


Roxen CMS 5.4

Newsletter Module Manual

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1 Newsletter Module

The Newsletter module will let you send you regular web pages as emails directly from the Insite Editor. It can also provide statistics on how many times the newsletter has been opened and also how many times links in the newsletter has been clicked.

2 Installation

These are the initial steps to take in order to get your Newsletter module up and running.

1. Add module CMS: Newsletter and optionally CMS Editor Component: Newsletter WebReg

If you want to use statistics for your newsletters and only use a backend server, you can move on to 2. If you want to use statistics and have frontend server(s), the Newsletter module must be loaded also on those servers. All Roxen servers must also share an external database.

2. Enable or disable the sending of emails for each instance

Only one server, the backend server, must be allowed to send emails.

3. Enable or disable unique emails

Enabling this means that each subscriber will get a unique email with a proper 'to' header. This can prevent SMTP servers from considering the email as spam, and the email will feel more personal to the receiver. Also, if you want statistics, this must be enabled.

4. Edit the Configuration file location setting in CMS: Newsletter

Note! Remember this location as you will have to copy the configuration file to this location in the next step.

5. Copy default configuration file

Copy `/roxen-files/cms-sites/4.5/newsletter/newsletter-configuration.xml` to the location you specified in the previous step.

6. Copy default template

Copy `/roxen-files/cms-sites/4.5/newsletter/newsletter-email.xml` to a location where all your pages that will act as a newsletter can reach it via SmartSearch (see Where to Place Stylesheets for further information).

7. Configuration

8. Customization

3 Configuration

To get your Newsletter module to work you need to edit `newsletter-configuration.xml`. The different sections of the configuration file are described below.

3.1 <smtp>

Note! Make sure the email addresses you specify in the configuration file are allowed to send emails from your mail server.

```
<smtp>
  <server>localhost</server>
</smtp>
```

<server>

The mail server that the module should use.

3.2 <send>

These settings will affect how the module will behave when sending the actual newsletter. There should be no need to change the values for `chunksize` and `wait` unless you are experiencing problems when sending your newsletters.

The `basehref` parameter is prepended to all links in your newsletter. This is so you can create and send your newsletter from a backend server, yet all links in the newsletter will refer to your frontend server.

```
<send>
  <chunksize>100</chunksize>
  <wait>10</wait>
  <basehref>http://localhost/</basehref>
</send>
```

<chunksize>

Defines how many subscribers the module will send to in each iteration.

Note! From RFC 2821: “The minimum total number of recipients that must be buffered is 100 recipients. Rejection of messages (for excessive recipients) with fewer than 100 RCPT commands is a violation of this specification.”

<wait>

Defines how many seconds to wait between every chunk (defined in `chunksize`) is sent.

<basehref>

This string will be prepended to all links in your newsletter.

3.3 <sendtest>

These settings are only used when you are sending tests.

```
<sendtest>
  <name>Test Mailman</name>
  <email>test@yourdomain.com</email>
  <reply>no-reply@yourdomain.com</reply>
</sendtest>
```

<name>

The name of the sender.

<email>

The email address of the sender.

<reply>

The reply-to address of the sender.

3.4 <lists>

This is where you define your different lists. Lists are what you send your newsletters to and what subscribers subscribe to. For example, you might want one list for your customers where you send public newsletters and announcements about new products or just news in general. Your second list might be an internal list which all your employees can subscribe to and you can send internal news and information to. You may declare one or more list sections.

```
<lists>
  <list>
    <identifier>customers</identifier>
    <name>Customers</name>
    <sender>
      <name>Customer Mailman</name>
      <email>customer-mailer@yourdomain.com</email>
      <reply>no-reply@yourdomain.com</reply>
    </sender>
    <optin>
      <subject>Confirm your subscription</subject>
      <file>/roxen-files/cms-sites/4.5/newsletter/newsletter-opt-
in.xml</file>
    </optin>
    <portal>/roxen-files/cms-sites/4.5/newsletter/newsletter-
portal.xml</portal>
  </list>
</lists>
```

The <lists> container accepts <list> elements as children and each <list> can contain the following settings:

<identifier>

This is the identifier for this list. This is used when referring to a certain list when using RXML tags. The identifier should only consist of lowercased letters a-z.

<name>

The name of the list.

<sender>

- **<name>**
The name that will be seen as the sender's name in the email.
- **<email>**
The email address of the sender.

- **<reply>**
The reply-to address of the sender.

- **<dummyto>**
This will be the to address visible in the mail headers.

<optin>

This is the email that users get when subscribing. It should contain some information about why they have got this email and two links, one for confirming that they want emails for this newsletter list and one for unsubscribing.

- **<subject>**
The subject of the opt-in email.
- **<file>**
The path to the opt-in email source.

<portal>

This allows you to point out a page where you want to handle the Confirm and Unsubscribe link from your opt-in email.

4 Customization

There are four files of interest in this matter:

newsletter-email.xml

This is the template that is used when sending your newsletter to transform your webpage to an email. This template is also used when sending opt-in, test and when using the preview button.

newsletter-webreg-comp.xml

This template is used by the Newsletter WebReg component. This component is a simple Subscribe/Unsubscribe component which can be used on any page so your visitors can subscribe to the list it is set to connect to.

newsletter-optin.xml

This file, with the `newsletter-email.xml` template applied to it will create the opt-in email users will get when subscribing.

newsletter-portal.xml

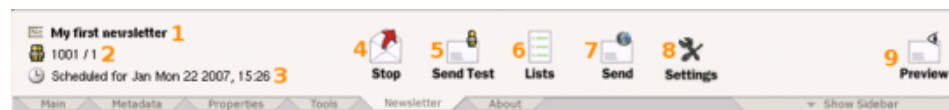
This file, with the `cms-common.xml` template applied to it will be where you should handle your Confirm and Unsubscribe links in the opt-in email.

5 Editing

This module is a bit different than other modules, it integrates it self with the Insite Editor toolbar. The integration with the toolbar is a big advantage since you can use all of Roxen's ordinary functionality to create your pages and then instantly switch to the Newsletter tab and send your page as a newsletter.

5.1 Newsletter panel

The newsletter tab panel consists of a set of buttons and a set of information fields.



1. Title

This is the subject of your newsletter.

2. Targets

These are your targets in the form: number of subscribers that will get this newsletters / number of selected lists. In this example 1001 subscribers from 1 list will receive this newsletter.

3. Schedule information

This is the state of the newsletter. A newsletter can have three states:

- Unscheduled
- Scheduled to be sent
- Sending
- Sent

4. Create or Stop

This is the "on/off" switch for the newsletter.

5. Send Test

This button allows you to send the page as a newsletter to one or more addresses. *Note!* Try opening your email in different applications since they often render different results from the same HTML.

6. Lists

This button will show a view where you can chose which lists that you want to send this newsletter to.

7. Send

This button will allow you to send or schedule the newsletter.

- Instant send — This will send your newsletter now.
- Scheduled send — This allows you to schedule the sending of the newsletter at a date and time of your choice.

- **Unschedule** – Using this option will unschedule the newsletter if it has previously been scheduled.

8. Settings

Enables/disables statistics for the newsletter

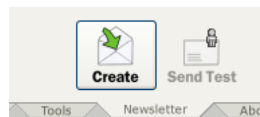
9. Preview

This will render a quick preview of your page as a newsletter. *Note!* Do not rely on this for validation that your newsletter layout looks the way you want it. There are differences in how web browsers and email applications render HTML. Use the Send Test button to see how it will look in your email application.

5.2 Sending a newsletter

5.2.1 Make the page into a newsletter

Click the Create button to make this page into a newsletter.

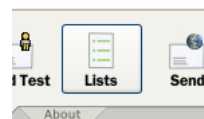


Choose the subject of the newsletter. The suggested title is taken from the page title.

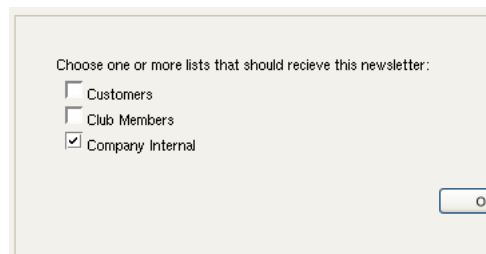


5.2.2 Choose lists that should receive this newsletter

Now click the *Lists* button to select which lists that should receive this newsletter.

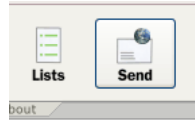


Check the lists that you want to send this newsletter to.



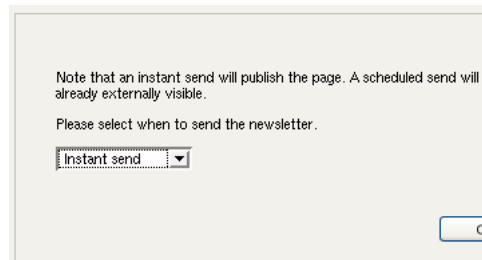
5.2.3 Sending the newsletter

Click the *Send* button.

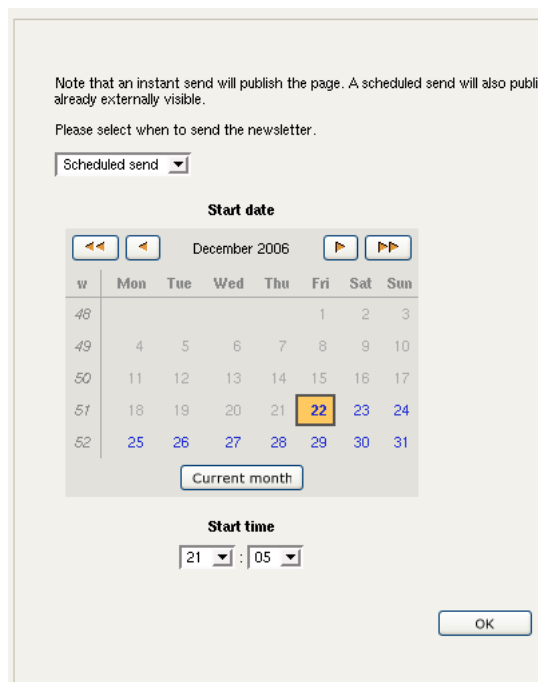


You now have two options. Either you send it now, *Instant send*, or you schedule it, *Scheduled send*.

If you select the *Instant send* option, click OK and you are done.



If you would rather send it at another time, select date by clicking on a day in the calendar and then by selecting a time in the drop down boxes beneath the calendar. Click OK and your newsletter will be scheduled to be sent at the specified date and time.



6 Statistics

The Newsletter module can register statistics for the newsletter, how many times it has been opened and how many times links in the newsletter has been clicked. This feature is off by default and is enabled by clicking the Settings button in the toolbar.

When the receiver opens the email or clicks a link in it, a request is made back to Roxen and the request is registered. This means that for statistics to be registered, the Newsletter module must be loaded also on the frontend servers. All servers must also access a shared external database.

To access statistics for a newsletter the module provides an RXML tag `<emit source="newsletter-statistics"/>`.