his email address on the website and clicks on the "Subscribe" link.

This email contains verification link that the user is supposed to follow in order to verify his email address and complete the subscription.

In order to start modifying this email message, select "Manage System Emails" and choose option "New Email Verification Message" from the pull down menu.

New Email Verification Message

Basic Text Box Rich Text Editor

abc [undo] [redo] [link] [unlink] [Custom Links] [text color] [background color] [bold] [italic] [underline] [strikethrough] [superscript] [subscript] [bulleted list] [numbered list] [indent] [outdent]

Ω [table] [text color] [background color] [font size] [font family] [font weight] [font style] [font color] [font background color] [font size] [font family] [font weight] [font style] [font color] [font background color]

p Apply CSS Cla [font color] [font background color]

Dear \$(FirstName),

Thank you for Opting to Beta Springs. Here are our newsletters you have opted for:

\$(Subscription)

In order to verify your email address and your subscription, please click the link below.

Figure 55: New Email Verification Message

You can modify the contents of this email by using the rich text editor. After changing the contents of this email, click on the “Update Message” button in order to save the changes.

#### 3.7.4.2 Defining “Existing Email Verification Message” email message

The “Existing Email Verification Message” email is sent to the already subscribed after he supplies his verified email on the website.

This email contains a link which the user has to follow in order to visit the page on the website where he can manage his subscription information (**e.g.** modify newsletter categories).

In order to start modifying this email message, select “Manage System Emails” and choose option “Existing Email Verification Message” from the pull down menu.

Figure 56: Existing Email Verification Message

You can modify the contents of this email by using the rich text editor. After changing the contents of this email, click on the “Update Message” button in order to save the changes.

**Note:** you can use the variables in order to personalize these messages by using parameters user supplied during the subscription process.

The following is the list of parameters which can be used:

- **\$(FirstName)** – enter this parameter in the email in order to address the user by his first name (e.g. “Dear **\$(FirstName)**” would be “Dear John”)
- **\$(LastName)** - enter this parameter in the email in order to address the user by his last name (e.g. “Dear Mr. **\$(LastName)**” would be “Dear Mr. Smith”)
- **\$(EmailAddress)** - enter this parameter in order to display user’s email address inside the email message (e.g. “ **\$(EmailAddress)**” would be “johnsmith@address.com”)
- **\$(DateTime)** – enter this parameter in order to display date and time
- **\$(Subscription)** – enter this email in order to display the newsletter categories this user is already subscribed to (see section 0 for further information)
- **\$(ManageURL)** – this parameter is a link the user will follow in order to return to the page on the website where he will be able to modify his subscription information (e.g. change the newsletter categories he is subscribed to)

### 3.7.4.3 Defining “Existing Subscription Updated Message” email message

The “Existing Subscription Updated Message” email is sent to the user as a confirmation that his subscription information has been updated successfully (e.g. that the user successfully modified newsletter categories he is subscribed to).

This email is sent after the user follows the link for managing subscription information, modifies his subscription and saves the changes (section 3.7.4.3).

In order to start modifying this email message, select “Manage System Emails” and choose option “Existing Subscription Updated Message” from the pull down menu.

The screenshot shows the email editor interface. At the top, a dropdown menu is set to "Existing Subscription Updated Message". Below this, there are two tabs: "Basic Text Box" (unselected) and "Rich Text Editor" (selected). The Rich Text Editor toolbar includes various icons for text formatting (bold, italic, underline, strikethrough, text color, background color), alignment (left, center, right, justified), indentation, bulleted and numbered lists, link management, and a "Custom Links" button. Below the toolbar, the email content is displayed in a text area. The content includes a greeting "Dear \$(FirstName),", a confirmation message "Your subscriptions have been saved.", a statement "You are currently subscribed to:", a variable placeholder "\$(\$Subscription)", a closing "Thanks again,", and a signature "My Website".

Figure 57: Existing Subscription Updated Message

You can modify the contents of this email by using the rich text editor. After changing the contents of this email, click on the “Update Message” button in order to save the changes.

**Note:** you can use the variables in order to personalize these messages by using parameters user supplied during the subscription process.

The following is the list of parameters which can be used:

- **\$(FirstName)** – enter this parameter in the email in order to address the user by his first name (e.g. “Dear **\$(FirstName)**” would be “Dear John”)
- **\$(LastName)** - enter this parameter in the email in order to address the user by his last name (e.g. “Dear Mr. **\$(LastName)**” would be “Dear Mr. Smith”)
- **\$(EmailAddress)** - enter this parameter in order to display user’s email address inside the email message (e.g. “ **\$(EmailAddress)**” would be “johnsmith@address.com”)
- **\$(DateTime)** – enter this parameter in order to display date and time
- **\$(Subscription)** – enter this email in order to display the newsletter categories this user is already subscribed to (see section 0 for further information)

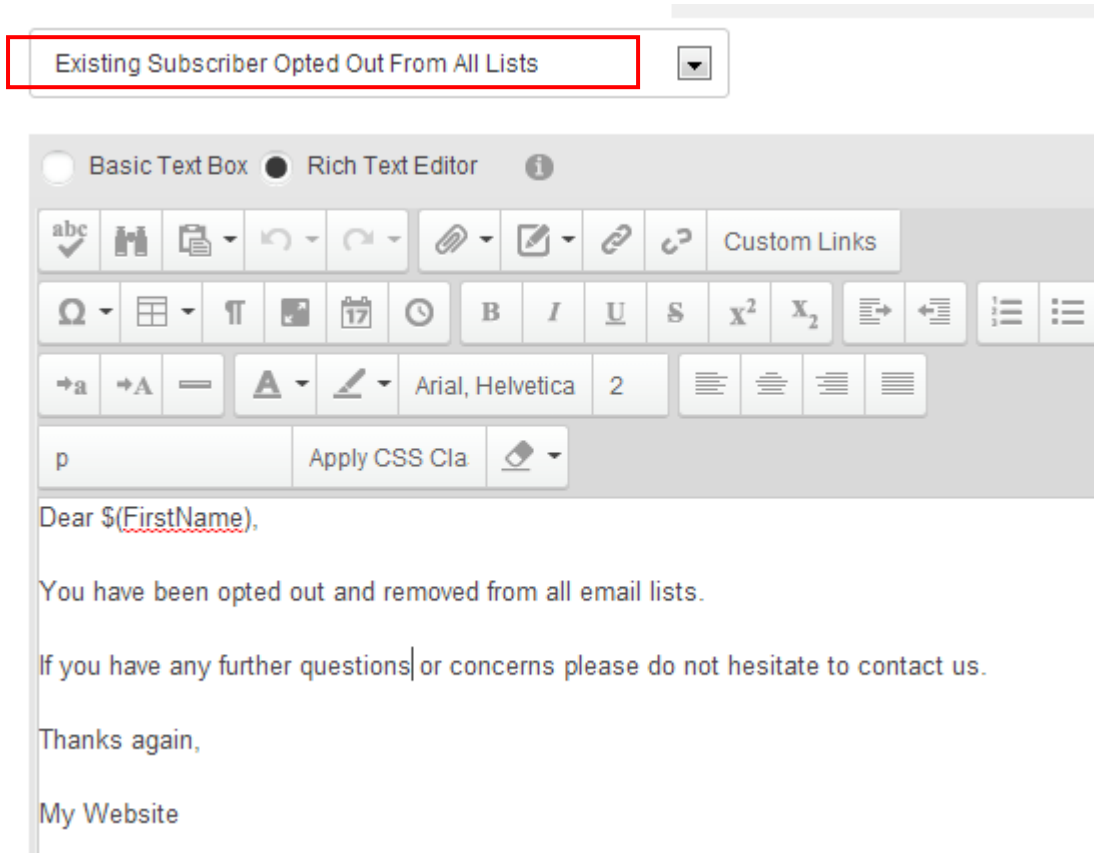


#### 3.7.4.4 Existing Subscriber Opted Out From All Lists

The “Existing Subscriber Opted out from All Lists” email is sent to the user as a confirmation that he has successfully unsubscribed from all lists.

This email is sent after the user follows the link for managing subscription information, modifies his subscription and saves the changes (section 3.7.4.3).

In order to start modifying this email message, select “Manage System Emails” and choose option “Existing Subscriber Opted out from All Lists” from the pull down menu.



The screenshot shows a web-based email editor. At the top, a dropdown menu is open, displaying "Existing Subscriber Opted Out From All Lists" with a red rectangular highlight around it. Below the dropdown is a rich text editor toolbar with various icons for text formatting (bold, italic, underline, strikethrough), alignment, indentation, and links. The editor area contains the following text:

Dear \$(FirstName),

You have been opted out and removed from all email lists.

If you have any further questions|or concerns please do not hesitate to contact us.

Thanks again,

My Website

Figure 58: Existing Subscriber Opted Out From All Lists

Define the contents of the verification email inside this screen and click on the “Update Message” to save the changes.

### 3.7.4.5 Setting up “Staff Notified of New Subscription”

In order to start setting up “Staff Notified of New Subscription”, which is a message sent to the staff notifying them about the new subscription, select option “Manage System Emails” and choose “Staff Notified of New Subscription” from the pull down menu.

Staff Notified of New Subscription

Basic Text Box Rich Text Editor

abc [Icons] Custom Links

Ω [Icons] Redo (CTRL+Y) U S x<sup>2</sup> x<sub>2</sub> [Icons]

→a →A [Icons] Font Name Size [Icons]

Paragraph Style Apply CSS Cla [Icon]

Administrator,

A new subscriber has just opted into the newsletter system. You can check their subscription information below:

Email: \$(EmailAddress)

Subscription:

\$(Subscription)

Figure 59: Setting new email verification message

Define the contents of the verification email inside this screen and click on the “Update Message” to save the changes.

**Note:** you can use the variables in order to personalize this message by using parameters user supplied during the subscription process.

The following is the list of parameters which can be used:

- **\$(FirstName)** – enter this parameter in the email in order to address the user by his first name (e.g. “Dear **\$(FirstName)**” would be “Dear John”)
- **\$(LastName)** - enter this parameter in the email in order to address the user by his last name (e.g. “Dear Mr. **\$(LastName)**” would be “Dear Mr. Smith”)
- **\$(EmailAddress)** - enter this parameter in order to display user’s email address inside the email message (e.g. “ **\$(EmailAddress)**” would be “johnsmith@address.com”)
- **\$(DateTime)** – enter this parameter in order to display date and time
- **\$(Subscription)** – enter this email in order to display the newsletter categories this user is already subscribed to

### 3.7.5 Editing the Stylesheet

The “Opt In” module allows you to modify the contents of the CSS file thus affecting the layout of module. In order to start editing the style sheet, click on the “+” symbol next to the “Style Sheet” label.

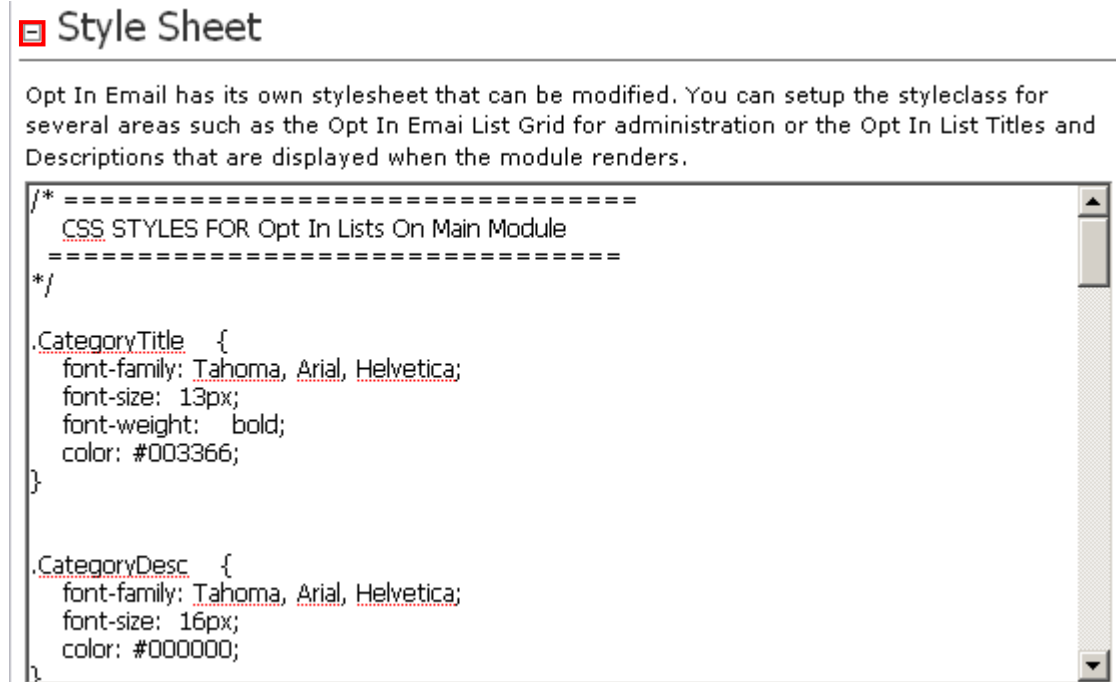


Figure 60: Editing the Stylesheet

### 3.7.6 Managing Email Settings

In order to start managing the email settings, click on the “+” symbol next to the “Email Settings” label.

Email Settings

---

From Email Name ⓘ

From Email Address ⓘ

Figure 61: Managing Email Settings

The following options are available:

- **From Email Name** - enter the name which will be displayed in the “From” field for the recipients. If no name is entered the email address will appear in the “From” field
- **From Email Address** - enter the “From” email address for the Opt In Email System

After setting the desired parameters, click on the “Update Configuration” link to save the changes.

### 3.8 Managing Extended Fields

The purpose of extended fields is to offer the possibility of including additional questions during subscription.

**For example:** let's say you also want to collect the user's zip code? Or maybe you would like to ask the user if they are a Job Seeker or a Job Employer?

When you export the list you can filter (in excel) based on these additional extended question. One primary feature is you can collect as much information from the user during the opt in process as the you would like because you can add as many or as few extended fields.

In order to start managing extended fields, choose option "Manage Extended Fields" from the main menu.

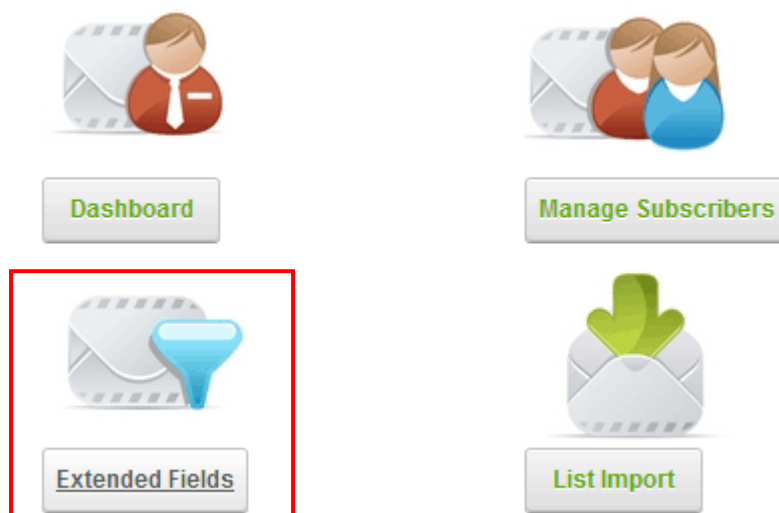


Figure 62: Choosing option "Manage Extended Fields"

The following screen will be displayed.

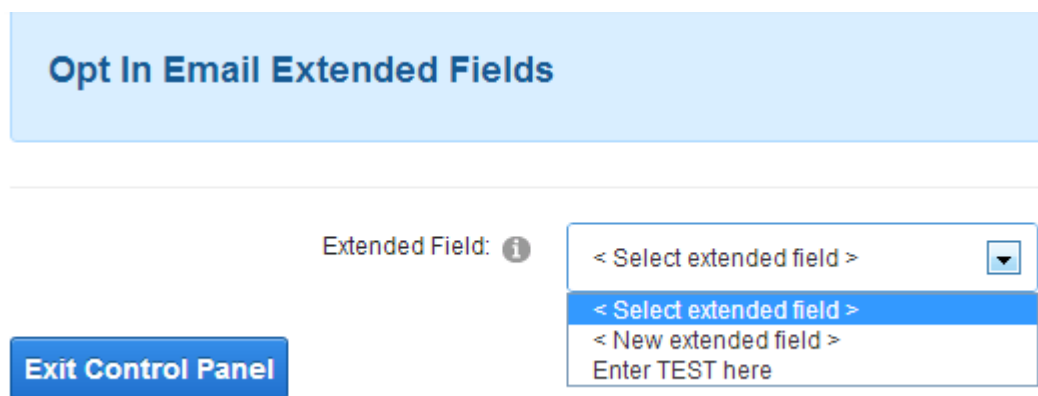


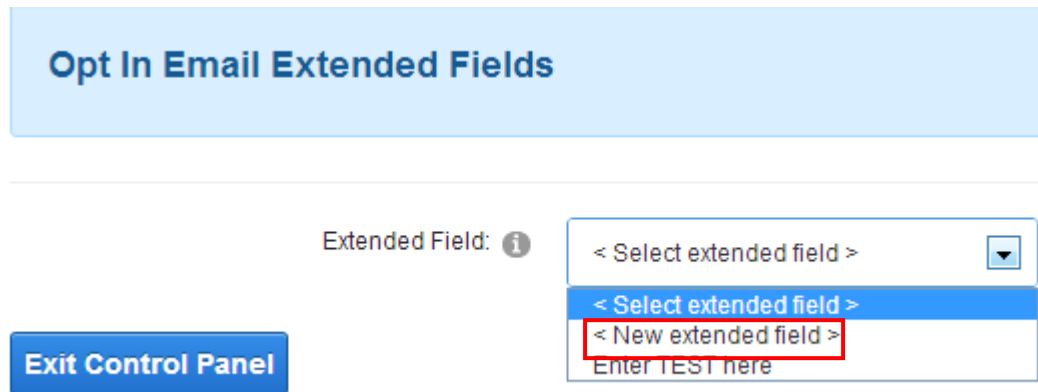
Figure 63: Managing extended fields

The following options are available inside this screen:

- **New Extended Field** – option for creating a new extended field (see section 3.8.1)
- **Existing Extended Field (e.g. Zip Code)** – choose this option to edit (see section 3.8.2) or delete an existing extended field (see section 3.8.3)

### 3.8.1 Creating a new extended field

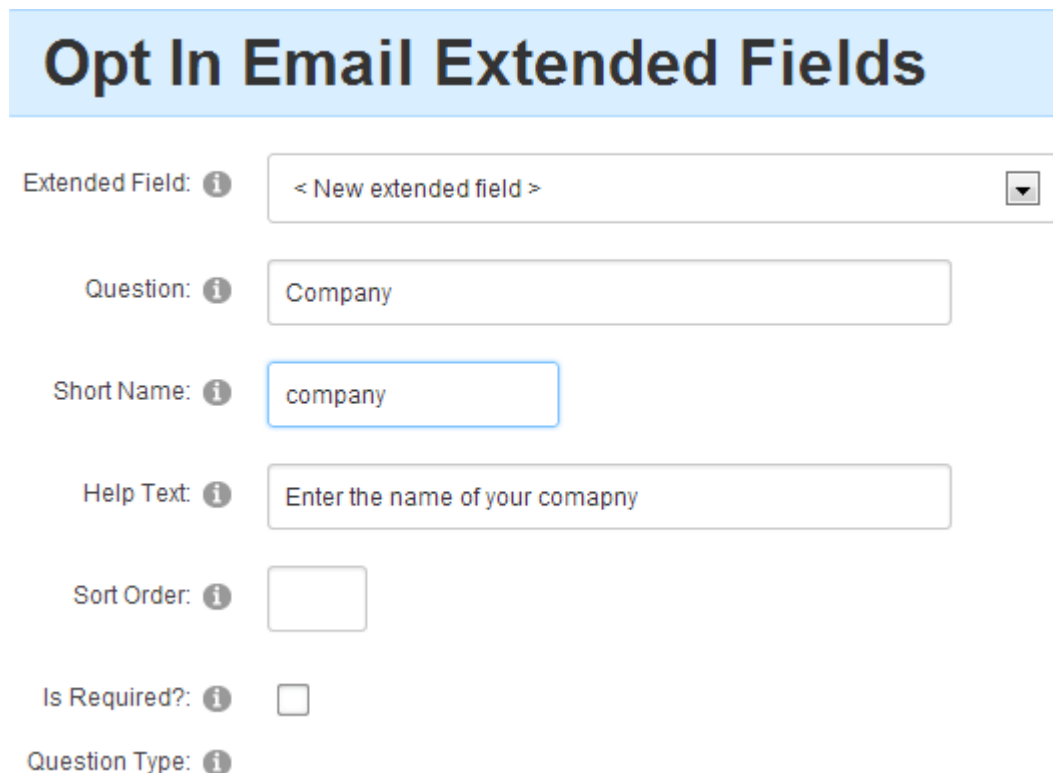
In order to create a new extended field, choose option “New Extended Field” from the pull down menu.



The screenshot shows the 'Opt In Email Extended Fields' interface. On the left is a blue button labeled 'Exit Control Panel'. To its right is the 'Extended Field:' label with an information icon. A dropdown menu is open, showing options: '< Select extended field >', '< Select extended field >', '< New extended field >' (highlighted with a red box), and 'Enter TEST here'.

Figure 64: Creating a new extended field (1/2)

The following screen will be displayed.



The screenshot shows the 'Opt In Email Extended Fields' interface with the following fields:

- Extended Field:** A dropdown menu showing '< New extended field >'.
- Question:** A text input field containing 'Company'.
- Short Name:** A text input field containing 'company'.
- Help Text:** A text input field containing 'Enter the name of your comapny'.
- Sort Order:** An empty text input field.
- Is Required?:** A checkbox that is currently unchecked.
- Question Type:** A dropdown menu with an information icon.

Figure 65: Creating a new extended field (step 2/2)

The following are the parameters inside this screen:

- **Question** – input field for entering the question, i.e. the information requested from the user (e.g. “Company” or “Zip Code”)
- **Short Name** - enter a short name for this field; short names are used for email and SQL parameters
- **Help Text** - enter the text which will be displayed once the user clicks the help icon for this question
- **Sort Order** – set the desired sort order for this question (the higher the number the further down the list the field will be displayed)

- **Question type** – select the desired type of question by choosing one of the following elements:
  - TextBox
    - Singleline textbox (Long)
    - Singleline textbox (Short)
    - Multiline Textbox
  - Checkbox
  - Combo Box
  - Radio Buttons (Options)

After setting the desired parameters, click on the “Update Question” and the new extended field will be created.

### 3.8.2 Editing an extended field


In order to edit the desired extended field, choose the desired field from the pull down menu.


The screenshot shows a light blue header bar with the text "Opt In Email Extended Fields". Below this, there is a section with a label "Extended Field:" followed by an information icon (i). To the left of this section is a blue button labeled "Exit Control Panel". To the right of the label is a dropdown menu. The dropdown menu is open, showing four options: "< Select extended field >", "< Select extended field >", "< New extended field >", and "Company". The "Company" option is highlighted in blue. Below the "Company" option is a text input field containing the text "Enter TEST here".


Figure 66: Editing an extended field (step 1/2)


The screen with the parameters set for this field will be displayed.


## Opt In Email Extended Fields


Extended Field: 


Question: 

Short Name: 


Help Text: 

Sort Order: 

Is Required?:  ☒

Question Type: 

☒ Textbox    ☐ Checkbox    ☐ Combo box    ☐ Radio Button (Options)

Field Options:  ☒ Singleline textbox (Long)



 [Update question](#)  [Delete question](#)


Figure 67: Editing an extended field (step 2/2)

Change the desired parameters and click on the “Update Question” link in order to save the changes.


### 3.8.3 Deleting an extended field

In order to delete the desired extended field, choose the desired field from the pull down menu. The following page will be displayed.


**Opt In Email Extended Fields**

Extended Field: 


Company

Question: 


Company

Short Name: 


company

Help Text: 


Enter the name of your company

Sort Order: 


0

Is Required?: 


☒

Question Type: 

☒ Textbox ☐ Checkbox ☐ Combo box ☐ Radio Button (Options)

Field Options: 

☒ Singleline textbox (Long)

 **Update question**


 **Delete question**

Figure 68: Deleting an extended field

Click on the “Delete Question” and the chosen field will be deleted.



### 3.9 Importing Opt In List

The “Opt In Email” module offers the possibility of importing the list of subscribers so it would be easier for you to setup users in case you already have a list of email addresses.

In order to start importing the list, choose option “Opt In List Import” from the main menu.

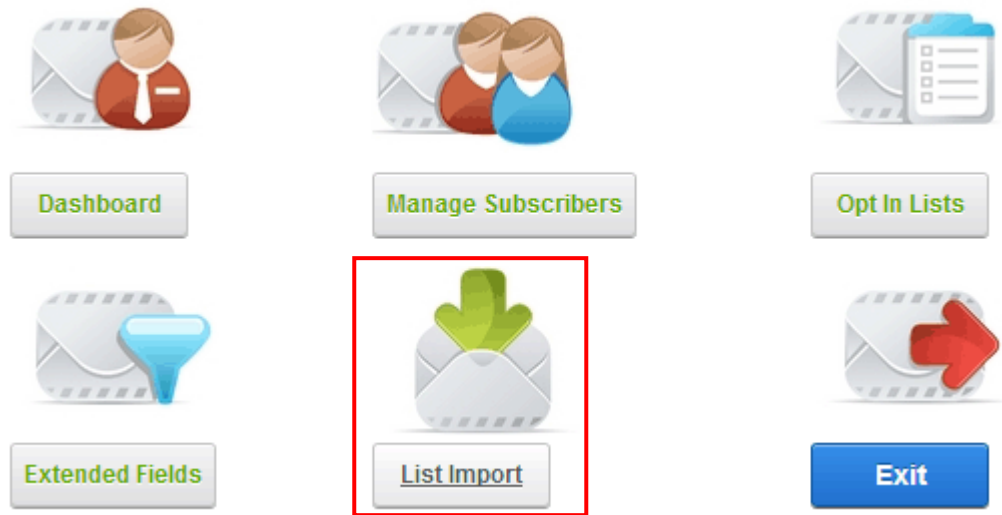


Figure 69: Importing Opt In List (step 1/2)

The following screen will be displayed.

## Opt In Email List Import

Welcome to the Opt In Email import wizard. This wizard can import subscribers into an opt in email distribution list from either a flat file (XLS/XLSX file or comma delimited .csv file), DNN user security roles, a custom SQL query, or by importing from an existing list. Please select from the options below, and follow specific import steps from instructions on the right. For specific import details please review the user guide on [www.datasprings.com](http://www.datasprings.com)



Opt In List(s): 1

☐ Bridges Test List☐ Opt In Email Trial Download☐ COLL6 TRNGPROMO☐ Dynamic Views Trial Download☐ Connections 2010☐ Dynamic User Directory Trial Download☐ DNN Module Updates☐ Dynamic Login Trial Download☐ DS Test List☐ Renewal Reminder Trial Download

Download

☐ Dynamic Forms Trial Download☐ Dynamic Registration Trial Download

Import Option: 1

☒ CSV / XLS / XLSX File ☐ User Role(s)☐ SQL Query ☐ Opt In Email List

Browse: 1

Choose File

Upload File

Ignore First Line In File: 1

☐

Import

Exit Control Panel

1

Select the opt in list(s) you would like to import subscribers to be

2

Select the file you would like to import. The format of the file needs to be in Comma or XLS / XLSX Excel file columns in the order first name, email address. You can import extended fields, each extended field will be based on the extended fields: if you import a 4th column this the first extended field within the 3 are reserved for first name, last name, email address. Before you can upload the file you must choose the 'Upload File' button.

3

Select if the first line within the file should be ignored. This is correct for files which include the column name in the import definition (for example: first name, last name, email address).

Figure 70: Importing Opt In List (step 2/2)

The following parameters are available inside this screen:

- **Opt In List(s)** – this is a list of all defined newsletter categories which you have previously created (see section 3.6.1); select the categories you wish to import users to
- **Import Option** – choose the desired import option
  - **CSV File** – select this radio button in case the list you are importing is in CSV format (Excel file).
    - **Note:** You can now import extended fields from within a CSV file. The import file should include the extended columns and will be based on the extended fields sort order (So if the fields were zip code with a sort order of 5 and city with a sort order of 10, you should include the zip code before the city in the import file).
    - **Example Format: Firstname, lastname, email, zipcode, city**
  - **User Role(s)** – select this radio button in case you would like to import users directly from DotNetNuke® Users based on their role; you can run this import process as many times as you would like, the system will only add new unique users to the system.

- **SQL Query** – select this radio button in case you would like to import users from a SQL query. Make sure you are importing at least the EmailAddress column within your SQL query, you can optionally import FirstName and a LastName column. Columns names must be spelled exactly as FirstName, LastName, and EmailAddress.
  - **Note:** You can now import extended fields from within your SQL Query. The query should include columns which represent the 'short field name' of the extended field
- **List Import** – this feature will allow you to add subscribers from one list into another
  - Example: Let's say you have a new opt in list called 'My Total List'. You could import all of the subscribers from 'Another List A' and/or 'Another List B' to be part of this opt in list
- **Browse** – click on the browse button to locate the import file on your PC
- **Ignore First Line In File** – If your CSV import file includes headers/column names for the first line then checking this box will ignore the first line of the file.

After setting the desired parameters, click on the "Import" in order to import the list of users.

### 3.10 Deleting "Opt In Email"

In order to delete "Opt In Email" part, choose option "Delete" from the main menu.

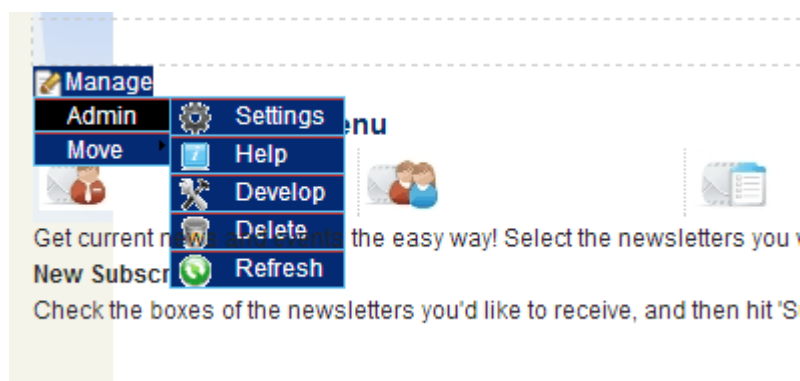


Figure 71: Deleting a viewer part of the module (step 1/2)

The confirmation dialog will be displayed.

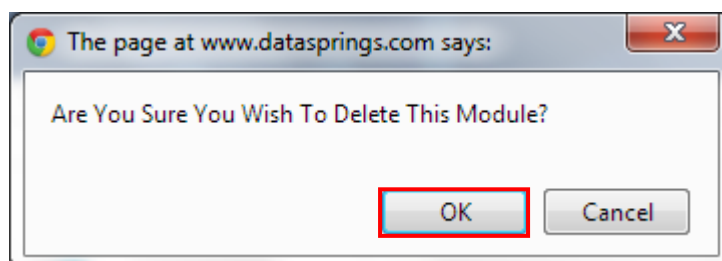


Figure 72: Deleting a viewer part of the module (step 2/2)

Click on the "OK" button and the module will be deleted.

## 4 SIMPLE OPT IN MODULE

“Simple Opt In Module” a simple version of the “Opt In Email” module. You can use this module if you do not want the users to be forced into checking their opt in categories, or if you want a simple version on some other location on the site from the main version.

The “Simple Opt In Module” will not display the lists the user can choose, and the user cannot manage their subscription etc.

It is also required that you setup within the configuration the location of the main “Opt In Email” module, this is necessary for functionality such as the ability for the user to verify their email address etc.

### 4.1 Adding “Simple Opt In” module to the page

In order to add “Simple Opt In” module to the page, click **Add Existing Module** from the **Modules** menu in the main navigation.

Choose **Opt In – Simple Op in** from the list of modules and drag it to the desired location in the page.

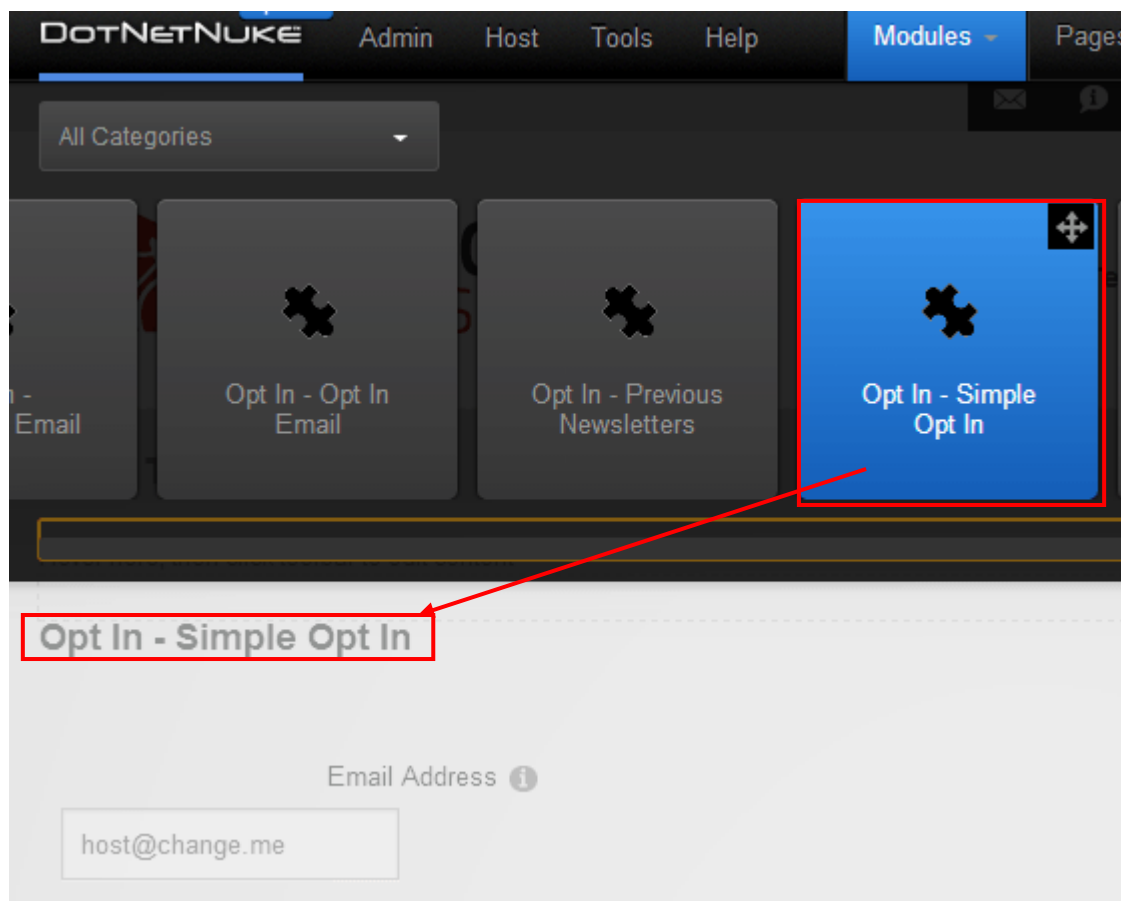


Figure 73: Adding “Simple Opt In” module to the page

Once you release it in the desired location, the “Simple Opt In” module will be added to the page.

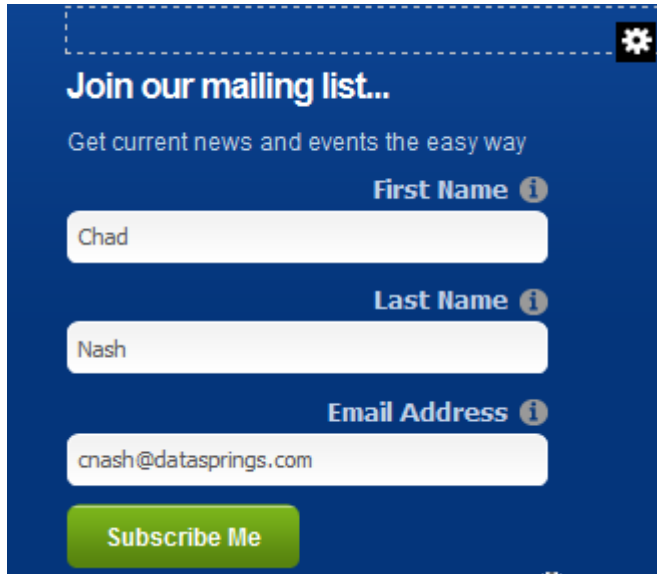
A blue rectangular module titled "Join our mailing list.." with a dashed border and a gear icon in the top right corner. Below the title is the text "Get current news and events the easy way". The form contains three input fields: "First Name" with the value "Chad", "Last Name" with the value "Nash", and "Email Address" with the value "cnash@datasprings.com". Each field has an information icon (i) to its right. At the bottom is a green "Subscribe Me" button.

Figure 74: Adding Simple Opt In Module to the page

Click on the arrow next to the name of the module to open the main menu (see section 4.2).

## 4.2 “Simple Opt In” module main menu

In order to access “Simple Opt In” module main menu, click on the arrow next to the name of the module.

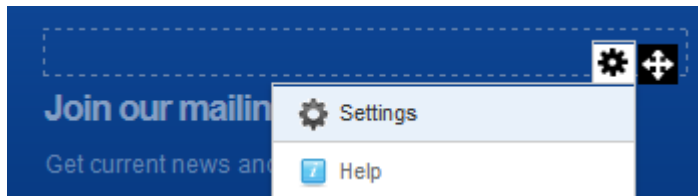


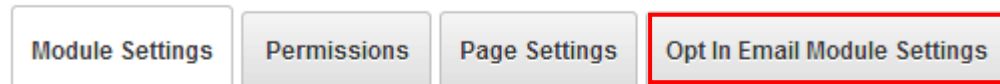
Figure 75: Simple Opt In module main menu

- **Print** – option for printing this page
- **Settings** – option for managing module settings (see section 4.3)
- **Delete** – option for deleting the simple Opt In module
- **Move** – option for changing the location of the simple Opt In module

### 4.3 Managing “Simple Opt In” Module Settings

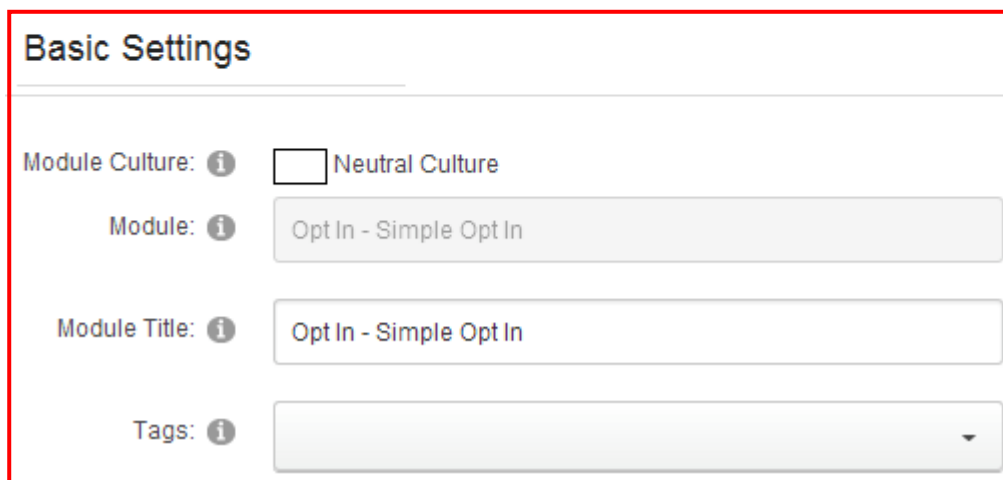
In order to start managing “Simple Opt In” module settings, choose option “Settings” from the main menu.

#### Module



Module Settings Permissions Page Settings Opt In Email Module Settings

#### Expand All



**Basic Settings**

Module Culture: ⓘ ☐ Neutral Culture

Module: ⓘ Opt In - Simple Opt In

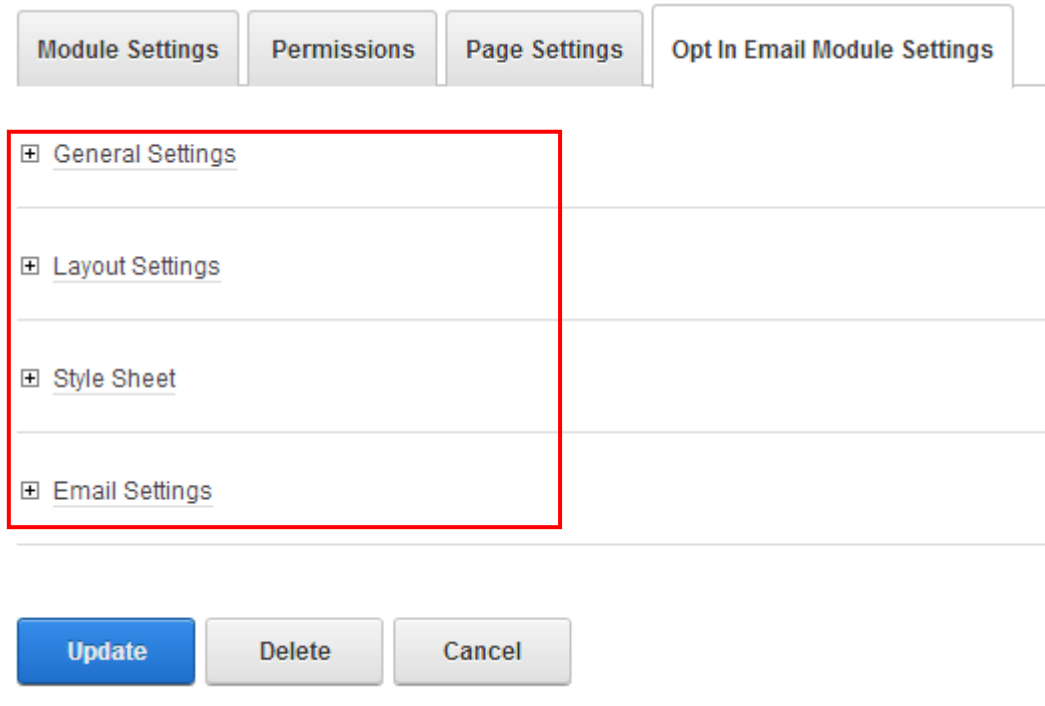
Module Title: ⓘ Opt In - Simple Opt In

Tags: ⓘ

Figure 76: Managing Simple Opt In module settings

The following options are available inside this screen:

- **Basic Settings** – option for setting up the title of the module
- **Opt In Email Module Settings** – click on the “+” symbol next to this label to access further options



Module Settings   Permissions   Page Settings   Opt In Email Module Settings

- ⊕ [General Settings](#)
- ⊕ [Layout Settings](#)
- ⊕ [Style Sheet](#)
- ⊕ [Email Settings](#)

Update   Delete   Cancel

Figure 77: Managing Opt In Email Module Settings

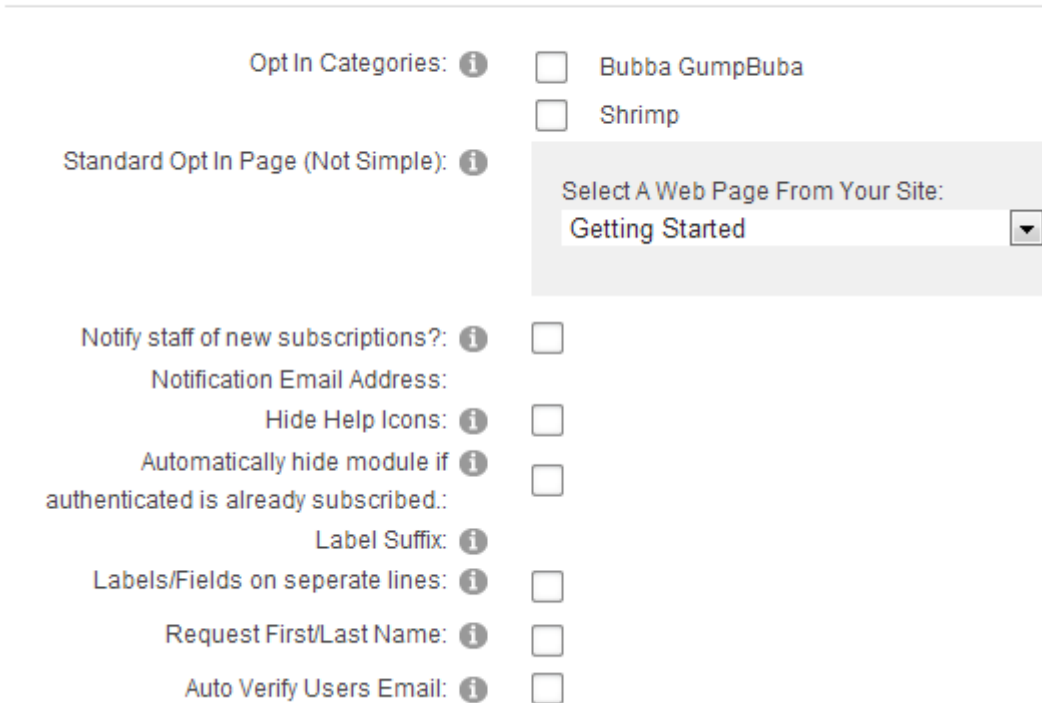
The following options are available:

- **General Settings** – see section 4.4
- **Layout Settings** – see section 4.5
- **Style Sheet** – see section 4.6
- **Email Settings** – see section 4.8

#### 4.4 General “Simple Opt In” Module Settings

In order to start setting the general “Simple Opt In” settings, click on the “+” symbol next to this label.

##### General Settings













Opt In Categories: 	<input type="checkbox"/> Bubba GumpBuba
	<input type="checkbox"/> Shrimp
Standard Opt In Page (Not Simple): 	<div> Select A Web Page From Your Site:  Getting Started  </div>
Notify staff of new subscriptions?: 	<input type="checkbox"/>
Notification Email Address:	
Hide Help Icons: 	<input type="checkbox"/>
Automatically hide module if authenticated is already subscribed.: 	<input type="checkbox"/>
Label Suffix: 	
Labels/Fields on separate lines: 	<input type="checkbox"/>
Request First/Last Name: 	<input type="checkbox"/>
Auto Verify Users Email: 	<input type="checkbox"/>

Figure 78: Managing general “Simple Opt In” module settings

The following parameters are available inside this screen:

- **Opt In Categories** – select the categories you wish to enable and add the new subscribers to
- **Standard Opt In Page (Not Simple)** – the standard opt in email module IS needed /Required if you plan to not Auto Verify users. The simple module is not setup to have a verification link. For this reason you must include the page where the standard opt in email module is located from this pull down menu; when the user submits their information to the opt in simple module the verification link will point them to the standard opt in email module
- **Notify staff of new subscriptions** – select this option if you wish to enable notifications to staff members about new subscription signup
- **Notification Email Address** – enter the email address notifications should be sent to
- **Hide Help Icons** – select this checkbox in case you wish to hide the help icons that are by default displayed next to each field label
- **Automatically hide module if authenticated is already** – select this option if you would like the system to automatically load authenticated users opt in email subscription settings
- **Labels Suffix** - enter a suffix for the field labels on the opt in page
- **Labels/Fields on separate lines** – choose this option in order to display label for the input field (First name) and input field in two different lines
- **Request First/Last Name** – use this option in order to enable first name and last name fields inside the subscription form



- **Auto Verify Users Email** – check this checkbox if you want to skip the step of verifying subscriber's email; otherwise users will need to click on the 'Verify Email' link that is sent to them upon initial registration.

## 4.5 Managing “Simple Opt In” module layout settings

In order to start setting the “Simple Opt In” layout settings, click on the “+” symbol next to this label.

#### Layout Settings

Opt In Layout

Manage Layout Text

Manage System Emails

Header

Basic Text Box

Rich Text Editor

abc

Custom Links

**B**

*I*

U

**S**

$x^2$

$x_2$

Font Name

Size

Paragraph Style

Apply CSS Cla

Get current news and events the easy way! Select the newsletters you would like to receive or enter your email address to view/modify your subscription settings.

Update message

Use Subscribe Link Button

Design

HTML

Preview

Words: 26 Characters: 159

Figure 79: Managing "Simple Opt In Module" layout settings

The following parameters are available inside this screen:

- **Manage Layout Text** – see section 4.5.1
- **Manage System Emails** – see section 4.7
- **Basic Text Box** – use this option if you want to define emails in TXT format
- **Rich Text Editor** – use this option if you want to use the advanced formatting features and send an email in HTML format (**note:** by using WYSIWYG editor)
- **Design/HTML** – use these buttons to toggle between design and HTML modes
- **Use Subscribe Link Button** – select this option if you wish to use text for the “Subscribe” option; if you choose this option, enter the desired text inside the “Subscribe Text” field
- **Subscribe Image Button** – select this option if you want to use an image/button for the “Subscribe” option; you can select the file which already resides on the server or choose to upload a new file

#### 4.5.1 Managing Text Layout

In order to start managing text layout (e.g. footer and header displayed to the user inside the website), select option “Manage Layout Text”.

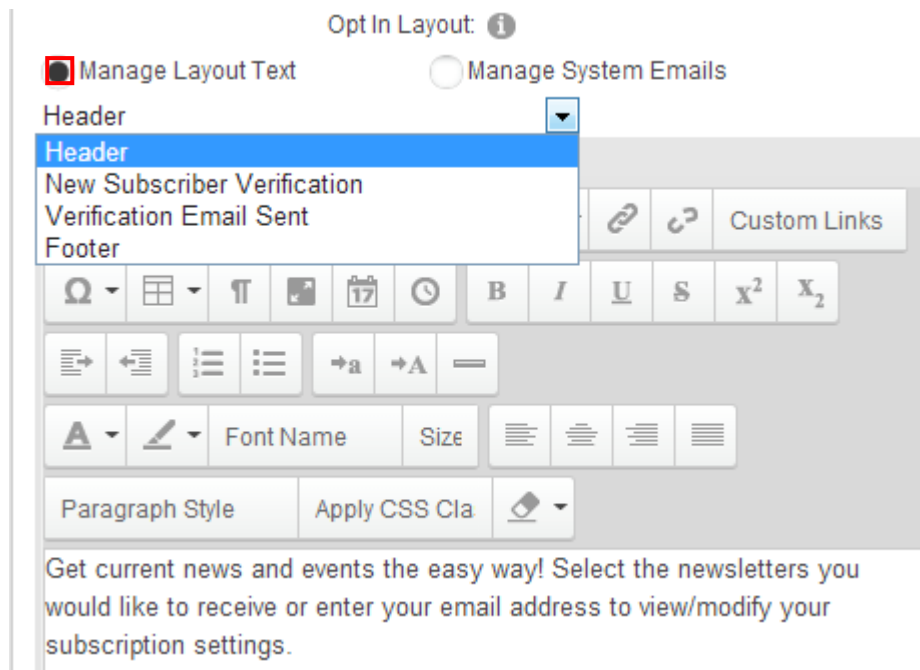


Figure 80: Managing Layout Text

The following options are available inside this screen:

- **Header** – option for setting up the contents of the **header** as seen by the end users on the page (see section 4.5.2)
- **New Subscriber Verification** – option for setting up contents of the email a new subscriber will receive as a confirmation that he has began subscription process successfully (see section 4.5.3)
- **Verification Email Sent** - the “Verification email sent” option is used for defining text displayed on the website after the user follows the verification link inside the email sent after submitting email address (see section 3.7.3.3)
- **Footer** - option for setting up the contents of the **footer** as seen by the end users on the page (see section 4.5.4)

#### 4.5.2 Setting up header inside the “Opt In Email” page

In order to setup header as seen by the end users in the page, choose option “Manage Layout Text” and then choose option “Header” from the pull down menu.

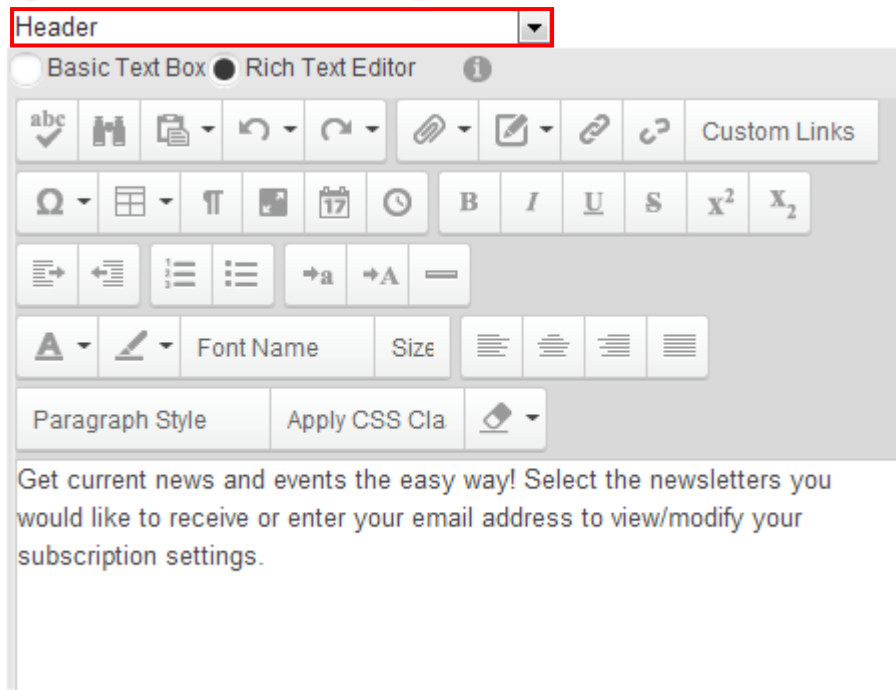


Figure 81: Setting up header as seen by the end users

Use the advanced rich text editor options (WYSIWYG editor) to define the header as seen by the end users on the website and click on the “Update Message” link in order to save the changes.

**Note:** put your mouse pointer over each of the options to see its function.

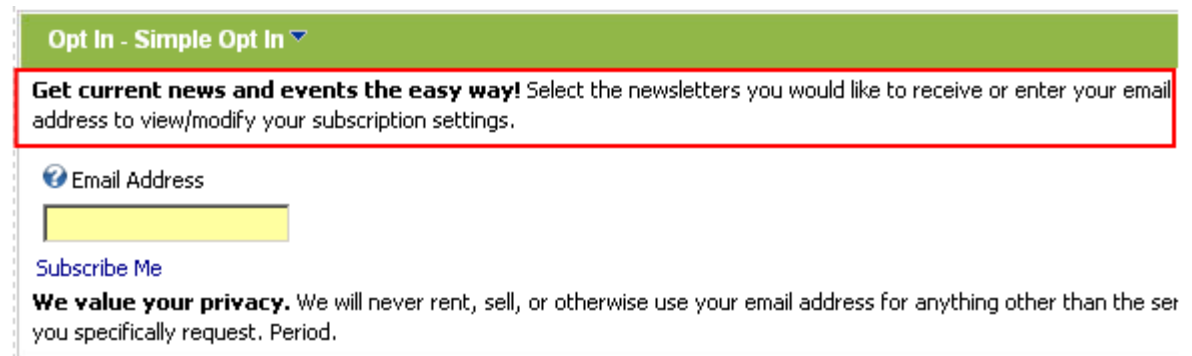


Figure 82: Example of the defined header

#### 4.5.3 Setting up New Subscriber Verification

In order to setup contents of the email a new subscriber will receive as a confirmation that he has began subscription process successfully (but prior to receiving verification email – see section 4.7.1), select option “Manage Layout Text” and then choose option “New Subscriber Verification” from the pull down menu.

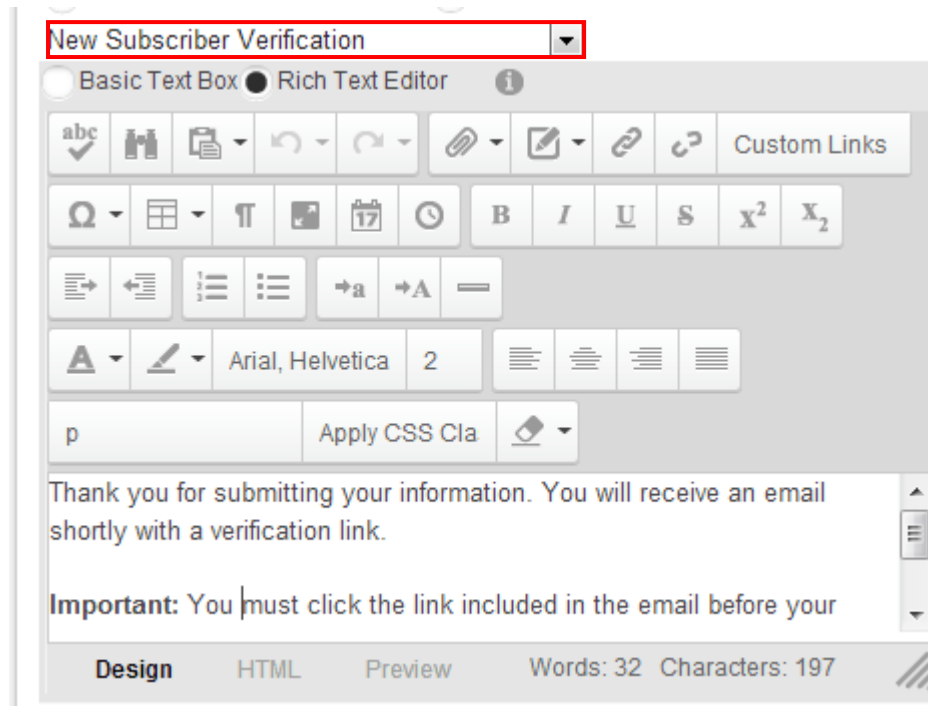


Figure 83: Setting up new subscriber verification email

Use the advanced rich text editor options (WYSIWYG editor) to define the contents of the email and click on the “Update Message” link in order to save the changes.

**Note:** put your mouse pointer over each of the options to see its function.

#### 4.5.4 Setting up footer inside the "Simple Opt In" page

In order to setup footer as seen by the end users in the page, choose option "Manage Layout Text" and then choose option "Footer" from the pull down menu.

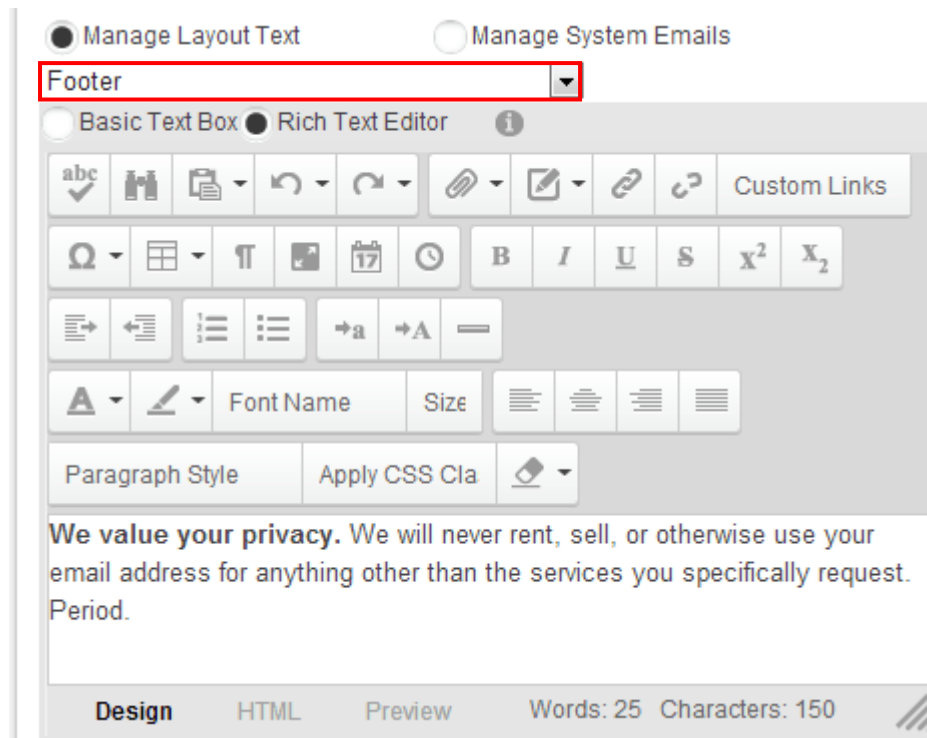


Figure 84: Setting up footer inside the "Simple Opt In" page

Use the advanced rich text editor options (WYSIWYG editor) to define the footer as seen by the end users on the website and click on the "Update Message" link in order to save the changes.

**Note:** put your mouse pointer over each of the options to see its function

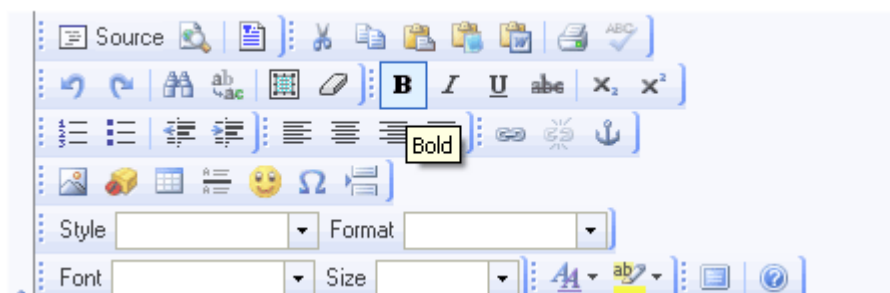


Figure 85: Example for choosing formatting option "bold"

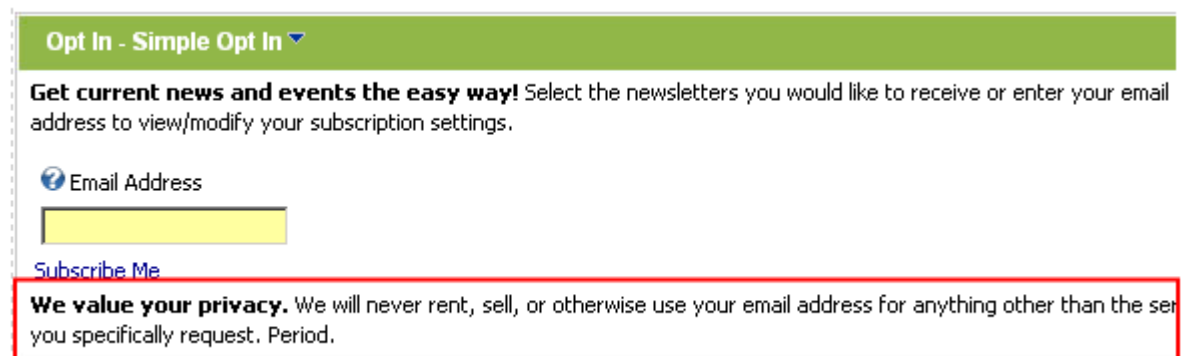


Figure 86: Example of the defined footer

## 4.6 Managing the Simple Opt In Style Sheet

The “Simple Opt In” module allows you to modify the contents of the CSS file thus affecting the layout of module. In order to start editing the style sheet, click on the “+” symbol next to the “Style Sheet” label.

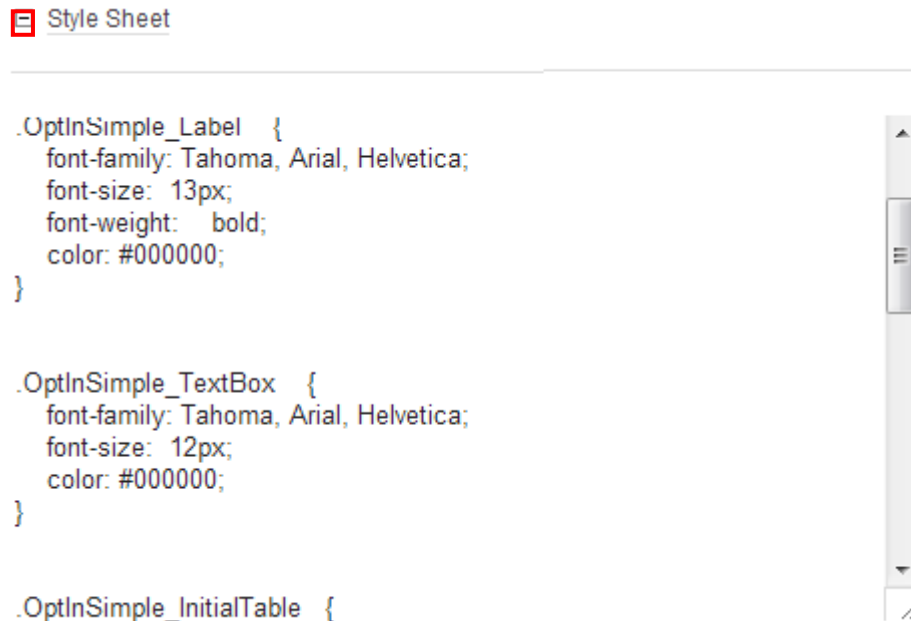


Figure 87: Editing the Stylesheet

Change the desired parameters within the text area and click on the “Update” link in order to save the changes.

## 4.7 Managing System Emails

The system email messages available for “Simple Opt In” module are:

- **New Email Verification Message** – see section 4.7.1
- **Staff Notified of New Subscription** – see section 4.7.2

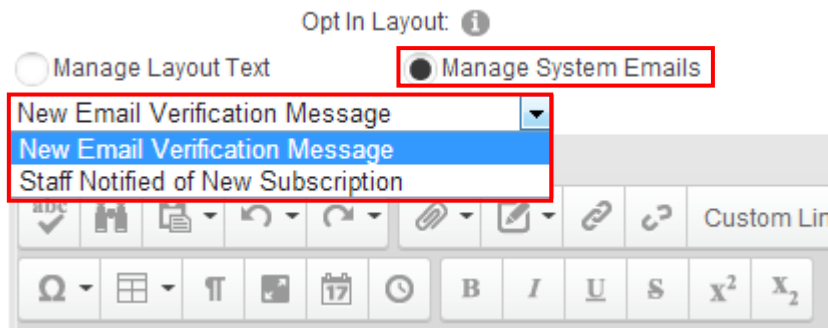


Figure 88: Available Simple Opt in System Emails

#### 4.7.1 Setting up “New Email Verification Message”

In order to start setting up “New Email Verification Message”, which is a message sent to the subscriber requesting verification prior to completing subscription, select option “Manage System Emails”. The following screen will be displayed.

New Email Verification Message

Basic Text Box ● Rich Text Editor

Dear \$(FirstName),

Thank you for Opting In to *My Website*

Here are the newsletters you have Opted In for:

\$(Subscription)

In order to verify your email address and your subscription, please click the link below.

\$(VerifyURL)

Thanks again,

My Website

Design HTML Preview Words: 40 Characters: 244

Figure 89: Setting new email verification message

Define the contents of the verification email inside this screen and click on the “Update Message” to save the changes.

**Note:** you can use the variables in order to personalize this message by using parameters user supplied during the subscription process.

The following is the list of parameters which can be used:

- **\$(FirstName)** – enter this parameter in the email in order to address the user by his first name (e.g. “Dear **\$(FirstName)**” would be “Dear John”)
- **\$(LastName)** - enter this parameter in the email in order to address the user by his last name (e.g. “Dear Mr. **\$(LastName)**” would be “Dear Mr. Smith”)
- **\$(EmailAddress)** - enter this parameter in order to display user’s email address inside the email message (e.g. “ **\$(EmailAddress)**” would be “johnsmith@address.com”)
- **\$(DateTime)** – enter this parameter in order to display date and time



- **\$(Subscription)** – enter this email in order to display the newsletter categories this user is already subscribed to

#### 4.7.2 Setting up “Staff Notified of New Subscription”

In order to start setting up “Staff Notified of New Subscription”, which is a message sent to the staff notifying them about the new subscription, select option “Manage System Emails” and choose “Staff Notified of New Subscription” from the pull down menu.

Staff Notified of New Subscription

Basic Text Box Rich Text Editor

Administrator,

A new subscriber has just opted into the newsletter system. You can check their subscription information below:

Design HTML Preview Words: 27 Characters: 205

Update message

Figure 90: Setting new email verification message

Define the contents of the notification email inside this screen and click on the “Update Message” to save the changes.

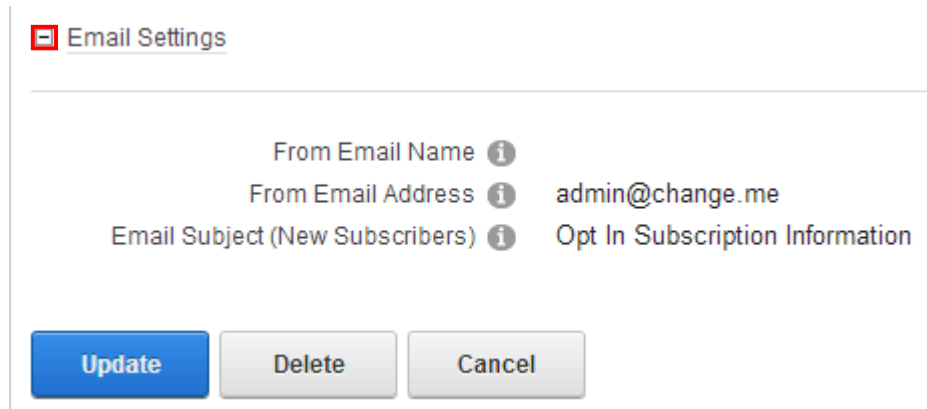
**Note:** you can use the variables in order to personalize this message by using parameters user supplied during the subscription process.

The following is the list of parameters which can be used:

- **\$(FirstName)** – enter this parameter in the email in order to address the user by his first name (e.g. “Dear **\$(FirstName)**” would be “Dear John”)
- **\$(LastName)** - enter this parameter in the email in order to address the user by his last name (e.g. “Dear Mr. **\$(LastName)**” would be “Dear Mr. Smith”)
- **\$(EmailAddress)** - enter this parameter in order to display user’s email address inside the email message (e.g. “ **\$(EmailAddress)**” would be “johnsmith@address.com”)
- **\$(DateTime)** – enter this parameter in order to display date and time
- **\$(Subscription)** – enter this email in order to display the newsletter categories this user is already subscribed to

## 4.8 Managing Email Settings

In order to start setting the “Simple Opt In” email settings, click on the “+” symbol next to this label.



The screenshot shows a web interface for managing email settings. At the top, there is a red square icon with a white plus sign followed by the text 'Email Settings'. Below this is a horizontal line. Under the line, there are three rows of settings, each with a label, an information icon (i), and a value. The first row is 'From Email Name' with an empty input field. The second row is 'From Email Address' with the value 'admin@change.me'. The third row is 'Email Subject (New Subscribers)' with the value 'Opt In Subscription Information'. At the bottom of the form, there are three buttons: 'Update' (blue), 'Delete' (grey), and 'Cancel' (grey).

From Email Name	i	
From Email Address	i	admin@change.me
Email Subject (New Subscribers)	i	Opt In Subscription Information

Update Delete Cancel

Figure 91: Managing "Simple Opt In" email settings

The following parameters are available inside this screen:

- **From Email Name** - enter the “from name” for the emails going out. If no name is entered the email address will appear as the from email
- **From Email Address** – enter your email address
- **Email Subject (New Subscribers)** – enter the subject of the email for new subscribers

## 4.9 Deleting “Simple Opt In” module

In order to delete “Simple Opt In” module, choose option “Delete” from the main menu.

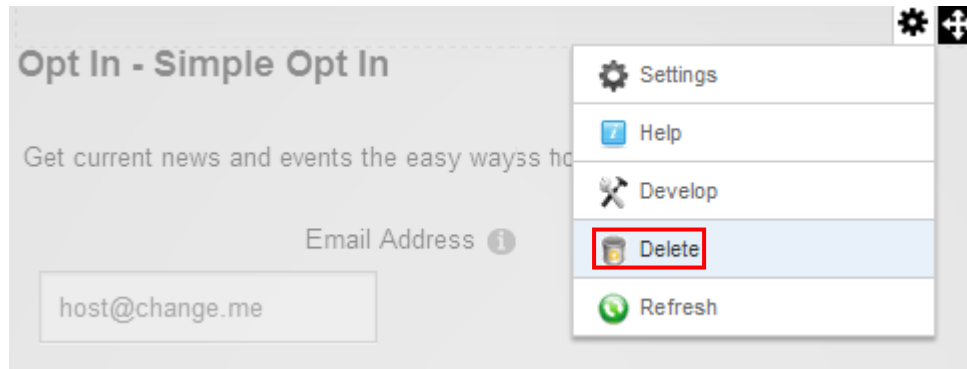


Figure 92: Deleting “Simple Opt In” module (step 1/2)

The confirmation dialog will be displayed.

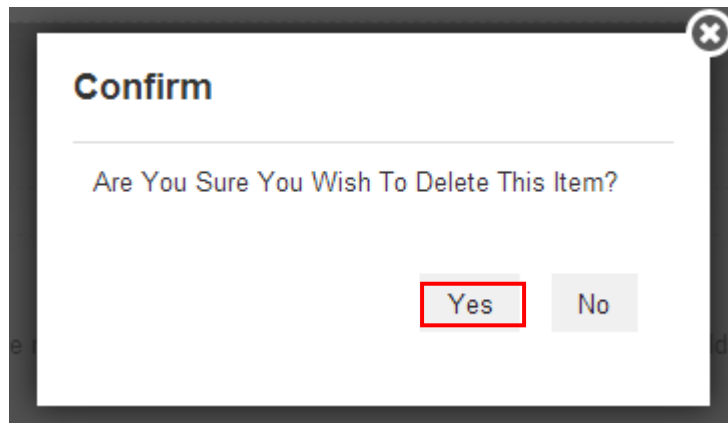


Figure 93: Deleting “Simple Opt In” module (step 2/2)

Click on the “Yes” button and the module will be deleted.

## 5 PREVIOUS NEWSLETTERS

### 5.1 Adding Previous Newsletters to the page

In order to add **Previous Newsletters** module to the page, choose option **Add New Module** from the **Modules** menu.

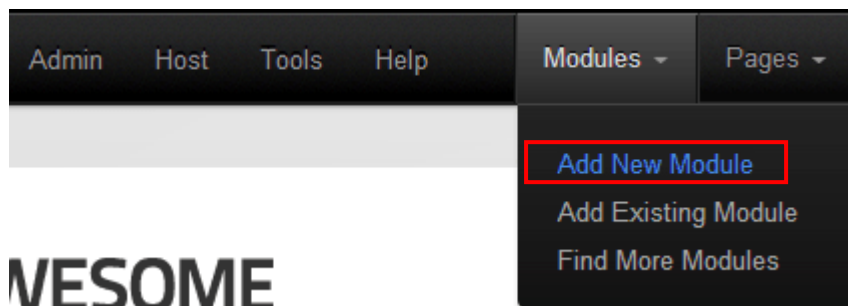


Figure 94: Adding previous newsletter to the page (step 1/2)

The list of modules will be displayed.

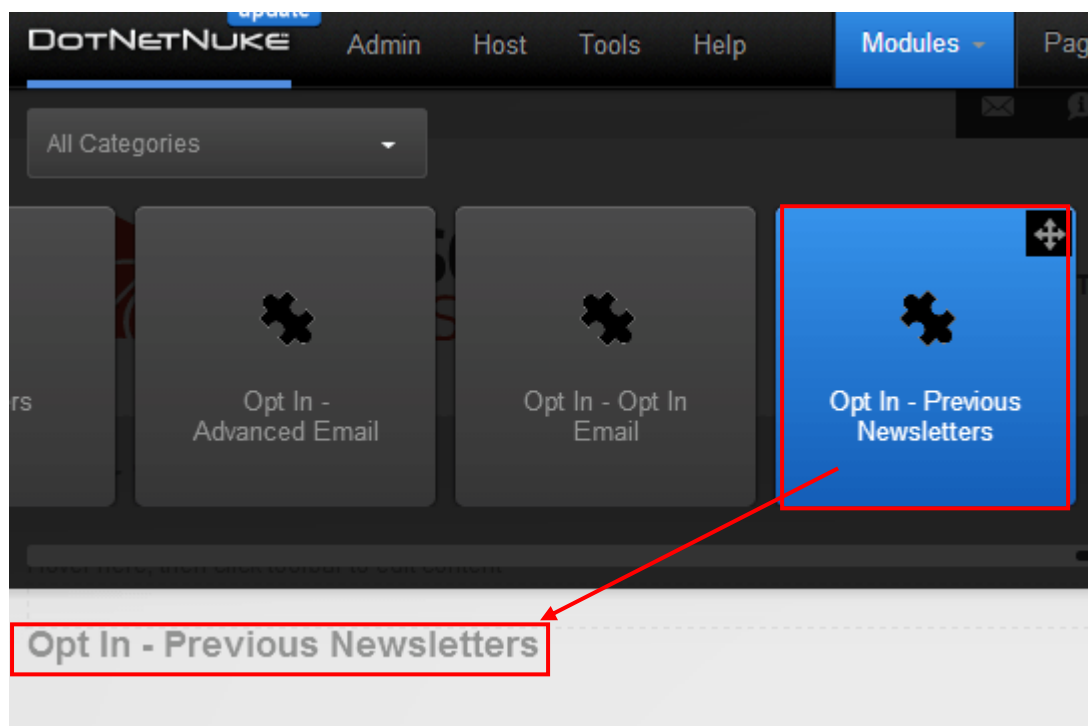


Figure 95: Adding previous newsletter to the page (step 2/2)

Drag and drop the **Opt In – Previous Newsletters** module to the desired location in the page below. The **Previous Newsletters** module will be added to the page.

## 5.2 Managing settings for the “Previous Newsletters” module

In order to start managing settings for the **Previous Newsletters** module, choose option **Settings** from the main menu.

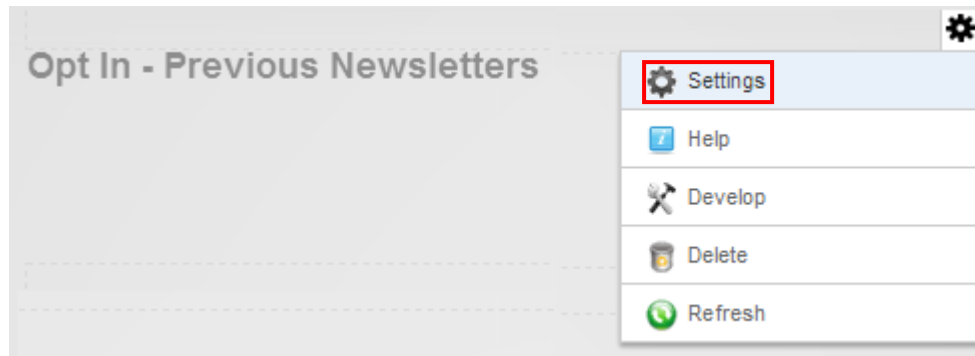


Figure 96: Managing previous newsletter settings (step 1/2)

The following screen will be displayed.

Figure 97: Managing previous newsletter settings (step 2/2)

The tab for managing the previous newsletters settings is displayed by default.

The following parameters are available inside this screen:

- **Display Type** - select the display type for this module instance; the display type can either display multiple previous newsletters or a single previous newsletter
- **Total Display Count** - enter the number of previous newsletters you wish to display to the users (e.g. “5”) and click on the “Update” link in order to save the changes
- **Opt In Categories** – choose the desired categories you wish to display previous newsletters from

## 6 ADVANCED EMAIL MODULE

The “Advanced Email” module contains advanced features for sending newsletter to your subscribers. Within the 4.0 release the Advanced Newsletter module also includes functionality for link tracking, newsletter tracking, bounceback protection, email campaigns (a series of emails), and detailed distribution reports.

### 6.1 Adding Advanced Email Module to the page

In order to add **Advanced Email Module** module to the page, choose option **Add New Module** from the **Modules** menu.

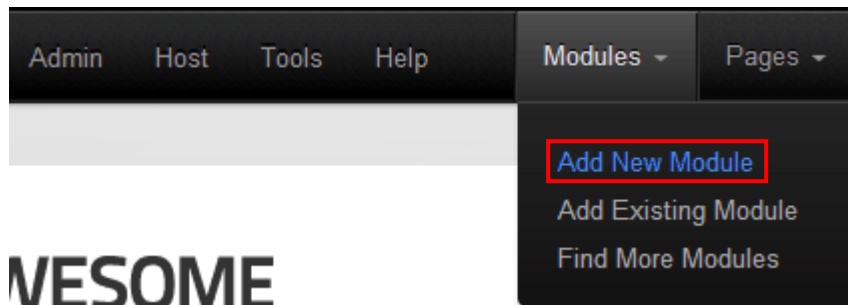


Figure 98: Adding Advanced Email Module to the page

Drag and drop the **Advanced Email** module to the desired location in the page below.

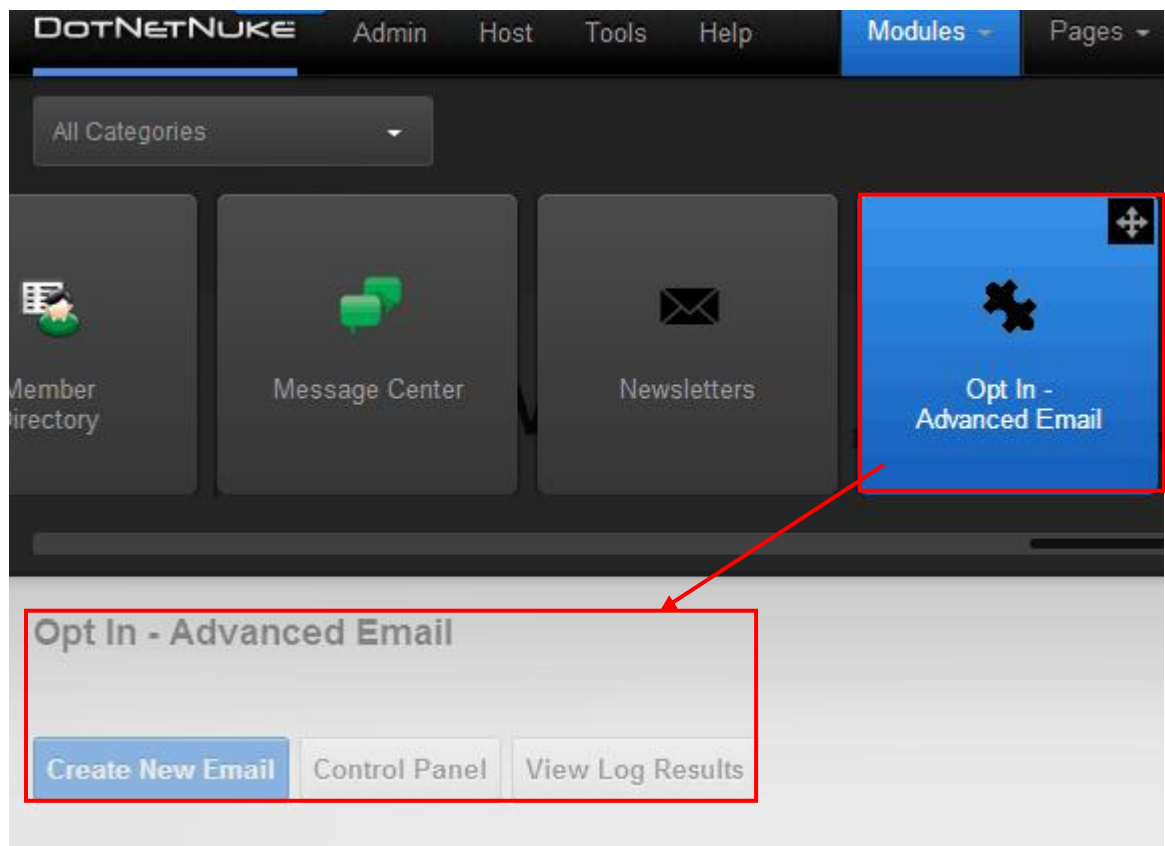









Figure 99: Available options for Advanced Email module

The following options are available within the page:

- **Create New Email**

- **Control Panel** – see section
- **View Log Results** – the option for viewing the log results (see section 6.6)
- **Opt In – Advanced Email Main Menu**
  - **Settings** – options for managing the usual module settings
  - **Delete** – option for deleting this module (see section 3.10)
  - **Move** – use this option to move the module to a different section of the page
  - **Control Panel** – option for accessing the Advanced Email Control Panel with all major module settings (see section 6.2)
  - **Create New Email** – the option for creating a new email (see section 6.5)
  - **Filter** – use this pull down menu to determine if you wish to display only the sent emails or drafts
  - **List of newsletters with the following options**
    -  - the option for editing a draft of the newsletter
    -  - the option for viewing the newsletter report (see section 6.7)
    -  - the option for viewing the contents of the newsletter
    -  - the option for creating a copy of the newsletter
    -  - the option for un-publishing a newsletter from newsletter archive (see section 6.8)
    -  - the option for un-publishing a newsletter to the newsletter archive (see section 6.8)
    -  - the option for deleting a newsletter

## 6.2 Using the Advanced Email Control Panel

In order to start using the Advanced Email Control Panel, choose that option from the main menu.

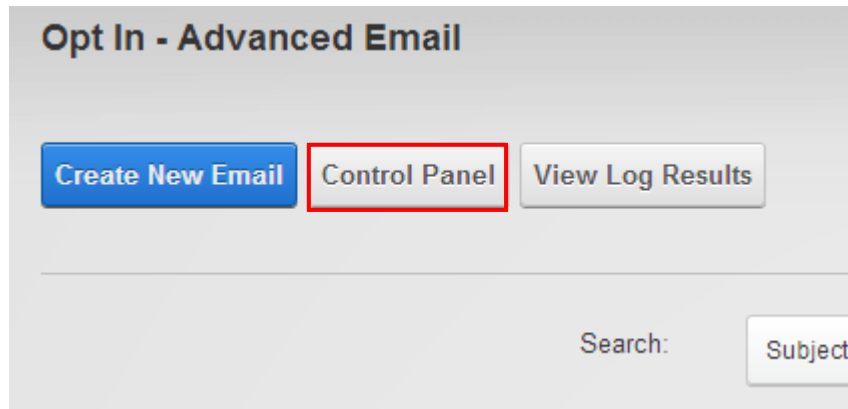


Figure 100: Choosing option "Control Panel"

The following page will be displayed.

### Advanced Email Control Panel

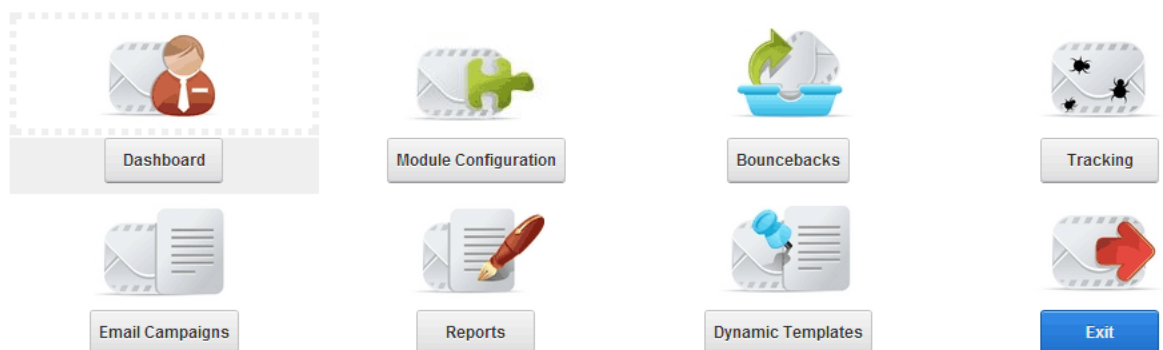


Figure 101: Using the Advanced Email Control Panel

The following options are available:

- **Dashboard** - see section 6.12
- **Module Configuration** - see section 6.12
- **Bouncebacks** – see section 6.11.7
- **Tracking** - see section 6.9
- **Email Campaigns** - see section 6.10
- **Reports** - see section 6.10.1
- **Dynamic Templates** – see section 6.12
- **List Cleanup** - see section 6.12
- **Exit** – option for closing the Control Panel



### 6.3 Viewing the Dashboard

The dashboard contains plenty of useful information about the Advanced Email module. It is displayed by default when you choose the „Control Panel” option from the main menu.

## Advanced Email Control Panel

Visibili

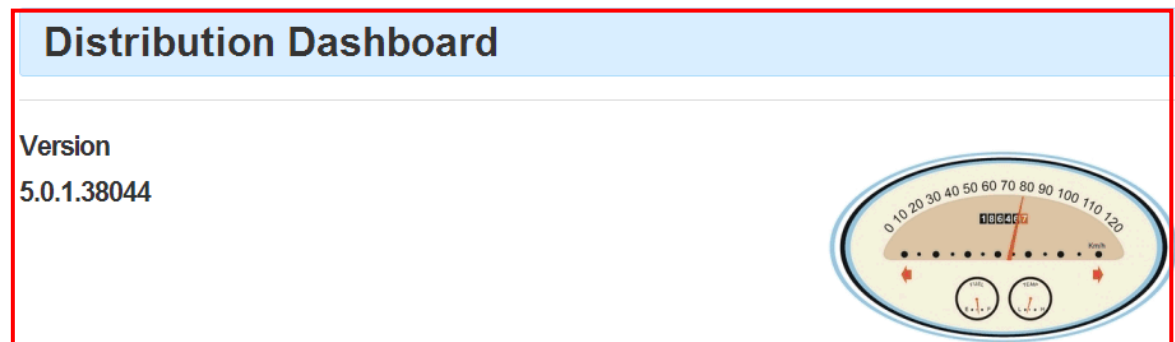
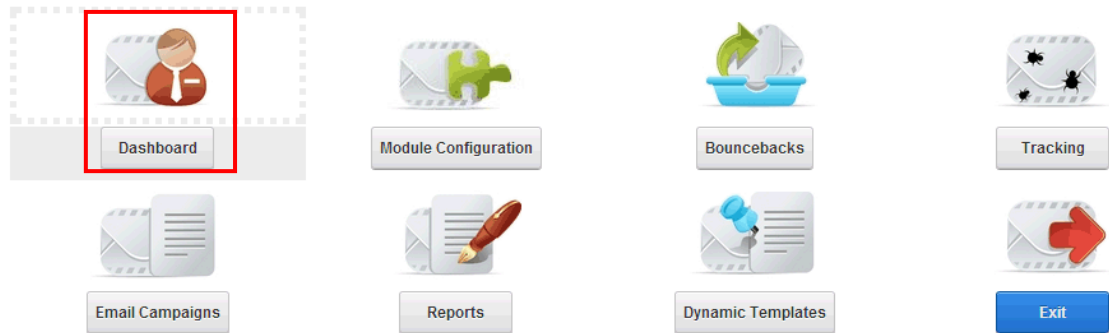


Figure 102: Viewing the dashboard

The following information is available:

- **Version** – information about the version of the Opt In Email Advanced Newsletter module
- **Information/Statistics** – the field displaying useful information and statistics such as the last newsletter or email campaign distributed
- **Warnings** – field for displaying system warnings

## 6.4 Configuring the Module

In order to start configuring the module, choose option “Module Configuration” from the Control Panel.

# Advanced Email Control Panel

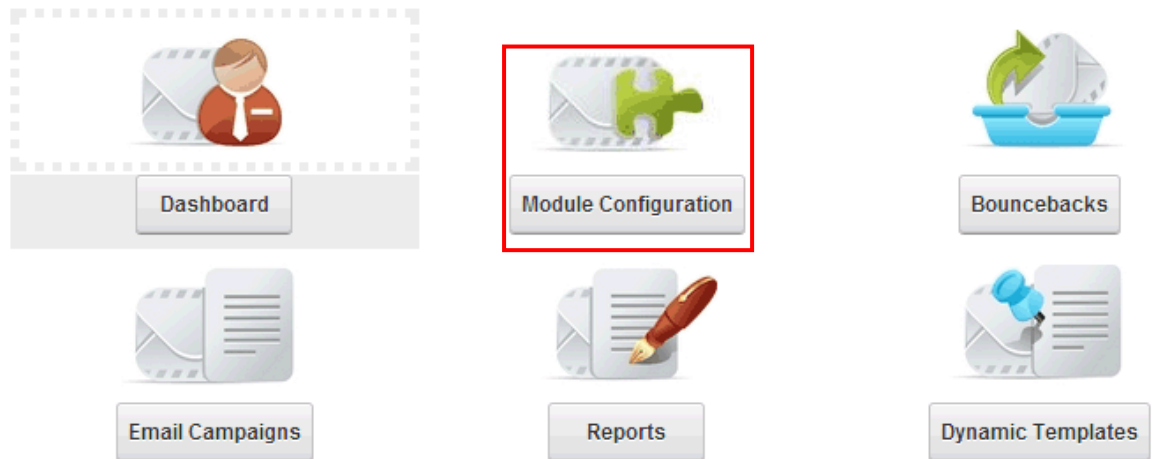


Figure 103: Choosing option "Module Configuration"

The following page will be displayed.

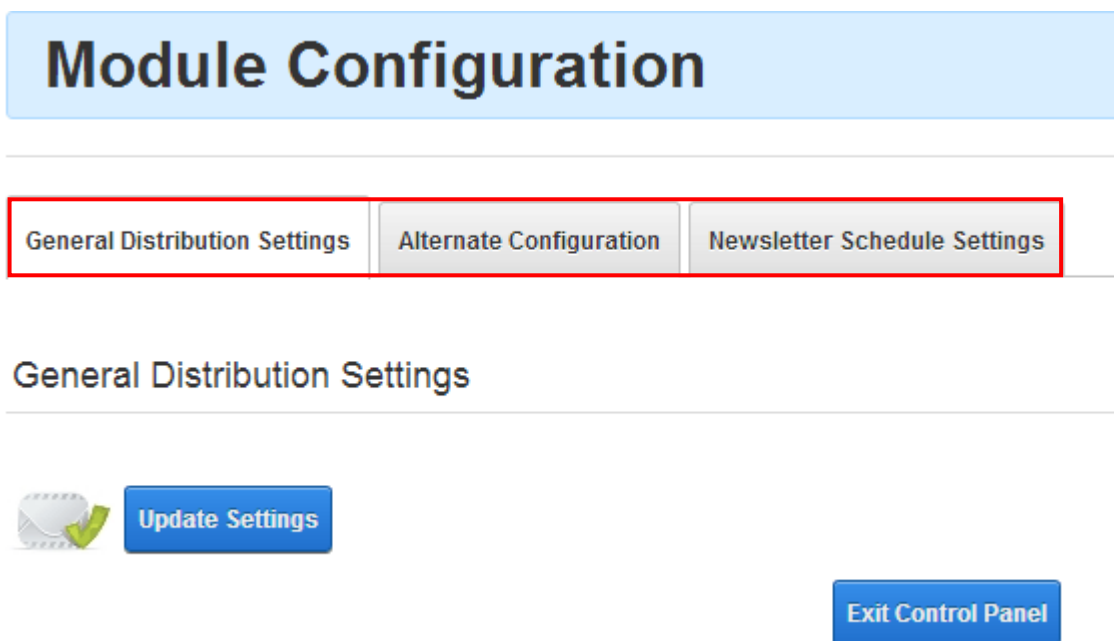


Figure 104: Options for configuring the Newsletter

- **General Distribution Settings** – the option for managing general newsletter distribution settings (see section 6.4.1)
- **Alternate Configuration** – the option for alternate module configuration (see section 6.4.2)
- **Newsletter Schedule Settings** – the option for managing the newsletter schedule settings (see section 6.4.4)

### 6.4.1 Managing General Distribution Settings

In order to start managing the general settings, click **General Distribution Settings** within the Module Configuration page. The following page will be displayed.

#### General Distribution Settings

Automatically include the Opt Out Message/Link: ☐

Opt Out Message:

Opt In Module Page:

Opt Out Link Text:

Exclude HTML Header Tags?: ☐

Do not replace images with full portal alias: ☐

Inject Portal Stylesheet into email header?: ☐

Email Header Tag:

Force SSL Hyperlinks: ☐

Disable AJAX for Control Panel: ☐

Insert Token Method:

Figure 105: Managing General Distribution Settings

The following options and parameters are available:

- **Automatically include the Opt Out Message/Link** – select this checkbox if you wish to include the opt out link in every newsletter
- **Opt Out Message** – use this text area to define the opt out message which will go with the link and use **\$(OptOutURL)** parameter to display the link
- **Opt In Module Page** – select your opt in module page from this pull down menu
- **Opt Out Link Text** – use this field to define the opt out link text
- **Exclude HTML Header Tags?** - select if you would not like the email to include a header tag
- **Do not replace images with full portal alias** - some Rich Text Editors replace site images within the newsletter to include the full portal alias with image file, while others just include `/portals/imagefile.jpg` etc. If you are having problems with images not showing up within your newsletter we suggest enabling this option

- **Inject Portal Stylesheet into email header** - select this checkbox if you would like to have the portal's stylesheet injected directly into the HTML header tag for newsletters and email campaigns(**note:** the styles from within the stylesheet will be directly embedded within the newsletter)
- **Email Header Tag** - use this setting to define the header tag that is added to each newsletter distribution.
  - The header tag is a feature that allows you to specify within the HTML header of the message certain features. For example you might want to include a link to a stylesheet here
  - The default header tag is:

**<head><Base href='http://www.yoursite.com></head>**

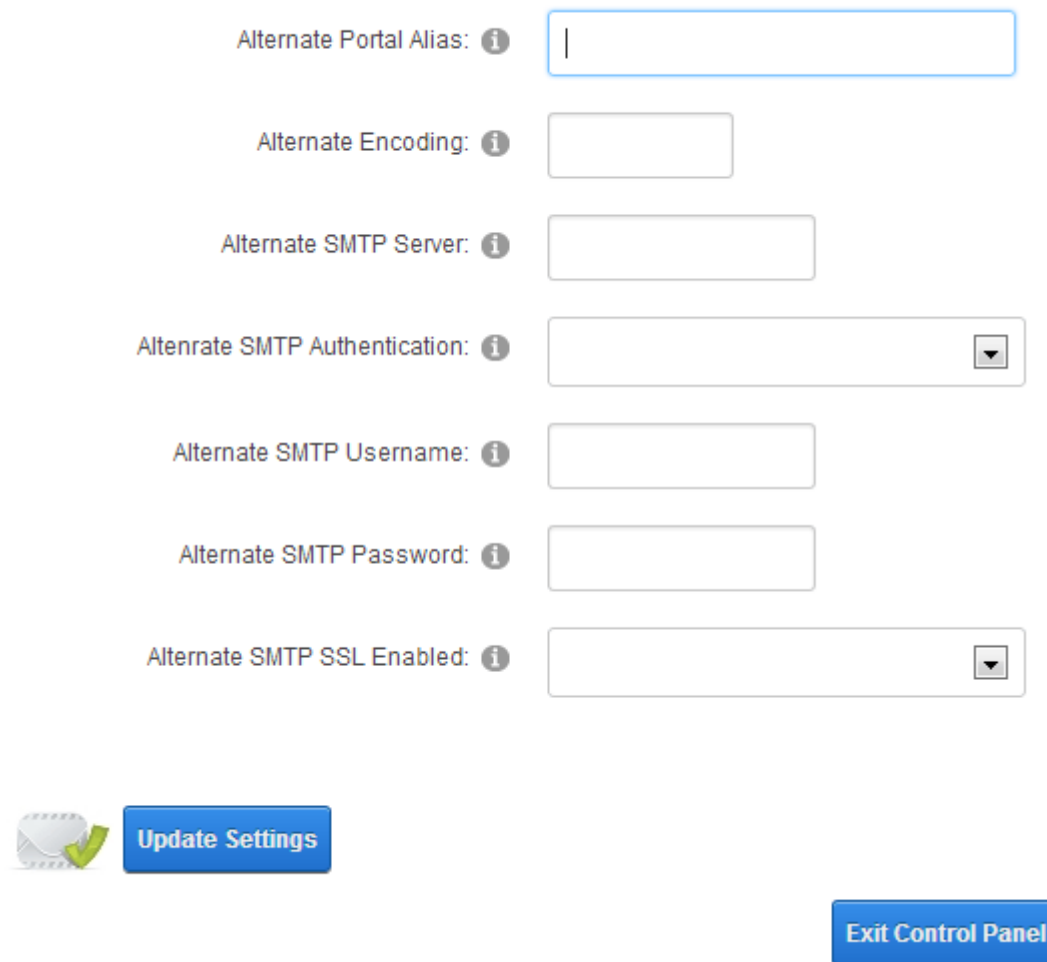
**Note:** The default header tag is used to set the base reference for the newsletter to your portals web site address. Often using a rich text editor when you add an image to the editor it will remove the full path to the image. By setting the base href property within the header tag your images should appear correctly.

- **Force SSL Hyperlinks** – select this option to force all hyperlinks to be HTTPS
- **Disable AJAX for Control Panel** - select this option to disable AJAX within the control panel and module configuration portions of this module
- **Insert Token Method** - select the method for inserting tokens within the newsletter; this feature can either be handled via JavaScript (client side) or AJAX (server side) - **note:** some Rich Text Editors will only support server side, but the client side is faster; this feature is used when clicking the insert link within the advanced newsletter module
  - **Client Side (FCK Editor)** – select this option to enable the client side editor
  - **Server Side (Other Rich Text Editors)** – select this option to enable the server side editor
- **Auto create Link Tracking objects for any URL's that are present within the newsletter?** – by enabling this option the module will automatically check each newsletter for hyperlinks and turn these into Link Tracking objects if the links do not already exist within the Link Tracking system. Each hyperlink will then be switched out within the newsletter with the correct link tracking object for distribution.
- **Notify email address when a newsletter is ready for distribution?** - by enabling this feature an email address will be notified whenever a newsletter has been marked "Ready for distribution" within the newsletter creation area.
- **Distribution notification email address** -you can enter the email address that you would like to have receive notifications when a newsletter has been marked as "Ready for Distribution". This email will be notified when the feature above is enabled
- **Security role necessary for sending newsletters** - select the security role that is necessary for the user to be able to schedule and distribute newsletters. This is a separate security role then users that are allowed to actually create newsletters.

### 6.4.2 Managing the Alternate Configuration

In order to start managing the alternate configuration, click **Alternate Configuration** within the Module Configuration page. The following page will be displayed.

#### Alternate Configuration



The screenshot displays the 'Alternate Configuration' page. It features several input fields, each preceded by an information icon (i):

- Alternate Portal Alias:** A text input field.
- Alternate Encoding:** A text input field.
- Alternate SMTP Server:** A text input field.
- Alternate SMTP Authentication:** A dropdown menu.
- Alternate SMTP Username:** A text input field.
- Alternate SMTP Password:** A text input field.
- Alternate SMTP SSL Enabled:** A dropdown menu.

At the bottom left, there is a green checkmark icon next to a blue button labeled 'Update Settings'. At the bottom right, there is a blue button labeled 'Exit Control Panel'.

Figure 106: Managing the Alternate Configuration

The following parameters are available:

- **Alternate Portal Alias** - enter an alternate portal alias for distributions; the portal alias is setup under the admin, site settings area; you can utilize this setting to use an alternate portal alias during distribution
- **Alternate Encoding** - enter an alternate encoding for distributions; the encoding is set to UTF8 by default; if you would like to change this encoding you can enter an alternate encoding here
- **Alternate SMTP Server** – specify the alternate SMTP Server; If no SMTP server is specified, the system uses the SMTP configuration for your DNN installation which is defined under host, host settings
- **Alternate SMTP Authentication** – specify the alternate SMTP Authentication; If no SMTP authentication is specified, the system uses the SMTP configuration for your DNN installation which is defined under host, host settings

- **Alternate SMTP Username** – specify the alternate SMTP Username; If no SMTP username is specified, the system uses the SMTP configuration for your DNN installation which is defined under host, host settings
- **Alternate SMTP Password** – specify the alternate SMTP Password; If no SMTP password is specified, the system uses the SMTP configuration for your DNN installation which is defined under host, host settings
- **Alternate SMTP SSL enabled** - select if the SMTP Settings should use SSL authentication. If no settings are definedngs. for SSL the module will use the default DotNetNuke settings defined under host, host settings.

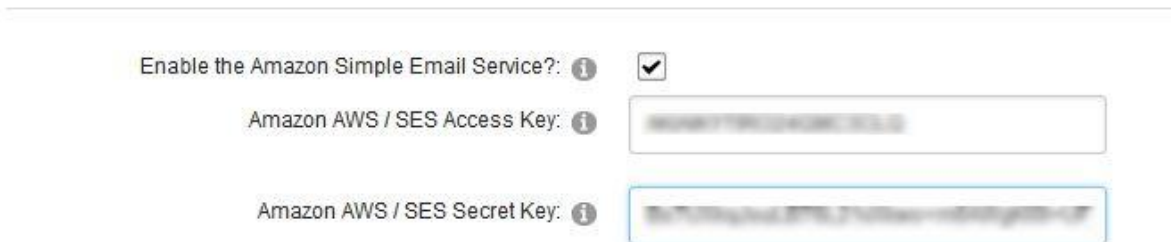
#### 6.4.3 Amazon Simple Email Service (SES)

The Amazon SES allows Opt In Email to send the email details and distribution directly over to the Amazon servers to handle.

This increases performance and reliability (especially if you are using an SMTP server with limitations). Pricing is extremely affordable and offers additional reporting techniques outside of Opt In Email.

- In order to get started, sign up and get an account here: <http://aws.amazon.com/ses/>
- Once you have an account, you can get the two tokens you need to enter within the Amazon AWS Simple Email Service section  
<http://docs.aws.amazon.com/ses/latest/DeveloperGuide/get-aws-keys.html>

#### Amazon AWS Simple Email Service (SES)



Enable the Amazon Simple Email Service?: ☒

Amazon AWS / SES Access Key:

Amazon AWS / SES Secret Key:

Figure 107: Amazon Simple Email Service (SES)

#### 6.4.4 Managing Newsletter Schedule Settings

In order to start managing the newsletter schedule settings, click **Newsletter Schedule Settings** within the Module Configuration page. The following page will be displayed.

## Newsletter Schedule Settings

Maximum number of emails to send in a single schedule:

Schedule Enabled: ☐ Yes

Time Lapse:  Hours

Retain Schedule History:

Test mode (Schedule Only): ☐ Yes

Test Email Address:

Log Category: ☐ Yes

Log Email Address: ☐ Yes

Log Body: ☐ Yes

Ignore checks against multiple scheduled instances (global setting): ☐ Yes

CC Email Address:

BCC Email Address:

Figure 108: Setting up newsletter template

The following options and parameters are available:

- **Maximum number of emails to send in a single schedule** – enter the maximum number of emails you wish to send in a single schedule (**e.g.** 50). This feature will allow you to distribute a smaller number of distributions per schedule instance. For example, if your distribution list contains 1000 emails/contacts and you would like to send only 100 out at a time until the entire distribution was delivered.
- **Schedule Enabled** – select this checkbox in order to enable scheduling
- **Time Lapse** – enter the desired amount of time which should pass before the scheduler should run .For example, should the schedule check for distribution and distribution emails every hour, every day, every 30 minutes? If you were to schedule the distribution to run every hour and the “Maximum number of emails in a single distribution” setting was set to 100 then it would send 100 the first hour, another 100 the 2<sup>nd</sup> hour, another 100 the 3<sup>rd</sup> hour etc. The full span of the distribution for 1000 emails would be completed after the 10<sup>th</sup> hour.

**Note: The recommended settings for this are to distribute 200 emails every 30 minutes.** This setting reflects logging, shared hosting, and typical implementations, please review how many emails are distributed within each schedule instance for the best settings for your portal.

- **Retain Schedule History** – choose how many schedules you wish to keep track of. Example: Select "10" to keep the ten most recent schedule history rows
- **Test Mode (Schedule Only)** - select this option if the module should be configured to work in test mode. Each distribution will be distributed to the email address specified as test email address
- **Log Category** – use this option to specify if you would like to log each category during the newsletter distribution

- **Log email address** – use this option if you would like to log every distributed email
- **Log Body** – use this option if you would like to log the body of the email for each distributed email
- **Ignore checks against multiple scheduled instances** - by selecting the option the system will ignore checking for ongoing or other failed Opt In Email scheduled instances. This can help if for some reason the scheduler got stuck on a previous distribution as the system would stop further distributions until this was corrected.
- **CC Email address** – specify an email address if you wish to CC every distribution message
- **BCC Email address**– specify an email address if you wish to BCC every distribution message

After setting the desired parameters, click on the "Update Settings" link in order to save the changes.

**Note:** for the scheduler to run properly, it is critical that you specify:

- Amount of emails to send per distribution (recommended 200 - 10000)
- Time Lapse (recommended every 30 minutes for small distributions and every hour for large distributions).



## 6.5 Creating a new email/newsletter

In order to start creating a new email i.e. newsletter, click the “Create New Email” link inside the main page.

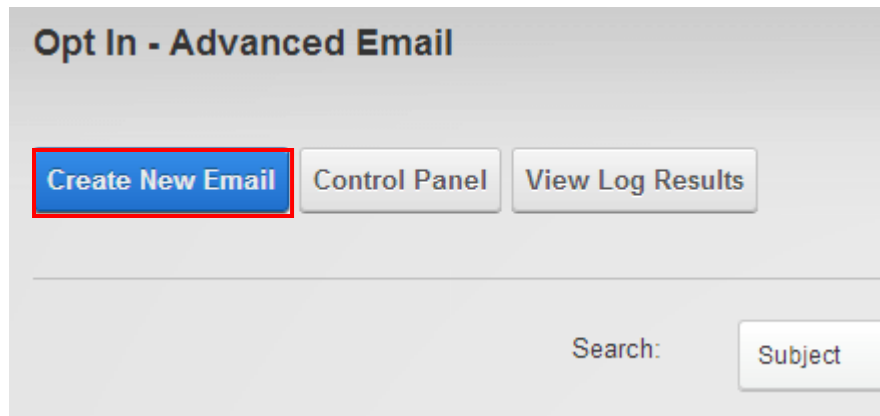


Figure 109: Creating a new email/newsletter (step 1/6)

The following screen will be displayed.

### 1. Create Email

Start from previous newsletter?: ⓘ - Select Newsletter -

Subject: ⓘ

Reply-To Address: ⓘ

From Name: ⓘ

HTML Version ⬆

Insert Mail Merge Token: ⓘ First Name ⬇ Insert

Email Message: ⓘ

☐ Basic Text Box ☒ Rich Text Editor ⓘ

Rich Text Editor toolbar:

- abc (font face), Bold (B), Italic (I), Underline (U), Strikethrough (ABC), Text Color (A), Background Color (■), Bulleted List, Numbered List, Indent Left, Indent Right, Outdent Left, Outdent Right, Link (🔗), Unlink (🔗), Custom Links, Spell Check (Ω), Preview (📄), Calendar (📅), Clock (🕒)
- Font Size: 12
- Apply CSS Class (Apply CSS Cla)

Figure 110: Creating a new email/newsletter (step 2/6)

The first part of the page is used for creating the email message. The following parameters are available:

- **Start from previous newsletter** – this option is used for creating a new newsletter based on the contents of a previous one, i.e. sort of as a template
- **Subject** – enter the subject for the newsletter
- **Insert mail Merge Token (Insert)** – the mail merge tokens are used for personalizing your message for each of the recipients (**for example:** choose the “First Name” token to address each of the recipients by their first name); open the pull down menu, choose the desired token and click the “Insert” link to put it into the body of the message; the following tokens are available:
  - **First Name** – use this token to display the subscriber’s First Name.
    - **Note:** this token will be represented by \$(FirstName) within the email message.
  - **First Name w/ Comma** – use this token to display the subscriber’s First Name with a Comma (e.g. “John,”). If the subscriber does not have a first name, then no name or comma will be replaced with the token. With this method your newsletter wouldn’t accidentally send a message with just a “,” for example if the subscriber didn’t have a first name.
    - **Note:** this token will be represented by \$(FirstWComma) within the email message.
  - **Last Name** – use this token to display the subscriber’s Last Name
    - **Note:** this token will be represented by \$(LastName) within the email message.
  - **Full Name w/ Comma** - – use this token to display the subscriber’s Full Name with a Comma (e.g. “John Smith,”). If the subscriber does not have a full name, then no name or comma will be replaced with the token. With this method your newsletter wouldn’t accidentally send a message with just a “,” for example if the subscriber didn’t have a first name or last name.
    - **Note:** this token will be represented by \$(FullWComma) within the email message.
  - **Email Address** – use this token to display the subscriber’s Email address (this will extract the email address the subscriber specified during the registration)
    - **Note:** this token will be represented by \$(EmailAddress) within the email message.
  - **Subscription Information** – use this token to display the opt in lists the user is currently subscribed to
    - **Note:** this token will be represented by \$(subscription) within the email message.
  - **Manage Subscription** – use this token to display a link for subscribers to manage their subscriptions within the system
    - **Note:** this token will be represented by \$(ManageOptIn) within the email message.
    - **Newsletter Web View Link** - use this token to utilize a hyperlink that the subscriber can click on which will render a ‘web version’ of the newsletter. The web version is based on the non-personalized version of the newsletter.
      - **Note:** this token will be represented by \$(WebDisplayLink) within the email message.
  - **Opt In Email ID (Database Key)** - this token can represent the subscribers Opt In Email ID key value within the Opt In Email system. This token should only be used for advanced implementation where you might want to make use of this token. Examples can include integration with Dynamic Forms for Surveys
  - **Opt Out Link** - use this token to display the Opt Out Link your subscribers can use to unsubscribe
    - **Note:** this token will be represented by \$(OptOutURL) within the email message
  - **Opt Out Message w/ Link** – use this token to display the Opt Out message and an Opt Out Link. The Opt Out Message is the message defined within the newsletter configuration of the My Newsletters control panel
    - **Note:** this token will be represented by \$(OptOut) within the email message.

- **Opt Out From All Lists** - use this token to display the link your subscribers can use to Opt Out all of the available lists. This token is unique as the user will not have to choose which opt in lists they want to unsubscribe from. It will just automatically opt them out
  - **Note:** this token will be represented by \$(OptOutAll) within the email message.
- **Opt Out From All Lists (Full URL Link)** - this has the same purpose as the \$(OptOutAll) but will render the full URL and not the Opt Out Text in hyperlink
  - **Note:** this token will be represented by \$(OptOutAllFull) within the email message.
- **Tracking Bug** – use this token to put a tracking bug into a newsletter. This token will reference whatever the default token is defined as within the newsletter configuration of the My Newsletters control panel. For example, if you chose to have Image as your tracking bug, then this token would be the same as using the Tracking Bug (Image) token which is listed below.
  - **Note:** this token will be represented by \$(Tracking) within the email message.
- **Tracking Bug (Image)** - use this token to put an image with a tracking bug in the message. Please note that some email programs, such as MS Outlook, do not allow this.
  - **Note:** this token will be represented by \$(TrackingImage) within the email message.
- **Tracking Bug (Stylesheet)** - use this token to put a tracking bug into the message as a stylesheet included into the message. Please note, some email programs do not allow this such as Microsoft Outlook®.
  - **Note:** this token will be represented by \$(TrackingCSS) within the email message.
- **Extended Fields** – all extended fields setup within the opt in email system can be referenced here as \$(Question Name). So if you created an extended question called 'Zip Code' you can reference the subscribers response to that question here in the message as \$(Zip Code).
- **Inject Module Content** - use this token to inject specific module content such as RSS Feeds, Announcements modules, or any module content. Injecting module content is easy but you first need to find the module ID for the content you wish to inject. To find the ModuleID you can click on 'Settings' and review the URL to find the moduleID. For example the URL might be /mid/5141 or /ModuleID/5141. The module ID for that module would be 5141.
  - **Note:** this token will be represented by \$(ModuleContent:ModuleID) within the email message.
  - **Example: \$(ModuleContent:5141)**
  - **Note:** Starting in version 5.1 and above, this feature can be disabled within the settings. The feature can also be included to allow STATIC content or DYNAMIC content. If STATIC content is chosen and if that text is a TEXT/HTML module, then only the TEXT/HTML will be injected.

Inject Module Content ^

---

Page .....Dynamic Forms Der v

You can choose to insert content from within your portal. Choose "Static" if you want the content to be based on the "Dynamic" if you want the content to be presented to the user live during the distribution process.

Module Ready to get started? v

Method Static (Current Content) v

[Add Module](#)

Static (Current Content)

Static (w/ Read More)

HTML Version

The read more link will produce a hyperlink back to the web site URL where this content is located at

Figure 111: Injecting Module Content

- **Link Tracking Objects** – the following options are available
  - **Link Tracking URL** – this will include the full http reference for the link tracking object. This is useful if you want to reference the link tracking object as a hyperlink for an image or other specific link in your message.
  - **Link Tracking URL (Full Link)** – this will include a link which is already setup with a link tracking definition name. If the link tracking definition was 'Data Springs' it would create a hyperlink with that specific text for the user. This is useful if you do not want to create your own link in the message.
- **Email Message and Email Message (Text Only)** – the text areas for entering the contents of the email message i.e. the body in HTML or text format

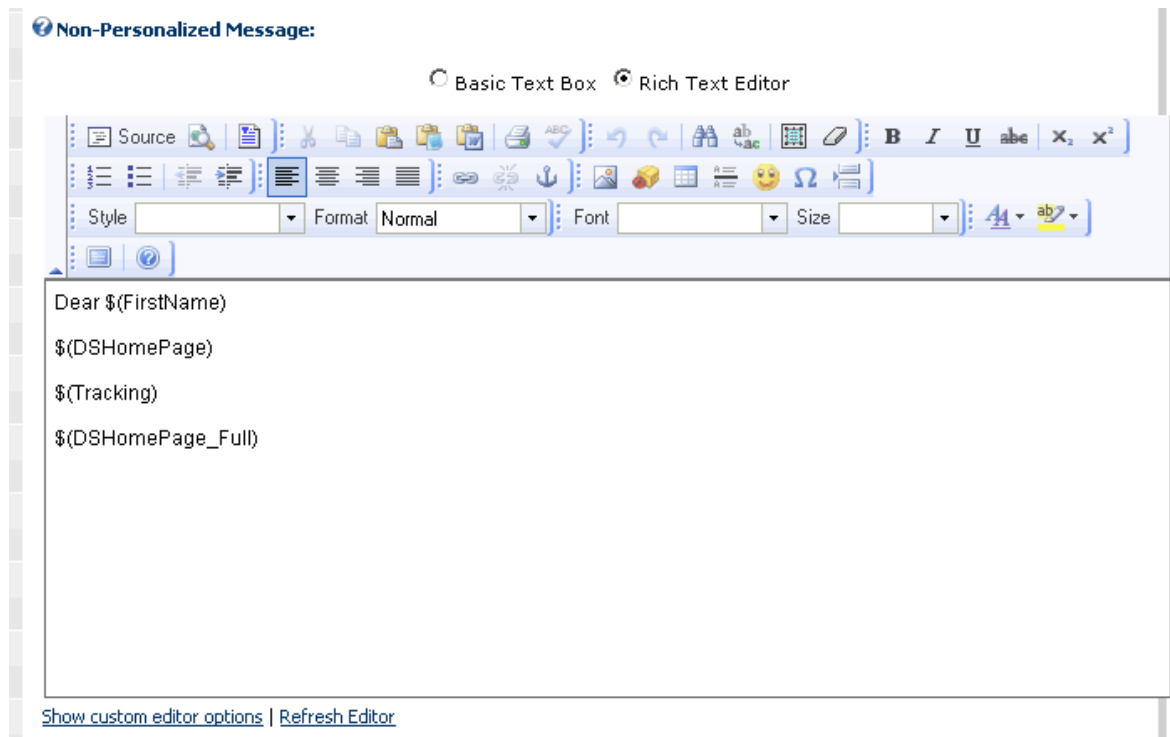



Figure 112: Creating a new email/newsletter (step 3/6)

- **Non-Personalized Message** – specify the contents of the email in case that will be saved within the previous newsletters database, or also when viewing for reports, statistics. This message should represent the same content, however not include any customized or personalized tokens
- **Note:** Starting within version 5.1 of Opt In Email, this non-personalized message can also be removed as a feature within the module configuration / control panel.

## 2. Email Status

Select from the below options for the status of this newsletter. If you save the newsletter as a draft, you can also schedule newsletters for immediate scheduled distribution. We recommend using the scheduler for all large distributions and for better logging purposes.

☐ Save Draft  
☐ Save Draft / Flag as Ready  
☐ Send Test Email  
☒ Send / Schedule Immediately  
☐ Schedule for... Date:   Time:  (hh:mm:ss)

[Exit / Cancel Newsletter Distribution](#)

Figure 113: Creating a new email/newsletter (step 4/6)

The second part of the page is used for defining the email status. The following parameters are available:

- **Save Draft** – select this option if you wish to save this newsletter as a draft and send it at some other time
- **Send Test Email** – select this option if you wish to send a test email. The test email will be sent to the email address specified in Advanced Email, Module Configuration, Newsletter Schedule Settings. Only a single test email will be distributed and will be sent immediately (not within the Opt In Email Scheduler)
- **Send Immediately** – select this option if you want to send the newsletter immediately; the email is sent as soon as you click “Finish” in the bottom of the page

**Tip:** sending immediately is not recommended for large distributions due to logging, web site time outs, and ability to throttle email messages within a given number per instance. We highly recommend utilizing the “Scheduler for...” option

- **Schedule Immediately** – use this option to schedule the newsletter to be distributed immediately. This is the recommended setting when you want to distribute a newsletter right away and has better logging, ability to throttle distribution, and reports compared to the ‘Send Immediately’ method.
- **Schedule for** – use this option in case you wish to schedule sending of the newsletter for a specific date and time

**Tips:**

- we recommend using the scheduler for all large distributions and for better logging purposes
- the scheduler is the recommended distribution method and will be defaulted upon creation of each newsletter


- the recommend schedule settings are for 200 every 30 minutes (defined when enabling the scheduler under Control Panel/Newsletter Configuration/Schedule section


#### Scheduler Test Mode Tips:

- the schedule mode will either be displayed as 'Schedule for...' or "Schedule for (test mode). If the newsletter configuration /schedule section test mode is enabled the setting will be reflected within this label.
- test mode for the scheduler is a portal specific setting for the newsletter scheduler, this setting is not per newsletter instance
- the test mode currently reflects the 'exact' emails that would go out if the system was not in test mode, the only difference is that the 'email to' will be sent to the email address specified within the newsletter configuration / schedule section. If you distribute a newsletter in scheduler test mode to an opt in list of 2000 subscribers, it will literally be distribute 2000 emails to the test email address.
- an alternative method for testing newsletters within test mode is to setup a 'Test' Opt In List. This method can allow you to add only a small subset of email addresses to the opt in list and distribute newsletters to this list. You can specify which Opt In Lists are displayed and utilized within the main Opt In Email module / Simple Opt In Email module, so standard subscribers will never see this test opt in list.
- Testing Is Important:** The purpose of test mode is not just to make sure your email system and scheduler is working properly, test mode is also recommended to test newsletter tracking, link tracking, images within your newsletter, all standard email and extended question email tokens, and overall success with your SMTP and email provider, site, and scheduler settings. The recommend schedule settings are for 200 every 30 minutes.

#### Select Recipients / Send Email

Select the recipients for this newsletter by checking the subscribers within the selected opt in lists who should receive this newsletter. If you have email addresses that are entered manually will be added to the selected opt in distribution lists.

Opt In List(s):  ☐ Bubba GumpBuba (0) ☐ Shrimp (0)

Additional Emails: 

**Advanced Settings**


Figure 114: Creating a new email/newsletter (step 5/6)

The third part of the page is used for specifying the recipients of your newsletter. The following parameters are available:


- **Opt in List(s)** – choose the opt in lists which will receive this newsletter (see section 3.6.1 for further information on how to create an opt in list)
- **Additional Emails** – enter any additional single email addresses you wish to send the newsletter to (**note:** the addresses should be divided with a semi-colon such as 'address@address.com;test@address.com;test2@address.com'). Any additional email addresses that are entered manually will be added to the selected opt in distribution lists that you are distributing this newsletter to.


## Advanced Settings

In this section, you can set up the advanced settings for your message.


Save Copy?:  ☐

Selecting this option will save this e-mail as a draft, though it will still send e-mails to any recipients s


Publish to Site:  ☐ Select if you want to publish this i

Attachment: 


File Location:

Root 

File Name:

<None Specified> 

**Upload New File**


Priority:  Normal

**Cancel** **Finish**

Figure 115: Creating a new email/newsletter (step 6/6)

The fourth part of the page is used for managing the advanced settings. The following parameters are available:

- **Save Copy** - selecting this option will save a copy of this message(as a draft) after sending the newsletter to the recipients
- **Publish to Site** – select this option to publish the newsletter to the public newsletter archive, if the newsletter has been published to the site it will be available for display within the “Opt In Previous Newsletter Archive” (see section 5)

**Tip:** after distribution of the newsletter you can easily publish/un-publish your newsletter to the newsletter archive within the data grid  on the main My Newsletter page.

- **(Reply-To-Address)** – specify the reply-to address inside this field
- **From Name** – enter the name the newsletter will appear from
- **Attachment** – use these options to add an attachment to your newsletter; you can either select a file which already resides on your server or add a new file by using the “Upload New File” option
- **Priority** – select the desired priority level for this message

- **Send Method** – choose the desired send method from this pull down menu
  - **One message per email address (personalized)** – select this option if you have used the mail merge tokens to personalize your message to each of the recipients (i.e. address them by their first name, etc – see Figure 110))
  - **One email to blind distribution list** – select this option if you wish to send the newsletter as one email to blind distribution list i.e. in case you haven't used the tokens, but specified the contents within the "Non personalized" part of the page (see Figure 112)
- **Send Action** – select the desired method for sending this message

After setting the desired parameters, click the "Finish" button.

## 6.6 Viewing the Log Results

In order to view the log results, choose that option from the main menu.

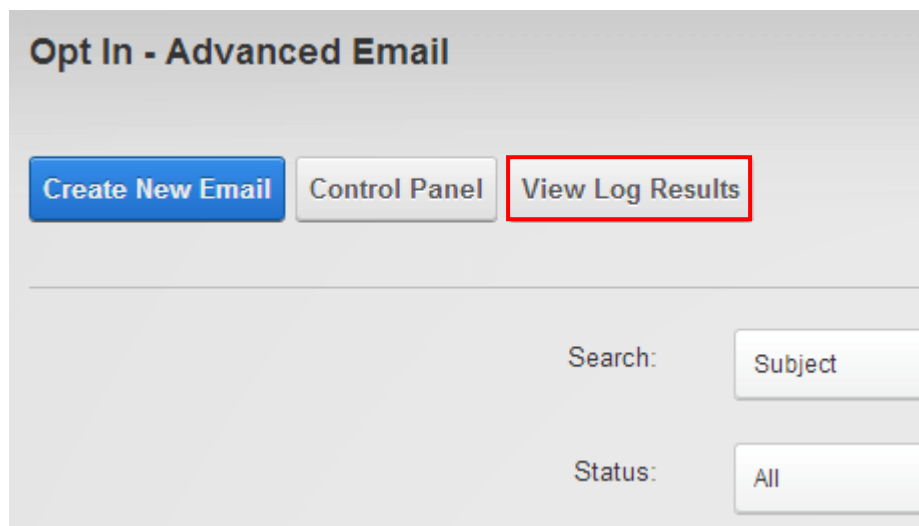



Figure 116: Viewing the log results (step 1/2)

The following page will be displayed.



## View Log Results

Cancel

Scheduled Task: 

Newsletter Distribution



The Newsletter Distribution routine distributes newsletters based on the configuration you have defined. It optionally log all details of each distribution. The more logging that is enabled the longer each distribution can limit the number of emails sent out for a specific timeframe (such as 300 every 30 minutes). The screen will show the log results.

**Run Newsletter Distribution Schedule Process Now**

Enabled:False

Time Lapse:4

Measurement:h

Retain History:50

Refresh History

Clear Log

Description	Duration	Succeeded	Start/End/Next Start
-------------	----------	-----------	----------------------

Figure 117: Viewing the log results (step 2/2)

The following options and parameters are available:

- **Scheduled Task** - select the task that you would like to view the log results for; the following tasks are available:
  - **Newsletter Distribution** – select this option to view the log result of the newsletter distribution task
  - **Email Campaign Distribution**– select this option to view the log result of the email campaign distribution task
  - **Bounceback Protection** – select this option to view the log result of the email bounceback protection task
- **Run Newsletter Distribution Schedule Process Now** – click this link to run the newsletter distribution schedule process immediately (see section 6.6.1)
- **Refresh History** – click this link to refresh the page i.e. log information
- **Clear Log** – click this link to delete all information within the page

### 6.6.1 Running the Newsletter Distribution Scheduler

In order to run the newsletter distribution schedule process, click that link within the page for viewing the log results.

**Note:** The distribution scheduler is based on the settings defined within the Advanced Newsletter Control Panel. These settings define how often the scheduler will run and how many newsletters should be distributed with each scheduler instance. You can also manually kick the scheduler off by clicking the link highlighted below.

**Run Newsletter Distribution Schedule Process Now**

Enabled:False  
Time Lapse:4  
Measurement:h  
Retain History:50


Refresh HistoryClear Log

Description	Duration	Succeeded	Start/End/Next	Start
-------------	----------	-----------	----------------	-------

Figure 118: Running the Newsletter Distribution Scheduler (step 1/2)

The following page will be displayed.

**View Log Results**

 **Newsletter Distribution Scheduler**  
The scheduler has been kicked off and should be running shortly.

Cancel



 **Scheduled Task:** Newsletter Distribution

Figure 119: Running the Newsletter Distribution Scheduler (step 2/2)

Once the scheduler has kicked off you can click 'Refresh History' to see updated statistics and history.

## 6.7 Viewing the Quick Stats Report

In order to view a quick stats report for a newsletter, click the “View report” icon  next to the desired newsletter.

Create New Email
Control Panel
View Log Results

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
























Search: Subject

Status: All

Opt In List: < All Opt In Lists >

Search Term: 
Search

---

Subject	Status					
How my Pet Pig Annie uses Opt-In Text	Sent 5/24/2013 7:41 AM					
Introducing Opt-In Text	Sent 5/22/2013 7:26 PM					
Opt In Email 5.0	Sent 4/23/2013 9:48 PM					
Love from Data Springs	Sent 2/14/2013 8:01 AM					
Data Springs celebrates Chad's 33rd birthday	Sent 12/18/2012 6:22 AM					
Three Holiday Goodies from Data Springs!	Sent 12/11/2012 12:07 AM					
Top 3 Reasons to get the Collection 6.0 NOW	Sent 10/23/2012 3:59 PM					
Your Collection 6.0 comes with free training!	Sent 10/18/2012 6:46 PM					
Invitation to #DNNChat on Friday Oct. 5 9 a.m. PST	Sent 10/3/2012 4:46 PM					
New DNN Training on Data Springs Modules	Sent 10/1/2012 1:53 PM					

1 2 3 4 5

Page size: 10

43 items in 5 pages

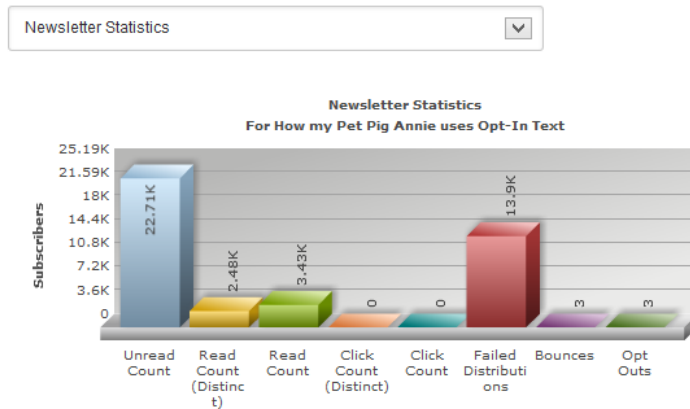
Figure 120: Viewing the Quick Stats Report

The following types of reports are available:

- **Newsletter Statistics** – see section 6.7.1
- **Read/Unread Counts** – see section
- **Read Counts per Hour of Day** – see section 6.7.3
- **Read Counts per Day of Week** – see section 6.7.4
- **Read Count per Day of Month** – see section 6.7.5
- **Success/Failure** – see section 6.7.6
- **Bounceback Reasons** – see section 6.7.7

### 6.7.1 Viewing the Newsletter Statistics

In order to view the newsletter statistics, choose “Newsletter Statistics” from the menu.



How my Pet Pig Annie uses Opt-In Text

Date / Time

5/24/2013 7:41:00 AM

Total Sent

25193

Opens (Distinct)

2481 (10%)

Opens

3428 (14%)

Clicks (Distinct)

0 (0%)

Clicks

0 (0%)

Failed Distributions

13903 (55%)

Bounces

3 (0%)

Opt Outs

3 (0%)

Note: Failed emails might possibly represent emails that failed from previous distributions. Certain failed emails could have been present when your SMTP settings were not configured properly because bouncebacks and failed emails are not based on a specific newsletter necessarily. Please make sure to clear out this table before checking against the most recent newsletter. You can do this by navigating into the Reports section of the Advanced Newsletter control panel.

Figure 121: Viewing the Newsletter Statistics

### 6.7.2 Viewing the Read/Unread counts Report

In order to view the read/unread count report, choose “Read/Unread Counts” from the menu.

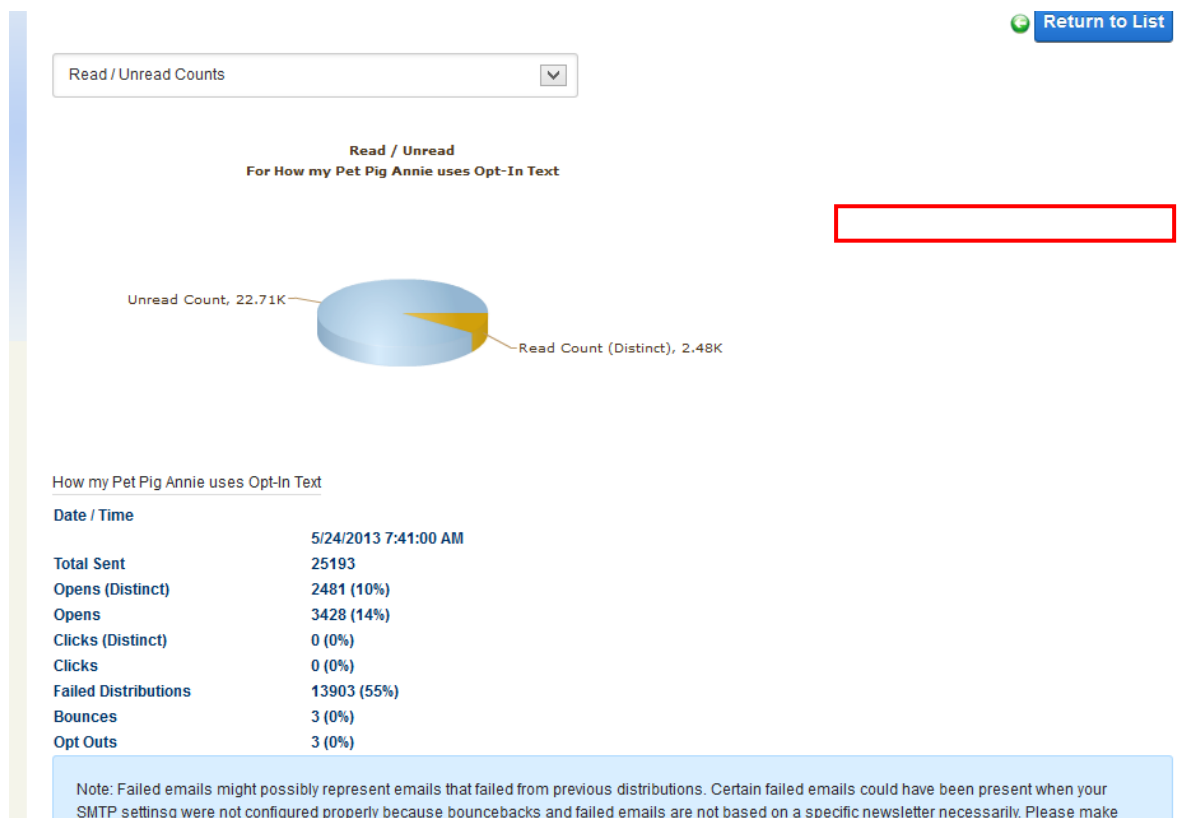


Figure 122: Viewing the Read/Unread counts Report

### 6.7.3 Viewing Read Counts per Hour of Day Report

In order to view the read counts per hour of day report, choose “Read Counts per Hour of Day” from the menu.

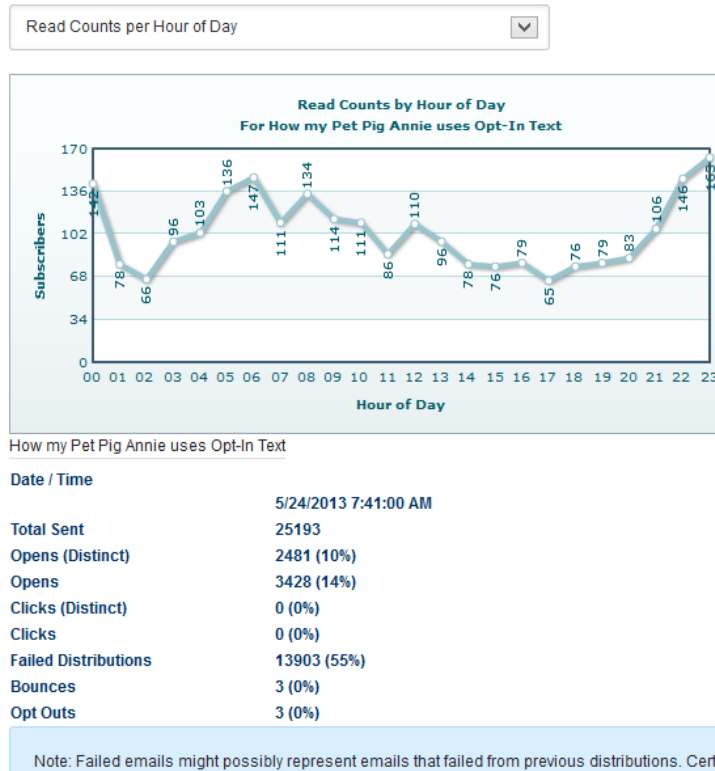


Figure 123: Viewing Read Counts per Hour of Day Report

### 6.7.4 Viewing Read Counts per Day of Week Report

In order to view the read counts per day of the week report, choose “Read Counts per Day of Week Report” from the menu.

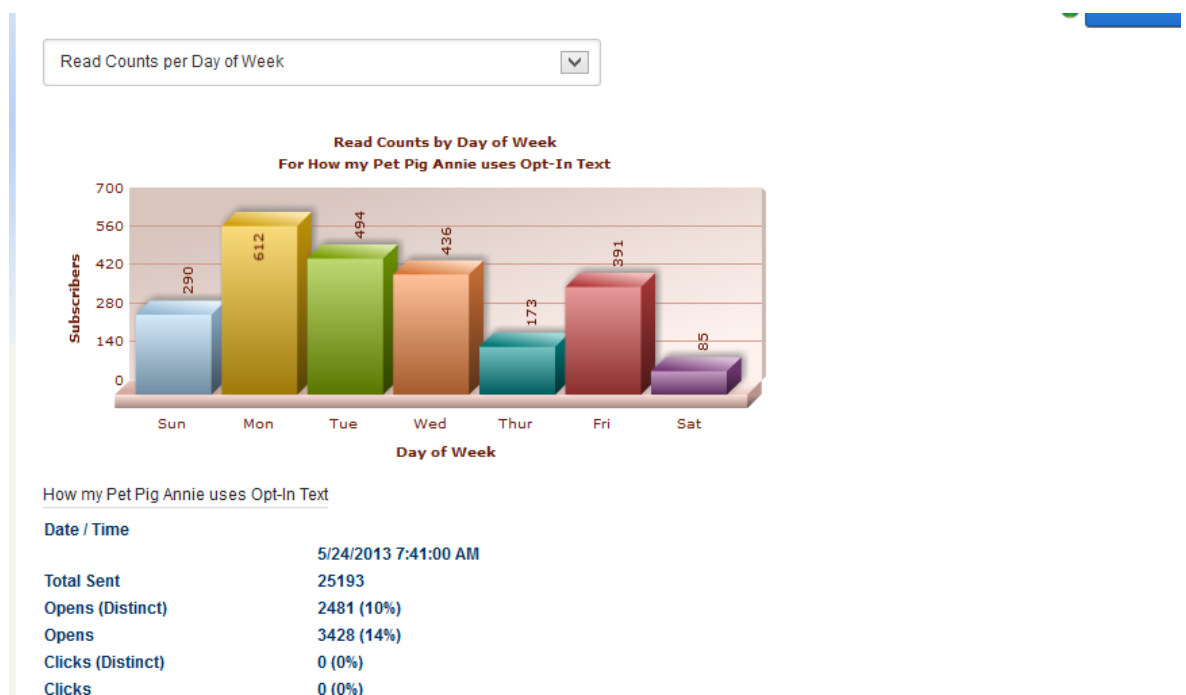
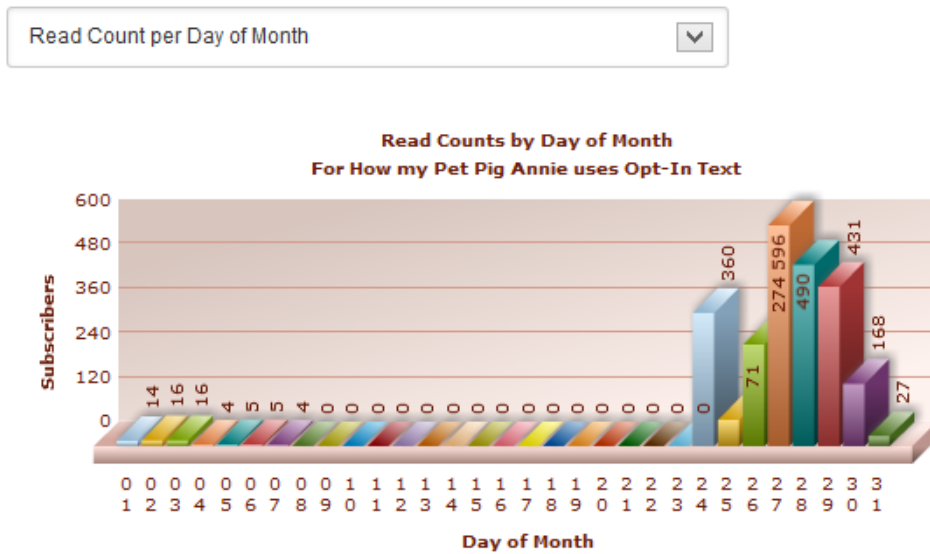


Figure 124: Viewing Read Counts per Day of Week Report

### 6.7.5 Viewing Read Count per Day of Month Report

In order to view the read count per day of month report, choose “Read Count per Day of Month Report” from the menu.



How my Pet Pig Annie uses Opt-In Text

Date / Time

5/24/2013 7:41:00 AM

Total Sent

25193

Opens (Distinct)

2481 (10%)


Opens

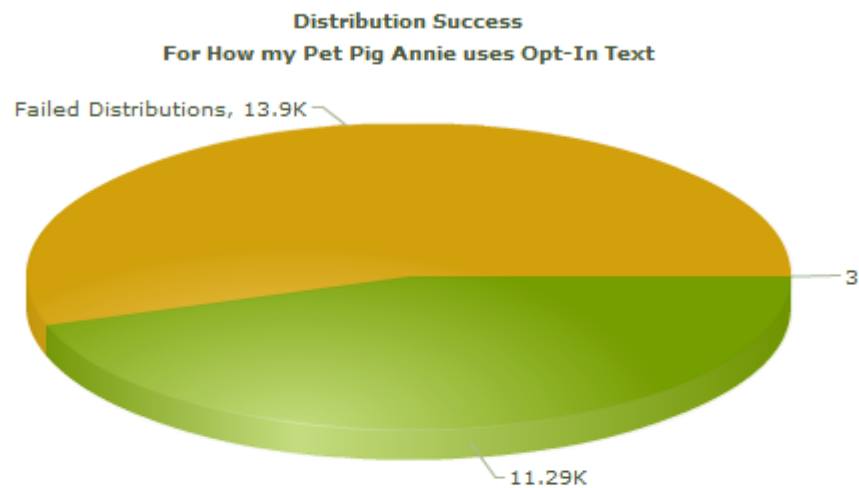
3428 (14%)

Figure 125: Viewing Read Count per Day of Month Report

### 6.7.6 Viewing Success/Failure Report

In order to view the success/failure report, choose “Success/Failure” from the menu.

Success / Failure 



#### How my Pet Pig Annie uses Opt-In Text

##### Date / Time

5/24/2013 7:41:00 AM

Total Sent	25193
Opens (Distinct)	2481 (10%)
Opens	3428 (14%)
Clicks (Distinct)	0 (0%)
Clicks	0 (0%)
Failed Distributions	13903 (55%)
Bounces	3 (0%)

Figure 126: Viewing Success/Failure Report



### 6.7.7 Viewing Bounceback Reasons Report

In order to view the bounceback reasons report, choose “Bounceback Reasons” from the menu.

Bounceback Reasons 

#### Bounceback Reasons For How my Pet Pig Annie uses Opt-In Text



How my Pet Pig Annie uses Opt-In Text

**Date / Time**

5/24/2013 7:41:00 AM

**Total Sent**

25193

Figure 127: Viewing Bounceback Reasons Report

## 6.8 Publishing and un-publishing the newsletter

This feature allows you to publish or un-publish the particular newsletter from the Previous Newsletters Archive. This archive is the separate Previous Newsletter module.

Previous versions only allowed you to define this setting when creating a new newsletter, however now you can modify this flag for each newsletter directly within the interface.

Create New Email
Control Panel
View Log Results

---

Search:

Status:

Opt In List:

Search Term: 
Search

Publish / Unpublish From Archive.

Subject	Status					
How my Pet Pig Annie uses Opt-In Text	Sent 5/24/2013 7:41 AM					
Introducing Opt-In Text	Sent 5/22/2013 7:26 PM					
Opt In Email 5.0	Sent 4/23/2013 9:48 PM					
Love from Data Springs	Sent 2/14/2013 8:01 AM					
Data Springs celebrates Chad's 33rd birthday	Sent 12/18/2012 6:22 AM					
Three Holiday Goodies from Data Springs!	Sent 12/11/2012 12:07 AM					
Top 3 Reasons to get the Collection 6.0 NOW	Sent 10/23/2012 3:59 PM					
Your Collection 6.0 comes with free training!	Sent 10/18/2012 6:46 PM					
Invitation to #DNNChat on Friday Oct. 5 9 a.m. PST	Sent 10/3/2012 4:46 PM					
New DNN Training on Data Springs Modules	Sent 10/1/2012 1:53 PM					

1 2 3 4 5
Page size:

43 items in 5 pages

Figure 128: Publishing and un-publishing the newsletter

- **Publish** –use this icon
- **Un-publish** - use this icon to un-publish the newsletter

## 6.9 Managing the Tracking information

In order to start managing the tracking information, choose option “Tracking” from the Control Panel.

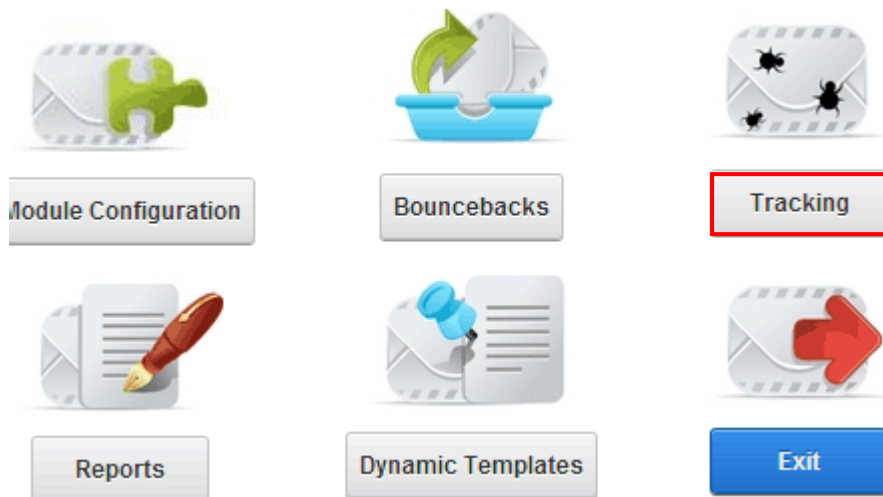


Figure 129: Choosing option "Tracking" from the Control Panel

The following page will be displayed.

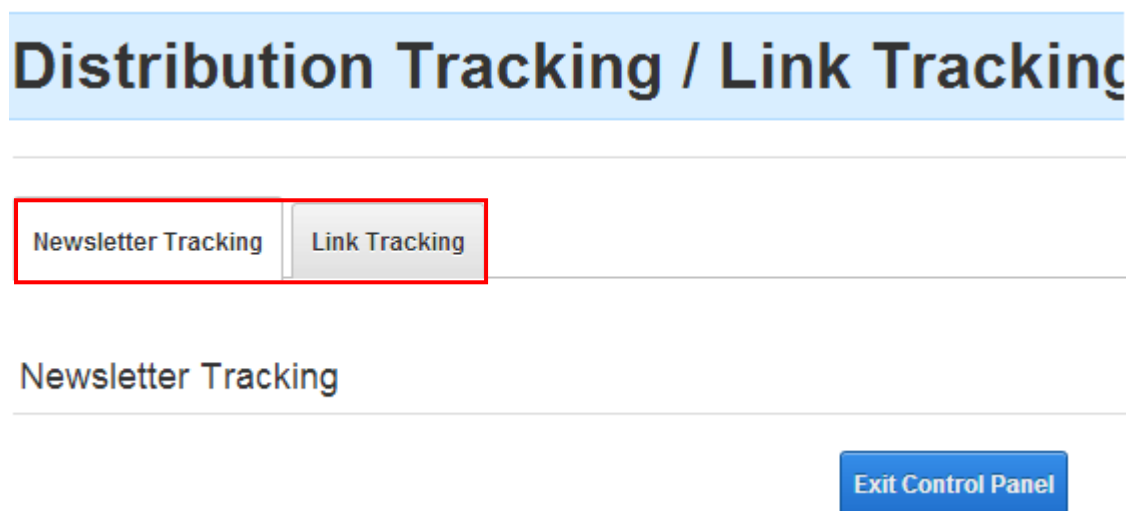


Figure 130: Distribution and link tracking

The following options are available:

- **Newsletter Tracking** – the option for tracking information about the newsletters (see section 6.9.1)
- **Link Tracking** – the option for managing tracking information about the links (see section 6.9.3)

### 6.9.1 Newsletter Tracking

In order to start setting the Newsletter tracking options, click the **Newsletter Tracking** tab after choosing **Tracking** in the Control Panel (see Figure 130).

Tracking Image: ⓘ


File Location:

Root

File Name:

Awesome-Cycles-Logo.png

Upload New File



Update

Exit Control Panel

Figure 131: Newsletter tracking

The following options and parameters are available:

- **File location** – choose the location of the image
- **File name** – choose the desired image after selecting the location
- **Upload new file** -the option for uploading a new image

After setting the desired parameters, click on the "Update" link to save the changes.

**Note:** see section 6.9 for details on viewing the tracking reports.

### 6.9.2 About the tracking

**Tips:**

- The tracking feature will either be included within the email as an image or a style sheet, the default implementation is to use an image and for that image to be your logo or other relative image
- Subscribers using popular email applications will be forced to 'download images' before the tracking can function properly, or request that subscribers add the from distribution email to their safe senders list
- Tracking implementation requires that the main Opt In Email module is placed on a page that is viewable to all users, this page must be specified within the newsletter configuration section
- Image is the preferred tracking method as some applications (such as Outlook® 2007) do not allow style sheets to be rendered from a link

### 6.9.3 Link Tracking

In order to start setting the Newsletter tracking options, click the **Link Tracking** tab after choosing **Tracking** in the Control Panel (see Figure 130).

The link tracking is used for tracking when subscribers click specific links within a newsletter or email campaign.

This feature tracks the subscriber's information and date/time of the click, and then redirects the user to the specific web page.

Start using the link tracking feature by clicking the "+" symbol next to the "Link Tracking" label.

Link Tracking Definition: ⓘ - Select Link Tracking Definition - ▼

Tracking Link Name: ⓘ

Hyperlink URL: ⓘ

Tracking Token: ⓘ

Distribute email if a link has been clicked?: ⓘ ☐ Yes

Email From Name: ⓘ

Email From Email Address: ⓘ

Email To (blank to send to subscriber): ⓘ

Mail BCC: ⓘ

Email Subject: ⓘ

#### Display Message Parameters

Email Message: ⓘ

☐ Basic Text Box ☒ Rich Text Editor ⓘ

Rich Text Editor toolbar: Includes icons for undo, redo, bold, italic, underline, link, unlink, custom links, font color, background color, font name, size, bulleted list, numbered list, indent, outdent, and paragraph alignment.

Figure 132: Using the link tracking feature

You can have unlimited number of link tracking definitions, i.e. links you wish to track. The "Link Tracking Definition" menu can be used for the following:

- **Creating a new tracking definition** – see section 6.9.4
- **Editing an existing tracking definition** - see section 6.9.5
- **Deleting a tracking definition** - see section 6.9.6



- **Hyperlink URL** - enter the URL that the user should be redirected to for this link (i.e. <http://www.yoursite.com>)
- **Tracking Token** - enter the token that should be used for this tracking link definition; this tracking token is required and will be represented within newsletters or email campaigns as **\$(Token)**; when used the token will be replaced with a link that will properly track the users click
- **Distribute email if a link has been clicked** – use this option if you would like the subscriber or anyone else to be emailed in case the subscriber clicks on the URL
- **Email from name** - enter the from name that you would like to be displayed when distributing this email
- **Email from Email Address** - enter the from email address that you would like to be displayed when distributing this email
- **Email to (blank to send to subscriber)** - enter the email address of the person you want to notify about the click. If no email address is specified, the message will be sent to the subscriber
- **Mail BCC** - enter the BCC recipient for the email notification
- **Email Subject** - enter the email subject for the email notification
- **Display Message Parameters**
  - **Email Message** - enter the email message body for the email notification
  - **Email Format** - select the email format for this message; the format can either be in HTML or in plain text
  - **Attach file to email** – select this option if you wish to attach a file to the email and use the options below (File Attachment) to specify the desired file

After setting the desired parameters, click on the "Update" link to save the changes and complete the procedure of creating a new link definition.

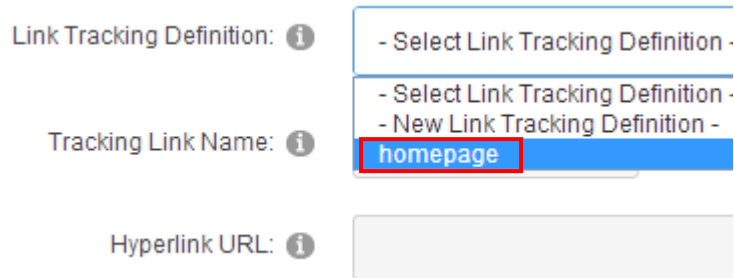
#### Tips:

- You can setup as few or as many link tracking definitions as you would like, each link tracking object can be used as many times throughout newsletters and email campaigns by using **\$(TokenName)** and **\$(TokenName\_Full)** within the email message. The standard link tracking token will generate the full link necessary for tracking, and the full token will include the link already setup as a hyperlink with the link tracking name as the link text
- Link tracking will generate a hyperlink which will provide both track the subscribers click, and then also redirect them to the appropriate URL
- Link tracking includes the ability to distribute an email message to the subscriber or anyone after clicking a link. For example you could have an email setup to distribute a message to the administrator that the subscriber is interested in a specific product, or distribute an email message to the user letting them know more about a web site page they just clicked to visit

**Important:** Adding tracking links can be really time consuming! ☺ If you want to skip the hassle, starting in Opt In Email 5.1 you can now choose to enable "Auto Link Tracking". This feature is enabled within the standard module configuration area (see section 6.4.1) . Once the link has been created via the Auto Link Tracking, you can then come back in and manage any of the configuration settings etc.

### 6.9.5 Editing a link tracking definition

In order to edit an existing tracking definition, choose that definition from the “Link Tracking Definition” menu.



Link Tracking Definition: ⓘ - Select Link Tracking Definition -

Tracking Link Name: ⓘ - Select Link Tracking Definition -  
- New Link Tracking Definition -  
**homepage**

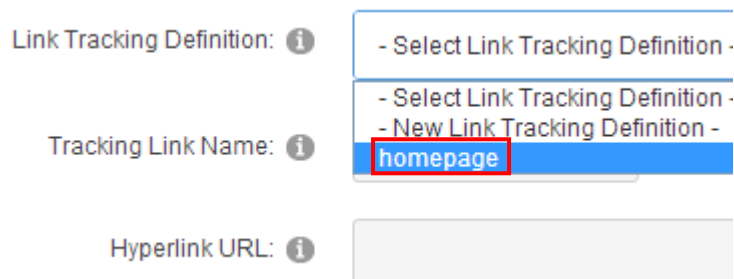
Hyperlink URL: ⓘ

Figure 134: Editing a link tracking definition

The definition for the chosen link will be displayed. Change the desired values and click the “Update” link to save the changes.

### 6.9.6 Deleting a link tracking definition

In order to delete an existing tracking definition, choose that definition from the “Link Tracking Definition” menu.



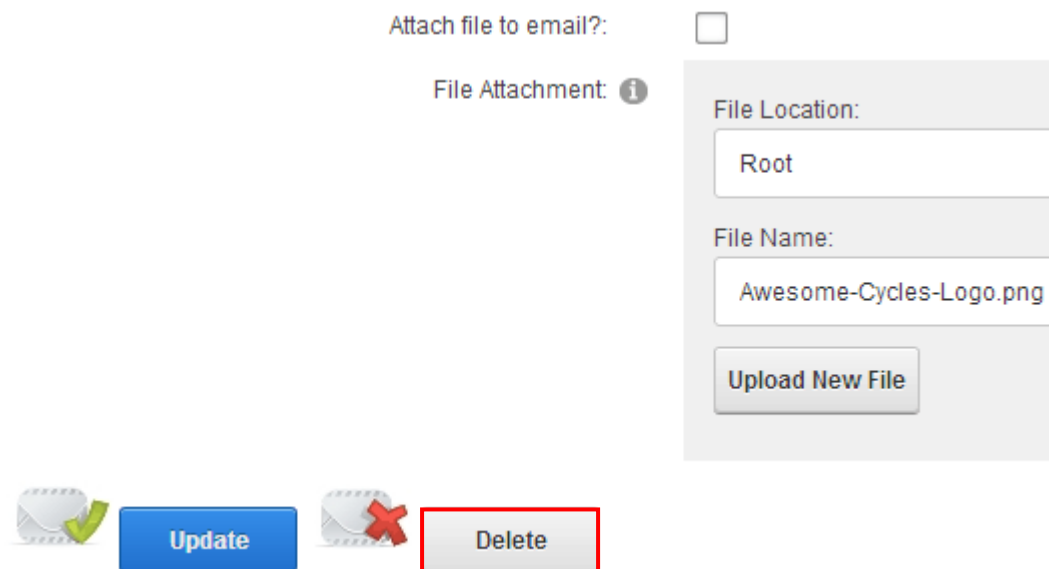
Link Tracking Definition: ⓘ - Select Link Tracking Definition -

Tracking Link Name: ⓘ - Select Link Tracking Definition -  
- New Link Tracking Definition -  
**homepage**

Hyperlink URL: ⓘ

Figure 135: Deleting a link tracking definition (step 1/2)

The definition for the chosen link will be displayed.



Attach file to email?: ☐

File Attachment: ⓘ

File Location:  
Root

File Name:  
Awesome-Cycles-Logo.png

Upload New File



 **Update**  **Delete**

Figure 136: Deleting a link tracking definition (step 2/2)



Click the “Delete” link and the definition will be deleted.

## 6.10 Using the Email Campaigns

The email campaign feature allows you to create a series of emails that will be distributed to subscribers based on a unique combination of time lines and precedence.

**For example:**

- You could setup a campaign called Baseball Cards with no prerequisite email campaign. You can setup the email campaign to go out 7 days after a subscriber first signed up
- You could then setup another campaign called Football Statistics, with a prerequisite of Baseball Cards and setup for 10 days. The system would then send out the first campaign 7 days after the user first subscribed to the system, and would send out Football Statistics campaign 10 days after the user was sent the Baseball Cards campaign email
- With this feature you could also include relevant content within the email, such as “Did you enjoy last weeks article on Baseball Cards?” You can setup as few or as many email campaigns as you would like, and all emails can include the same features for tracking, reports, and bounceback protection as newsletters

In order to start using the email campaigns, choose option “Email Campaigns” from the Control Panel.

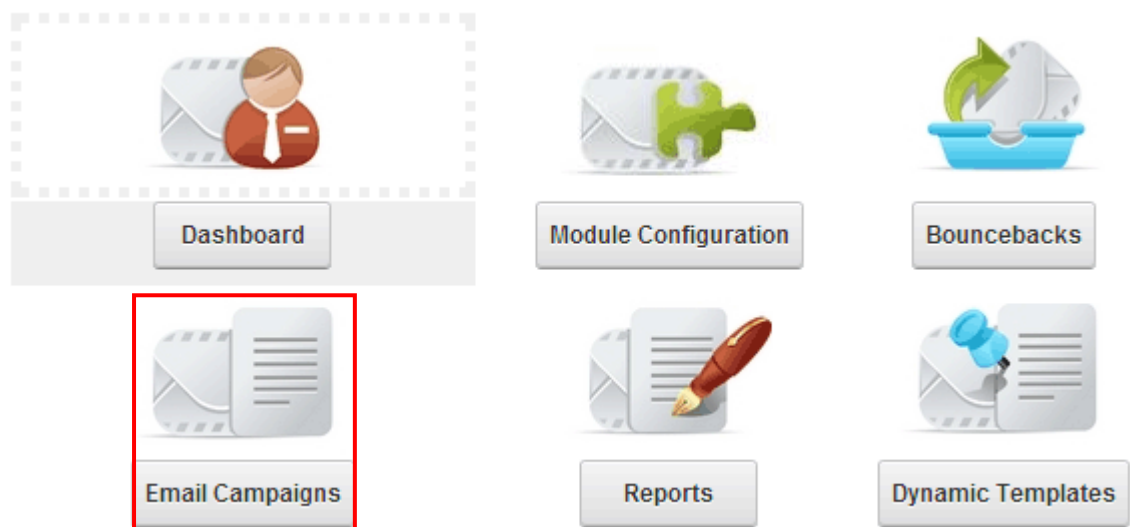


Figure 137: Choosing the "Email Campaigns" option

The following page will be displayed.

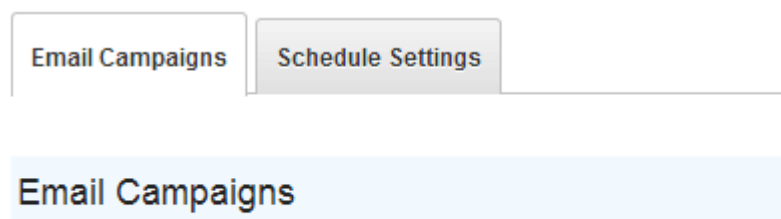


Figure 138: Available email campaigns options

The following options are available:

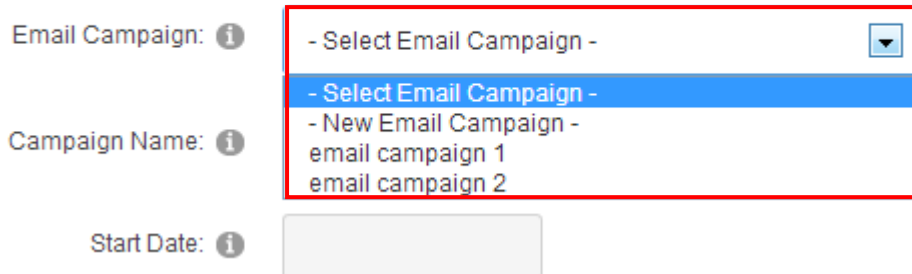
- **Email Campaigns** – option for managing the campaigns (see section 6.10.1)

- **Schedule Settings** – option for managing the schedule (see section 6.10.5)

#### 6.10.1 Managing Email Campaigns

In order to start managing the email campaigns, choose one of the available options from the “Email Campaign” menu.

### Email Campaigns



Email Campaign: ⓘ

Campaign Name: ⓘ

Start Date: ⓘ

Figure 139: Managing Email Campaigns

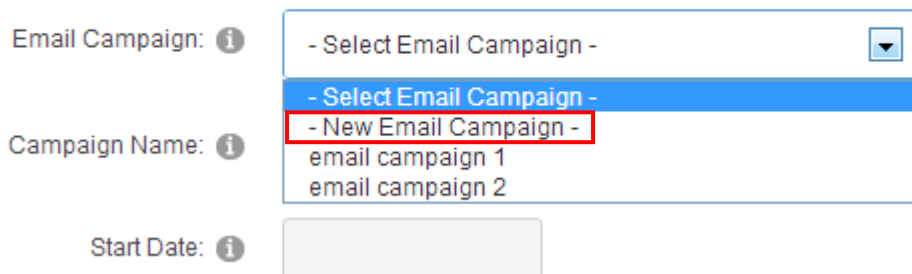
The following options are available:

- **Creating a new email campaign** – see section 6.10.2
- **Editing an existing campaign** – see section 6.10.3
- **Deleting an email campaign** – see section 6.10.4

#### 6.10.2 Creating a new email campaign

In order to create a new email campaigns, choose option “Email Campaign” menu.

### Email Campaigns



Email Campaign: ⓘ

Campaign Name: ⓘ

Start Date: ⓘ

Figure 140: Creating a new email campaign

The following page will be displayed.

## Email Campaigns

Email Campaign: ⓘ

Clone Existing Definition: ⓘ

Campaign Name: ⓘ

Start Date: ⓘ

End Date: ⓘ

Only distribute campaign to new subscribers (after start date?): ⓘ ☐

Opt In Lists: ☐ Bubba GumpBuba  
☐ Shrimp

Prerequisite Email Campaign: ⓘ

Prerequisite Days: ⓘ

Test Mode Enabled?: ⓘ ☐

From Email Name: ⓘ

From Email Address: ⓘ

BCC Email Address: ⓘ

Figure 141: Creating a new email campaign

The following parameters are available:

- **Campaign Name** – field for setting the name of the campaign; it will only be used as a reference i.e. will not be displayed to the users
- **Start Date** - enter the starting date for this email campaign; this date will be used as a starting point for sending emails within this campaign; the first email will be distributed after the starting date has been reached and in case the prerequisite days have gone by
- **End Date** - enter an ending date this email campaign; no emails will be distributed after this date
- **Only distribute campaign to new subscribers (after start date?)** - select this checkbox if you want to send emails in case the users subscribe after the start date; otherwise, emails will be distributed to any users within the opt in email list
- **Opt in Lists** - select the opt in list subscribers who should receive these email campaign emails
- **Prerequisite Email Campaign** - select a prerequisite Email for this email campaign; in other words, a campaign that the subscriber must receive before receiving this email
- **Prerequisite Days** - select the number of days that must pass (and after the prerequisite email) before the user is eligible to receive this email campaign
- **Test Mode Enabled** – select this option if you would like to enable the test mode for this campaign; the test mode will only distribute emails to the email address you have specified as 'from'; with this feature turned on, no subscriber will receive an email from you

- **From Email Name** – enter the name for the 'From' field
- **From Email Address** – enter the email address for the 'From' field
- **BCC Email Address** – enter a BCC recipient for the emails
- **Email Subject** - enter the subject line for this email
- **Display message parameters**
  - **Email Message** – enter the contents of the email message inside this field
  - **Email Format** - select the email format for this message; the format can either be in HTML or in plain text
  - **File attachment** – select this option if you wish to attach a file to the email and use the options below (File Attachment) to specify the desired file

After setting the desired parameters, click on the "Update" link and the new email campaign will be created.

### 6.10.3 Editing an existing campaign

In order to start editing an email campaign, choose the desired campaign from the "Email Campaign" menu. The page with the parameters of the selected campaign will be displayed.

## Email Campaigns



The screenshot shows a web form titled "Email Campaigns". It contains several input fields and a dropdown menu. The "Email Campaign" dropdown is open, showing a list of options: "- New Email Campaign -", "- Select Email Campaign -", "- New Email Campaign -", "email campaign 1" (highlighted in blue), and "email campaign 2". The "Clone Existing Definition:" label is next to the dropdown. Below the dropdown are input fields for "Campaign Name:" and "Start Date:". Each label has an information icon (i) next to it.

Figure 142: Editing an email campaign


Change the desired values and click the "Update" link to save the changes.

#### 6.10.4 Deleting an email campaign


In order to delete an email campaign, choose the desired campaign from the “Email Campaign” menu. The page with the parameters of the selected campaign will be displayed.

Email Format:  HTML 


Attach file to email?: ☐

File Attachment: 

File Location:

Root 

File Name:

Awesome-Cycles-Logo.png 

[Upload New File](#)




Figure 143: Editing an email campaign


Click the “Delete” link and the email campaign will be deleted.



#### 6.10.5 Managing the Schedule

In order to start managing the schedule for the emails, click the **Schedule Settings** tab within the Email Campaigns page (see Figure 137).

### Schedule Settings

Maximum number of emails to send in a single email campaign schedule:  200

Schedule Enabled:  ☐ Yes

Time Lapse:   Minutes 



Retain Schedule History:  None 

Figure 144: Managing the Schedule

The following options and parameters are available:

- **Maximum number of emails to send in a single email campaign schedule** – set the maximum number of emails which will be sent in a single schedule

- **Schedule Enabled** – select this option to enable the scheduler
- **Time Lapse** - enter the desired amount of time which should pass before the scheduler should run
- **Retain Schedule History** – select “None” if you do not want to keep the history or select the desired number of history rows

After setting the desired parameters, click on the "Update" button to save the changes.

## 6.11 Managing the Reports

In order to start managing the reports, choose option “Reports” from the Control Panel.

# Advanced Email Control Panel

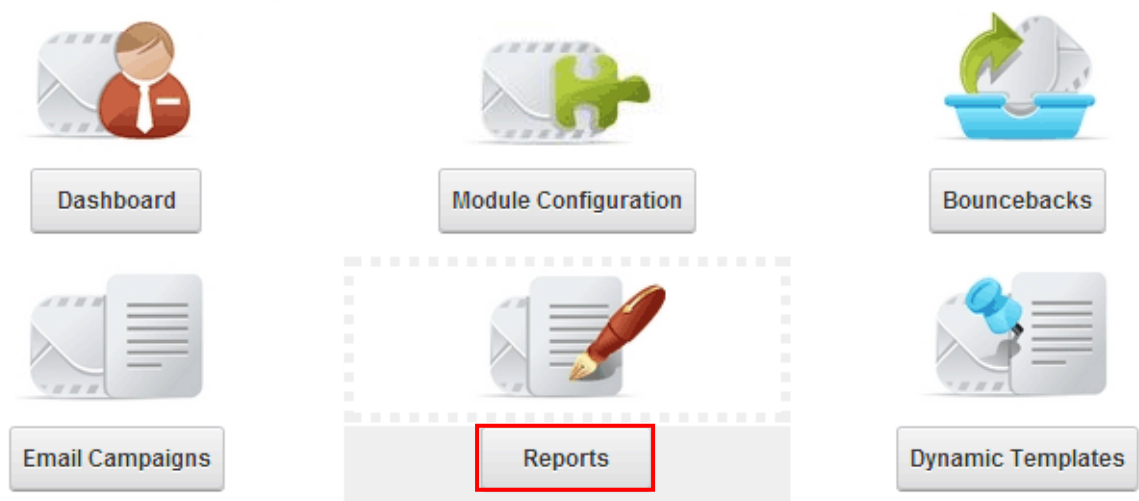


Figure 145: Choosing option "Reports" from the Control Panel

The following page will be displayed.

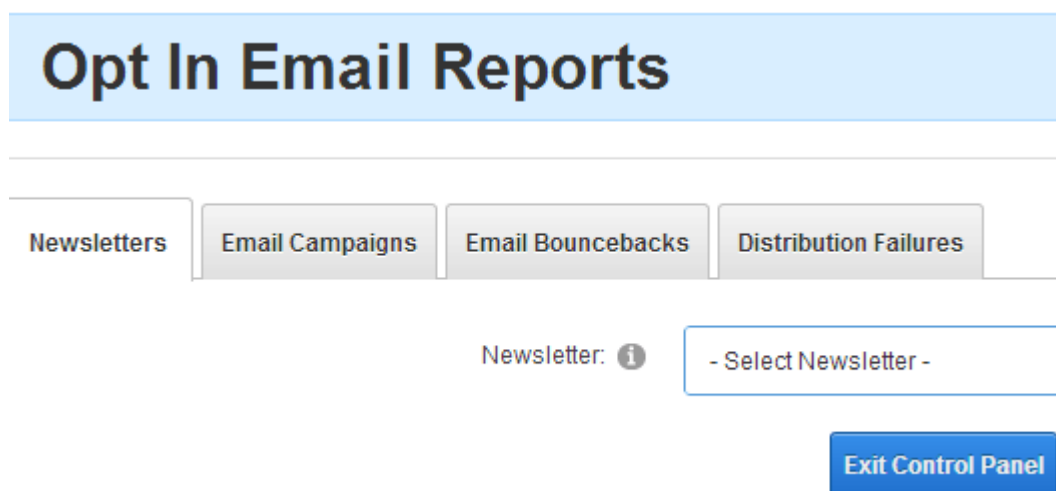


Figure 146: Opt in Email reports

The following options and parameters are available:

- **Newsletter**– the option for viewing newsletter reports (see section □)

- **Email Campaign Reports** – the option for viewing Email Campaign reports (see section 6.11.6)

#### 6.11.1 Viewing a Newsletter Report

In order to view a report for a newsletter, select “Newsletter Reports” and choose the newsletter from the pull down menu.

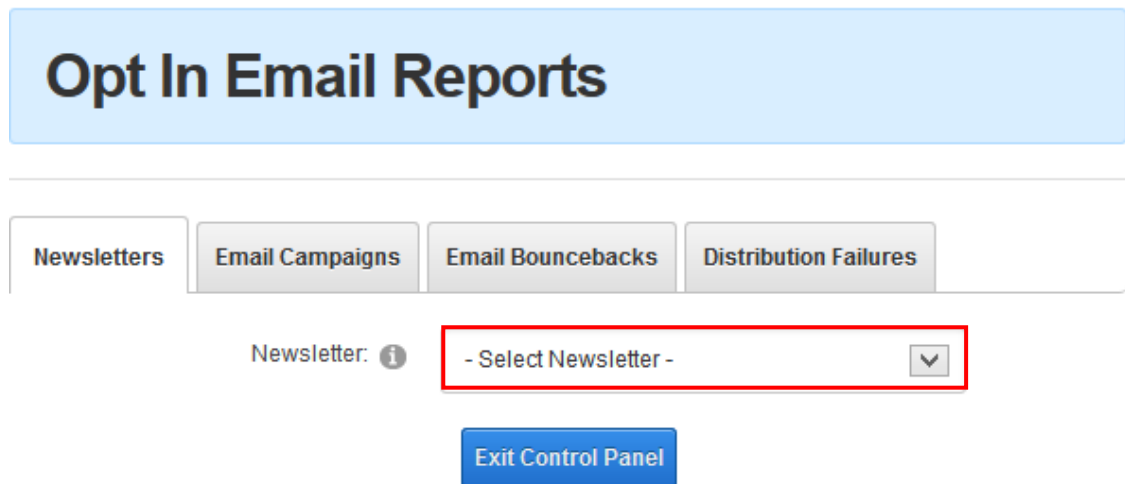


Figure 147: Viewing a Newsletter Report

The following page will be displayed.

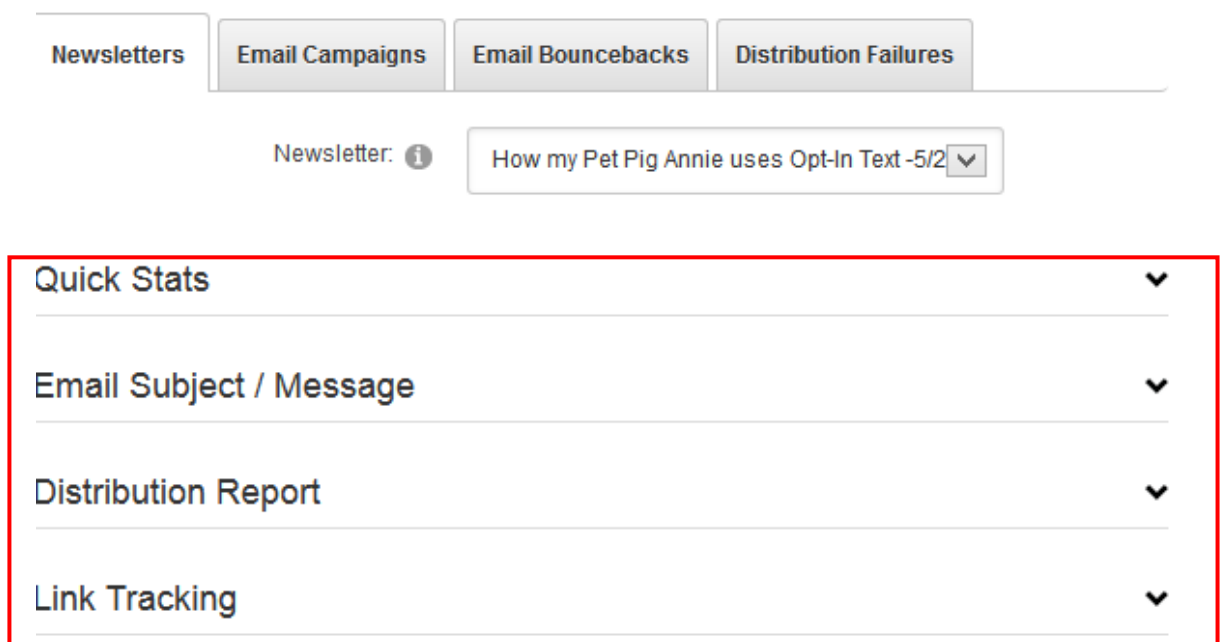


Figure 148: Available newsletter reports

The following options and parameters are available:

- **Quick Stats** – the option for viewing quick statistics (see section 6.11.2)
- **Email Subject/Message** – the option for viewing email subject and body of the email message (see section 6.11.3)

- **Distribution Report** – the option for viewing the email distribution parameters such as the time email has been sent, read, IP address of the reader, etc. (see section 6.11.4)
- **Link Tracking Report** - the option for viewing link tracking report, i.e. information such as last clicked date, the time of the click, IP address of the user who clicked the link, etc. (see section 6.11.5)

### 6.11.2 Viewing Quick Stats

The “Quick Stats” option is used for accessing quick statistics about the newsletter. In order to view these statistics click the “+” symbol next to the “Quick Stats” label.

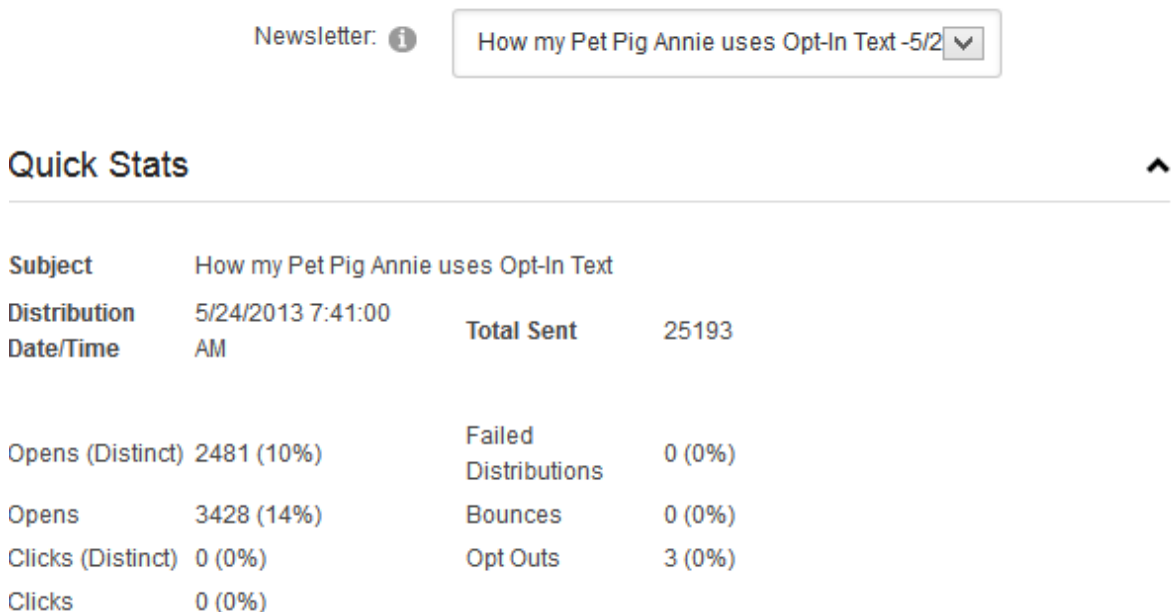


Figure 149: Viewing quick stats

The following information is available:

- **Subject** – the field displaying the subject of the email message
- **Distribution Date/time** – the field displaying information about the time and date the distribution took place
- **Total Sent** – the total number of sent message
- **Opens (Distinct)** – how many unique openings of the newsletter
- **Opens** – total number by all users
- **Clicks (distinct)** – how many unique clicks
- **Clicks** – total number of clicks
- **Failed Distribution** – the field displaying the number of failed distributions i.e. the newsletters who weren't delivered to the recipients. This list reflects failures from the mail system when attempting to actually send the message. Failed distributions often reflect addresses without a valid syntax such as not including a “@” or a “.” within the email address.
- **Bounces** – the total number of bounced emails collected and currently within the list cleanup table. **Note:** If the bounceback list is cleared this number will reflect the cleared changes and no longer display them as bouncebacks within the report.
- **Opt Outs** – the total number of users who have decided to opt out of your newsletter from within this distribution.



### 6.11.3 Viewing Email Subject/Message

The purpose of this option is to allow you to view the contents of the newsletter i.e. the subject and the body of the message.

In order to see the contents, click the “+” symbol next to the “Email Subject/Message” label

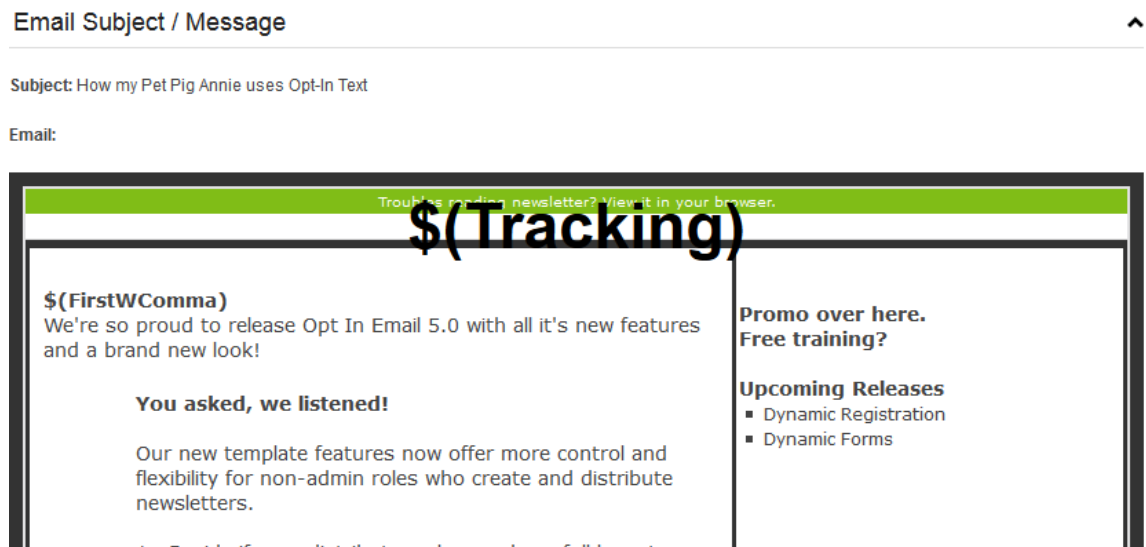


Figure 150: Viewing the contents of the email message

### 6.11.4 Viewing the Distribution Report

In order to view the distribution report click “+” next to the “Distribution Report” label.

Distribution Report							
Search Users/Emails: ⓘ		Email					
Page Size: ⓘ		10					
Search Term: ⓘ							Search
Email Address	Status	Sent at	Read	Read Date / Time	Read Count	IP Address	User Agent (Browser)
rem...@...com	Sent	5/24/2013 3:04:43 PM	<input type="checkbox"/>		0		
ch...@...com	Sent	5/24/2013 7:53:35 AM	<input type="checkbox"/>		0		
hugh...@...com	Sent	5/24/2013 3:29:39 PM	<input type="checkbox"/>		0		
...@...com	Sent	5/24/2013 6:02:54 PM	<input type="checkbox"/>		0		
...@...com	Sent	5/28/2013 9:36:48 PM	<input checked="" type="checkbox"/>	5/29/2013 5:47:52 AM	1	63.164.116.126	Mozilla/4.0 (compatible; MSIE 7.0; Windows NT 6.1;
...@...com	Sent	5/24/2013 3:13:31 PM	<input type="checkbox"/>		0		
...@...com	Sent	5/26/2013 9:45:15 PM	<input type="checkbox"/>		0		
...@...com	Sent	5/26/2013 7:30:48 PM	<input type="checkbox"/>		0		

Figure 151: Viewing the distribution report

The following options and parameters is available:

- **Search Users/Emails** – use these options to look for the specific users based on their email address, first name or last name
- **Email Address** – the email address of the newsletter recipient
- **Status** – the status of the action for each of the recipients, most commonly ‘Sent’ but this field can also reflect other statuses such as failed distributions.

- **Sent At** – the time and date newsletter was sent
- **Read** – the read flag reflects if the specific subscriber ever opened the newsletter or email campaign and triggered the tracking mechanism (**note:** Please review the tracking section 6.9), the tracking feature requires the main Opt In Email module to be visible to all users and requires that the user either adds your email address as a safe sender, or more commonly allows for images within the email (often application such as Microsoft Outlook® will allow the user to right click within the message to allow images)
- **Read Date/Time** – the date and time the newsletter has been read by the recipient
- **Read Count** – the field displaying the number of times the recipient has read the newsletter
- **IP Address** – the IP address of the recipient
- **User Agent (Browser)** – the browser used to open the newsletter

#### 6.11.5 Viewing the Link Tracking Report

In order to view the link tracking report, click the “+” symbol next to the “Distribution Report” label.

Distribution Report

This newsletter was sent to a total of 0 subscribers, of those subscribers 0 have actually read the newsletter.

Email Address	Status	Sent at	Read	Read Date / Time	Read Count	IP Address	User Agent (Browser)
---------------	--------	---------	------	------------------	------------	------------	----------------------

Link Tracking Report

Link Tracking Name	Link	Email Address	Last Clicked Date Time	Click Count	IP Address
--------------------	------	---------------	------------------------	-------------	------------

Exit Control Panel

Figure 152: Viewing the Link Tracking Report

The following parameters are available:

- **Link Tracking Name** – the field displaying the name of the link tracking definition (see section 6.9)
- **Link** – the link the recipient visited
- **Email Address** – the email address of the visitor
- **Last Clicked Date Time** – the date and time the visitor last clicked on the link
- **Click Count** – the total number of clicks from the specific subscriber
- **IP Address** – the IP address of the visitor

### 6.11.6 Viewing Email Campaign Reports

In order to view the email campaigns reports, choose option “Email Campaign Report” option and select the campaign you wish to see the report for from the pull down menu.

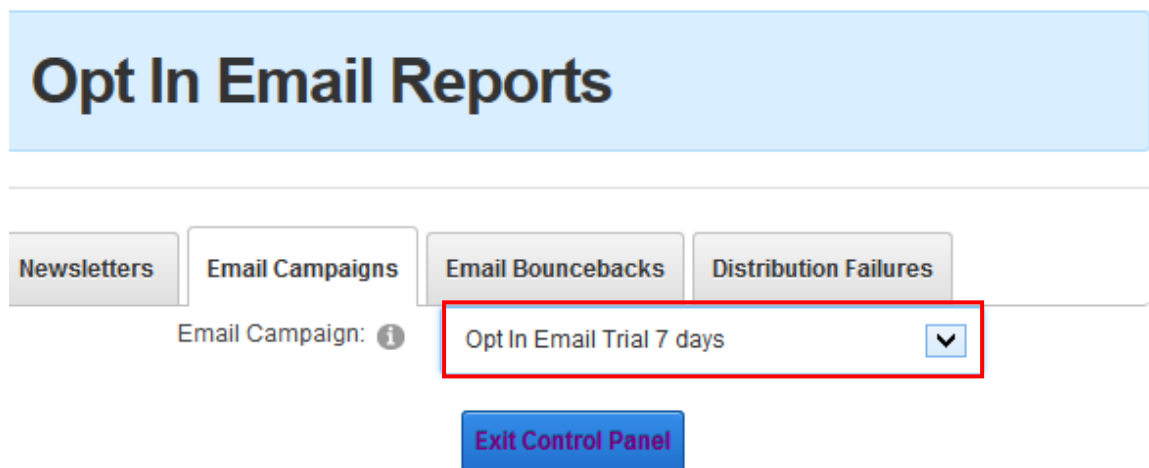


Figure 153: Viewing Email Campaign Reports

The following screen will be displayed.

Quick Stats ▼

Email Subject / Message ▼

Distribution Report ▲

Search Users/Emails: i  ▼

Page Size: i  ▼

Search Term: i  Search

Email Address	Status	Sent at	Read	Read Date / Time	Read Count	IP Address	User Agent (Browser)
_it@ckc.ca	Sent	1/28/2010 11:34:57 AM	<input checked="" type="checkbox"/>	1/28/2010 12:02:26 PM	1	66.135.119.66	Mozilla/5.0 (iPhone; U; CPU iPhone OS 3_1_2 like M
007heights@gmail.com	Sent	1/28/2010 7:30:42 AM	<input type="checkbox"/>		0		
12345mail@gmail.com	Sent	1/28/2010 6:44:48 AM	<input type="checkbox"/>		0		

Figure 154: The available Email Campaign Reports

The following options are available.

- **Quick Stats** – the option for viewing quick statistics (see section 6.11.2)
- **Email Subject/Message** – the option for viewing email subject and body of the email message (see section 6.11.3)
- **Distribution Report** – the option for viewing the email distribution parameters such as the time email has been sent, read, IP address of the reader, etc. (see section 6.11.4)
- **Link Tracking Report** - the option for viewing link tracking report, i.e. information such as last clicked date, the time of the click, IP address of the user who clicked the link, etc. (see section 6.11.5)

### 6.11.7 Managing Bouncebacks Settings

The purpose of the bounceback protection feature is to check an email account for emails that have bounced back. In order to start managing the bounceback settings, choose that option from the “Opt in Email Report” page (see Figure 153).

#### Bounceback Settings

The bounceback protection feature will check an email account for emails that have bounced back.

##### Recommended Settings:

Sending emails out with a from email address that is not checked on a regular basis is recommended or newsletter@yoursite.com

Configuring the system to delete emails is recommended, the schedule will only delete emails within the bounced report

A number between 200 and 1000 is the recommended setting for number to check for each :

Bounceback Host (i.e. mail.yoursite.com):

Username:

Mail Password:

Alternate Port:

Use SSL: ☐

Maximum number of emails to check for each schedule instance:

Deleting email after flagging it as bounced?: ☐

Forward non-bounced emails to an alternate email address: ☐

Non bounced email address:

Figure 155: Managing the Bouncebacks Settings

The following options and parameters are available:

- **Bounceback Settings**
  - **Bounceback Host (i.e. mail.yoursite.com)** - enter the name of your mail host
  - **Username** – enter the username for that email account
  - **Mail Password** – enter the password for that email account
  - **Alternate Port** - select this option if you would like to enable SSL for the Bounceback email configuration settings
  - **Use SSL** – select this option to use SSL
  - **Maximum number of emails to check for each schedule instance** - use this option to specify the maximum number of emails which should be checked for bouncebacks within each schedule
  - **Deleting email after flagging it as bounced?** – select this option if you would like to delete the email message after you have saved the bounce flag to the database
  - **Forward non-bounced emails to an alternate email address** - enable this feature to send non bounced emails to an alternate email address. This feature allows people who might have replied to your newsletter or noreply email address

and you would like to follow up with. By enabling this feature if the email is not marked as a bounceback the email will be forwarded to you for review.

- **Non bounced email address** - enter the email address that you would like to have receive non bounced emails.

Figure 156: Managing the schedule settings

In order to access the Schedule Settings, click that tab on the right. The following parameters are available:

- **Schedule Enabled** – select yes to enable the schedule
- **Time lapse** –select the desired time interval for the schedule
  - For example: enter "5" and select "Minutes" to run task every 5 minutes. Leave blank to disable the timer for this task.
- **Retain Schedule history** – enter the desired number of rows for the schedule history (for example: select "10" to keep the ten most recent schedule history rows)

#### Recommended Settings:

- Sending emails out with a from email address that is not checked on a regular basis is recommended. For example, noreply@yoursite.com or news@yoursite.com, or newsletter@yoursite.com
- Configuring the system to delete emails is recommended, the scheduled process will only delete emails if the message is marked as bounced and is also stored within the bounced report
- A number between 200 and 1000 is the recommended setting for number of emails to check for each scheduled instance

## 6.12 Managing the dynamic templates

The Dynamic Templates feature (when enabled below) allows the website Administrator to create templates with Dynamic Fields such as textbox's, images, and links, which can then be referenced within the email message that will go out.

This feature is great when you would like to allow end-user newsletter administrators to create newsletters without allowing them to change the HTML or worry about the proper formatting for the email message.

In summary, you are creating fields that the user will fill out and will be injected within the email message to simplify creating properly formatted newsletters.

In order to start managing the Dynamic Templates, choose that option from the Control Panel.

### Control Panel

#### Advanced Email Control Panel

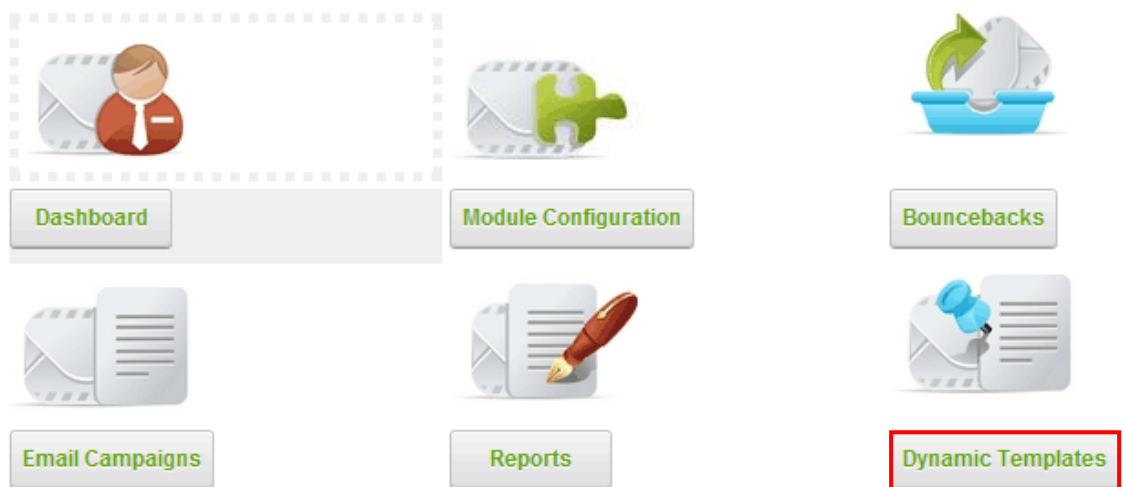


Figure 157: Managing the dynamic templates

The following page will be displayed.

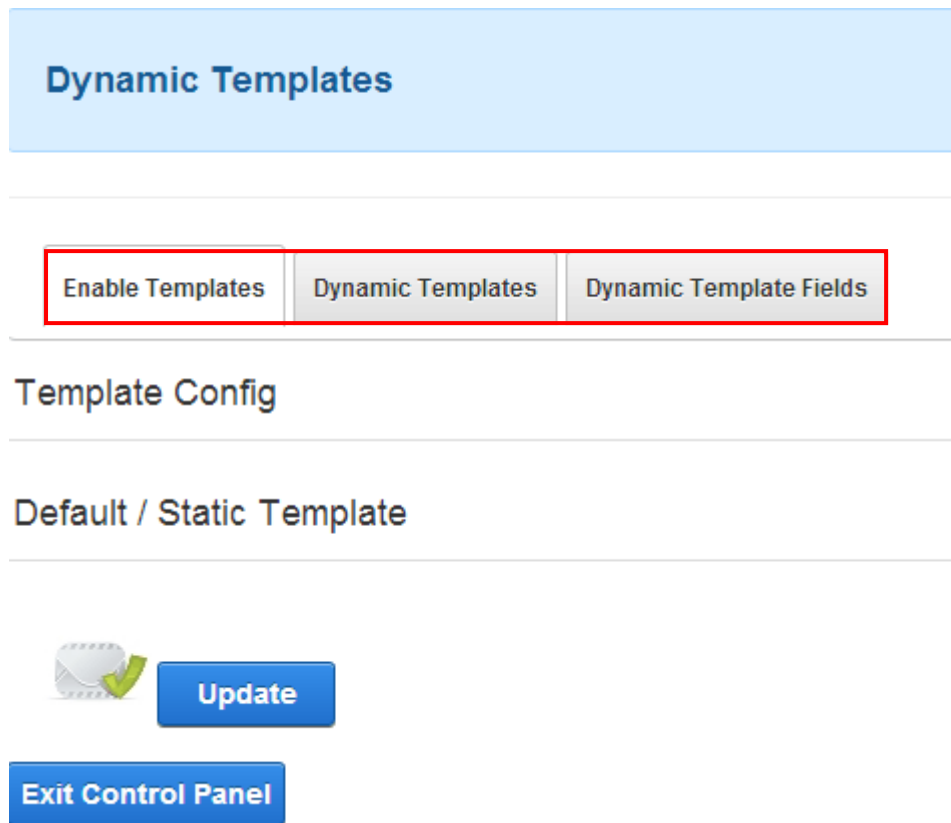


Figure 158: Options for managing dynamic templates

The following options are available:

- **Enable Templates** – the option for enabling the dynamic templates (see section 6.12.1)
- **Dynamic Templates** – the option for managing the dynamic templates (see section 6.12.2)
- **Dynamic Template Fields** – the option for enabling the dynamic templates (see section 6.12.3)

#### 6.12.1 Enabling the Templates

In order to start managing the options for enabling dynamic templates, choose that option from the menu.

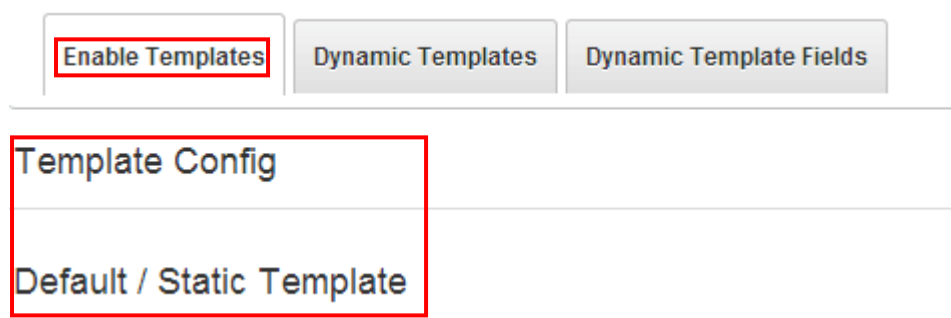


Figure 159: Options for enabling the templates

The following options are available:

- **Template Config** – see section 6.12.1.1
- **Default/Static Template**

### 6.12.1.1 Managing the template configuration

In order to start configuring the dynamic templates, choose the **Template Config** option (see Figure 159).

## Template Config

Dynamic Template Type: 

Disabled (Static Template Only)   
 Disabled (Static Template Only)  
 Enabled (Dynamic Templates Only)  
 Enabled With Free Form (Dynamic Templates w/ Ability to Change)

Figure 160: Managing the template configuration

The following options are available:

- **Disabled (Static Template Only)** – choose this option to keep the dynamic templates disabled
- **Enabled (Dynamic Templates Only)** – choose this option if you wish to allow using the dynamic templates only without allowing the users to modify it
- **Enabled With Free Form (Dynamic Templates w/ Ability to Change)** – choose this option if you wish to allow the users to modify the templates during the newsletter creation and distribution process

### 6.12.2 Setting up the Dynamic Templates

In order to start setting up the dynamic templates, choose that option from the menu.

Enable Templates
 **Dynamic Templates**
 Dynamic Template Fields

---

**Dynamic Templates**

---

**Dynamic Template Email Subject / Message**

Figure 161: Setting up the Dynamic Templates

The following options are available:

- **Dynamic Templates** – the option for setting the dynamic template parameters (see section 6.12.2.1)
- **Dynamic Template Email Subject/Message** – the option for managing the email subject and message (see section 6.12.2.2)



### 6.12.2.1 Setting the dynamic template parameters

In order to start managing the dynamic template parameters, choose that option from the menu.

Enable Templates
Dynamic Templates
Dynamic Template Fields

Dynamic Templates

Dynamic Template: ⓘ

Data Springs Sales Promo Newsletter

▼

Template Name: ⓘ

Data Springs Sales Promo Newsletter

Sort Order: ⓘ

20

Template Description: ⓘ

This template is utilized so that you can setup a promotional newsletter easily. You can specify certain areas of content that can then be injected into the newsletter easily.

Template Security Role: ⓘ

Administrators

▼

From Name: ⓘ

Data Springs

From Email Address: ⓘ

info@datasprings.com

Can Change Dynamic Template Subject?: ⓘ

☒

Can Change Dynamic Template Message?: ⓘ

☒

Can Change Dynamic Template From Email?: ⓘ

☒

Can Change Dynamic Template From Name?: ⓘ

☒

Figure 162: Setting up the dynamic template

The following parameters are available:

- **Dynamic Template** – select New to create a new template or select an existing template to edit it
- **Template Name** – enter the name of the new dynamic template
- **Sort Order** – set the desired sort order for the new dynamic template
- **Template Description** - enter the description for this template. The description will appear when creating a new email from this template.
- **Template Security Role** -Select the security role that the user is required to have in order to utilize this template.
- **From Name** -Enter the 'from name' for the Advanced Newsletter System. When creating new newsletters this is the name that will be defaulted.
- **From Email Address** - Enter the default 'from email' address for the Advanced Newsletter System. When creating new newsletters this is the name that will be defaulted.
- **Can Change Dynamic Template Subject?** - By selecting this option the module will allow the user to change the email subject within Dynamic Templates.
- **Can Change Dynamic Template Message?** - By selecting this option the module will allow the user to change the email message within Dynamic Templates.

- **Can Change Dynamic Template From Email?** - By selecting this option the module will allow the user to change the from email within Dynamic Templates.
- **Can Change Dynamic Template From Name?** - By selecting this option the module will allow the user to change the from name within the Dynamic Templates.

#### 6.12.2.2 Managing the Email subject and message

In order to start managing the dynamic email subject and message, choose that option from the menu.

### Dynamic Template Email Subject / Message

Email Subject: ⓘ

Email Message: ⓘ

Editor: ⓘ Basic Text Box (

Design HTML

Figure 163: Managing the email subject and message

The email body can be populated with the dynamic fields by calling these fields in the desired location in the message (see 6.12.3)

### 6.12.3 Managing Dynamic Template Fields

The Dynamic Template Fields option is used for creating the individual dynamic fields within the template. These can then be incorporated into the email body

Dynamic Template Fields

Dynamic Template: ⓘ Data Springs Sales Promo Newsletter

Dynamic Fields: ⓘ Sales Coupon Code

Field Label: ⓘ Sales Coupon Code

Field Help Text: ⓘ

Field Short Name: ⓘ CouponCode

Sort Order: ⓘ 30

Field Type: ⓘ Textbox (Short)

Field Description

Field Description: ⓘ Enter a coupon code that will be injected into the module.

Field Example Text: ⓘ (i.e. DSPromo)

Figure 164: Managing the dynamic template fields (screenshot 1/2)

The following parameters are available:

- **Dynamic Template Fields**
  - **Dynamic Template** - select the Dynamic Template that you would like to manage fields for.
  - **Dynamic Fields** - select the Dynamic Field you would like to edit or select to create a new Dynamic Field for this template.
  - **Field Label** - Enter the Dynamic Field label for this field.
  - **Field Help Text** - Enter the Dynamic Field help text for this field.
  - **Field Short Name** - Enter the Dynamic Field short name for this field. This is a very important field because the short field name will be referenced within the email subject, email message, and other properties of the email.
  - **Sort Order** - Enter the sort order the email.

- **Field Type** - Select the field type that this template field will represent.
- **Field Description**
  - **Field Description** - Enter the field description for this field. The field description will be presented to the user when entering the data for the field as a literal before the field
  - **Field Example Text** - Enter the field example text for this field. The example text will be displayed to the user when entering the data for the field as a literal below the field.

#### Advanced Field Options

---

Default Value: ⓘ	<input type="text"/>
Alternate field CSS: ⓘ	<input type="text"/>
Field Max Length: ⓘ	<input type="text" value="50"/>
Use Default As Watermark?: ⓘ	<input type="checkbox"/>
Field is Required?: ⓘ	<input type="checkbox"/>
Required Field Error Text: ⓘ	<input type="text"/>
Required Field Error Message: ⓘ	<input type="text"/>

Figure 165: Managing the dynamic template fields (screenshot 2/2)

- **Advanced Field Options**
  - **Default Value** – enter the default value
  - **Alternate field CSS** - enter the field alternate CSS property.
  - **Field Max Length** – set the maximum length for the field
  - **Use Default As Watermark** - Select if you would like the default value to be displayed as a watermark within the module.
  - **Field is Required** - Select if you would like this field to be setup as a required field within the module.
  - **Required Field Error Text** - Enter the required field text that will appear if the user does not submit the correct information for the newsletter.
  - **Required Field Error Message** - Enter the required field text that will appear if the user does not submit the correct information for the newsletter.

### 6.12.3.1 Example of using the Dynamic Templates

The created template will be available in the **Newsletter Template** menu.

**Create Newsletter**

Create Email Setup Distribution Select Recipients / Send Email

1. Create Email

Newsletter Template: Select Template

HTML Version

Exit / Cancel Newsletter Distribution

Figure 166: Example of using the Dynamic Template (screenshot 1/2)

**Create Newsletter**

Create Email Setup Distribution Select Recipients / Send Email

1. Create Email

Newsletter Template: Data Springs Sales Promo Newsletter

Subject:

Reply-To Address: newsletter@datasprings.com

From Name: Data Springs

**Data Springs Sales Promo Newsletter**

This template is utilized so that you can setup a promotional newsletter easily. You can specify certain areas of content that can then be injected into the newsletter easily.

Heading One:

Sales Coupon Code: Enter a coupon code that will be injected into the module. (i.e. DSPromo)

Intro Paragraph:

Promo Hyperlink:

Link Type:

☒ URL ( A Link To An External Resource )

☐ Page ( A Page On Your Site )

Location: ( Enter The Address Of The Link )

http://

The templates you have created based on security role will be displayed here.

Depending on the Dynamic Template configuration, these fields will be displayed or hidden

Each of these fields is based on the "Dynamic Field" The field "Short Name" will be replaced as \$(ShortName) within the Dynamic Template Email Subject and Message.

Figure 167: Example of using the Dynamic Template (screenshot 2/2)

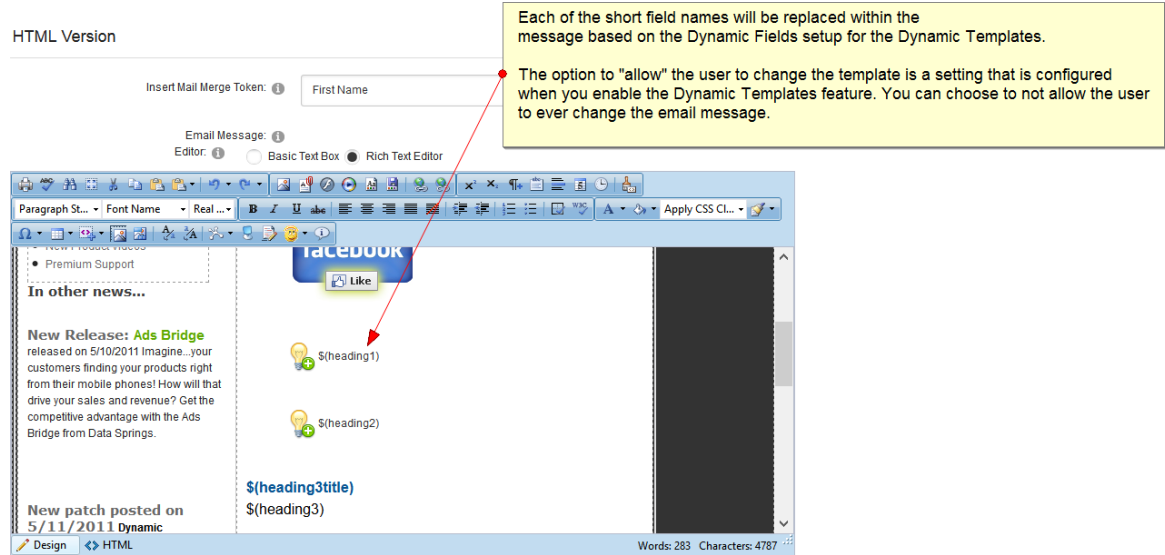


Figure 168: Example of how the fields are displayed

The screenshot below demonstrates using the token `$(CouponCode)` within the body of the email message.

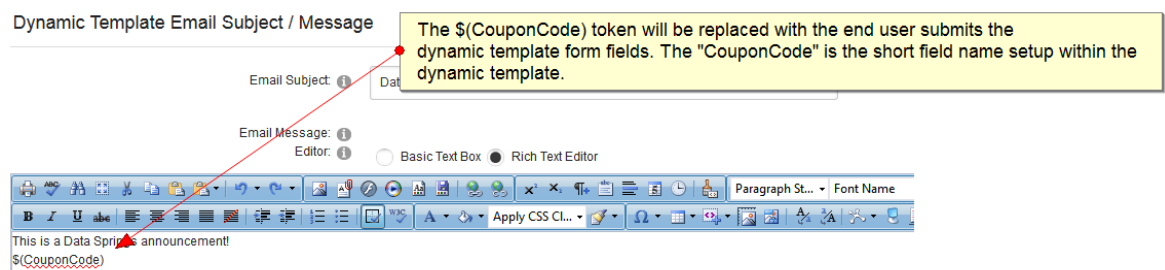


Figure 169: Using the token within the email body

The user can then enter the JuneCollection as the coupon

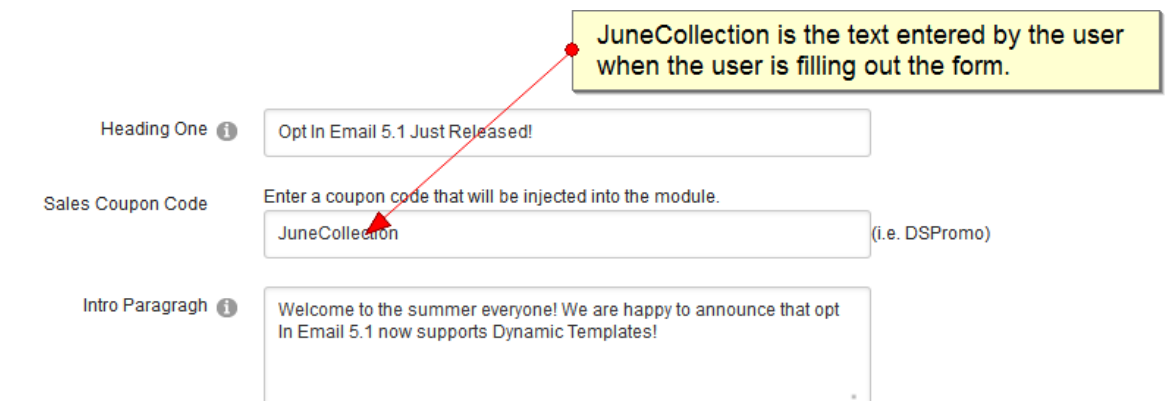


Figure 170: the added coupon is available to the user when creating the newsletter

### 6.13 Deleting Advanced Newsletter Module

In order to delete “Advanced Newsletter” module, choose option “Delete” from the main menu.

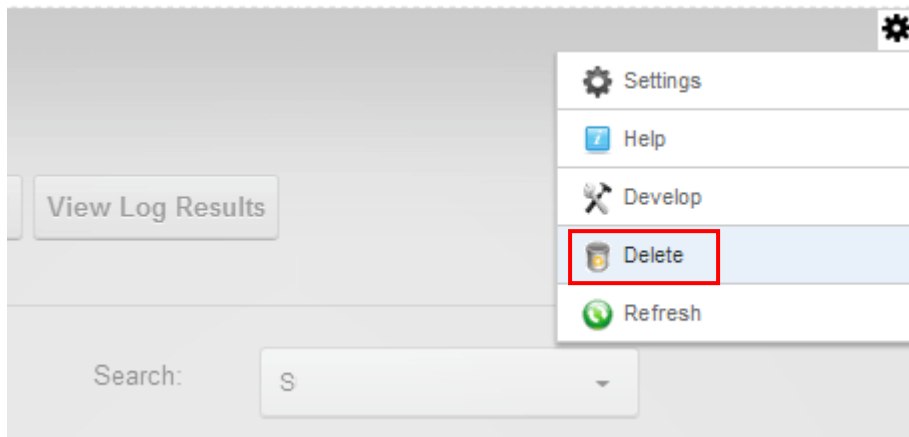


Figure 171: Deleting advanced newsletter module (step 1/2)

The confirmation dialog will be displayed.

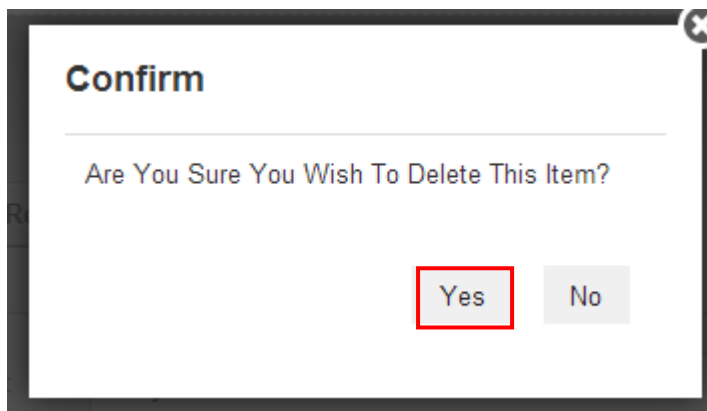


Figure 172: Deleting advanced newsletter module (step 2/2)

Click on the “OK” button to confirm deletion and the module will be deleted.

## 7 CONTENT LOCALIZATION

The Opt In email module can be setup to display the content in several different languages. You can localize the Opt in list name and description as well as the layout settings and the system emails.

### 7.1 Localizing the Opt in List name and description

The name and description of the opt in list can be localized within the “Opt In Lists” section of the Control Panel (choose “Control Panel” from the main menu and then click “Opt In Lists”).

#### Opt In Email Lists








List Name	Description	Sort Order	Default	Portal	Distribution Security Role			
Information	Various company	0	<input type="checkbox"/>	Beta Springs	Administrators	✗		
Corporate	Corporate Users	6	<input type="checkbox"/>	Beta Springs	Jason-Test-Member	✗		
TestML	some info	0	<input type="checkbox"/>	Beta Springs	Administrators	✗		
D'entreprise	Les utilisate		<input type="checkbox"/>	Beta Springs	admin			

Figure 173: Setting up lists

In order to localize the name and the description, you can either create a new list by using the options in the bottom or edit the existing one with the edit icon.

**Note:** see section 7.2 for further information on how to display the localized lists once you have created them.



## 7.2 Displaying the localized lists

In order to display the localized lists, choose “Module Configuration” from the Control panel, then expand the “General Settings”.

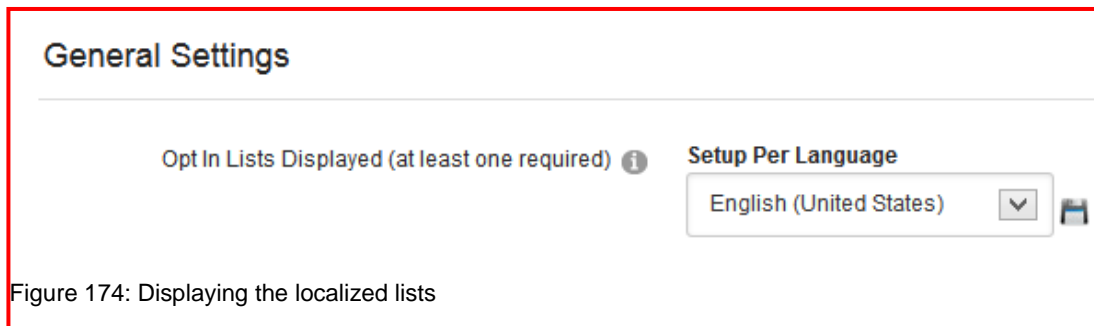


Figure 174: Displaying the localized lists

Inside this page you can specify which lists will be displayed based on the desired language. Choose the language first and then select the lists which are defined in that language.

The result is that the selected lists will be displayed for the chosen language on the website.

### 7.3 Localizing the Layout Settings

In order to localize the layout settings, choose “Module Configuration” from the control panel and then expand the “Layout Settings” section.

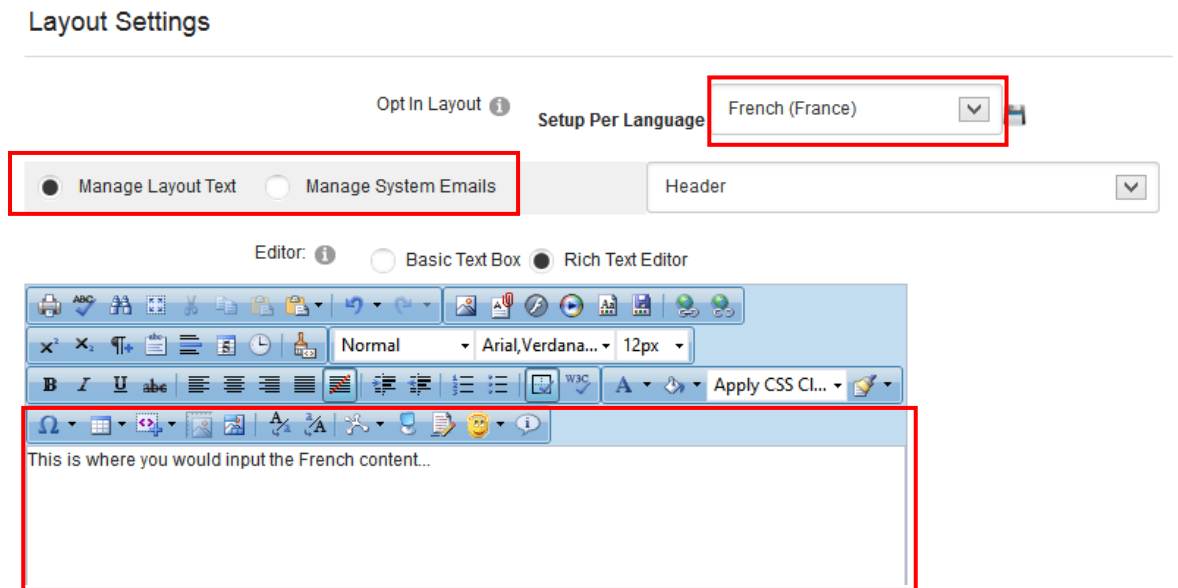


Figure 175: Localizing the layout settings

All of the available elements for customizing the layout can be localized with the following steps:

1. selecting the desired language from the language menu
2. choosing the element (e.g. Header)
3. specifying the content in the text area

In the screenshot above the header has been localized for the French version of the site.

## 7.4 Localizing the system emails

In order to localize the system emails, choose “Module Configuration” from the control panel and then expand the “Layout Settings” section.

### Layout Settings

The screenshot displays the 'Layout Settings' configuration page. At the top, there is a section for 'Opt In Layout' with a sub-section 'Setup Per Language'. A dropdown menu is set to 'French (France)'. Below this, there are two radio buttons: 'Manage Layout Text' (unselected) and 'Manage System Emails' (selected). To the right of these is a dropdown for 'Existing Email Verification Message'. Below the radio buttons is an 'Editor' section with two options: 'Basic Text Box' (unselected) and 'Rich Text Editor' (selected). The rich text editor is active, showing a toolbar with various formatting options (bold, italic, underline, text color, background color, bulleted list, numbered list, link, unlink, etc.). The text area of the editor contains the placeholder text: 'This is content only for the french language...'.

Figure 176: Localizing the system emails

Within this page choose “Manage System Emails” to display the options related to the emails. All available system emails can be localized with the following steps:

4. selecting the desired language from the language menu (e.g. French)
5. choosing the desired system email (e.g. “New Email Verification Message”)
6. specifying the email content in the text area

In the screenshot above the “New Email Verification Message” has been localized for French subscribers.