SendStudio 2004
End User Guide

Contents

Introduction

SendStudio is a powerful, all-in-one email marketing tool that's incredibly easy to use. From building a mailing list and creating personalized newsletters, to measuring campaign results and sending automated follow up emails -- you can manage it all using only your web browser!

Obtaining help
When you see this icon inside the application control panel   you may roll your mouse over it for more information about the item being referred to.

Getting Started

Before starting an email campaign, it is advised that you try to familiarize yourself with the interface of the application. Below is a list of all current options in the interface of the program with descriptions of their functionality.

The Top Navigation Menu
The navigation menu allows you to quickly navigate to a section that you need for specific functions. Each menu 'tab' or 'button' has several elements that form a second level to allow you to navigate within a certain section into a subcategory.

Fig. 1.1 – The Menu bar (at rest)
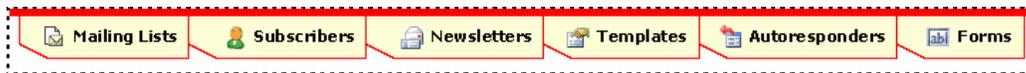

Fig. 2.4 – The Menu Bar with the 'Mailing Lists' tab being invoked

The Control Panel
The first page you will see when you login to the email application is the home page of your control panel. It gives you statistics at a glance on the right hand side and gives you navigation to all aspects of the program in a clear, easy to read layout in the greater part of the page.
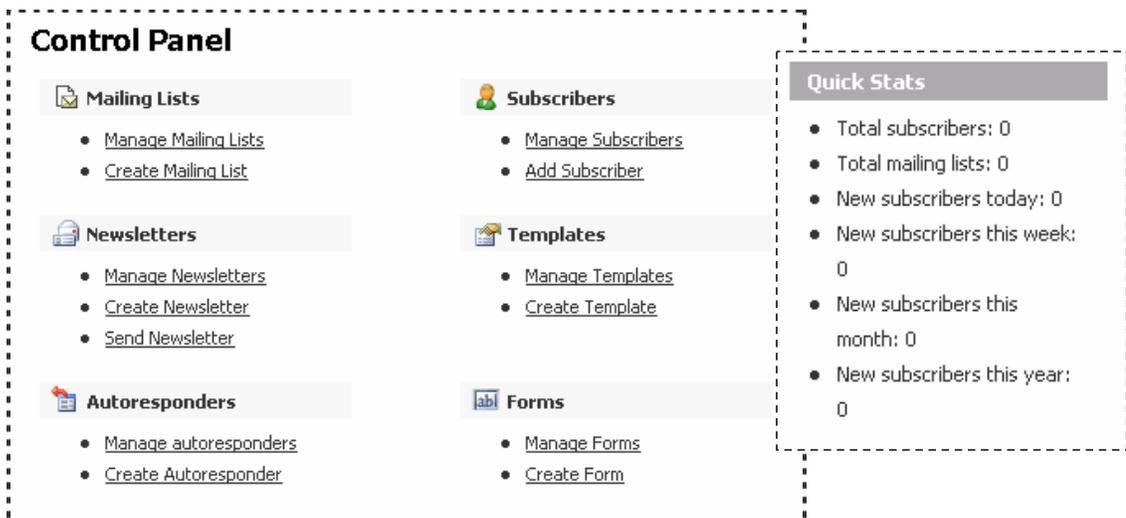

Fig. 1.3

Mailing Lists

What is a mailing list?
A mailing list is a list of people that have shown interest in the topic of the mailing list by subscribing to it. When a message is sent to a mailing list, all subscribers of the mailing list receive the message, unless otherwise specified.

Why do I need a mailing list?
In order to start a campaign, you will need a **mailing list**. A mailing list holds all the information about your subscribers. SendStudio can then send a newsletter to the subscribers of the list and give you statistics for this mailing list once you send a newsletter.

Creating and Managing Mailing Lists
When you first login, there may or may not be a mailing list already made. Click on the 'Manage Mailing Lists' from the Control panel (fig 2.1) or from the top navigation (fig 2.2).

fig. 2.1
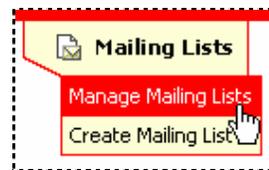
Fig. 2.2

If you do not have a mailing list the following screen should show.

Fig. 2.3

If you already have 1 or more mailing lists, these will be listed in a table as shown below.

Fig. 2.4

Creating a mailing list
To create a new mailing list you can click on the 'Create Mailing List' link (shown in fig 2.3) You can also choose the 'Create Mailing List' link in the control panel (shown in fig 2.1) or click on the 'Create Mailing List' subcategory from the top navigation under the 'Mailing Lists' tab (shown in fig 2.2). **Note:** the number of mailing lists you can create is dependant on your hosting account level. If you do not see the 'Create Mailing List' option, you can use the 'SendStudio' link in the hosting Members area to add additional lists.

Fig. 2.5

This screen will ask you for the following:

- **List Name:** This is just a name that you wish to use to allow you to reference this list. It will appear in your control panel and subscription form.

- **List Owners Name:** The actual name of the person that owns this list.

- **List Owners Email:** The email address of the list owner.

- **Allow Subscriptions**: This option will decide whether to allow subscribers to subscribe themselves to the list or only allow manual subscriptions using the control panel.

- **Allow Unsubscriptions**: This option will determine whether users can unsubscribe themselves or if unsubscriptions must be handled manually through the control panel.

- **Newsletter Formats**: The format that the mailing list will accept. I.e. Text, html or both.

- **Notify List Owner**: This option allows the list owner to receive an email to provide notice of new subscribers.

When you have filled in your desired settings, click on the 'save' button to proceed. The following message should then appear.

Fig. 2.6

Process Bounced Emails

A bounced email is an email that doesn't reach its recipient for some reason. Sometimes the machine that is receiving & processing email will respond to a newsletter with an error because the email could not be delivered. This error message will be sent to an email address of your choice and must be entered in the return-path email field. **It is important to ensure that your return-path address is unique and is only used for this purpose**.

To start processing bounced emails for your mailing lists, click on the 'Manage Mailing List' link on the front page of the control panel or on the 'Mailing Lists' tab.

Fig. 2.7

This screen will ask you for the details of the email account that is holding all the bounced email error messages.

- **Bounce Email Address:** The email address that you entered as your return-path for the newsletter.

- **Email Server:** Enter the mail server for this account (usually the same as your incoming server in a normal email client).

- **Email Username:** Your username for this email account.

- **Email Password:** Your password for this email account.

- **Bounce Handler:** Enter the action you wish to perform on any bounced emails that are matched in this email account. You can choose to mark them as inactive or delete them entirely from the system.

Note: If you have not yet setup an email account for bounced emails or you have not sent a newsletter, then you will need to do this first before you can process any bounced emails.

Bounce Processing Completed

1600 email(s) were processed, 276 bounced email(s) were processed.

[OK]

Fig. 2.8

Subscribers

Before you can send any newsletters to a mailing list, you will need to have **subscribers** in the mailing list.

What is a subscriber?
A **subscriber** is a person that has indicated that they would like to receive information from you by subscribing to a mailing list. They can either subscribe using an online form or you may input their details manually.

Note: It is very important to make sure that the subscriber wants to be on your mailing list. We recommend using a double opt-in list where the subscriber has to confirm their email address before they are added to your list.

When you first login to the control panel, there will not be any subscribers in your mailing lists. Click on the 'Add Subscriber' from the Control panel (fig 3.1) or from the top navigation (fig 3.2).
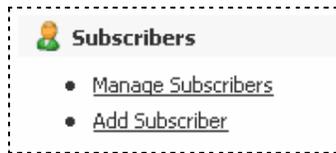
fig. 3.1

fig. 3.2

Add Subscriber
If you have an existing mailing list in another application or you receive mailing list subscriptions manually, then you can add subscribers one by one if you prefer.

Once you click on 'Add Subscriber' from the control panel or top navigation the following page should appear. This first page will present all mailing lists to allow you to choose which mailing list you want to add the new subscriber to.

Add Subscriber (Step 1 of 2)

Before you can add a subscriber, please choose a mailing list to work with.

[Cancel] [Next »]

Import Details

* Mailing List: Test List (0 subscribers)

[Cancel] [Next »]

Fig. 3.3

Choose the mailing list you require and click 'next'. The following page will present you with a few more options as follows:

Fig. 3.4

Fill in all 'fields' in this page. The asterisk next to a field name indicates that the field is required. Here is a brief outline of each field in this step:

- **Email** – This is the email of the subscriber.

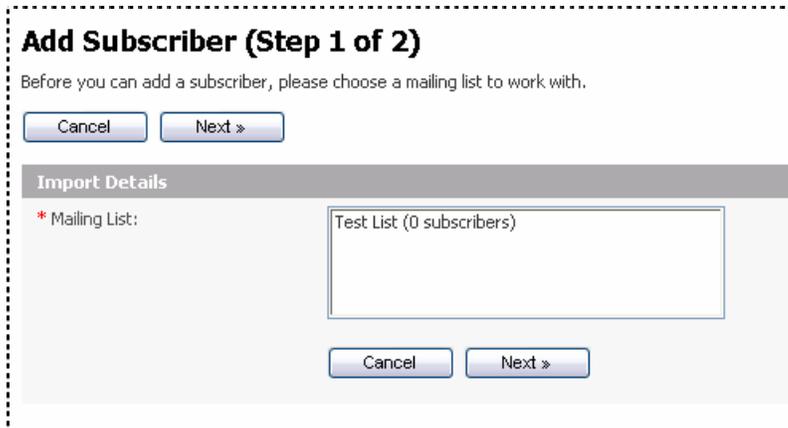- **Format** – This indicates the format that the subscriber wishes to receive your newsletter in. eg. Some email programs can not receive and view html formatted emails, so you would use text for this user.

- **Status** – You can choose to have the subscriber added to a list, but not yet active, meaning that their details are added to the mailing list but they will not receive any newsletters.

- **Confirmed** – You can choose to have the subscriber unconfirmed until you confirm that they wish to be added to a list.

Once you click 'finish' this subscriber will be added.

Fig. 3.5

Import Subscribers
This application allows you to quickly subscribe a group of emails from an existing list.

Choose 'Import Subscribers' from the top navigation under the 'Subscribers' tab.

Import Subscribers (Step 1 of 5)

Before you can import subscribers, please choose a mailing list to work with.

[Cancel] [Next »]

Import Details

* Mailing List:

Test List (0 subscribers)

[Cancel] [Next »]

Fig. 3.6

Choose the mailing list you require and click 'next'. The following page will present you with a few more options as follows:

Import Subscribers (Step 2 of 5)

Choose which type of import you will be performing.

[Cancel] [Next »]

Import Type

* Import Type: [File ▼] ⑦

[Cancel] [Next »]

Fig. 3.7

In this step you must choose the importing source, whether it is a File, Database, or an email account. The 3 options are outlined briefly below:

- **File –** The file option allows you to import a number of emails with details from a comma delimited file or CSV file. This means that all information within the file is separated by commas & new lines to allow the program that is reading it to separate them into respective fields of information.

- **Database** – This option allows you to import subscribers from another existing database. The database must be a MySQL database and accessible from the installations location.

- **Email account** – This option allows you to check email that is sent to an account with 'subscribe' or 'unsubscribe' in the subject line. This option will only import the actual email addresses without any other details eg. Name, address and other user details.

File Option

The file importing option will look in a file that you specify and will import the email addresses (and other fields if you create custom fields) to your mailing list.

To use the file option, you will need to export your subscriber list from your other program that is holding these subscriber records. You should export your subscriber list into a CSV (comma separated value) file. If you open your CSV file it should look something like this:

    user1@site.com,MALE,Y,20030101
    user2@site.com,FEMALE,N,20031014
    user3@site.com,MALE,N,20020706

The example above includes three records, and each record is separated with a new line. Each record contains four fields, and each field is separated with a comma. The CSV file will typically have a .CSV or .TXT file extension. Start by clicking on the "Browse..." button in the form to select your CSV file from your hard drive.

When you have the CSV file ready, choose the File import option, and then the next step will be as follows:

Fig. 3.8

This page will allow you to choose the options for all imported records from the file.

- **Status** – This will allow you to set the status of all imported emails as active or inactive in the mailing list.

- **Confirmed** – This option will allow you to set all emails to be confirmed or unconfirmed in the mailing list.

- **Format** – This option allows you to set the format that the subscribers will receive mail. They may receive mail in html or text format.

- **Overwrite Existing Subscriber** – This box will allow you to overwrite an existing subscriber's record if they already exist in your mailing list. This would be useful if

their information may have changed.

- **Contains headers** – If your CSV file has all field names on the first line ie. Headers, then you would check this box. The above example would look like this if you have headers:

      email,gender,confirmed,date
      user1@site.com,MALE,Y,20030101
      user2@site.com,FEMALE,N,20031014
      user3@site.com,MALE,N,20020706

- **Field separator** – This is the character that separates all the fields. Usually this is a comma. Your exporting tool/program may use a different separator that you can enter here. In the above example the comma is used to separate fields.

- **Record separator** – This is a character that separates all the records. Usually this is a new line, but your exporting tool/program may use a different character that you can enter here. In the above example a new line indicates a new record.

- **Import file** – Here you can use the "browse" button to look for the CSV file on your local drive to allow the program to upload it and read the contents for importing.

Click "next" to allow SendStudio to read the file and import the values.

Fig. 3.9

In this step you must choose which fields correspond to 'subscriber fields' in your newsletter. (covered later on in this document). If you have not set any values for these 'subscriber fields' yet, then the program will show you the default values available.

Note: You can make more 'fields' available by creating custom fields before importing.

The most important part of this process is to make sure that you know which field is the email address. In the above example it is the first field.

Click 'next' and SendStudio will start importing your users from the file.

Import Completed Successfully

- 3 subscribers were imported successfully.
- 0 duplicate subscribers were detected and were rejected.
- 3 subscriber details were updated.
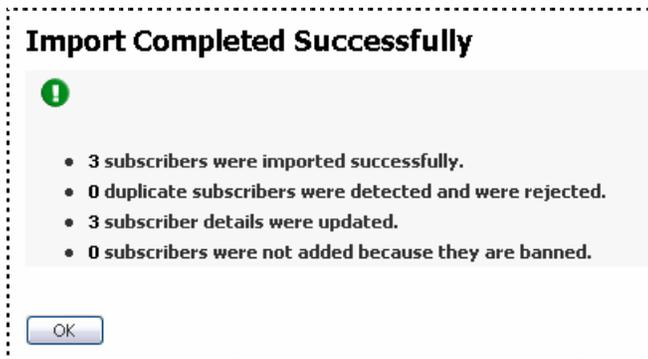- 0 subscribers were not added because they are banned.

OK

Fig. 3.10

You will then automatically be taken to the 'Manage Subscribers' screen for this list.

Note: The program also gives you a small tutorial on how to import users within the 'Importing Subscribers' screens (choose file then click 'next')

The Database Option
The database importing option will look in your database that you choose and will import the email addresses (and other fields if you create custom fields) to your mailing list.

To use the database option, your database must be accessible from the current server that SendStudio is installed in. If you have access to a database manager that can output to a CSV file you can use the file option.

To get started you will need to choose the Database option from the Step 2 of the Import Subscribers screens.

Import Subscribers (Step 3 of 5)

Complete the form below and then click on the "Next" button to proceed importing data from a database

Cancel   Next »

Import Details

* Status:	Active
* Confirmed:	Confirmed
* Format:	Text
Overwrite Existing Subscriber?	☐ Yes, overwrite existing subscriber

Database Details

Previously Saved Settings:	New
* MySQL Server:	
* MySQL Username:	
MySQL Password:	
* MySQL Database:	

Cancel   Next »

Fig. 3.11

This page will allow you to choose the options for all imported records from the database.

- **Status** – This will allow you to set the status of all imported emails as active or inactive in the mailing list.

- **Confirmed** – This option will allow you to set all emails to be confirmed or unconfirmed in the mailing list.

- **Format** – This option allows you to set the format that the subscribers will receive mail. They may receive mail in html or text format.

- **Overwrite Existing Subscriber** – This box will allow you to overwrite an existing subscriber's record if they already exist in your mailing list. This would be useful if their information may have changed.

- **Database details** – Simply enter the details of the database you wish to import from.

Click next and the 'next' button and the email manager will process all the records from the database.

Fig. 3.12

In this screen you must find the relevant information that pertains to the fields on the left. If you only have the email field that corresponds to your email, then you should find the database table and the database field that stores the email information.

Note: You can make more 'fields' available by creating custom fields before importing.

The save settings box can be checked to save these database settings for your next import to allow you to quickly make the same import. This helps when you are importing fields from a database that is constantly being updated. Click next and SendStudio will check that the database has been mapped properly and it can access all the relevant fields.

Connected to Database successfully

ⓘ Database mapped successfully. Click OK to start importing.

[OK]

Fig. 3.13

This screen will confirm that the database has been connected to successfully. Click 'Ok' to import all the relevant fields from this database.

Import Completed Successfully

ⓘ

- 100 subscribers were imported successfully.
- 0 duplicate subscribers were detected and were rejected.
- 0 subscriber details were updated.
- 0 subscribers were not added because they are banned.

[OK]
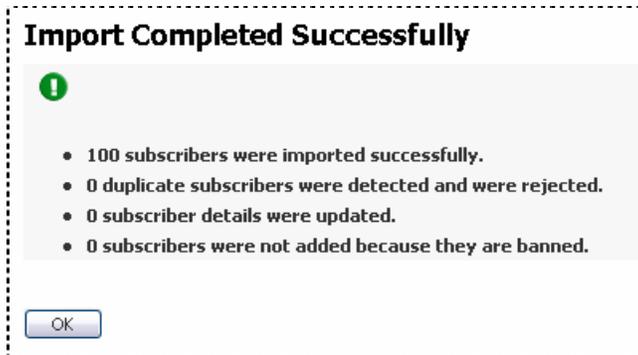
Fig. 3.14

Email Option
The email importing option will look in an email account (ie. It will check all emails inside an email account) that you choose and will import the email addresses that have 'subscribe' in the subject line, to your mailing list.

To use the email option, you will need to have received emails to an email account that have the 'subscribe' in the subject line.

To get started you will need to choose the 'Email' option from the Step 2 of the Import Subscribers screens then click 'Next'.

Import Subscribers (Step 3 of 5)

Complete the form below and then click on the "Next" button to proceed.

[Cancel] [Next »]

Import Details

Status: Active ▼

Confirmed: Confirmed ▼

Format: Text ▼

Overwrite Existing Subscriber: ☐ Yes, overwrite existing subscriber

Email Server Details

Previously Saved Settings   New ▼

* Email Hostname   [   ]

* Email Username   [   ]

* Email Password   [   ]

* Email Port   [110   ]

Save Import Details: ☑ Yes, save import details ⓘ

[Cancel] [Next »]

Fig. 3.15

This page will allow you to choose the options for all imported records from the database.

- **Status** – This will allow you to set the status of all imported emails as active or inactive in the mailing list.

- **Confirmed** – This option will allow you to set all emails to be confirmed or unconfirmed in the mailing list.

- **Format** – This option allows you to set the format that the subscribers will receive mail. They may receive mail in html or text format.

- **Overwrite Existing Subscriber** – This box will allow you to overwrite an existing subscriber's record if they already exist in your mailing list. This would be useful if their information may have changed.

- **Previously Saved Settings** – This dropdown will contain any previously saved import settings. These settings are saved from any previous importing from an email address if you check the save import details checkbox in this form. SendStudio will create an entry in this dropdown box that will automatically fill in the email hostname, username and password with the details you used previously.

Email server details

- **Email Hostname** – the email server. Usually the same as your 'incoming server' in your local email programs.

- **Email Username** – the username that you use to access email

- **Email Password** – the password that you use to access email

- **Email Port** – the number of the port that the mail server uses to receive mail. If you aren't sure then leave this as 110 as this is a default port that most servers use.

- **Save Import details** – Check this box to save these import settings. This is useful if you regularly import from this email address.

Click 'Next' once you enter your mail server details. SendStudio will check if it can connect to the mail server before proceeding.

Connected to Email Server Successfully

Connected to email server successfully. Click OK to start importing email addresses

OK

Fig. 3.16

Click 'Ok' to continue importing the emails from this email account.

Import Completed Successfully

- 10 subscribers were imported successfully.
- 0 duplicate subscribers were detected and were rejected.
- 0 subscriber details were updated.
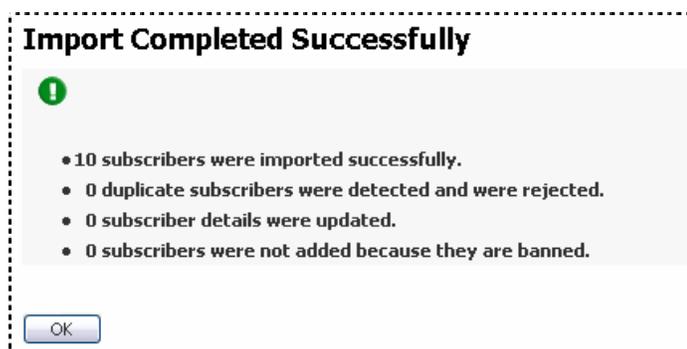- 0 subscribers were not added because they are banned.

OK

Fig. 3.17

Exporting Subscribers

In some cases you may need to export the information that you have in the mailing lists for use in another database. The export function allows you to create a CSV file to help you export this information for use in another program.

Subscribers
Manage Subscribers
Import Subscribers
Add Subscriber
Export Subscribers

Choose the 'Export Subscribers' option from the top tool bar under the 'Subscribers' tab and the Export Subscribers Step One will appear.

Fig. 3.18

Export Subscribers (Step 1 of 4)

Before you can export subscribers, please choose a mailing list to work with.

Cancel   Next »

Mailing List Details

* Mailing List: Test List (104 subscribers)

Cancel   Next »

Fig. 3.19

Choose the mailing list that you wish to export information from and click 'Next' to proceed to the next step.

Export Subscribers (Step 2 of 4)

Complete the form below to filter subscribers that should be exported.

Cancel   Next »

Subscriber Details

* Status: View All

* Confirmed: Either

* Format: Either

Clicked on Link: Not Applicable

Match Email:

Filter by Date: ☐ Yes, filter by date

Cancel   Next »

Fig. 3.20

On this screen you can choose to export based on the Status, Confirmed, Format and Clicked on Link properties for each subscriber in the mailing list. The fields are outlined below.

- **Status**: You can choose to export only Active records, Inactive records or choose View All to export all records with no preference in this field.

- **Confirmed**: You can choose to export only Confirmed records, unconfirmed records or choose either to export all with no preference on this field.

- **Format**: You can choose to export records based on the format they receive email in – text or html. If you have no preference, you may choose "either" in this field.

- **Clicked on Link**: You may export records based on whether they clicked a link or choose "Not applicable" if you have no preference.

- **Match Email:** Enter an email, domain or part of an email address that you would like to export records from. This allows you to export based on common text in the email address field. Eg. Hotmail.com will export subscribers that have "hotmail.com" in their email address.

- **Filter by date**: Check this box to export records between certain dates only.

Click 'Next' once you have chosen your required settings.

Export Subscribers (Step 3 of 4)

You will be exporting 104 subscribers.
Complete the form below to choose which subscriber fields will be included in the export.

| Cancel | Next » |

Export Field Details

* Field #1 Content:	Users Email	
* Field #2 Content:	Users Status	
* Field #3 Content:	Users Confirmation Status	
* Field #4 Content:	Users Chosen Format	
* Include Headers?:	Yes	
* Field Separator:	,	
Field Enclosed by:		
* Record Separator:	NEWLINE	

| Cancel | Next » |

Fig. 3.21

This page will show you all fields available for exporting in this mailing list in their current order. You can choose which fields you would like to export into each numbered field by selecting it from the dropdown box. This allows you to change the order of the fields if you require it. The other fields are outlined below:

- **Include Headers**: Choose 'Yes' in this field to include the name of the headers in the first line of the exported file. Choose No to only export the records themselves.

- **Field Separator**: This is the character that you wish to use to separate the fields in each record. Usually this is a comma.

- **Field Enclosed by** – In some cases you may wish to enclose fields in quotes or brackets to make it easy to read or because the program that you are using the records in may require it.

- **Record Separator –** This is the character that you wish to use to separate the records from each other. Usually this is a new line. If you place NEWLINE in capitals, the exporter will place an actual new line not the characters "NEWLINE".

Click 'Next' to start the exporting of the records using your chosen settings.

Export Subscribers (Step 4 of 4)

The export has been completed successfully. 104 member(s) were exported. <u>Click here to download the export file.</u>

OK

Fig. 3.22

This screen indicates that the export was successful. Click on the link and a new window will open with all your exported records presented. From here you can save or cut & paste into a text file.

Removing Subscribers

Subscribers

Manage Subscribers

Export Subscribers

Remove Subscribers

Manage Banned Emails
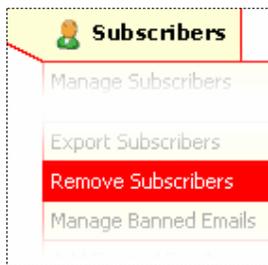
There are times when some subscribers choose to be removed from the mailing list.
SendStudio allows you to quickly remove one or many email records and also choose whether to delete them totally or simply mark them as inactive.

To get started, click on the 'Remove Subscribers' link under the 'Subscribers' tab in the top navigation.

Remove Subscribers (Step 1 of 3)

Before you can remove subscribers, please choose a mailing list to work with.

Cancel   Next »

Remove Subscribers

* Mailing List: Test List (104 subscribers)

Cancel   Next »
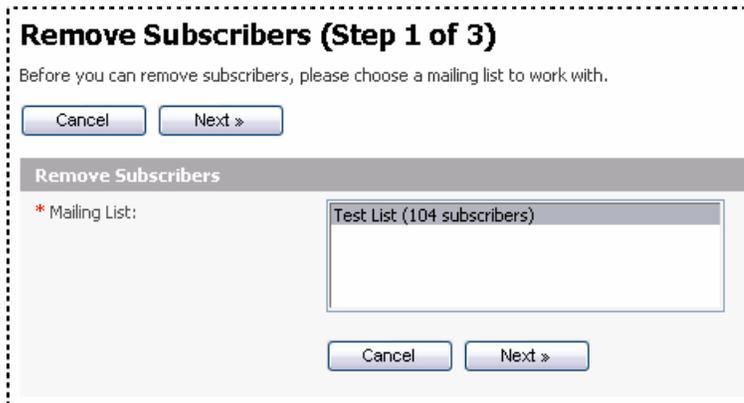
Fig. 3.23

Choose the mailing list that you wish to Remove Subscribers from and click 'Next'.

Fig. 3.24

The options on this page are as follows:

- **Remove options** – You can choose to Mark the user as inactive or delete the record from the mailing list completely.

- **Remove Emails** – Use this field if you have a small number of emails to remove. You should use a new line to separate emails.

- **Remove File** – If you have a large amount of emails to remove you should first export the records (use export subscribers) and then use the file option.

If you enter the email addresses in the 'Remove Emails' field then clicking 'Next' will start removing them.

If you choose the file option you must browse for the file on your drive then click 'Next' to allow the email manager to upload and read your file contents.

Fig. 3.25

If you see the following screen, then the file has successfully been uploaded and checked. Click 'Ok' to continue removing addresses.
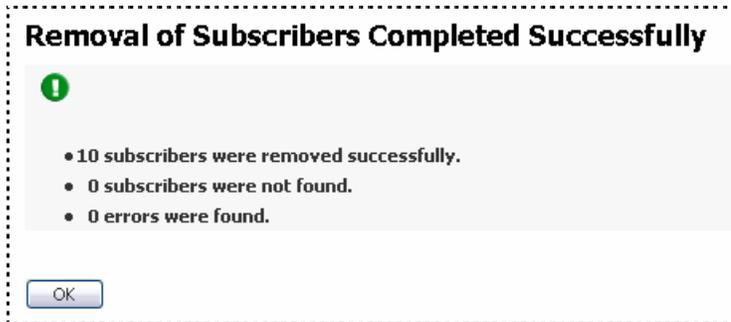
Fig. 3.26

Adding Banned Emails
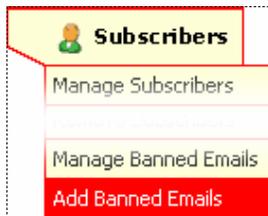
In some cases you may wish to ban email addresses or whole domains from being able to subscribe to your mailing lists.

To get started with adding a banned email click on the 'Add Banned Emails' link on the 'Subscribers' tab

Fig. 3.27

The following page will appear to give you some options for adding banned emails.
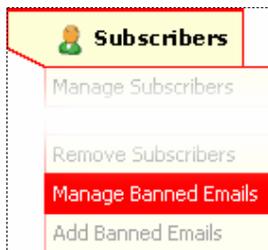

Fig. 3.28

- **Banned Emails field:** This is where you place all banned emails. You can separate each email address by using a comma. Eg. example1@mail.com,example2@mail.com. You can also ban a whole domain name by entering @DOMAINNAME.

- **Ban From field:** Select a mailing list to ban emails from.

Fill in the form and click 'Save'

Banned Emails Added Successfully

The emails that you entered have been added to your banned list.

OK

Fig. 3.29

Managing Banned Subscribers

To manage banned subscribers you will first need to add them to a mailing list. You have the option to unban and remove emails from your banned list using this section.

Fig. 3.30

To start managing banned subscribers simply click on the 'Manage Banned Emails' from the 'Subscribers' tab. This first page is a search page that allows you to search for the banned emails you are looking for based on certain conditions. When you hit 'search' these conditions will be considered and the results will be returned in the next step based on these conditions.

Manage Banned Emails

Use the form below to view or search for emails and domains on your banned email list.
On the next page you will have the option to unban and remove emails from your banned list.

Cancel   Search

Banned Search Details

* View:	All Banned
* Status:	Active
* View Banned From:	Select a mailing list
* Emails Per DisplayPage:	20
Match Email:	

Cancel   Search

Fig. 3.31

Here is an outline of the fields.

- **View:** In this field you can choose All Banned emails (which will choose emails and domains), only banned emails or only banned domains.

- **Status:** Choose to view emails based on their active or inactive status or view all.

- **View Banned From:** All mailing lists will be listed here to allow you to choose from.

- **Emails Per Display Page:** Choose how many records to display per page on the search page.

- **Match Email:** You may choose to search for a specific email address or a range of email address that are on a specified domain. Eg. @mail.com

Click 'Search' to start your search based on the conditions you choose in this page.

Search Banned Emails

Your search returned 1 results. Currently displaying page 1 of 1 pages.

| Start New Search | Add Banned Emails |

	Email Address	Date Added	Action
	banned1@email.com	22 Sep 2004	Unban Delete
	banned2@email.com	22 Sep 2004	Unban Delete
	banned3@email.com	22 Sep 2004	Unban Delete

Fig. 3.32

From here you can choose to unban/reban email addresses that are listed. You can also delete the subscriber from the banned list, but this will not delete them from the actual mailing list itself.

Newsletters

A newsletter is the actual publication that you will send to your mailing list.
Before you can create a newsletter, make sure that you have a mailing list created.

Creating a Newsletter
To create a newsletter click on the 'Create Newsletter' link on the 'Newsletters' tab in the top navigation or from your front page control panel link under the Newsletters section.
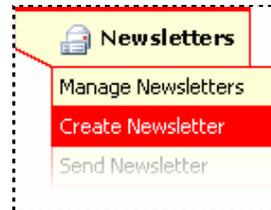
Fig. 4.1   Fig. 4.2

If you click on the "Newsletters" tab itself or 'Manage Newsletters' link on this tab and you do not have any newsletters created, the following page will be displayed.

Fig. 4.3

Click Create Newsletter to go to Step One of Creating a Newsletter.
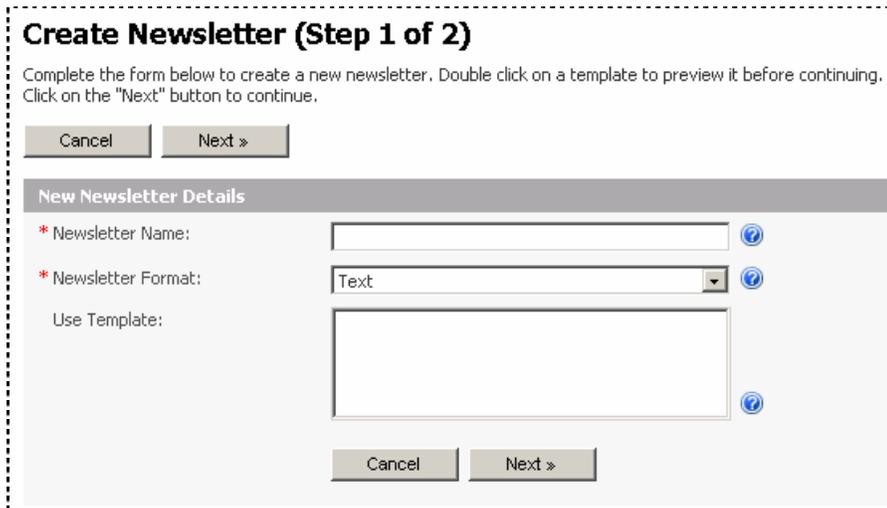
Fig. 4.4

This page asks you for the following:

- **Newsletter Name:** This is the name of the newsletter for your own reference. This will not be shown to any subscribers etc.

- **Newsletter Format:** You can choose which format to use when sending out your newsletter. HTML emails allow you to use pictures, formatted & coloured text and tables for layout. Text emails allow people that do not have access to html compatible email programs to receive the newsletter as well.

- **Use template:** If you have created a template to use for your newsletter then you can choose it here. If you do not yet have a template, you may create this later.

Click 'Next' to continue to step 2.

In this step you can enter the content for your newsletter.

Fig. 4.5

This first field is the Newsletter subject. This subject will appear in the subject line of the email that is received by your subscribers.

Fig. 4.6

This section is for the HTML content of the newsletter. This section will only be able to be seen by html compatible email programs and will be sent to the subscribers that have the html format specified.

The HTML Content (Visual editor)
The HTML content section is a visual editor that allows you to layout your newsletter content as it will appear in the recipients email program. You can insert and format the content using the editor and the tools provided in the toolbar.

The toolbar has the following tools available:

- **Toggle Full screen Editing:** Clicking this icon will swap the layout from full screen edit mode or back to the normal embedded editor in the page. It will give you more room to edit your layout.

- **Cut:** Allows you to select content & 'cut' it out to be placed elsewhere on the layout.

- **Copy:** Similar to cut but it simply makes a copy rather than simply cutting the content out.

- **Paste:** Place any content that you have previously cut or copied.

- **Inserted numbered list:** Click to add a numbered list to your layout.

- **Insert bullet list:** Click to add a bullet list to your layout.

- **Insert Link:** Allows you to select a portion of text or an image and apply a link to it.

- **Insert Image:** Allows you to open the image insert manager. From the popup window you can upload multiple files to insert into your layout.

- **Toggle source mode:** This button will swap between html source mode and visual editing mode.

- **Font menu:** This menu allows you to apply a font to selected text.

- **Font size menu:** This menu allows you to apply a font size to selected text.

- **Bold:** Apply a bold style to selected text.

- **Italic:** Apply an italic style to selected text.

- **Underline:** Apply an underline style to selected text.

- **Left Alignment:** Apply left alignment to selected paragraph or image.

- **Center Alignment:** Apply center alignment to selected paragraph or image.

- **Right Alignment:** Apply right alignment to selected paragraph or image.

- **Text colour picker:** This allows you to apply a colour to selected text.

- **Text highlight picker:** This allows you to apply a background colour to selected text.

Below the edit window are a few more fields for the editor.

- **Insert a HTML merge field:** This link will allow you to insert automatic content such as an unsubscribe link for this newsletter or the subscription date. It will also allow you to insert custom fields that you have that correspond to the subscription records in your mailing list. Eg. Name, address etc. This will allow you to personalize

newsletters automatically by inserting a custom field.

- **Insert Unsubscribe Link:** This simply inserts an unsubscribe link into the edit window.

Note: Be careful when pasting content from other editor and word processors as most will try to add their own code that may not be compatible or valid within this editor. It is advised that you test a portion of the pasted layout before attempting to create a full newsletter, only to find that the code was not valid.

Apart from using the editor to create a HTML layout, you can also use an existing HTML page online or by importing HTML content from a file.

- **HTML Content from URL:** Insert the full website address to the file that contains the content for this newsletter.

- **HTML Content from a file:** Click browse to find a file on your hard drive to be used in the newsletter.

Note: The html content will be imported AS IS and will not maintain any links to your images etc. So you will need to ensure that the links to images are correct before importing content.

Extract text from html: Use this link to quickly copy your text from the html editor window into the next text field which will be the email that is sent to all your subscribers that receive the text format.

Fig. 4.7

This next section of the newsletter page applies to the subscribers that receive text formatted emails.

If you used the extract text from html link above, then you will have some text in this box that may be ready to simply space out properly with line breaks and proper spacing.
You can also import text from a web page or from a text file on your hard drive.

- **Text Content from URL:** Enter the full website address to the webpage that you wish to grab text content from.

- **Text Content from File:** Click 'browse' to look for the text file that contains the content you wish to use in this newsletter.

Note: These two options will import content AS IS, so if the page is HTML then it will import

HTML code, not just the text portions. If you wish to extract text from HTML then finish the HTML portion of the newsletter first, click 'Finish' to save and then 'edit' the newsletter to come back and import the text from the HTML editor into your text version.

Fig. 4.8

Once you've entered your html and text content for the newsletter, you may wish to preview the newsletter through an email program. Simply insert your email address in the Email Address field and click 'Send Preview' – SendStudio should send you a preview to allow you to view it as your subscribers will see it.

When you are happy with your newsletter, click 'Finish' to save it.

Manage Newsletters
Once you've created a newsletter you will be familiar with the 'edit' section of managing a newsletter as it is the same page that you saw when creating the newsletter.

To manage a newsletter click on the 'Manage Newsletters' link on the 'Newsletters' tab in the top navigation or from your front page Control panel link under the Newsletters section.

Fig. 4.9

Fig. 4.10

All available newsletters will be listed in the Manage Newsletters page.
From here you can view, send, schedule, edit, copy or delete newsletters.
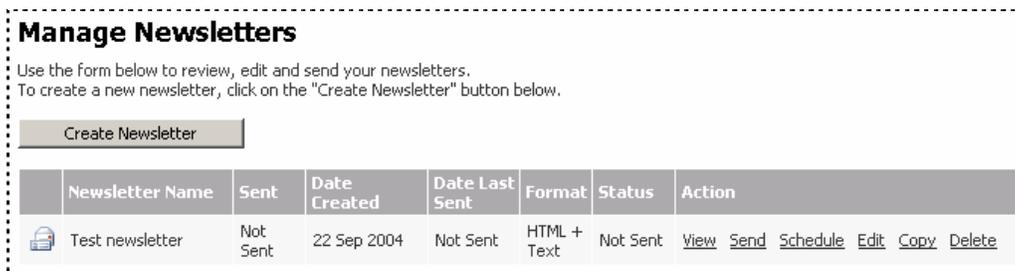
Fig. 4.11

Here is a brief outline of the Actions that can be taken when managing a newsletter

- **View a Newsletter:** The view link allows you to preview the newsletter content in both HTML and text format (which ever applies to the newsletter).
  When you click the 'view' link, a new window will pop up. You can use the drop down menu at the top of the window to switch between the HTML preview and the

text preview.

Fig. 4.12

- **Send a Newsletter:** This will lead you to the 'Send Newsletter' section. Please view the section titled "Send Newsletters" for a guide on how to use this section.

- **Schedule a Newsletter:** A scheduled newsletter is a newsletter that has been setup to be sent out on a certain date.

- **Edit a Newsletter:** Click on the 'edit' link to navigate to the 'Update Newsletter' page. This page is the same as the create newsletter page and your current content will load in the HTML editor and the text content sections to allow you to update.

- **Copy a Newsletter:** If you wish to copy a newsletter, click the 'copy' link.

Fig. 4.13

The first screen will simply ask you for the name you wish to call the new newsletter.

Click 'Save' to create the new copy.

Fig. 4.14

- **Delete a Newsletter:** To delete a newsletter simply click on the delete link. A confirmation popup will appear to make sure that you wish to delete the newsletter.

Send Newsletters

The 'send' link in the manage newsletters page allows you to start sending a newsletter. Click the 'send' link to start the sending process or click on the Send Newsletter link on your front page control panel or the 'Send Newsletter' link from the 'Newsletters' tab.

Fig. 4.15   Fig. 4.16

Fig. 4.17

This page simply asks you which mailing list you wish to send.
Click 'Next' to continue.

Send Newsletter (Step 2 of 4)

Use the form below to choose the recipients to receive this newsletter.
Click on the "Next" button to continue.

[Cancel] [Next »]

Newsletter Recipient Details

* Status:	Active
* Confirmed:	Confirmed
* Format:	Either
Match Email:	
Have Clicked Link:	None

Filter by Custom Fields

Match mycustomfield1:

[Cancel] [Next »]

Fig. 4.18

You can choose to send a newsletter based on the following fields on this page.

- **Status:** Subscribers that have a status of Active, Inactive or both.

- **Confirmed:** Subscribers who have confirmed, unconfirmed or both.

- **Format:** Email subscribers who receive in certain formats according to their email program.

- **Match Email:** Send to only one email or all emails from a single domain. Eg. You can send newsletters to one specific email address such as user1@mail.com or all email addresses at mail.com.

- **Have Clicked Link:** Send based on whether the subscriber has clicked a link in a previous newsletter.

If you have custom fields such as name, address etc. that relate to records in your mailing list, then you can also use these to filter the sending. Eg. Send newsletter only to subscribers in a certain country, or city. These fields will automatically be picked up and shown to you on this page.

Click 'Next' to go to the next step based on your chosen settings.

Fig. 4.19

This page will give you the following options:

- **Send Newsletter:** You must choose which newsletter to send to your subscribers. You may wish to preview the newsletter to make sure that all layout and spelling is correct.

- **Send Multipart:** Check this box if you would like to allow the users email program to choose which format to receive email in. Emails that are sent in multipart allow the email program to choose which format to display it in according to its own settings. Eg. If you send an html email to a text based email program, you will not be able to see the intended content, it will all display in text. If the same email is sent in multipart, with a text version of the email, the text based email program will display it correctly in text format.

- **Track Email Opens:** This only applies to HTML emails and will track whether the user has opened the email to be viewed. (This information will then be available to you in the statistics)

- **Track Links:** Check this box to allow links to be tracked. If a link is clicked from the email, SendStudio will record it.(This information will then be available to you in the statistics)
- **Send From Name:** The name that will be displayed in the 'From' field.

- **Send From Email:** The email address that will be displayed in the 'From' field.

- **Reply-To Email:** The email address you wish to display in the Reply-To field. If a user replies to the newsletter email, it will be sent to this address.

- **Return-Path Email:** If an email does not get through, or if it is rejected by the mail server, a notice will be sent to the email address you specify here. If you would

like to use the bounce handler in SendStudio, please ensure that this email address does not receive any other email.

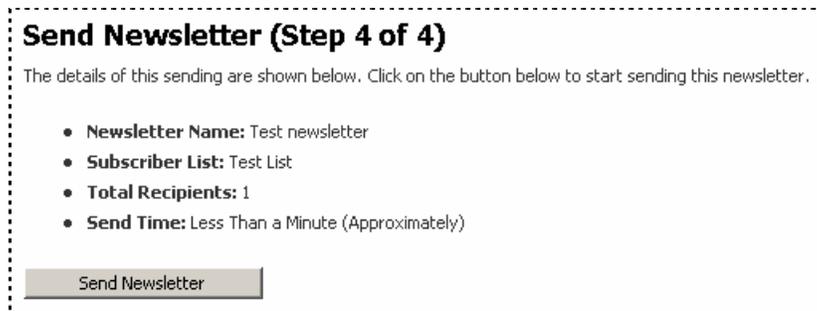Click 'Next' to continue, once you have filled in all fields.

Send Newsletter (Step 4 of 4)

The details of this sending are shown below. Click on the button below to start sending this newsletter.

- **Newsletter Name:** Test newsletter
- **Subscriber List:** Test List
- **Total Recipients:** 1
- **Send Time:** Less Than a Minute (Approximately)

Send Newsletter

Fig. 4.20

Once you have reviewed the information on this page, click 'Send Newsletter' to send. The newsletter will be sent the next time that the sending program runs(hourly).

Newsletter Sent Successfully!

The selected newsletter has been sent successfully. It was sent to 1 subscriber and took 4 seconds

OK
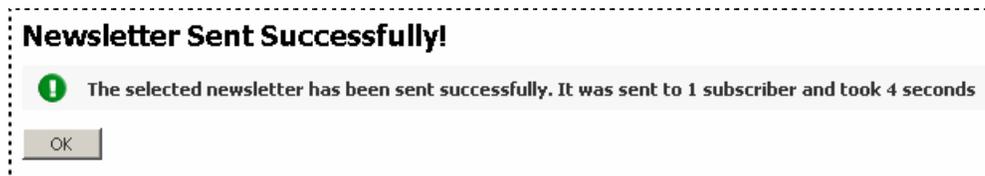
Fig. 4.21

Manage Templates

What is a template?
A template is a reusable layout with placeholders for different areas such as content and custom fields within a set design.

Why should I use templates?
Templates save you a lot of time and allow you to use the same professional layout for your newsletters for a consistent look and feel.

Creating and Managing Templates
To get started with creating and managing templates in the email manager, click on the Manage Templates link on your front page control panel or the 'Manage Templates' link from the 'Templates' tab. If you wish to create a new template click on the 'Create Template' link on the front page or the 'Create Template' link on the 'Templates' tab.
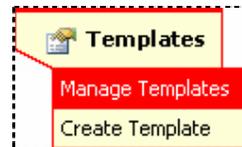
Fig. 5.1   Fig. 5.2

If you do not have templates created yet, the following screen should appear after clicking on the 'Manage Templates' links.

Fig. 5.3

If you have templates the following screen should appear.

Fig. 5.4

Fig. 5.5

Step One of Creating a new template requires you to enter the following:

- **Template Name:** This field is for your reference when using the email manager. The template name will be displayed in a list when you need to choose a template layout for your newsletters or auto responders.

- **Format:** You can choose to create templates for your text emails, HTML emails or both.

Click 'Next' to go to Step Two.

Fig. 5.6

The first part of this screen will show the template name that was chosen in step one.

Fig. 5.7

This is the visual editor that will be displayed on this page if you chose to create a HTML based template. The fields are outlined below:

- **HTML content:** This field allows you to edit your layout visually as it will appear in the subscribers email program.

- **Insert HTML Merge Field:** If you have any custom fields set in your mailing list, these can be inserted using this link. A placeholder will be inserted to allow SendStudio to substitute it for the user details that are in this field.

- **HTML Content from URL:** You can choose to insert the full website address to a file that contains the content & layout for the template.

- **HTML Content from a file:** You may choose a file on your hard drive to be used for the layout and content in the template.

Note: The html content will be imported AS IS and will not maintain any links to your images etc. So you will need to ensure that the links to images are correct before importing content.

- **Extract Text from HTML:** If you have chosen to send the template as text, then you can use this link to extract all text from your HTML layout and paste it automatically into the text content field. This will save you a lot of time typing the same content.
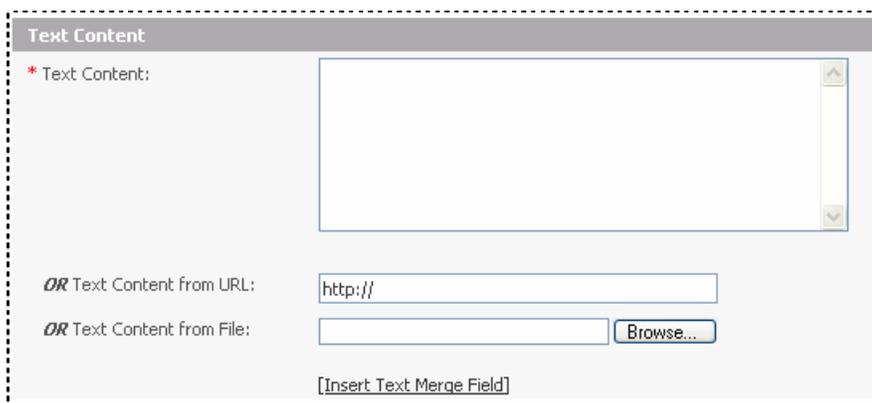
Fig. 5.8

- **Text Content:** This section is for the text content of your template.

- **Text Content from URL:** You can choose to insert content from a text file using a website address to the file.

- **Text Content from File:** Choose a text file on your hard drive to be used for the text content in the template.

Note: Only text files can be used to insert text. Text from the files will be inserted as it appears in the file, so if a HTML file is chosen, all HTML tags and code will also be inserted.

- **Insert Text Merge Field:** If you have any custom fields, these can be inserted using this link. A placeholder will be inserted in the content section.

When you are satisfied with your settings, click "Finish" to create your template.

Manage Custom Fields

What is a Custom Field?
A custom field is a piece of information that describes some of your records that are in your mailing list. They can be used to filter certain functions based on the information or to allow personalization of email newsletters.

An example of a custom field could be a firstname, lastname, address, etc.

Why should I create and use Custom Fields?
Custom fields allow you to collect more information about your subscribers that will allow you to personalize your emails to subscribers based on this information. It equips you with more information about the user to help you send relevant information to the right people.

Create a Custom Field
To create a new custom field, click on the 'create custom field' button in this 'Manage Custom Fields' section.

Fig. 6.1
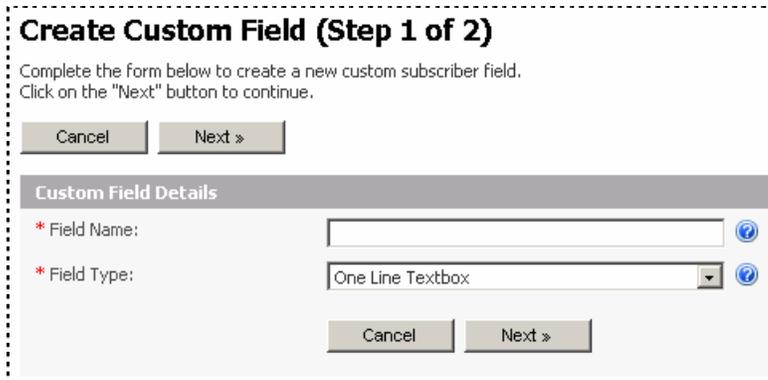
Fig. 6.2

This page will ask you the name and type of custom field you wish to create. The types of fields are outlined below:

- **One Line Text Box** – This is the general type of field to hold text records about most things like name, address, etc.

- **Multi Line Text Box** – This is for larger amounts of information such as comments or descriptions.

- **Drop down list** – This field is for holding up to 5 different values that can be modified from a drop down menu.

- **Check box** – This is usually a yes/no value or a value that has one of two possible answers. Eg. Male/female specification.

- **Multiple Check box** – This is for more than one value that will be chosen for this field where a user may satisfy more than one option.

- **Number Text box** – For information that contains numbers only. Eg. Age, salary, telephone.

- **Date box** – This field is for storing date information.

For **a one line text box**, the following step will be shown.

Fig. 6.3

- **Field Name:** This field name contains the field name as it will appear on your subscription forms but it is also for your own reference when using this custom field.

- **Required:** You can choose whether this field is mandatory or can be left blank on the subscription form.

- **Default Value:** You can choose a default value to appear in the subscription form.

- **Size** You can choose how wide this field is. 30 is a default text input field size.

- **Minimum Length:** You can choose the minimum amount of characters allowed in the field.

- **Maximum Length:** You can choose a maximum amount of characters allowed in the field.

When a **Multi Line Text box** type of field is chosen, the following options will be available in step 2.

Fig. 6.4

- **Field Name:** This field name contains the field name as it will appear on your subscription forms but it is also for your own reference when using this custom field.

- **Required:** You can choose whether this field is mandatory or can be left blank on the subscription form.

- **Default Value:** You can choose a default value to appear in the subscription form.

- **Width:** You can choose how wide this field is. 40 is a default text area field size.

- **Height:** You can choose the height of the text area field.

If you chose **Drop down list** as the field type the following screen will be shown in step 2. It allows you to create 5 options at one given time. To create more than 5 you should click Finish then edit this custom field again. An additional 5 options will be shown to allow you to add more. You can repeat this until you reach the number you require.

Fig. 6.5

- **Field Name:** This field name contains the field name as it will appear on your subscription forms but it is also for your own reference when using this custom field.

- **Required:** You can choose whether this field is mandatory or can be left blank on the subscription form.

- **Default Value:** You can choose a default value to appear in the subscription form.

- **Value (number):** This is the actual value this field will hold when the label on the dropdown is selected.

- **Label (number):** This is the text that is displayed to the user in the dropdown menu list.

If you chose the **Check box** type field the following page will display in Step 2.

Fig. 6.6

- **Field Name:** This field name contains the field name as it will appear on your subscription forms but it is also for your own reference when using this custom field.

- **Required:** You can choose whether this field is mandatory or can be left blank on the subscription form.

- **Default Status:** You can choose a default status – checked or unchecked.

- **Label:** This is the text that will appear next to the checkbox. Eg. ☐ Yes

For a **Date box** type of field the following options will be shown on step 2

Fig. 6.7

- **Field Name:** This field name contains the field name as it will appear on your subscription forms but it is also for your own reference when using this custom field.

- **Required:** You can choose whether this field is mandatory or can be left blank on the subscription form.

- **Default Value:** You can choose a default value to appear in the subscription form.

- **Display Order (First, Second & Third) :** Choose which order you wish to display the date, use day, month and year for these three fields.

- **Start Year:** Choose which year to start the year dropdown with.

- **End Year:** Choose which year to end the year dropdown with.

Manage Auto Responders

What is an Auto responder?
An auto responder is a newsletter that is sent to your subscribers automatically, a set period of time after they have subscribed to your mailing list. You can have as many auto responders as you like.

Auto responders can be sent based on the information that was collected during signup so this feature is a great way to follow up their subscription with a personalized message or offer.

Why should I use an auto responder?
Auto responders are a good way to follow up with your subscribers. You can follow up with an offer that is targeted based on their information, or you can simply send them a personalized message based on their information that was provided during the subscription process. It is another marketing tool that allows you to target specific groups within your mailing lists.

Create and Manage Auto responders
To get started, click the 'Manage auto responders' link on your front page control panel or the 'Manage auto responders' link from the 'Auto responders' tab. If you would like to create a new auto responder, click on the "Create Auto responder" link on the front page or in the 'Auto responder' tab.

Fig. 7.1   Fig. 7.2

The first screen will ask you which mailing list the auto responder belongs to. Auto responders are linked to a mailing list because the auto responder will be sent to this mailing list only.
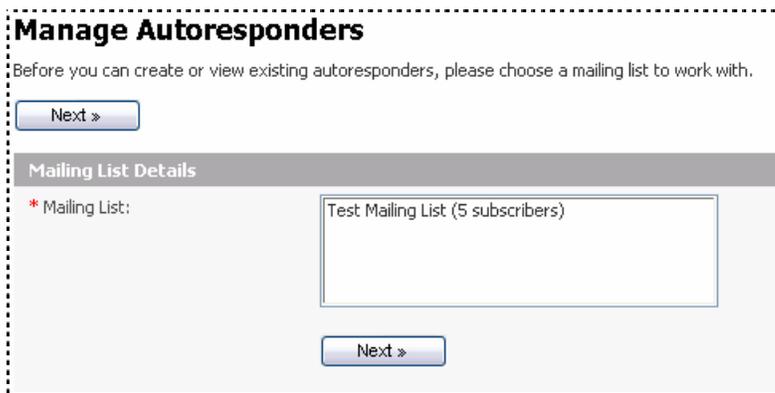
Fig. 7.3

If you haven't created any forms yet, the following screen will be shown when you click "Manage Auto responders". If you haven't created any you will need to create an auto

responder before you can manage it.

Manage Autoresponders

The are currently no saved autoresponders. Click "Create Autoresponder" to create one.

[Create Autoresponder]

Fig. 7.4

If you have an auto responder for the mailing list, then it should appear on this page, to allow you to view, edit or delete it. You can also click on the "Create Auto responder" button if you would like to create a new auto responder.
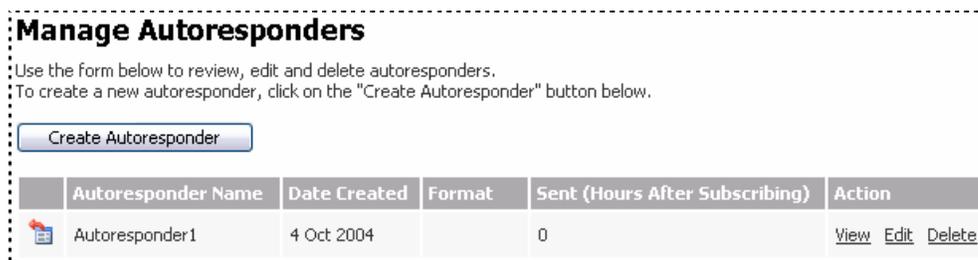
Manage Autoresponders

Use the form below to review, edit and delete autoresponders.
To create a new autoresponder, click on the "Create Autoresponder" button below.

[Create Autoresponder]

	Autoresponder Name	Date Created	Format	Sent (Hours After Subscribing)	Action
	Autoresponder1	4 Oct 2004		0	View Edit Delete

Fig. 7.5

To create a new auto responder, simply click on the create auto responder button.

Create Autoresponder (Step 1 of 3)

Choose who your autoresponder will be sent to.
When you are done, click on the 'Next' button.

[Cancel] [Next »]

Autoresponder Details

* Autoresponder Name:		
* Match Status:	Active	
* Match Confirmed:	Confirmed	
* Match Format:	Either	
Match Email:		
Have Clicked Link:	Not Applicable	

[Cancel] [Next »]
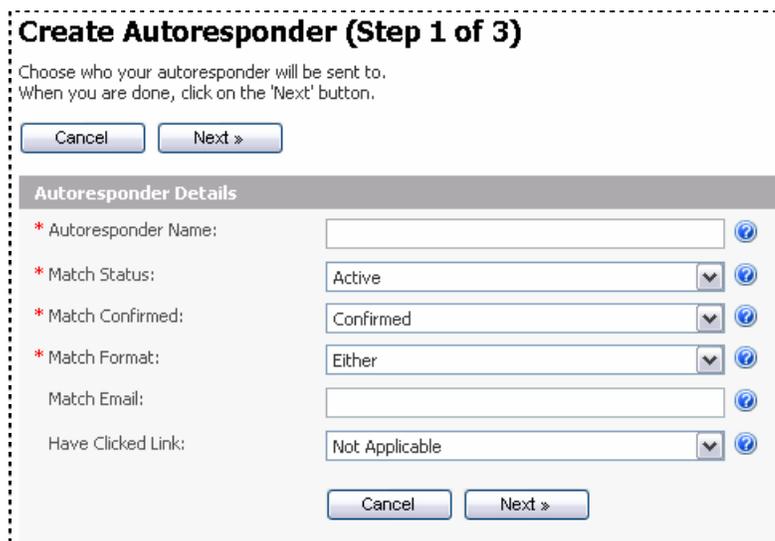
Fig. 7.6

The first step will require you to enter some details about the auto responder you are creating for your mailing list.

- **Auto responder name**: This is for your reference when using SendStudio to manage your auto responders.

- **Match Status:** You can send a newsletter to subscribers that have a status of Active, Inactive or both.

- **Match Confirmed:** You can send an auto responder to subscribers who have confirmed, unconfirmed or both.

- **Match Format:** You can choose whether to send to email subscribers who receive in certain formats or all formats.

- **Match Email:** You may choose to send an auto responder to only one email or all emails from a single domain.

- **Have Clicked Link:** You can send an auto responder based on whether the subscriber has clicked a link or not.

Click "Next" to continue to the next step.

Fig. 7.7

On this screen you will enter more information about the auto responder, as outlined below:

- **Send From Name:** This is the name that will appear in the 'From' field in the recipients email.

- **Send From Email:** This is the email that will appear in the 'From' field in the recipients email.

- **Reply-To Email:** This is the email that will be used if the recipient replies to the email using their email program.

- **Return-Path Email:** This is the email that will be used to send all error notices for this auto responder. The recipients mail server may send a notice if the email is

delayed or did not get through.

- **Email Format:** You can choose which format to send your auto responder in. Choose from HTML, text or both.

- **Use Template:** You can choose a template design layout for your auto responder if you have created a template design for this mailing list.

- **Hours Delayed:** Enter the number of hours you wish to send the auto responder after subscription.

- **Send Multipart:** Click here to send the auto responder in multipart format. Use this feature if you want the recipients email program to choose between text or html display.

- **Track Email Opens:** Check this box if you wish to track email opens of the auto responder. This feature will only work for HTML based emails.

- **Track Links:** Check this box to track all links in the auto responder.

Click "Next" to continue

If you have already created a newsletter before, these screens will be familiar to you, as this step looks very much like the steps taken to create a newsletter. (Note: If you would like individual descriptions of the editing toolbar in this step, please refer to "Managing Newsletters").

Create Autoresponder (Step 3 of 3)

Complete the form below to build a multi-part autoresponder containing both text and HTML versions.

Cancel   Finish

Autoresponder Details

* Email Subject: [   ] ⓘ

Fig. 7.8

This section will be the email subject that appears in the recipients email.
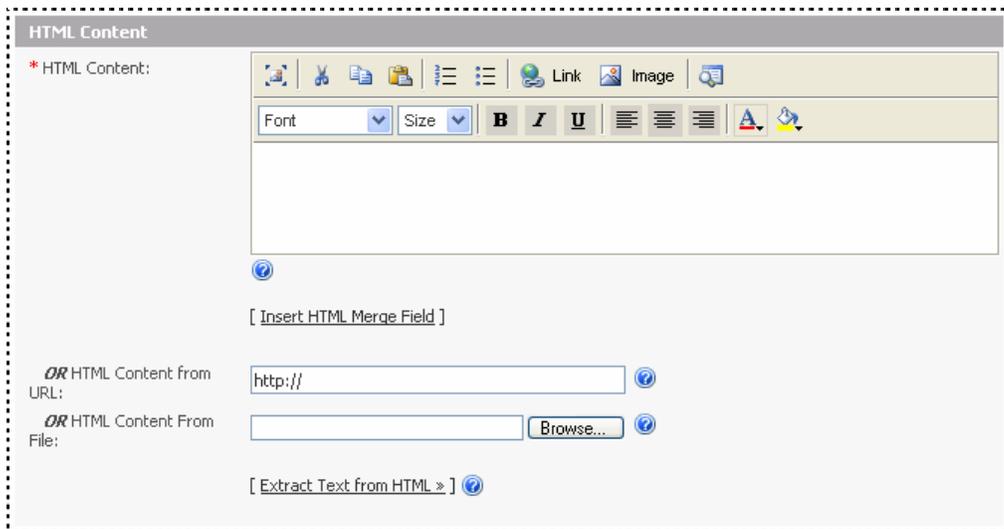
Fig. 7.9

This is the visual editor that will be displayed on this page if you chose to create a HTML based auto responder. The fields are outlined below:

- **HTML content:** This field allows you to edit your layout visually as it will appear in the subscribers email program.

- **Insert HTML Merge Field:** If you have any custom fields set in your mailing list, these can be inserted using this link. A placeholder will be inserted to allow SendStudio to substitute it for the user details that are in this field.

- **HTML Content from URL:** You can choose to insert the full website address to a file that contains the content & layout for the autoresponder.

- **HTML Content from a file:** You may choose a file on your hard drive to be used for the layout and content in the auto responder.

Note: The html content will be imported AS IS and will not maintain any links to your images etc. So you will need to ensure that the links to images are correct before importing content.

- **Extract Text from HTML:** If you have chosen to send the auto responder as text, then you can use this link to extract all text from your HTML layout and paste it automatically into the text content field. This will save you a lot of time typing the same content.

Fig. 7.10

- **Text Content:** This section is for the text content of your auto responder.

- **Text Content from URL:** You can choose to insert content from a text file using a website address to the file.

- **Text Content from File:** You may choose a text file on your hard drive to be used for the text content in the auto responder.

Note: Only text files can be used to insert text. Text from the files will be inserted as it appears in the file, so if a HTML file is chosen, all HTML tags and code will also be inserted.

- **Insert Text Merge Field:** If you have any custom fields set in your mailing list, these can be inserted using this link. A placeholder will be inserted to allow the email manager to substitute it for the user details that are in this field.

Fig. 7.11

If you wish to preview the auto responder in your email program, enter your email address in the Email Address field and click "Send Preview".

When you are satisfied with your settings, click "Finish" to create your Auto responder.

Fig. 7.12

Manage Forms

What is a form?

A Form is a part of a web page that allows a user to input information by answering a set of predefined questions. This form is then submitted to allow the information to be collected. The forms that are created in SendStudio are closely linked with the custom field functions and their properties outlined in the previous section.

An example of a standard form is shown below.

Fig. 8.1

Creating and Managing Forms

To get started, click the 'Manage Forms' link on your front page control panel or the 'Manage Forms' link from the 'Forms' tab. If you would like to create a new form, click on the "Create Form" link on the front page or in the 'Forms' tab.

Fig. 8.2
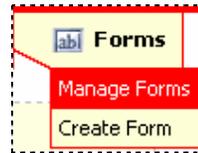
Fig. 8.3

If you haven't created any forms yet, the following screen will be shown when you click "Manage Forms".

Fig. 8.4

If you have created a form the following will show:

Fig. 8.5

Create Form (Step 1 of 3)

Complete the form below to create a new subscription/unsubscription form.
Click on the "Next" button to continue.

[Cancel] [Next »]

New Form Details

* Form Name: Business Subscription 1

* Form Type: Subscription

[Cancel] [Next »]

Fig. 8.6

- **Form Name:** Enter the name of the form that you would like to use. This is for your own reference when using the form within the email manager.

- **Form Type:** Choose the type of form. Subscription, unsubscription or a form simply to modify details.

Click 'Next' to continue to the next step

Subscription Form
If you chose to create a subscription form, then the following screen will be shown.

Create Form (Step 2 of 3)

Complete the form below to create a new Subscription form.
Click on the "Continue to Step 3" button to continue.

[Cancel] [Next »]

New Form Details

* Form Name: Business Subscription 1

* Form Design: Default White
                       ⊕ Preview Form

* Require Confirmation: Yes

* Send Thank you: Yes

Lists to Subscribe to

Test Mailing List: ☑ Yes

Custom Fields to Show

FirstName: ☑ Yes 0

Surname: ☑ Yes 0

[Cancel] [Next »]

Fig. 8.7

- **Form Name:** This is the name of the form for your personal reference.

- **Form Design:** You may choose from a number of pre-made layouts and colour schemes.

- **Require Confirmation:** You may choose to require confirmation from the user before their details can be placed in the mailing list.

- **Send Thank you:** You may choose to send a thank you message once the user confirms or subscribes to the mailing list.

- **Lists to Subscribe to:** You can choose the mailing list from the 'Lists to Subscribe to' section.

- **Custom Fields to Show:** If you have any custom fields created, they will appear in the 'Custom Fields to Show' section to allow you to select them to appear on this new form.

Click 'Next' to continue.

Fig. 8.8

- **Send From Name:** This is the name that should appear in the 'From' field when this form is submitted.

- **Send From Email:** This is the email address that should appear in the 'From' field when this form is submitted.

If you chose 'No' to both Require Confirmation and Send Thankyou in the previous step, then the following page will be shown.

Fig. 8.9

- **Send From Name:** This is the Name of the form to show in the 'From' field for this form.

- **Send From Email:** This is the Email of the form to show in the Email field for this form.

- **Thank you Page:** You may enter content to show the person once they have subscribed.

- **Thank you Page URL:** Enter a page that you would like to forward the person after they subscribe.

- **Error Page:** If there is an error, you may choose to show the person some content that you place in this field.

- **Error Page URL:** Alternatively, you can send the person to a page you have already built.

If you chose 'Yes' for 'Require Confirmation' in the previous step the following will also show on this page.

Fig. 8.10

- **Confirmation Subject:** This is the subject that will show in the persons email.

- **Confirmation Email:** This will form the content of the email that will be sent to the person to confirm the subscription.

- **Confirmation Page:** This Page will be shown to the person when they submit the form to allow them to confirm straight away. They will still be sent the confirmation email.

- **Confirmation Page URL:** Alternatively, you may wish to redirect the person to a different page when they submit the form.

If you chose 'Yes' to 'Send Thank you' in the previous step, the following will also show on this page.

Fig. 8.11

Click 'Finish' to create your subscription form.

Fig. 8.12

Unsubscription Form
If you chose to create an unsubscription form the process is the same as creating a subscription form. Custom fields will not be shown in the second step as they are not required.

Modify Details Form
If you are creating a 'Modify Details' type form then this second page will display.

Fig. 8.13

- **Form Name:** This is the name of this form, from step one.

- **Form Design:** You can choose from a list of pre-designed forms to use.

- **Lists to modify details for:** You must choose the mailing list you wish to use with this form.

- **Custom Fields to Show:** Choose the custom fields you wish to allow to be updated using this form.

Click 'Next' to continue.

Fig. 8.14

- **Send From Name:** This is the name of the form to show in the 'From' field.

- **Send From Email:** This is the email address of the form to show in the 'Email' field.

- **Thank you Page:** You may enter content to show the person once they have updated their details.

- **Thank you Page URL:** Enter a page that you would like to forward the person after they have updated their details.

- **Error Page:** If there is an error, you may choose to show the person some content that you place in this field.

- **Error Page URL:** Alternatively, you can send the person to a page you have already built.

Click 'Finish' to create the form.

Fig. 8.15

Statistics

What are statistics?

Statistics are reports about the newsletter campaigns, subscribers and other aspects of SendStudio to allow you to measure your performance. If you know more about your newsletter campaigns you are then able to plan better email campaigns based on this information.

Creating Statistical Reports

To navigate to the Statistics page, click on the 'Statistics' link on the top right menu.

Home | Statistics | Users | Settings | Logout

fig.9.1

There are several types of statistical reports available:

- **Newsletter Send Statistics:** View statistics about newsletter sending, including the number of newsletters successfully sent, the date sent and how many newsletters were viewed (html only).

- **Subscriber Statistics:** View information about individual subscribers such as subscription date, clicked links and opened newsletters.

- **Subscriber Dates:** View the number of subscriptions by day, month & year.

- **Auto-responder Statistics:** View information about auto-responders including number of opens and clicked links.

- **User Statistics:** View control panel user statistics such as the number of newsletters sent, the date of sending and more.

- **Mailing List Statistics:** View information about each mailing list including number of subscribers, active/inactive, confirmed/unconfirmed subscribers etc.

- **Link Click-through Statistics:** View information about links & click-throughs from newsletters and auto responders.

Statistics

Select a statistics report type below and click "Next" to continue.

[Cancel]   [Next »]

Choose Report Type

* Statistics Report:
- ● Newsletter Send Statistics
- ○ Subscriber Statistics
- ○ Subscriber Dates
- ○ Autoresponder Statistics
- ○ User Statistics
- ○ Mailing List Statistics
- ○ Link Click-through Statistics

[Cancel]   [Next »]

Fig. 9.2

Newsletter Send Statistics.

Choose Newsletter Send Statistics and Click 'Next'.

Fig. 9.3

This screen requires you to choose a mailing list to build this report from. Select the mailing list you wish to build this report from and click 'Next'.

Fig. 9.4

The statistics engine will build a report that contains all newsletters that have been sent. You can then view the report for more information. Click 'View'.

Fig. 9.5

Subscriber Statistics

Statistics (Subscriber Statistics)

Before you view statistics, please choose a mailing list to work with.
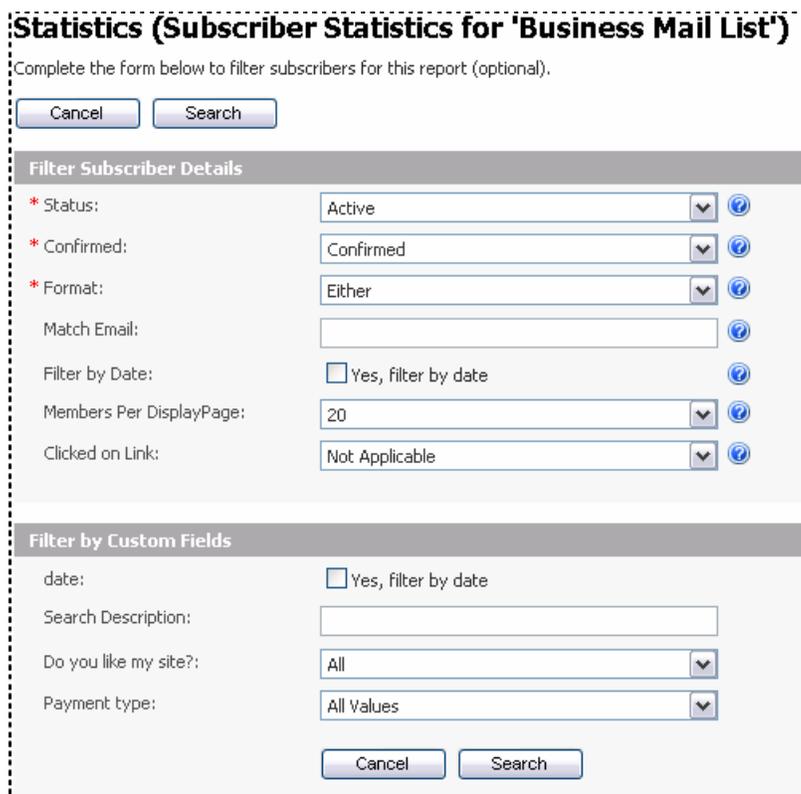
[Cancel] [Next »]

Select a mailing list

* Choose a mailing list:

Business Mail List (82 subscribers)

[Cancel] [Next »]

Fig. 9.6

Select the mailing list you wish to build this report from and click 'Next'.

Statistics (Subscriber Statistics for 'Business Mail List')

Complete the form below to filter subscribers for this report (optional).

[Cancel] [Search]

Filter Subscriber Details

* Status:	Active
* Confirmed:	Confirmed
* Format:	Either
Match Email:	
Filter by Date:	☐ Yes, filter by date
Members Per DisplayPage:	20
Clicked on Link:	Not Applicable

Filter by Custom Fields

date:	☐ Yes, filter by date
Search Description:	
Do you like my site?:	All
Payment type:	All Values

[Cancel] [Search]

Fig. 9.10

This screen requires you to enter more information about the subscriber(s) for this statistical report. The details you provide on this form will be used to look for all relevant records.
Filter results of the report based on the following:

- **Status:** The subscriber status. Choose from Active, Inactive or View All.

- **Confirmed:** The subscriber confirmed or unconfirmed status.

- **Format:** The format of the subscriber. Choose from HTML, text or both.

- **Match Email:** Match the email of the subscriber or all emails at one domain.

- **Filter by Date:** Check this box to filter by date.

- **Members per DisplayPage:** Choose the number of members displayed on each page of this statistical report.

- **Custom Fields:** If you have any custom fields they will be shown at the base of this page to allow you to use them as filters for this report also. The above example has date, search description, answers to a question, or payment type.

Click 'Search' to continue building this report based on the information you have filled in this screen.

Fig. 9.11

This screen will allow you to 'View' more information about the resulting list of subscribers.

Subscriber Dates

Fig. 9.12

Select the mailing list you wish to build this report from and click 'Next'.

Statistics (Subscriber Dates for 'Business Mail List')

The following lists the number of subscribers per year for the specified mailing list. Select a year to view subscribers per month

	Year	Number of Subscribers	Action
	2004	82	View

Fig. 9.13

You will be presented with the available year statistics. Choose view to view all statistics that you need from a specific year.

Statistics (Subscriber Dates for 'Business Mail List')

The following lists the number of subscribers per month for the specified mailing list. Select a month to view subscribers per day

	Month	Number of Subscribers	Action
	Jan 2004	0	View
	Feb 2004	0	View
	Mar 2004	0	View
	Apr 2004	0	View
	May 2004	0	View
	Jun 2004	0	View
	Jul 2004	0	View
	Aug 2004	0	View
	Sep 2004	82	View
	Oct 2004	0	View
	Nov 2004	0	View
	Dec 2004	0	View

Fig. 9.14

You will then be presented with all the months within the chosen year. This allows you to see how many subscribers for each month at a glance. Click 'view' to choose the month that you require to narrow your search by the month.

Statistics (Subscriber dates for 'Business Mail List')

The following lists the number of subscribers per day for the specified mailing list.

September, 2004

Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1st	2nd	3rd	4th
			0	0	0	0
5th	6th	7th	8th	9th	10th	11th
0	0	0	0	0	0	0
12th	13th	14th	15th	16th	17th	18th
0	0	0	0	0	0	0
19th	20th	21st	22nd	23rd	24th	25th
0	0	82	0	0	0	0
26th	27th	28th	29th	30th		
0	0	0	0	0		

Fig. 9.15

This page will show you how many subscribers signed up on each day.

Auto-responder Statistics

Statistics (Autoresponder Statistics)

Before you view statistics, please choose a mailing list to work with.

[Cancel]   [Next »]

Select a mailing list

* Choose a mailing list:

Business Mail List (82 subscribers)

[Cancel]   [Next »]

Fig. 9.16

Click on the mailing list that you would like to use for this statistical report.

If you have not yet run any auto responders or setup new auto responders, the following page will display.

Statistics (Autoresponder Statistics for 'Business Mail List')

The following lists information regarding the autoresponders setup for the specified list. Select an autoresponder for more detailed statistics.

No autoresponders have been set up. Please click on the button below to view another report.

[Generate New Report]

Fig. 9.17

If you have created an auto responder for the mailing list, the following will be displayed.

Statistics (Autoresponder Statistics for 'Customers')

The following lists information regarding the autoresponders setup for the specified list. Select an autoresponder for more detailed statistics.

	Subject	Date Created	Send When?	Action
	Important Information	Unknown	1 hours after	View

Fig. 9.18

You can click 'View' for more information about the auto responder.

Mailing List Statistics

Statistics (Mailing List Statistics)

Before you view statistics, please choose a mailing list to work with.

[Cancel] [Next »]

Select a mailing list

* Choose a mailing list: Business Mail List (82 subscribers)

[Cancel] [Next »]

Fig. 9.23

Select the mailing list you would like to use for this statistical report.

Statistics (Mailing List Statistics for 'Business Mail List')

The following lists information regarding the selected mailing list.

Mailing List Details

Total Subscribers:	82
Text Subscribers:	81
HTML Subscribers:	0
Active Subscribers:	1
Inactive Subscribers:	81
Confirmed Subscribers:	81
Unconfirmed Subscribers:	1

Fig. 9.24

All available statistics will be shown for the mailing list.

Link Click-through Statistics

Fig. 9.25

Select the mailing list you would like to use for this statistical report.

Fig. 9.26

Glossary / Definitions

Mailing List: A list of subscribers that can be categorized by a common name (for example, a mailing list called "YourMailingList"). When a message is sent to a mailing list, all subscribers of the mailing list receive the message.

Newsletter: A group announcement or message that is conducted through email messages, specific to a topic or common interest. When a message is sent to a mailing list, each list subscriber receives a copy.

Subscriber: A subscriber is a person that has indicated that they would like to receive information from you by subscribing to a mailing list. They can either signup using an online form or you may input their details manually.

Comma Delimited File, CSV file: A CSV file is compatible with Microsoft Excel (and Excel can export a normal Excel file as a CSV file for use in SendStudio). CSV stands for "Comma Separated Value" and CSV files are also called comma delimited files. This means that all field information is separated by a comma (,) and all records are usually separated by a new line or other character.

A Record: A record is a 'container' that holds fields of information.

A Field: A field is one piece of data inside a data record. It can be explained as one piece of information that describes the record. Eg. A record in the mailing list may contain the following fields – name, email, client_id etc.

A Custom Field: Fields used by the email manager when creating forms for collecting user input. These fields can be used to hold different types of information such as date, text input, multiple choices and yes/no responses.

A Template: A template is a reusable layout design that can be used for creating newsletters & auto responders. It saves production time to allow a consistent layout and design.

A Form: A form is part of a webpage that has input fields to collect data from the person viewing the webpage. When the form is submitted, the data is sent to the server.

An Auto-Responder: A message that is automatically sent to a subscriber after they subscribe to a mailing list. It is used as a follow-up tool.

Multipart: Multipart emails are emails that are sent in both a non-text format(HTML) and a text format. This is done to allow the recipients email program to choose which type of display to use according to its inbuilt functionality. Eg. If an email client does not display HTML emails, then the text version will be shown.

Bounced emails: Bounced emails are emails that do not reach the recipient. The target email server that is receiving the emails will use the return-path email that is specified in the send email to send back any error messages that occur to alert the sender that the email did not reach the recipient. Some reasons for bounced emails can be a non-existent email address or server, a server that is not allowing emails, or a spam filtering program that requires the sender to click on a link and manually confirm the sending of the email before it will reach the recipient.

Spam: This is unsolicited and unwanted email correspondence.