Creating a Newsletter in SiteCM

Everything in Site. Content. eCommerce. Customers

By: Krystal Williams

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Newsletter Tab

A newsletter is a way to interact with your users. It allows you to collect email addresses so that you can contact your users. It also allows you to be top of mind with people who are interested in your area of expertise and/or your products.

The Newsletter like the other sections of the SiteCM manager is divided into 2 parts; the Main Pane and the Secondary Pane.

Main Pane
The main pane of the Newsletter tab contains 3 tabs:

Newsletters   **Lists**   **Emailings**

Secondary Pane
The secondary pane of the Newsletter does double duty depending on what is selected in the main pane.

When Newsletters is selected the secondary pane shows:

- **Newsletter Properties** - used to display the basic properties of the newsletter

- **Permissions** - where you can set the permissions of the newsletter

When Lists is selected the secondary pane shows:

- **List Properties** - where you can name your list and view its basic properties

- **Manage** - allows you to manage your lists via individual or groups of email addresses

When Emailings is selected there is no secondary pane.

The newsletter tab displays a list of all the newsletters which have been created. Clicking on any of the newsletters within that list will bring up two options in the secondary pane:

Newsletter Properties   **Permissions**

At the bottom of the main pane is also the Create New button where you can create a new newsletter.
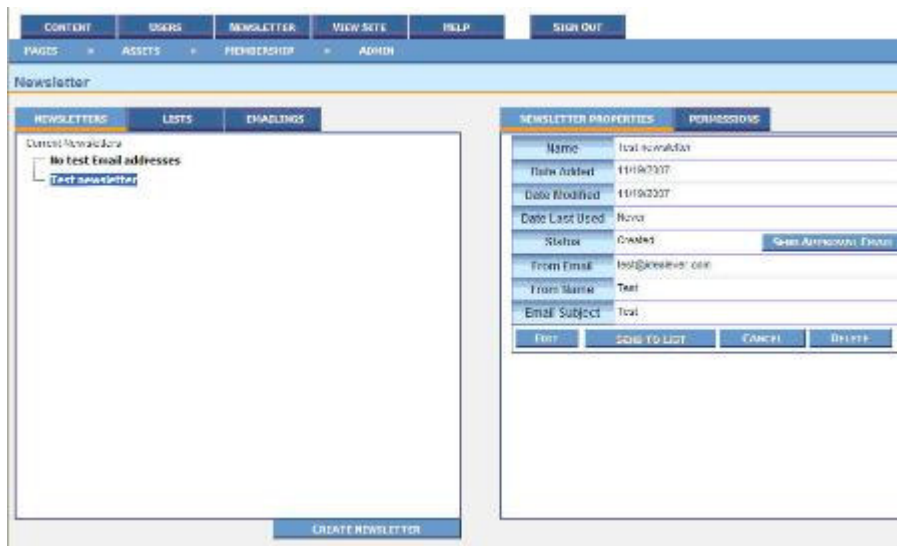
Clicking on this button will take you to an editor that is very similar to the one you use to edit a normal HTML page. The only difference is the tabs which are across the top of it.

Newsletter Properties

In the secondary pane of your manager you can view some of the basic properties of your newsletters.

Name: This shows you the name of your newsletter.

Date Added: This shows you the date your newsletter was added.

Date Modified: This shows you the date your newsletter was last modified.

Date Last Used: This shows the date of the last time you sent the newsletter.

Status: This shows you the status of your newsletter. There are three different potential statuses for a newsletter: Created, Waiting For Approval and Approved.

From Email: This shows you the email address that the newsletter will appear to be from.

From Name: This is the company name or the person's name that the newsletter will appear from.

Email Subject: This field shows the subject line of the newsletter.

These properties are all defined when you create a new newsletter.

The Permissions Tab does double duty with SiteCM pages.

It gives control to:

1. Set what SiteCM Users may do with a page within the SiteCM manager:

   o **Read a page** – whether a user role can read the page

   o **Edit a page** – set whether a specific user role has access to edit the page.

   o **Add a Sub page**- set whether a specific user role may add a new page as a child of the currently selected item..

   o **Approve a page** – set whether a specific user role may approve this page.

   o **Launch a page** – set if a specific user role may launch any changes made to the page.

   o **Delete a Page** – set whether a specific user role may delete this page.

2. Set what the membership groups may do:

   o Read or view on the page on the front end of the site

   o Add content to the page on the front end. This could be used to disallow certain membership groups from filling out Feedback forms or Surveys.

Save Changes

Setting any of these permissions requires that the SiteCM User click on the Save Permissions to save changes made to the Permissions on the page.

Upon selecting to create a newsletter page you will see 4 tabs across the top three of which you will already be familiar with Content, Metatags and Save. The Properties tab will be new to you.

Properties Tab

In order to distribute your newsletter some information to be associated with it needs to be filled out.

Name – name of the newsletter you are sending out

Test Email Address – is an address (perhaps your own) where the newsletter will be sent when it is tested.

From Email Address – because your newsletter will be emailed it requires a 'reply-to' address which will appear in the reply field of the email. This can either be an email that can be replied to or a generic no-reply address.

From Name – name to be associated with who sent the newsletter. Perhaps a company name or if it is an internal newsletter the name and position of who within the company sent it.

Subject – the title of your newsletter which will appear as the subject in the inbox of your recipients

Format – you may choose to send in either HTML or plain text. HTML allows for formatting options and plain text will be just that.

Content Tab

This is a content editor that is exactly the same as the one you use to edit your HTML pages. In here you will add all of the text, links and images that are to be contained within your newsletter.

For more information on how to use the Content Tab please see the corresponding help section under Help > SiteCM Content Editor

MetaData Tab

The Meta Data tab is where you can add Meta tags that are used by Search Engines to help index your site within the engines. The Meta Data carries about 30% of the weighting in the Engines.

Browser Title – is the Title of the page as it shows at very top of the Browser window. This Title may only have letters and numbers with spaces. The browser title may be 100 characters in length. To help with this, you will notice that there is a character counter to let you know how many characters have been used. Spaces do count as characters. The Browser Title is mandatory if you attempt to save a page without this title you will be taken back to this page to complete the title.

Search Engine Keywords – Keywords that relative to the page you are editing. When adding keywords keep in mind that you are only allowed 500 characters. The keywords are a list that is separated by commas. This list can contain single words or word combinations. IE: "content, content editor, HTML content editor"

Search Engine Description – is a sentence that best describes what the page is about relative to your business. As with the Keywords you are allowed 500 characters.

NOTE: if a page does not have any Keywords or Description SiteCM will use the Global Keywords and Description that is set in the Admin tab. SiteCM Micro clients do not have access to this tab and will have to have these Keywords and Description set by either an ideaLEVER representative or your reseller.

The save tab for a newsletter page is slightly different than other save tabs you have seen. Once you click on the save tab it will run a check to ensure you have filled out all the required fields. If not you will receive and error message and be taken back to the corresponding page.

Once everything is filled in you will have the option to save & close, save & send for approval or cancel your changes. CANCEL will, naturally, discard all your changes and take you back to the manager. SAVE & CLOSE will save your changes for editing at a later date. SAVE & SEND for APPROVAL will save your changes and bring you back to the manager where, if you are an administrator, you can approve your newsletter for distribution.

After saving the test email will be sent so that you may view your newsletter as it will appear in your clients inbox and make any necessary changes before it is approved.

When you first click on the Lists tab you will be able to see any pre-existing lists displayed. If you are looking to create a new list you can click on the Add New

List button ADD NEW LIST

Lists contain the email addresses of all your newsletter recipients. You can manually add emails or import them from an external CSV file. You can create different lists so that you can customize who gets what newsletter.

LIST PROPERTIES	MANAGE	
List Type	SiteSubscription ⌄	
List Name	T Test	
Date Added	11/19/2007	
Date Last Used	12/19/2007	
Total Emails	3	
Download List	Download List to CSV	
Upload New	Upload ReplacementList	
UPDATE	DELETE	CANCEL

Within the lists tab there are three main options:

Add New List   **List Properties**   **Manage**

Clicking on any of your existing lists will bring the List Properties into the secondary pane.

List Type - This shows what type of list you have:
Site Subscription, Uploaded or Membership.
If you select membership you will have to the ability to specifically select what membership role you would like your newsletter to be sent to.

List Name - the name of your list.

Date Added - the date from when you added the list.

Date Last Used - the last time your list was used to send a newsletter.

Total Emails - how many email addresses are in your list.

Download List - download your email list as a CSV file.

Upload New - upload a new list as a CSV file.

Deletable - removing this check box prevents other users from deleting the list

When you are finished click on the UPDATE button below to save your changes, the DELETE button to delete your list or the CANCEL button to discard any changes you have made.

If you click on the Manage tab you will have the ability to add, remove and manage your newsletter emailing list:

Add - If you are looking to add an email address, or several email addresses, enter or copy and paste the email addresses and click the ADD button. If you are looking to add more than one email address separate the email addresses with a comma.

Find - enables you to find email addresses based on the entire email address or a part of the email address

Remove - remove email addresses from your newsletter email list.

Note: If you want to remove an email address you need to make sure that is the only visible email address when you click the Remove button. To remove a specific email address, do a search for that email address. Once the email address is listed by itself click the remove button.

List All - show all the email addresses on your list.

Cancel - If you are not looking to make any changes or manage your newsletter email list simply click on the Cancel button.

This is tab that holds the information about sent and about to be sent newsletters. If you're in the process of sending a newsletter and you want to cancel it this is the tab where you can choose to stop it.

Right beside the Status – Queued area you will see the word **Stop**. Clicking on this text will stop the newsletter sending process.

Once stopped the word Stopped will change to read **Resume**. If you wish to resume with sending the newsletter at a later time just click on the text **Resume**.

Once the newsletter is sent to all the email addresses in your list you will receive a confirmation email at the email address you entered in the From Email Address field under the Properties tab in the Newsletter Content Editor.