Entersoft Newsletter Management

Entersoft CRM ®

Implementation & User guide
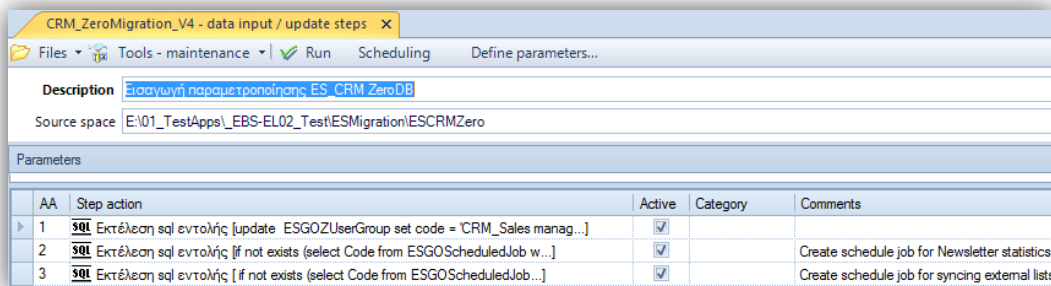
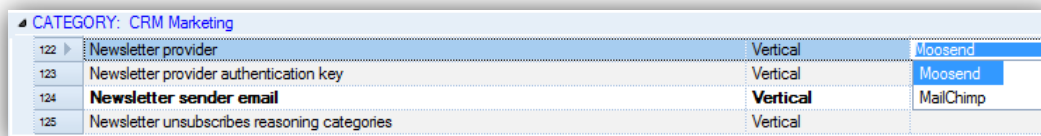# Contents

1. Newsletters | Set up

1.1 Run the CRM Zero migration

Navigate to Tools and Configuration > Import/export data > Import data (advance mode) and run the CRM_ZeroMigration_V4.emi in order to insert all necessary actions related to the newsletter administration.

1.2 Customization

Navigate to Customization > General > Company Parameters. Under category CRM Marketing you will find the following parameters that need to be defined in order to set up the newsletter migration service.

- **Newsletter provider**: Currently Mailchimp or Moosend are supported. Select the provider you wish to connect to from the dropdown list.

- **Newsletter provider authentication key**: Complete the Newsletter provider authentication key.

  Mailchimp: In order to find the API key login to Mailchimp, go to your Account, select Extras > API keys. Then copy the API key and paste it in the parameter field.
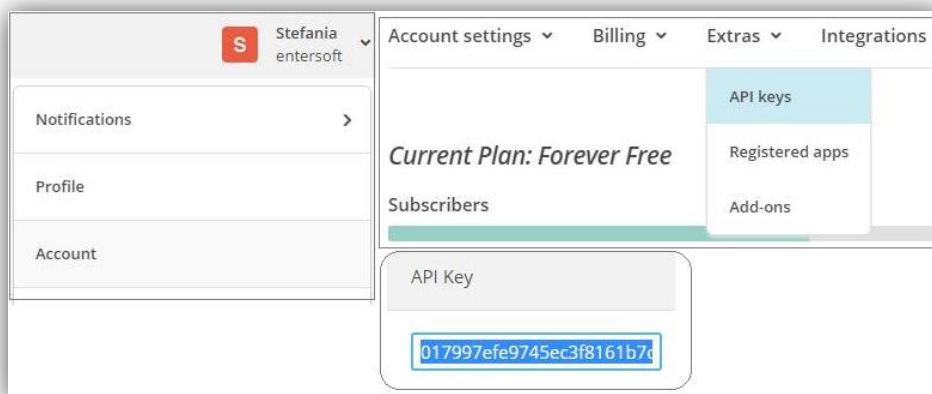
Moosend: In order to find the API key login to Moosend, go to Account > API key, copy the key and paste it in the parameter field.
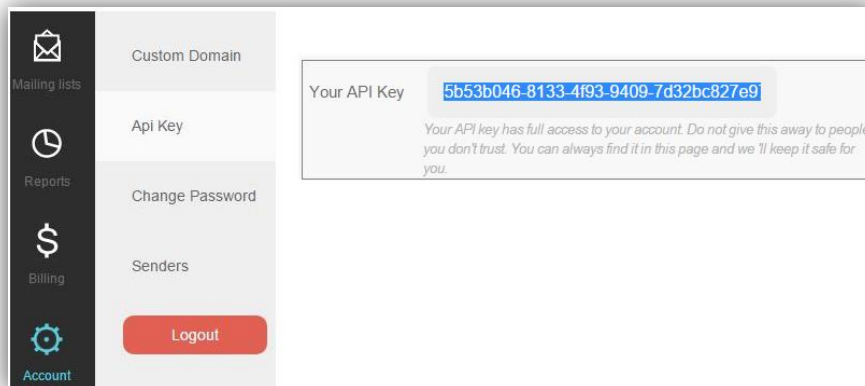
- ▪ **Newsletter sender email:** Complete the default newsletter sender email ("from" email) you wish to use for your newsletter campaigns. This should be one of the confirmed emails you have defined as senders in the external provider. In Mailchimp you can find these emails under List > Settings > List name and defaults and in Moosend under Account > Senders.

*Attention! The Business rule 'Assign campaign data list based on segment entity' must be enabled. By default it is auto activated.

1.3 System administration

Navigate to Tools & Configuration > System administration – DB > Use the most recent Internet Explorer version in order to set the most recent Internet Explorer version. This affects the functionality of the HTML editor
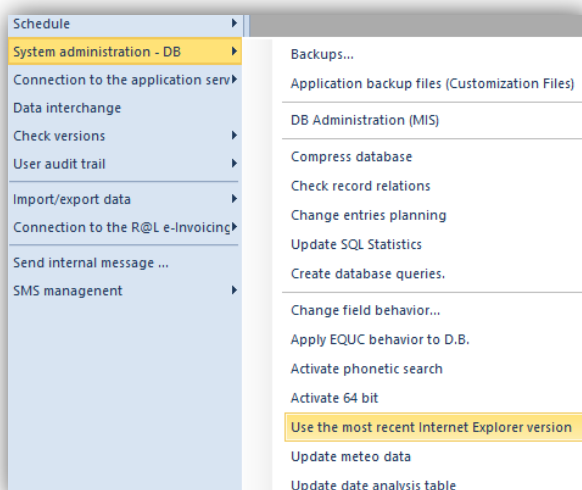
! Attention: An installation of Internet Explorer version 9 (or latest) must exist in the system in order for the html editor to be fully functional.

2. Newsletters | Administration

2.1 Newsletter Lists

In order to synchronize your EBS lists with the external provider lists, you will need to do the following actions:

2.1.1 Download external provider lists to EBS

In order to "download" the lists you have created in the external provider to EBS go to Newsletters > Newsletter Lists. If you don't have any lists, you need to create new ones and then sync them with the external provider ones.
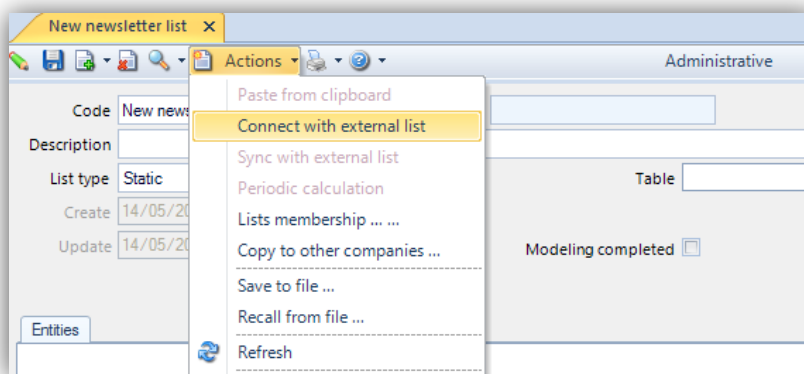
Create a new Entity list and complete the Code field. Then select Actions > Connect with external list.

A dialog box (Newsletter Provider List Selection box) will appear with all available external provider lists. Select the list you wish to connect to and press Accept. Automatically, all necessary fields and settings will apply. The external code and Description will be filled in, the list type will change to Static, the selected Table will turn to Newsletter Recipient and the Campaign list box will be checked. Save

In order to download all emails from the external list you need to go to Actions > Sync with external list
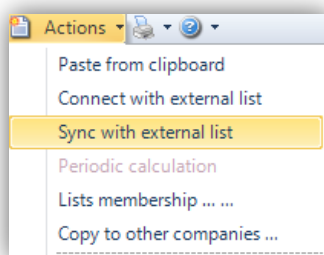
2.1.2 Upload EBS lists to the external provider

In order to "upload" the EBS list to the external provider you need to create a new campaign, connect it to the list and then export the data, as described in the next section Export the Campaign & List

2.1.3 Add custom fields to list

If you want to add custom fields in your newsletter list data, for example add fields from the recipient's associated person, go to the relevant context scroller Campaign – List data > Newsletter and add the columns from the relevant table. You need to modify the Name in filter in order for the fields to be "identified" by the external provider when they will be uploaded. Add the word custom_ before the name of the field, as shown in the picture below. Save

Table	Title	Name in filter	Name in the Database	Visible
Newsletter recipient	GID	GID	GID	☑
Newsletter recipient	Email	Email	Email	☑
ES00ListItem	Synced	Synced	Synced	☑
ES00ListItem	fListGID	fListGID	fListGID	☐
Person	Name	Custom_Name	Name	☑
Person	Group	Custom_Group	fGroupCode	☑

Once you create the campaign and connect it with your list, as described in the Newsletter campaigns section, the new custom fields will appear in the list data of the campaign.

	Email	Name	Group	Category	Created on
2	hka@entersoft.gr	hka	group 1	cat 1	18/05/2015
3	ans@entersoft.gr	Stef	group 2	cat 2	18/05/2015

After exporting data you will see the newly added fields in the related external provider list.

Email Address	NAME	GROUP
hka@entersoft.gr	hka	group 1
ans@entersoft.gr	Stef	group 2

E-mail Address	Name	Status	Added on	
@yahoo.gr		Active	19/05/2015	view details

Name: Ioanna | Group: group 2 | Category: cat 2 | expression: 2 | ESDCreated: 19/05/2015 14:33:52 | FlagField1:

2.1.4 Update provider list

You can update an external provider list with new EBS data, for example new emails added in an EBS list, by selecting the action Update provider list which is found in the campaign newsletter form (More > Update provider list).
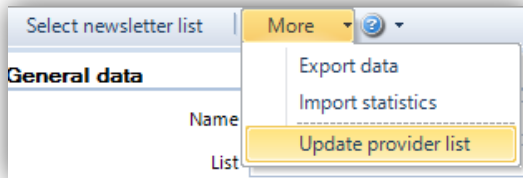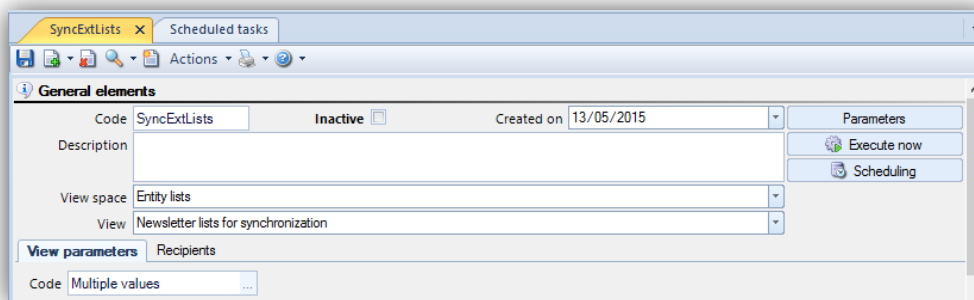

2.1.5 Schedule automatic sync of lists

Go to Tools & Configuration > Schedule > Scheduled tasks, find the scheduled job with Code SyncExtLists and schedule it as required.

Attention! You need to run the CRM Zero migration emi in order for the scheduled job SyncExtLists to be imported.

The syncing mechanism works as follows:

- Asks for new subscribers since the last sync date

- Creates the new subscribers as newsletter recipients if the emails do not exist in your database

- Updates the EBS connected list with the new subscribers

- Asks for the unsubscribed emails

- Deletes these emails from the EBS connected list.

  o If the unsubscribed email does not exist as a member in any other EBS list then the service updates the newsletter recipient record with status 'Unsubscribed'

  o Asks for removed emails and then deletes them from all EBS lists and updates the status of the newsletter recipient record as 'Removed'

2.2 Newsletter Campaigns

2.2.1 Create a newsletter campaign

Navigate to Newsletters > New Newsletter and complete the following fields:

Name: Insert the name of the campaign (for internal use).

Email subject: Insert the subject of the email (visible to recipients).

External campaign code: This field will be automatically completed once the newsletter campaign is exported to the provider. Do not fill in this filed.

Belongs to: This field shows the selected parent campaign. Once the parent campaign is selected, it cannot be changed

Status: This field regards the state of the campaign and changes automatically once you export the campaign.

Representative: Select a representative if applicable.

Sender email: If you complete the relevant parameter Newsletter sender email in Customization > General > Company Parameters > CRM Marketing this field will be filled with the specified email. You may change it if you wish.

Attention! In order for the sender email to be accepted from the provider, it first needs to be verified. In Mailchimp you can find these emails under List > Settings > List name and defaults and in Moosend you may go to Account > Senders in order to add a new sender email. A confirmation email will be sent to the specified email with an activation link.

2.2.2 Select the newsletter list

Once you have completed the necessary fields for the campaign, click on the Select newsletter list command. From the dialog box select the newsletter list you wish to send the campaign to and press Accept. The name of the connected list will appear in the List field of the General data tab of the campaign.
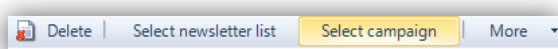

2.2.3 Select parent campaign

In order to define a **marketing campaign** as a **parent** to a newsletter campaign, click on the **Select campaign** command on the newsletter toolbar.

Once the parent campaign is selected, the **relevant list** (that has been connected to the parent campaign) will be associated with the newsletter campaign. The relevant fields of the newsletter form (List, Belongs to) will be filled accordingly.
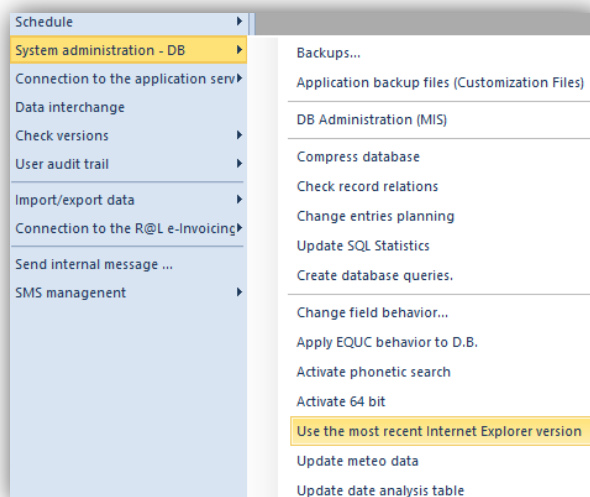
2.2.4 Create the HTML

2.2.5 New HTML Editor

2.2.5.1 Set up

▪ Navigate to Tools & Configuration > System administration – DB > Use the most recent Internet Explorer version in order to set the most recent Internet Explorer version. This affects the functionality of the HTML editor

! Attention: An installation of Internet Explorer version 9 (or latest) must exist in the system in order for the html editor to be fully functional.

▪ In Tools & Configuration > Customization > General > Company parameters > Content management parameters, the following parameters have been added and must be defined:

o Azure connection string: it should have the following format

DefaultEndpointsProtocol=http;AccountName=YourAccountName;AccountKey= YourAccountKey

This connection string provides access to your Azure cloud storage.

o Azure Storage URL: Optional (http://...)

o External Publishing URL: This parameter is mandatory. It actually specifies your content delivery network (http://...). The external publishing URL may possibly be the same with the Azure Storage URL.

- o Internal File Storage: This parameter is mandatory. This file storage must be granted for access to the user account that runs the application server service.

	CATEGORY: Content management parameters	
116	**Azure Storage connection string.**	**System administration**
117	Azure Storage URL	System administration
118	External file publishing url	System administration
119	File storage location	System administration

If an azure storage connection string has been defined, then this string will be used. If another storage location has been defined (i.e \\storage\temp), then this will be used. If both parameters have been completed, the azure string will be used.

2.2.5.2   HTML Editor Administration

The following functions are available in the **HTML editor**:

HTML Editor
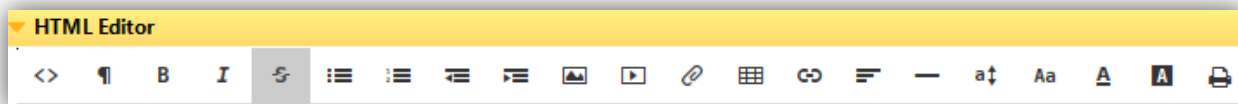
- **HTML**

  View the html source

- **Formatting**

  Change the Style of the text you have inserted by applying a header or a Style you have created

- **Bold**

- **Italic**

- **Deleted**

  Insert a strikethrough line   ~~Deleted Text~~

- **Unordered list**

  Insert bullets

- **Ordered list**

  Insert numbering

- **Outdent**

  To indent negatively, bring towards the margin.

- **Indent**

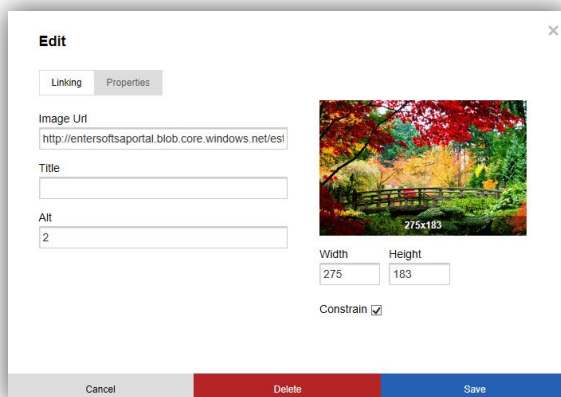 Set a line (of a paragraph, for example) in from the margin.

- **Insert Image**

In order to insert an image in the html editor, you need to define all relevant parameters regarding Azure or other file systems you may be using (see section Set up).

After completing the necessary settings, select insert image and then click on Upload > Browse. Locate and select the image file you wish. Once the file is uploaded, it will appear in the Choose tab of the Insert Image dialog box. Select the image to insert it.

Click on the Image and then Edit in order to make the necessary adjustments. In the Edit dialog box you may define the Title, Link & Position of the image (Linking tab) and the Image url, Title, Alt text and the width & height (Properties tab)

Save

▪ **Insert Video**

In order to insert a video in the html editor from Youtube or Vimeo navigate to the site and locate the desired video. Click on the **Share** button that appears beneath the player and then click on **Share / Embed**.
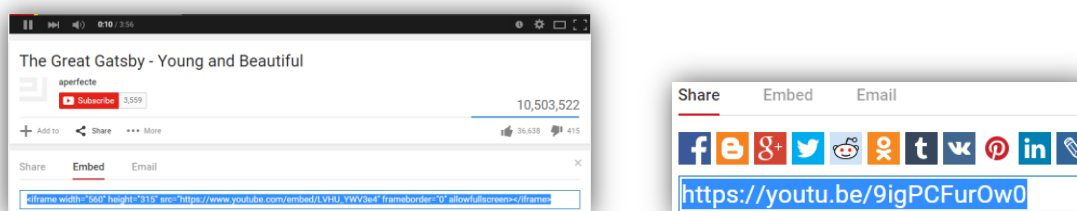

Copy the iframe code or youtube / vimeo URL, return to the html editor and paste it in the relevant box. Select **Insert** and you will see the video embedded in the page.
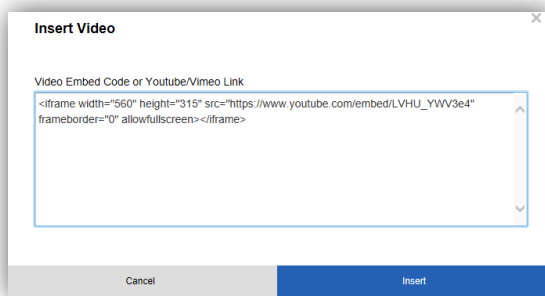
- **Insert File**

  In order to insert a file in the html editor, you need to define all relevant parameters regarding Azure or other file systems you may be using (as defined in the Set up section).

  After completing the necessary settings, select insert file and in the Upload tab complete the name of the file you wish to appear (optional). Then click on browse in order to locate the file and select it. Once the file is uploaded, select it from the Choose tab in order to insert it. Once the file is inserted, in order to view it you may click on the link where the file has been uploaded. You can also Edit the url or unlink the file.
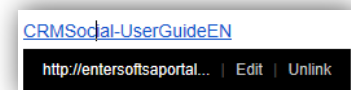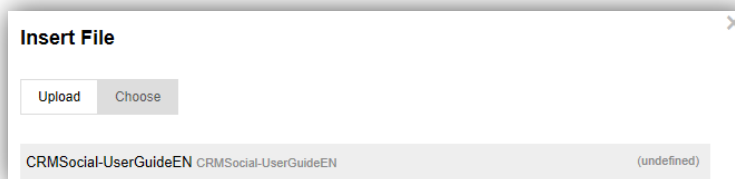
- **Table**

  Insert a table and add rows, columns etc
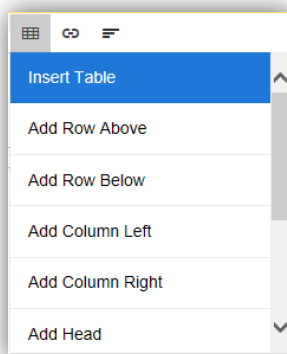
- **Link**

  Insert a new link or select the text you wish and make it a hyperlink. You may set the link to open in a new tab

- **Alignment**

  Align the text according to your needs (left, right, center etc)

- **Insert horizontal rule**

    Insert a horizontal line

- **Change font size**

- **Change font family**

- **Font color**

- **Back color**

- **Print**

2.2.5.3 Attach html file

It is possible to attach an html file to a newsletter campaign and then export it to the desired newsletter provider. You can, for example, create a new html in the Newsletter Editor (Newsletters > Newsletter editor) and then save & attach it.

In order to attach the html file, find the newsletter campaign, go to Attachments and select the file.   When you export the data select the option From an attached file.


2.2.6 Export the campaign & list

The next step you need to do is export the campaign with the selected list to the external email provider. Go to More > Export data.

Once you select the export data command, the following dialog box will appear in order for you to select the HTML source that you wish to export to the email provider.

The available options are:

1. From the HTML Editor: Select this option if you created the HTML in the HTML editor

2. From an attached file: Select this option if you wish to export an already created html (i.e from the Newsletter editor).

3. The HTML editing will take place at the provider site: Select this option if you wish to create the html in the external provider site.
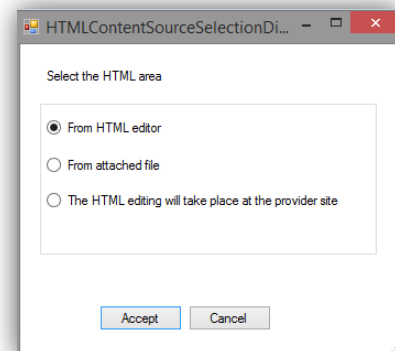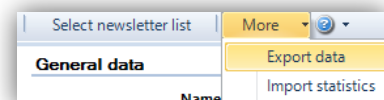
Once the export process is complete, all necessary fields & data will be transferred to the external provider site where you can now send the campaign.

Please note the following regarding the export of the list:

If the selected EBS list has already been connected & synced with an external provider list, as described in section Sync EBS with external lists, then all data will automatically be exported to the provider.

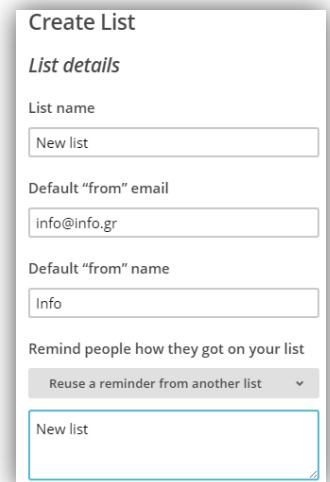**If the selected EBS list has NOT been connected & synced with an external provider list**:

Mailchimp: A list selector dialog box will appear in order for you to select the external list you wish to connect the EBS list to. Mailchimp does not support the automatic creation of a new list via the API so if you wish to connect the list with a NEW external list you need to first create it in Mailchimp.

Login to Mailchimp, go to Lists > Create List and after completing the necessary fields press Save. You do not need to add members in the list as they will be transferred from the EBS list once you connect them.

Go back to EBS and press export data again. The new list you created in mailchimp will now be available in the list selector dialog box. Select the list and Accept. The list will now be filled with the emails included in your EBS list.

Moosend: Moosend supports the creation of a new list via the API so if the EBS list has not been connected & synced with an external one, then a new list will be created in Moosend automatically.

Attention! If an email recipient has unsubscribed from a list **Moosend** will NOT subscribe this email again, during the Sync process, even if the list is a different one. This happens because Moosend by default manages the unsubscribes **PER account** and not per list. To change this setting, please contact Moosend directly.

## 2.3 Newsletter Reports

2.3.1 Import statistics

Once the newsletter campaign is sent, you may download the statistic data. Navigate to Newsletters > Newsletters campaigns and open the desired campaign. Then click on the Import statistics command (More > Import statistics) and select one of the following options from the drop-down list:
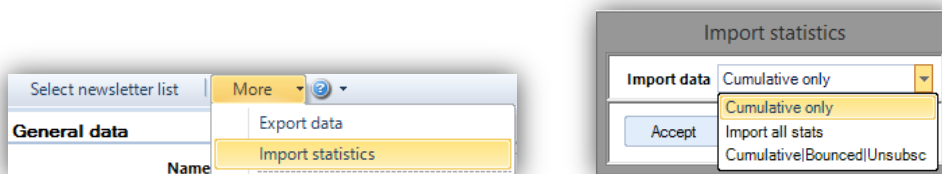
- **Import all stats:** With this option all statistics relevant to the specific campaign and the newsletter recipients (included in the connected list) will be downloaded (Newsletter figures, URL clicks, Unsubscribes | Bounces).

- **Cumulative only:** With this option only the cumulative statistics (Newsletter figures) will be downloaded.

- **Cumulative|Bounced|Unsubscribed:** With this option the cumulative statistics (Newsletter figures) and the Unsubscribes | Bounces will be downloaded.

2.3.2 Schedule automatic import of statistics

Go to Tools & Configuration > Schedule > Scheduled tasks, find the scheduled job with Code ImportNewsletterStatistics and schedule it as required.
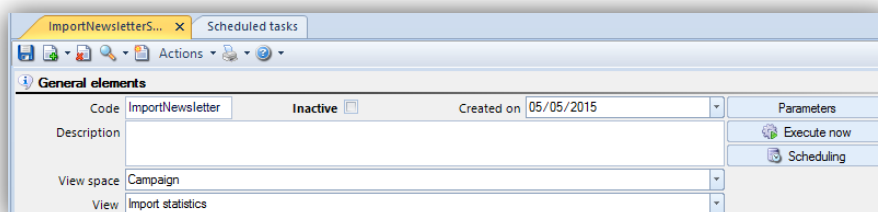

Attention! You need to run the CRM Zero migration emi in order for the scheduled job ImportNewsletterStatistics to be imported.

2.3.3 View campaign statistics

To view the statistics of a specific campaign go to Newsletters > Newsletter campaigns and open the campaign. Click on the Newsletter figures tab to see the Open Rate, the Click through Rate and the Bounce Rate of the campaign.

The URL clicks tab shows the total and unique clicks on the URL links included in the campaign and the Unsubsribes | Bounces tab shows the emails that unsubscribed or bounced.
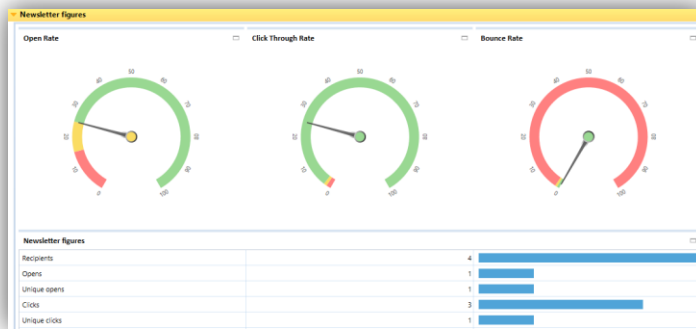
2.3.4 View comparative campaign statistics

In order to see the statistics (Open, Clicks, Bounces etc) of different campaigns go to Newsletters > Newsletter comparative statistics.

2.3.5 View newsletter recipient statistics

To view the statistics of a specific newsletter recipient go to Newsletter > Newsletter recipients and open the desired email recipient. Under the Audit trail tab you can see details about the recipient's status and under Newsletter figures you can view the recipient's behavior on different campaigns.