Manual for BwPostman

Romana Boldt

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This book covers the use of BwPostman for Joomla!®-powered web sites.

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Introduction

BwPostman since version 1.3.0 is a complete and extensive newsletter extension for Joomla!® 3.3.6. The versions until 1.0.8.2 of BwPostman also work with Joomla!® 2.5.16.

BwPostman main features:

- You can compose the content of the newsletter with free text and articles that are already written in Joomla!®.

- The newsletters can be personalized.

- In BwPostman you can create as many mailing lists as you want and so you can get different mailing lists for every thinkable constellation of recipients (guests, registered users, issue...).

- BwPostman always generates the newsletter in HTML and in text format.

- Extensive template system for easily adjusting the appearance of newsletters. Provided templates may be copied and adjusted or you can create completely free templates for the newsletters (very big thanks to Karl Klostermann!).

- The campaign manager in BwPostman enables you to combine newsletters to a campaign that belongs together.

- You can import subscribers from a CSV- or XML-file. So you can e.g. export the address book from a mail program and import it in BwPostman. Export of subscribers is also possible.

- You can archive subscribers, newsletters, mailing lists, campaigns and templates and restore it from the archive.

- A special property is the possibility to adjust, how many mails will be sent at once. The delay is adjustable.

- Sending of an attachment with the newsletter.

- Module for newsletter subscription.

- Module for monthly overview of newsletters in front end with many and varied options.

- For the front end predefined CSS styles may be overridden by self-defined CSS file.

- User-defined texts for activation mail and legal informations.

- Webmaster or another person may be informed per mail at each confirmation or un-subscription.

- Author and created date of articles of Joomla!® may be deselected in settings.

- Arrangements against subscriptions by robots with a simple maths task or as user defined question, adjustable in settings.

- Tables of BwPostman can be saved and restored.

- Tables of BwPostman can be checked and repaired.

- Newsletter templates can be exported and imported.

- Information of subscriber details can be printed (GDPR).

- Migration to another Joomla!® Installation is possible conditionally.

The download of the package includes:

- The basic component BwPostman,

- a module for registration to the newsletter system to show at a module position; it may use the settings of the component or its own settings,

- a module to show the number of sent newsletters per month for selected recipients or campaigns,

- a plugin for enhanced personalization,

- a plugin for subscription to the newsletter while an account for the website is created.

The package of BwPostman can be installed as usual by the installer of Joomla!®.

This manual is arranged in such a way, that you are able to learn the use of BwPostman step by step and you are able to create your first newsletter as soon as possible. For that reason I suggest to practise the use of BwPostman parallel to reading this manual.

While the module to register effectively is a copy of the subscription form of the component, the settings are exactly the same as at the component. Therefore there is a switch, with which the settings may be adopted. If the switch is set to **no**, then you have to set the options of the module completely.

This manual is written mainly for less experienced Joomla!®-Users. Experts in Joomla!® may overlook the very detailed descriptions.

The main idea of BwPostman is based on the component mkPostman, which is no longer supported and maintained by their developers after Joomla!® 1.5.

In comparison to the predecessors BwPostman in version 1.0.1 is mainly rewritten. The code is adapted to the new API, reduced and many internal processes are simplified. With version 1.1.0 the support of Joomla!® 2.5 was dropped. The code could be slimmed down, filtering and searching in back end is obviously improved with the possibilities of Joomla!® 3.

Suggested Proceeding

BwPostman must be installed and configured, before you can use the component.

> **<u>Hint:</u>**
>
> In BwPostman mailing lists are the key elements: Subscribers subscribe to one or more mailing list(s) and newsletter will be sent to one or more mailing list(s) (and also user groups may be selected).

Because of that you now need one or more mailing lists, that keeps the subscribers.

It is very useful to create some test recipients. They can be used to learn about the functionality of BwPostman. Next you can test the CSS entered in the options without sending these tests to a real mailing list. Later you can use test recipients to test the single newsletter, before it is sent to the subscribers.

Then the first newsletter will be created and sent.

Finally I will write about the special features BwPostman contains:

- Create menu entry points for front end

- Campaigns

- Import and export recipients

- Batch processing at subscribers

- Archiving of recipients, mailing-lists, newsletters, campaigns and templates

- Adjustments to the look in front-end

- Adjusting the look of the newsletters

- Maintenance

Further Help

If there are questions or problems occur, fast help in English and German you get at the Forum of BwPostman:

https://www.boldt-webservice.de/en/forum-en/bwpostman.html

Since version 1.0.1 of BwPostman there is a link **Help** in the toolbar, which opens a new browser window with the forum of BwPostman. Furthermore there is a button in the main view of BwPostman to the forum. A click to the button opens a new browser window or browser tab – depending on browser settings – with the forum of BwPostman.

Incidentally you everywhere find tooltips (that is, when you move the cursor to the list entry and wait a little while), that may help very fast. Many are really detailed, some will get improvements with the time.

Safety Instructions

BwPostman is tested on many Joomla!®-installations without problems. Most notably I test with the current Version of Joomla!®, partly also with the preceding version. Nevertheless I can't exclude that something goes wrong during installation. Especially the „interplay" of different extensions can't be estimated fully and negative effects can't be excluded.

> **Therefore:**
>
> I suggest to always backup the complete system (database and files) before you make changes to your Joomla!® installation (installation or update of an extension)! For this task the free version of Akeeba Backup e.g. is suitable.

Since BwPostman 1.0.1 the possibility exists at maintenance to save and restore the tables of BwPostman directly from BwPostman. Furthermore since this version there will be created a backup file of the tables of BwPostman at each update and the tables were checked on consistency. Particulars in chapter Update.

> Testing an unknown extension – this is also true for BwPostman – it is highly advised not to do at a life-system.

Installation and Update

Please read the safety instructions ahead before!

Installation

Download Packages

Before you can install BwPostman, the installation package has to be downloaded. At https://www.boldt-webservice.de/index.php/en/joomla-extensions/bwpostman/101-bwpostman.html you will find the downloads for BwPostman and the manuals as well. The current stable version is always at the top of the list.

In the back-end of Joomla!® you also find the download of BwPostman, namely in the web catalogue of the extensions.

> Since version 2.0.0 as a package as a whole, which may be installed as is and that contains all free parts of BwPostman, as there are component, modules and plugins.

Installation of BwPostman

The installation of BwPostman works like all other Joomla!®-components: Log in into the back-end. Then in the back-end go to **Extensions → Extension Manager**.

At tab **Upload Package File** click at **Browse...**, select the file *pkg_bwpostman.version_number.zip* and click at **Upload & Install** – ready.

Alternative Installation

Sometimes the installation won't work as described. Then you can try this alternative way: As explained above download the overall package and unzip it locally. Then unzip the single packages locally also.

At the temporary folder of your web server crate a new folder *com_bwpostman*, *mod_bwpostman*, *mod_bwpostman_overview*, *plg_bwpostman_personalize* and *plg_bwpostman_user2subscriber* and copy the unzipped files in this folder. Copying to web server works comfortably via Filezilla. After that attach **/com_bwpostman**, **/mod_bwpostman**, **/mod_bwpostman_overview**, **/plg_bwpostman_personalize** respectively **/plg_bwpostman_user2subscriber** to the entered path in Joomla!® installer and click at **Install** in the same row.

In all the cases the installation finished after a few seconds and Joomla!® confirm the installation with a success message.

Update

<div style="background:#f8b; color:red; font-weight:bold">

Please read the safety instructions ahead before!
</div>

BwPostman serves the automatic update function in Joomla!®. That means, that it will be displayed in the back-end as soon as a new version of BwPostman component or modules is available. When the Joomla!®-integrated plugin **Quick Icon - Joomla!® Update Notification** is activated, you can see this when you enter back-end and the control panel will be shown. A click at the button ***Updates are available*** will show you the available updates, even so the updates for BwPostman.

When the plugin is not activated, you can look for updates in the back-end in the menu ***Extensions → Extension Manager*** in sub menu ***Update*** (clear cache before if necessary) and install it.

> **Hint:**
>
> Since version 1.0.1 after each update the table structure of BwPostman tables will be checked and repaired if necessary. The check is processed in a Popup, where you may see the progress. Has he check finished, you may close the Popup.
>
> Before the check a backup file of the BwPostman tables is created in the folder
>
> > *<my_joomla_installation>/images/bw_postman//backup_tables/*.
>
> The name of the backup file is *BwPostman_Tables_Server_<date>_<time>.xml*, where <date> is the actual date of the backup in the format yyyy_mm_dd, <time> is the time of the backup in the format hh_mm. When the file is created at July, 31 2018 at 08:13 AM, then the backup file is named
>
> > *BwPostman_Tables_Server_2018_07_31_08_13.xml*
>
> If the check of the tables was successful, the file may be deleted. You should do that from time to time for that the folder is not claimed to much from these automatic backup files. You also may download these backups and keep it locally.
>
> Download and remove You can do easily at Media-Manager of Joomla!®.

Configuration

After installation BwPostman has to be configured. To do so you click in the top right corner of **Components → BwPostman** at the button **Options** in the back-end of your Joomla!® installation. Or you click at the button **Basic settings** in the main view of Bw-Postman. The options are only available in the main view or in the maintenance.

The options are divided in seven sections: **Basic Settings**, **Registration**, **Activation**, **Unsubscription**, **Lists View**, **Single View** and **Permissions**. For all options there are tooltips.

Basic Settings

Sender's name
Sender's email
Reply-to-email

With the values entered here the fields **Sender's name**, **Sender's email** or **Reply to email** of each newsletter will be preallocated. They may be overwritten in each newsletter individually. They are predefined with the values of your Joomla!® configuration.

If the fields **Sender's name**, **Sender's email** or **Reply to email** remain empty they will be filled automatically with the data of your Joomla!® configuration. But I suggest to enter these data to become independent form changes in Joomla!® core.

Legal Infos

Here you can set the infos that are required by law.

This text appears in the newsletter directly above the links to edit or cancel the subscription.

Excluded article categories

Here You can define, that selected categories of articles are not available for selection for the newsletters. If nothing is selected, all articles of all categories may be used for newsletters.

Number of newsletters per step
Time Delay While Sending
Unit Of Time Delay

Next you can enter how many newsletters will be sent at once. Some providers don't like it, if you want to send too many mails at once. Thus BwPostman never sends all newslet-

ters at once but in blocks except the entered value is higher than the number of recipients for this newsletter/mailing list. The default value is 100.

Below you set the time, that shall BwPostman wait, until the next block will be sent. Bw-Postman only accepts positive integers. All other values will be interpreted as 0.

You can select whether the entered value means minutes or seconds.

Publish newsletters at sending?

Until now all newsletters are unpublished after sending. Per default this is still the same. Since version 2.1.0 of BwPostman here You can set, that a newsletter is published and visible at front end, once it is sent.

Compress backup file

The file created at backup tables as a XML file, which may reach remarkable size easily. This may cause problems at restoring, because providers only allow upload of files until a specified limit. Because of this, since version 2.1.0 of BwPostman there is this option, which is set to on by default after installation.

Show Boldt Webservice link

May I do some commercial for me? If not, then select **no**.

Registration

Introduction text

In this field you can enter a text, which will be shown at the front-end in the registration form of component and module for registration and in the subscription manager as introduction. For the module for registration you may enter the text in its settings.

Show gender selection

Here you set, whether the selection for the gender should be shown in the registration form and in the edit form of the subscription. This makes sense if you want to personalize your newsletter more specific. This setting is applies to both, component and module as long as there is nothing else adjusted in the module.

Display form field name and first name

Here you set, whether the fields for last name and/or first name should be shown in the registration form and in the edit form of the subscription. This makes sense if you want to personalize your newsletter.

Name or first name is obligation

Here you set, whether first name or last name (or both) are obligatory. If you chose **yes**, then the appropriate field will be shown in the registration form and the edit form of the subscription, even if it is disabled in the option field above. A registration to the newsletter without obligatory entries is not possible.

Show additional field

Here you set, whether the additional field should be shown in the registration form and in the edit form of the subscription. For example, here you can ask the subscriber for the membership number of an association or a customer ID, if the subscriber has no account at Joomla!®. This setting is applies to both, component and module as long as there is nothing else adjusted in the module.

Additional field is obligation

Here you set, whether the input of the additional field is obligatory. If you chose **yes**, then the appropriate field will be shown in the registration form and the edit form of the subscription, even if it is disabled in the option field above.

Label additional field

Here you set, how the label of the additional field shall be. To work also on multi-language websites, you may enter a language string, which is applied in the appropriate override file for the language. It will be used the override file for the back end, the override files therefore resides at *<my_joomla_installation>/administrator/language/overrides*. If the folder does not exist, simply create. The English override file is called *en-GB.override.ini*.

If here a language string BWPOSTMAN_ADDITIONAL_FIELD_LABEL is set, then the entry in the override file may look like:

BWPOSTMAN_ADDITIONAL_FIELD_LABEL="membership number"

Important:

• At the language string, that is the left part until the equal sign, there must not occur a space or special sign. Umlauts also are not allowed.

• Please don't enter spaces around the equal sign, The delimiter for the text, that shall be shown instead of the language string, use double quote.

• Each language string needs a separate row. Empty rows will be ignored and may be used to structure the file.

Tooltip additional field

The additional field may get a tooltip, which will be displayed, if you hover the label with the mouse. Just as well, you may use a language string.

Show the mail format selection

Here you define whether the email format shall be shown in the registration form or not. This setting is applied to both, component and registration module as long as there is nothing else adjusted in the module.

Email format

Here you set the default email format the newsletter will be sent out, when the subscriber has not selected anything. This is the predefined setting for both registration forms, component and registration module. Here also: The registration module may have its own settings.

Show mailinglist description

To fulfil the needs of the GDPR and to give the required information about the newsletter to the subscriber, this switch is implemented. If the switch is set to on, then the description of the mailing list is displayed at registration form.

Length of the description

Here You set, how much characters are displayed at description. With the next character the description is shortened. But to show the subscriber, that the description is longer than displayed, there are three dots displayed, if the description is shortened. The whole description is displayed as tool tip, if one hovers with the mouse.

Display disclaimer

In the registration form you can display a link to a disclaimer. To do so You set the switch **Display Disclaimer** to **Yes**. In this case the subscriber has to accept the disclaimer before sending the registration. In some countries a disclaimer is useful, in Germany it is possibly harmful.

But you may use it as a manner of terms of use for the newsletter, what you may do with the email address you got, or, or, or. For something, the subscriber has to give his okay.

Link target
URL for the disclaimer
Article
Menu item

Here you set, where BwPostman will find the disclaimer to use. In the field **URL for the disclaimer** you enter an **URL** as source for the disclaimer. Then you have to select **URL** as **Link target**.

At **article** you are able to select an article of Joomla!®. Then you have to select **Article** as **Link target**.

At last you may use a menu item of Joomla!®. In this case the **Link target** is **Menu item**.

Open disclaimer in current window

Here you set, if the disclaimer will be shown in the current window/tab of the browser or in a new one.

Secure registration form

Here you set, whether the registration form will be secured against robots. This protection will help to get less subscriptions by robots and less error mails because of undeliverable activation mails. Possible values are **No**, **Question** or **Captcha**.

The **Question** you may select by yourself and should not be too complicated. It will be set in the fields **Question** and **Answer**.

Examples:

- How many legs has a horse? (1, 2, …)
- Which colour has a red car?

Captcha is a little Captcha driven maths task.

This setting is used by both, component and subscription module, if there is nothing else set at the module.

Question
Answer

If **Question** is set in **Secure registration form**, then you have to fill these fields by your question and its answer. The question appears in registration form, the answer is needed by evaluation and will not be shown.

Activation

Title for Activation

The activation mail always will be sent personalized. Here you set, how to approach the subscriber, e.g. **Hello** or **Hello Mr./Mrs**. Last one only make sense, if last name, first name or both are obligatory.

Text for Activation

This is the text that appears after the salutation.

After this text the link to activation appears. It is useful to tell the subscriber, that he has to activate his subscription by clicking the link below. You may amplify this text by your wishes.

If nothing is entered here, the link for activation will be shown directly after the salutation. Does the subscriber knows, what he has to do? No? Therefore: Enter **Text for Activation**!

Text Agreement

In some countries it is necessary by law to tell the subscriber some more informations, that haven't to appear in each mail. Here you may enter these informations. Or further informations by your own.

This text appears after the link for activation.

Activation also to webmaster

If you want to be kept current, how the subscriptions grow up, when and who someone subscribed a mailing list, then you should switch on **Activation also to webmaster**. This notification contains all details of registration, beneath first name and last name the date, time and IP of registration and confirmation. These data may be helpful in case of dispute.

Sender name

Here you enter the sender name, that will be used in the notification mail.

Mail address of webmaster

Here you enter the mail address, to which the notification mail will be sent. That may be the webmaster or another person, that shall be informed, that a new subscriber has activated his subscription.

Unsubscription

Cancel subscription with one click

To get the ability only to unsubscribe current newsletter for a subscriber, which had subscribed to multiple newsletters, at a previous version of BwPostman war introduced, that the subscriber is able to unsubscribe with one click exactly from this one newsletter. With this it also was impossible for a recipient of a forwarded newsletter to unsubscribe the subscriber "accidentally". The whole subscription could still be removed at the settings of the subscription.

Some considers this proceed as difficult since GDPR takes effect. So this option is added. When this option is activated, a subscription is completely and ridiculously removed without asking.

Unsubscription also to webmaster

If you want to be kept current, how the subscriptions grow up, when and who someone unsubscribed a mailing list, then you should switch on **Unsubscription also to webmaster**. This notification contains all details of unsubscription, beneath first name and last name the date, time and IP of unsubscription. These data may be helpful in case of dispute.

Sender name

Here you enter the sender name, that will be used in the notification mail.

Mail address of webmaster

Here you enter the mail address, to which the notification mail will be sent. That may be the webmaster or another person, that shall be informed, that a new subscriber has unsubscribed his subscription.

Lists View

These settings are for the newsletters list view front-end. They serve as default values if there is nothing entered at menu entries.

Search Field

May the visitor search for a specific subject? Then select **Show**. This is the default value.

Show Date List Filter

If visitors may search for a specific month and/or year, then select **Show**. This is the default value.

Show Mailing List Filter
Show Campaigns Filter
Show User Groups Filter

If you show several mailing lists/campaigns/user groups in the list of newsletters in front-end, then it may quite be meaningful for the visitor to limit the list of shown newsletters to a specific mailing list/campaign/user group. The appropriate select lists you set with these switches.

Show Attachment

If you do not want to show the attachment of a newsletter in the front-end, then you should select **hide** here. The default value is show and arranges, that a little icon is shown at the respective subject, if there is an attachment to this newsletter. A click to this icon opens the attachment.

#Newsletters to List

Here you set, how many newsletters are shown per page. Default value is 10.

Single View

Show Attachment

This switch has the same meaning like at lists view, but obtains to the view of a single newsletter in front-end. The icon is shown as a button beside the sending date.

Show subject as page title

With this switch you determine, if the subject of the newsletter is used as page title. Concurrently the subject serves as browser page title. This setting may be overwritten at menu entry at Page Display.

Permissions

In permissions you set, who may do what in back-end of BwPostman.

The rights **Configure**, **Administration access**, **Create**, **Edit**, **Modify state**, **Edit self-created contents** and **Delete** correlate to them you know from Joomla!®.

BwPostman adds additional rights for **Archive**, **Restore**, **Delete**, **Send newsletter**, **View Newsletter**, **View Subscribers**, **View Campaigns**, **View Mailinglists**, **View Templates**, **View Settings** and **View Maintenance**. The denotations of this rights are self-explaining, nevertheless following:

BwPostman version 2.0.0 is also delivered with predefined user groups to see, how they work with the access rights. You may use these user groups as is.

Since version 2.0.0 BwPostman offers the ability to set access rights for a sinlge data set (mailing lists, newsletters, subscribers, campaigns, templates). Here You are able to revoke permissions for an administrator. If You locked out, the SuperUser can correct this, because You can't revoke permissions for a SuperUser.

To be able to edit these permissions as administrator of a section (mailing lists, newsletters, subscribers, campaigns, templates) there are the new permissions **Manage Newsletters**, **Manage Mailinglists**, **Manage Subscribers**, **Manage Campaigns**, **Manage Templates**.

Checking the permissions BwPostman works a bit different than Joomla!®. BwPostman checks bottom up: If a permission is explicitly set at a data set (allowed of forbidden), this permission is valid. If there is nothing set (inherited), the permission of the section will be checked. If the permission here is set explicitly, this permission is used. If not, the permissions of the component is used. At least now is clear, if a user is allowed to this action or not. The strategy Joomla!® uses, namely to check the permissions top down excludes to allow something on a lower level if it is forbidden at a higher level.

With this it is possible to allow for a user to edit a single mailing list while the others are tabu.

Examples Permissions

Example 1:

User is allowed to create subscribers and to edit the subscribers, which he/she created self, too.

Needed permissions:

Admin Login **Configure** **View subscribers** **Create** **Edit self-created content**

Example 2:

User is allowed to create mailing lists and to edit all mailing lists, too. User is allowed to publish and unpublish.

Needed permissions:

Admin Login **Configure** **View mailing lists** **Create** **Edit**
Modify state

Example 3:

User is allowed to create newsletters and to edit all newsletters. User is allowed to publish, unpublish, send, archive and restore.

Needed permissions:

Admin Login **Configure** **View newsletters** **View archive** **Create** **Edit**
Modify state **Archive** **Restore** **Send newsletters**

Example 4:

User is allowed to create campaigns and to edit all campaigns. User is allowed to publish, unpublish, archive, restore and delete. User is allowed to change permissions for single campaigns.

Needed permissions:

Admin Login **Configure** **View campaigns** **View archive** **Create** **Edit** **Modify state** **Archive** **Restore** **Delete** **Manage campaigns**

The Back-end

The back-end of BwPostman has a main view, dashboard called here, that may be used as a starting point for all actions that are possible in BwPostman. It contains buttons for all overviews together with buttons to create newsletters, subscribers, test-recipients, campaigns, mailing lists or templates. There also are buttons to reach options, the maintenance and the forum of BwPostman. At the right you find informative statistics.

The menu at the left may be switched of by a click to the blue left arrow.

Okay, let's start:

Before the first newsletter can be created, there must exist at least one mailing list. It is possible to use separate lists for different topics and/or groups of recipients.

Creating Mailing Lists

Via button *Mailing lists* you get an overview about already created mailing lists.

A new mailing list will be created either at the dashboard of BwPostman with the button *Add mailing list* or in the overview of the mailing lists with the button *New* in the toolbar. The view **Mailinglist details** appears and one is at the tab **New mailinglist**.

Each mailing list needs a **title/name** and a **description**. Both can be displayed in the front-end.

In the select list **access level** you can determine, who can subscribe to this mailing list. When a subscriber is not allowed to subscribe to this mailing list, then it will not be shown in the select list in the front-end.

In order to be able to select the mailing list in the front-end, it **must** be published. This can be done in the details (mode *Edit*) of the mailing list. But a click to the symbol in the column *Published* in the overview of the mailing lists switches the state, too.

At the tab **Mailinglists permissions** the permissions or exactly this mailing list may be edited.

A mailing list can be edited by clicking at the *title* in the overview of the mailing lists or while checking the check box in front of the title and clicking at the button *Edit* in the toolbar. The view **Mailinglist details** apears and one is at the tab **edit mailinglist [ID = nn]**.

> **Hint:**
>
> A user can't select unpublished mailing lists in the front-end, but in the back-end an administrator or a person with appropriate rights can allocate each user to this mailing lists. In this way you can enable access to this mailing lists to "hand selected" users.

Archived mailing lists will **not** be displayed in this overview! They also are not available for a subscription.

Enter Subscribers and Test-Recipients

Normally subscribers subscribe to the mailing lists by themselves. More precisely mailing lists will be subscribed to and to them you send newsletters. But there are cases to create a subscriber in the back-end by webmaster. Because of that you got this possibility in the back-end. Test-recipients only may be created in back-end.

How we just learned at the mailing lists, subscribers can be created at the dashboard of BwPostman with the button *Add subscriber* or in the overview of the subscribers with the button *New* at the tabs **Confirmed subscribers** and **Unconfirmed subscribers**. The view **Subscriber details** appears an one is at the tab **New subscriber details**.

Test recipients will be created at the dashboard of BwPostman with the button *Add Test-Recipient* or in the overview of the subscribers in the tab **Test-Recipients** with the button *New*. The view **Test-Recipient details** appears an one is at the tab **New subscriber details**.

Last name and **first name** must be entered, when it is set to obligatory in the options of BwPostman. There also is no exception in the back-end!

It must be entered at least a **mail address** for the subscriber. Indeed, BwPostman has to know where to send the newsletter.

The mail format can be selected at **Format** and is predefined with the value from the options of BwPostman.

The field **Confirm** only appears when you create a new subscriber. At test recipients and editing a subscriber it is not displayed.

> **To Confirm regard the following:**
>
> The subscriber gets an automatic mail, that contains a link, with that the subscriber has to confirm his subscription (Double-Opt-In), when the field **Confirm** is

set to **unconfirmed**. If you want to avoid legal difficulties (sure for Germany), then you shouldn't select confirmed by yourself but you should let confirm the subscription by subscriber!

At the right there are further information of the subscription. Details of registration and details of confirmation. If there is nothing to see at **registered by** or **confirmed by**, the subscriber has done it by himself.

Since version 2.1.0 of BwPostman there is a button *Print subscriber data* at the top if these details. With a click to this button a pop-up is displayed, which shows all available and used data of the subscriber. A click at the button *print* opens the print dialogue of the browser.

The **available mailing lists** will be shown below. On the left you find the mailing lists, that ever can be selected in the front-end in general. The state of this mailing lists is **Public** and they are published.

In the middle there are mailing lists, that only specific user groups may subscribe to in the front-end. These mailing lists are published basically and can be subscribed at front-end, but not for everyone.

At the right there are mailing lists, that **only can be assigned in the back-end**. These are the mailing lists, that are unpublished, nevertheless to which user group they are assigned to.

The mailing lists are not shown at test-recipients. They will be created in general and get all mailing lists at test sending.

Like noted above someone with appropriate access to the back-end may assign the subscriber to that mailing lists, that are not shown in front-end, for what reasons ever.

While the subscriber has not confirmed his subscription, he will be displayed in the overview at the tab **Unconfirmed subscribers**. When the subscription is confirmed, the entry moves to the list **Confirmed subscribers**.

Now something about the rights of the subscribers to select mailing lists:

Guests, that means user, that have no user account in Joomla!®, only are able to register to public mailing lists (access level public). When an user has an account

in Joomla!®, then he is able to register to mailing lists, that needs higher permissions – depending on the specification of mailing list and his access level in Joomla!®. In the back-end you can assign each subscriber to all mailing lists you want independent of the predefined access levels.

Archived subscribers and test recipients will **not** be displayed in this overview!

At the tab **Subscriber permissions** the permissions or exactly this subscriber may be edited.

At the end of this chapter some helpful hints:

Per mail address it is only possible to create one subscriber. But for the same mail address you can create two test recipients, one test recipient for each mail format. With this a mail address may occur three times in the overviews of the subscribers at maximum.

If a subscriber is added, BwPostman checks back whether this mail address perhaps exists at a registered Joomla!® user. If so, then the corresponding ID will be stored at the subscriber and the subscriber – if he is logged in – gets offered the mailing lists to subscribe, that are available for his access level.

Creating or Editing Newsletters

Now we come to the core piece of BwPostman, the newsletters.

A newsletter is also created at the dashboard of BwPostman. And as usual there are two possibilities, too. Either with the button *Add newsletter* directly in the main menu or from the overview of the newsletters (button *Newsletters*) in the tab **Unsent newsletters** with the button *New* at top. The view **Newsletter details** appears an one is at the tab **Step 1: General information**.

A newsletter also can be created by copying an already created newsletter. Either unsent and sent newsletters may be copied.

To copy a newsletter click at the button *Copy* in the toolbar. The copy appears in the tab **Unsent newsletters** in the overview, even if you copied a sent newsletter.

A click at the *subject* of the newsletter or select the checkbox in front of the row and a click to *Edit* on top on opens the newsletter.

Creating newsletters will be processed in five steps. This will be symbolized with five tabs. Creating a new newsletter or modifying an existing newsletter always begins at tab **General information**.

Tab *General Information*

Sender's name, **Sender's email** and **Reply to email** were taken automatically from option entries of BwPostman, but they may be overwritten, too. Then you enter the **subject** for the newsletter. There is nothing without subject. Since version 1.0.8 the subject needs not to be unique. You may use one subject several times. But to keep newsletters apart there is a new field **description**, that you find right-hand.

Next you may select an **attachment** to send with the newsletter. The dialogue to select the attachment is the same one Joomla!® uses. This means, that you may upload the desired attachment to the server if it is not there.

If you already have created campaigns, then you can select whether and – if yes – to which campaign the newsletter belongs to.

Below you can set whether a newsletter shall be set published at a specific time and when publishing ends. This only meets the visibility in front-end. These dates work exactly like the dates at the articles of Joomla!®. With the publishing date you do **not** set, when the newsletter will be sent!

Right-hand you find further informations to the newsletter. Here you may enter a **description** for the newsletter. This is very helpful to keep newsletters apart, that use the same subject. The description is only for internal use. A subscriber does not see this description.

Next you select the template, the newsletter shall use. This will be done separately for HTML newsletters at the left and text newsletters at the right. A tooltip for the template shows a preview of the template if there is any created at the template. More informations you will find in chapter **Templates – Adjusting the appearance of a newsletter**.

Subsequently you select to whom the newsletter shall be sent: To one or more certain mailing lists and/or to one or more user groups of Joomla!®. You may select multiple entries from the select lists. It also is possible to select entries from the select list for the mailing lists **and** for the user groups of Joomla!® contemporary.

Here, too, the mailing lists are divided into three sections: At the left the mailing lists, that may be selected in front-end ever, in the middle the mailing lists, that only may be selected by designated subscribers and beside at right are the mailing lists, that only can be assigned in back-end. At the far right the user groups created in Joomla!® are selectable.

Hint:

If a newsletter belongs to a campaign, the recipients are selected at the campaign and this section does not occur.

Finally you select the articles from Joomla!® you want to use. To do so make a double click at the desired article of Joomla!® in the select list **Available website contents** at right or mark the desired article in the select list and click the button with the left arrow between the two select lists. The selected article moves from the right to the left select list **Selected website contents** and disappears in the right list, so you can't select him twice accidentally. Double content isn't very pretty.

Articles of categories, which are listed at **excluded article categories** at the Basic settings of BwPostman, are not shown!

If you were in error and you don't want a specific article already selected for your newsletter, then select it in the left select list and click at the right arrow. It moves back to the right select list and will be shown afterwards at the bottom of the select list. A double-click to the unwanted article does the same.

Hint:

You can crate a newsletter only based on articles from Joomla!®, you can enter a free text or mix both.

The current working state always can be saved by clicking the button **Save**, if the mandatory fields are filled.

Hint:

If content exists in one of the tabs **HTML Newsletter** or **Text Newsletter** and then there were made changes to **Selected website contents** in the tab **General Information**, then a confirmation question occurs while clicking on another tab to check if the already selected contents in the HTML and Text version shall be overwritten. **OK** takes the changes, **Cancel** discards them. These changes only are saved finally, if the newsletter is stored by clicking to **Save** or **Save & Close**. **Close** or **Cancel** discards the changes.

The same confirmation question appears, if you select another template and the behaviour is just the same.

> These changes only will be stored, if the newsletter is saved by **Save** or **Save & Close**. **Close** or **Cancel** discards the changes.

At the bottom one find the section **Newsletter permissions**. Here the permissions or exactly this newsletter may be edited.

Tab *HTML newsletter*

In the second step you now are able to edit the content of the newsletter in the HTML format. For that the editor selected as default in Joomla!® is used to let you work in your familiar environment.

Have I to write much about here? I think no. Everyone knows best at himself/herself, what he/she wants to communicate in the newsletter.

Before the newsletter content you may give a heading and an intro text to the newsletter. The fields are predefined with the settings of the template, but may be overwritten here. These two fields will not be shown in the editor, for showing this you use the preview.

> **Only one:**
>
> The personalisation will be integrated at this step. If you want to address your reader personally, then this will be made at this tab. To do so we asked for last name and/or first name at registration, didn't we?

Personalisation

For the first name you take the code [FIRSTNAME], the last name will be coded with [LASTNAME] and the full name containing first name and last name with [FULLNAME]. You don't have to memorize this because they are offered as buttons, which inserts the code at cursor position.

If you like to write yourself: Upper cases **and** square brackets belongs to the code!

Tab *Text newsletter*

Like you are able to adapt the content of the HTML newsletter, you may do this for the text newsletter. As you know it is not possible to embed images e.g. to the text version of the newsletter, which the article of Joomla!® may contain. Such things should be controlled.

Heading, intro text and personalisation works exactly like described in the chapter before.

Tab *Preview*

In the preview you get a first impression of how the newsletter will look like to the receiver. But you can't see personalized data at this step, because they will be applied just before sending. (Which name of a mailing list, that possibly contains thousands of entries, should the preview show?)

At the top you see the data, with that the newsletter will be sent. Below you find the newsletter in the HTML version and at bottom there is the newsletter in the text version.

The preview by the way is a bit of browser-dependent. At some CSS styles you could see some differences in the HTML newsletter (like they may occur at websites and mail clients in general).

Tab *Send*

The tab **Send newsletter** again is divided into two parts. The upper part is for the real sending of newsletters, the lower part for sending test newsletters.

Personally, I prefer first to send my newsletters to the test recipients to be sure that all looks like I want to and there slipped in no orthographic mistakes.

> **Hint:**
>
> At test sending the links in the newsletter to unsubscribe or edit the subscription doesn't work!

It is suggested to create different test recipients for the most usual mail clients, particularly if you use some special CSS styles.

The real sending of the newsletters will be launched at this tab, too. Again here you can set, how many mails will be send per step. e.g., if you have 500 subscribers for this mailing list and the value entered is at the (default) value 100, then BwPostman creates 5 queues each with 100 receivers, that will be processed subsequently with the entered delay time. This time You have to wait at the screen. The pop-up don't disappear until the last subscriber is processed.

You also may set, if the sending of the newsletter shall take place to unconfirmed subscribers, too.

With a click to one of the buttons *Send newsletter*, *Send newsletter and publish* or *Send test newsletter* (or also to *Send* in the list of newsletters, see below), the newsletter will be personalized for each recipient, delivered to a queue and processed in the

queue. While doing this, a pop-up occurs, where you can see, how the single recipients will be processed. A progress bar shows the execution.

Newsletters are not published automatically, if they are sent by the button **Send news-letter**. Published means that they may occur in the front-end. But there may be the desire to publish newsletters for front-end by sending the newsletter, therefore there is the button **Send newsletter and publish.** If you select a start date for publishing at first **tab General Information**, then you should use the button **Send newsletter and publish**, because only published newsletters will be shown in front-end.

Tab *Queue*

Once the queue is built, the open pop-up will close and you touch down at the overview of the newsletters. While the queues are not completely processed, you will see a third tab named **Queue** beside the tabs **Unsent newsletters** and **Sent newsletters**.

Normally the queue will be handled within short time. But that also depends on the set number of emails to be sent simultaneously and the entered waiting time.

Thus the tab **Queue** only occurs permanently, if the newsletter can't be sent because of technical reasons. May be, the configuration for mailing in Joomla!® is improper (**System → Configuration → Server, section Mailing**) or the server, that is responsible for sending newsletters – more precisely sending mails within Joomla!® – is not reachable. In this case the newsletter for all subscribers should appear in the queue and the length of the queue is appropriate to the number of subscribers.

But it also could be, that the server for sending the newsletter has a limit. That means, that a specific number of newsletters can be sent, the rest moves to the queue. This You can recognize by the number of entries in the queue. This number should be lesser than the number of recipients. In this case You should contact Your provider to get knowledge of the specific conditions. Best case would be to raise or remove this limit.

If there are other reasons responsible, that a newsletter can not be delivered, then it doesn't matter BwPostman or Joomla!® but the mail server, that is entered in the configuration of Joomla!®. If the mailbox quota exceeds or the recipient may not be found, then you won't see this in the queue!

Delivering a newsletter will be tried twice for a recipient, then BwPostman tries the next recipient. A higher number of trials doesn't make sense, because if there are technical problems, they won't be corrected as shortly, that a higher number of trials will help.

When the technical problems are removed, then the queue can be executed anew with a click to the button **Continue sending**. Before doing so, you have to reset sending attempts with the button **Reset sending attempts**.

If there are entries in the queue and you send another newsletter, these entries also will be processed, if the sending attempts are reset.

Also you may empty the queue with the button **Clear queue**.

> **Caution:**
>
> A newsletter, that once reached the queue, considers as sent for BwPostman, even delivering war not possible due to technical reasons!

Button *Send*

Newsletters may be sent directly from the list of unsent newsletters. To do so, select the desired newsletter by clicking to the checkbox in front of the subject and click to the button **Send** in the toolbar. But it is not possible to send more than one newsletter at once. If there are selected multiple newsletters to send, BwPostman only take the first selected newsletter to send, because:

After the click to **Send** the newsletter will be opened to edit and BwPostman immediately shows the tab **Send newsletter**. Further procedure is like described in previous chapter **Tab Send newsletter**.

Sent newsletters

If the newsletter is sent it moves from the list of unsent newsletters to the list of the sent newsletters. In this list you may take a look at the newsletter, but changes to content and other data concerning sending are no longer possible. A click to **HTML Newsletter** opens the HTML version in a pop-up, a click to **Text Newsletter** a pop-up for the text version.

A click to the subject of the newsletter opens a view to change publish-up and publish-down, state and the description afterwards.

In the list of sent newsletters you also can publish the sent newsletters to be able to show them in the front-end. An unpublished newsletter will not be shown in the front-end.

Default status after sending is unpublished unless you have sent the newsletter using the button **Send newsletter and publish** or the option **Publish newsletters at sending** at the Basic settings of BwPostman is activated.

Creating Menu Entries For The Front-end

To see sent newsletters not only as email, BwPostman offers the ability to create menu entry points for front-end.

You are free to decide, if you create an own menu for BwPostman or if you add single menu entries to an existing menu and which menu entries you offer your visitors. I suggest to create at least one menu entry to edit the subscription. This is especially important, if you do not use the module for subscription.

For subscription it is not critical, whether you use the module or a menu entry to the subscription page of the component. It depends on how you are interested to get subscribers. While the subscription page of the component is only reachable by the menu entry, the module for subscription will be shown on all pages, that are selected in module options.

Another difference is, that the module for subscription needs space on all pages, where it is shown, while the page to subscribe of the component only shows on one page in the area, that is used for articles on Joomla!®.

For menu entries you may select:

- Newsletter registration

- Edit newsletter subscription

- Published newsletters (overview)

- Published newsletters (single view)

The procedure is as usual in Joomla!®:

In the back-end add further menu entries to an existing menu or create a new menu with the desired menu entries.

Newsletter registration

Edit newsletter subscription

There isn't much to say to these two menu entries. They are simple links to the appropriate pages. The details you find in chapter **Configuration** and there at **Registration**.

Published newsletters (single view)

At this menu entry at tab options you find the possibility to determine, if the attachment (as link) shall be shown or not, if someone exists. There are three possibilities:

- **Use Globals**

  The value set in the options of the component is used.

- **Show**

  The link to the attachment is shown, even if the options of the component says something else.

- **Hide**

  The link to the attachment is not shown, even if the options of the component says something else.

Published newsletters (overview)

This is the menu entry with the most options.

Most of these settings you find here are the same like at the options of the component at tab list view. I don't describe them here again. The selection options are **Use Globals**, **Show** and **Hide**. The meaning is the same as described in single view.

Filters are only shown, if there is a need for.

New is **Newsletter Selection** with the alternatives (constraints see below)

- **All**

  All published newsletters are displayed, archived, too.

- **All but not archived**

  All published newsletters except archived are displayed.

- **neither archived nor expired**

Shows all newsletters, which are not archived and not expired. Expired means, that publish-down date is not overridden.

- **not archived but expired**

  Here all newsletters are displayed, which are not archived, but should actually not be shown in front-end. That is useful, if there are a lot of newsletters in the list. In this case, you may create one menu entry, that shows actual newsletters and another menu entry, which shows older newsletters, since they are nor archived.

- **only archived**

  This setting shows all archived newsletters, no matter whether expired or not.

- **only expired**

  With this option all expired newsletters will be displayed.

- **archived and expired**

  With this option all expired newsletters are shown.

- **archived or expired**

  Last but not least there is a possibility to show all newsletters, which are either archived or expired.

Constraints

1. In front-end only published newsletters are displayed.

2. Only newsletters are displayed, which fulfil the criteria at Recipient selection and Campaign selection.

If a newsletter belongs to a mailing list, that is not selected, the newsletter is not displayed. If a newsletter belongs to several mailing lists, from which at least one is selected, then it will be displayed. If a newsletter belongs to a mailing list, that is not selected, while it also belongs to a selected user group, the newsletter is displayed and vice versa.

If a newsletter belongs to a campaign, that is selected, then it is displayed, even if the related mailing list is not selected. Because of this there is the separate tab to select the campaigns.

Check access

You eventually ask, what this option is good for. Why access restrictions, if it is levered out here? To this the following deliberations:

You don't want the content of a just sent newsletter to be accessible to all. After one or two years these information is so "old", that it does not matter, if all visitors may see it. But in BwPostman there is no possibility to change the assignment to the mailing lists, if the newsletter once is sent and that is a good ting, too. But changing the access level of a mailing list is no option, because the mailing list is still active. How to get the newsletter accessible to the community? For that reason this option exists!

The accessibility is always checked, if you select **All** at mailing list selection, user groups or campaigns, there is no change. But if you select specific mailing lists, user groups or campaigns (you also may check all), then you are able to suppress the check for access with this switch.

Recipient selection

Campaign selection

I think, there is no need to write more, that is obvious. Perhaps it is to mention, that there is a column to display, if a mailing list or campaign is archived.

The Front-end

The Front-end usually shows the module of BwPostman at a module position to enable the visitors to subscribe to the (several) mailing lists.

As mentioned previously only the mailing lists will be shown here to which the visitor has access to. If only one mailing list is selectable, then the select list will not be shown to save a needless click. Is no mailing list available that the visitor may subscribe to, a warning message is displayed instead.

In front-end you are able show an overview of all newsletters, if a menu entry is created. The titles (subjects) of the newsletters are linked to show the single newsletter. Unpublished newsletters will *not* be displayed in the overview. Which newsletters are displayed you set at the options of the component and may override it in the options of the menu entry.

It is also possible to create a menu entry for a single newsletter.

Filters, that means select lists for mailing lists, user groups or campaigns, only are displayed, if there is something to select. If there is only one mailing list available to display, then a select list is redundant, because there is nothing to select and select lists are not displayed even if there is set something else at the options.

Edit newsletter subscription

Finally you should enable the subscriber to edit or to delete his subscription while visiting the website. For this you also can create a menu entry in the front-end.

Editing the subscription for subscribers without user account in Joomla!® works with Double-Opt-In, too: If the subscriber clicks at this menu entry, it will be asked for his email address. To this address a link will be sent to edit the subscription, provided the subscriber has entered the correct email address. Clicking to this link the subscriber will be conducted to the web page, at that he/she may edit or delete the subscription.

Subscribers with an user account in Joomla!® are able to edit their subscription directly.

> **Hint:**
>
> At the end of each newsletter there are links to unsubscribe and edit the subscription. For Germany this is mandatory! A click to the link *unsubscribe* will not be processed immediately since version 1.2.0. This lead to remove the complete subscription, even if only this specific mailing list should be unsubscribed.

This behaviour also is mentioned as a problem, if a newsletter was forwarded. If the recipient of the forwarded newsletter clicked to unsubscribe, the origin subscriber was unsubscribed!

Because of that this link also leads to the page to edit subscription. Beneath the selectable mailing lists there is a checkbox to unsubscribe the whole subscription at once. The expense for the subscriber isn't grown essentially.

Since version 2.1.0 at the options of BwPostman there is a possibility so switch to the previous behaviour. With this the subscriber is completely archived and does not get any newsletter to the subscribed mailing lists.

Advanced Use

Campaigns

Several newsletters, that are build on one another and/or correlate thematically are called campaigns in BwPostman. Campaigns are used e.g. to launch, relaunch or promote a product or a service and in this case have few to do with a common newsletter, that first of all serves for information. Nevertheless the newsletters belonging to campaigns also are displayed in the list of newsletters. Additionally, newsletters of campaigns you can see in the details of the campaign at the particular tabs.

Campaigns may be used, but it is no must. They only give you the ability to give a structure to your newsletters.

Have I to write how to create or edit a campaign? That happens like all other parts of Joomla!® or BwPostman.

A campaign at tab **Campaign details** owns a **title**, which is mandatory, and a **description**, which is useful for orientation. A subscriber does not see this description.

Since version 1.2.0 the **recipients** of a campaign you set here. Therefore below title and description a section exists, at which you may select mailing lists and/or user groups. It is absolutely the same dialogue like at newsletters.

For information there are listed all newsletters of a campaign at the tabs **Unsent newsletters** and **Sent newsletters**.

At the tab **Campaign permissions** the permissions or exactly this campaign may be edited.

Import and Export

BwPostman offers the ability to import subscribers. The accepted formats are XML and CSV. You also are able to export your subscribers. The used formats are XML and CSV as well.

To see how the data looks like in the respective formats, demo data are supplied. You will find them in the admin-folder of the component (*<path-to-your-Joomla-installation>/administrator/components/com_bwpostman*). They are named *import_demo.csv* and *import_demo.xml*.

Import Subscribers

You call the import with the button *Import* at the toolbar in the sub-menu *Subscribers* of BwPostman. The button is not visible at test recipients.

First you have to select the format, XML or CSV. Only then the button *Browse...* will be enabled, with that you can select the file to import. If you import a CSV file, then you have to enter the CSV delimiter as field separator and the CSV text separator and whether the file contains the field names in the headline.

For field separator there are available **comma**, **semicolon**, **tabulator** and **space**. For text separation you can select **no separation**, **apostrophe** and **double quote**. For best practise at CSV files you will find a detailed guidance below.

XML files don't need this informations naturally.

With the button *Further* you go to the next view. Here you allocate the data from the file to import (in the right list) to the fields of BwPostman (in the left list). Important here is to match the same order at the left and right. The order of the import fields will be adjusted in the right column. To do so highlight the name of the data field and click to the button *up* or *down* under the select list.

Also fields, that only exists in one of the select lists, have to be removed. This will be done with the button *Remove* below the corresponding select list.

Then you select the mailing lists, to which the subscribers shall be added. Here, too, the mailing lists are divided into three: At the left the mailing lists that are public, in the middle the mailing lists that only can be subscribed by special user groups and in the right the mailing lists that only can be assigned in back-end by the webmaster or a person with appropriate permissions.

Below you set the default email format that will be allocated to the subscriber in case there is no entry in the committed data. Finally you set, whether the subscriber gets an email to confirm the registration (check box not marked) or to confirm the subscriber while importing.

This setting only takes effect, if the data to import contain nothing else. If you exported the subscribers of BwPostman with their state before and now you import these data, this setting takes no effect.

The import will be processed by clicking the button *Import data*.

> **Hint:**
>
> In BwPostman (like Joomla!®) it is not possible to create one or more subscribers with one and the same email address. But it is possible to create two equal test recipients – one per mail format – and one subscriber with the same mail address.

If the data to import contains one email address multiple times with the same settings (regular subscription, test recipient HTML, test recipient text), then it will be imported only the first set of data of this email address.

If an email address already exists in BwPostman, then all sets of data with this email address will be skipped while importing. In each case of skipping you get a message at end of importing.

Caution:

In countries with mandatory double-opt-in-procedure the handling with automatic confirmation while import possibly is improper! A proper usage may be the import of subscribers from another newsletter system.

Hint:

Mail clients often offers a lot of data fields in their address manager. You principally should restrict the export of the address data to that data fields BwPostman is able to import: last name, first name, mail address and mail format. The field *status* only concerns the internal state of a subscriber in BwPostman and is normally only of interest while importing data, that were exported form BwPostman prior. Status 1 means the subscriber has confirmed his subscription, 0 is an unconfirmed subscription and status 9 means test recipients.

If it is not possible to restrict the data to export from mail client or other program, then I suggest to export the data to CSV. This file can be cleared out by a program, that can handle CSV files. Well done is this by CALC from the OpenOffice-Series (Apache OpenOffice, LibreOffice, …).

Surest Strategy To Import CSV Files

Open your CSV file with OpenOffice. There is a portable version of this program, that only has to be unpacked and called. OpenOffice is a sure candidate for functional CSV files.

Apache OpenOffice (other versions of OpenOffice eventually have different labels) shows a dialogue while opening a CSV file, where you can select character set, with which the file is written, field separator and text separator and more. But OpenOffice recognizes really well, which conditions are set. If you take changes here, then you can examine these changes in the section below. A click to **OK** opens the file.

Because BwPostman only uses first name, last name, email address, email format and state, you should remove the columns BwPostman don't need. That eases following work. If email format is given, but as text – e.g. HTML/text – then you can enter the values **0 for text** and **1 for HTML** by Edit à Find & Replace.

Following save the file by ***Save As*** as CSV file with UTF-8, field separator (best is semi-colon) and text separator double quote. These settings you reach by checking ***Edit filter settings***. OpenOffice asks, whether you want to keep current format – that is CSV – or ODF format. It is imperative to click to ***Keep Current Format***.

Next dialogue is preset with the selections while opening the file. But that settings not always are the best, take care. Ensure the checkbox ***Quote all text*** cells is selected.

Now the CSV data are treated in a manner, BwPostman may import.

So far the settings **UTF-8**, **;** and **"** did work properly, whilst the data **did not come from Excel**, because Excel makes a BOM, absolutely unusual an hardly to exorcise.

A **text separator** particularly is important, if spaces and special characters occurs at first name or last name. These characters bring trouble upon import (empty or broken data sets).

It is indeed recommended to use double quote as text separator, because the chance to occur in a name is really little, while a single quote may occur in name affix. Think of names like D'Angelo...

Export Subscribers

You call the export with the button ***Export*** in the sub-menu ***Subscribers*** of BwPostman. First you select to export in XML or CSV format. While exporting to CSV you have to enter the delimiter, that separates the fields and which text separator shall be used.

For field separator there are available **comma**, **semicolon**, **tabulator** and **space**. For text separation you can select **no separation**, **apostrophe** and **double quote**. If you want to import the data to BwPostman later, it is recommended to use double quote. I have explained detailed at Import, why to do so.

At XML files these fields are not displayed.

Next you select, whether confirmed and/or unconfirmed subscribers and/or test recipients will be exported. You also can determine to export only not archived, only archived or all subscribers.

Finally you select the fields to export.

With click to **Export data** the export file will be created and saved locally.

Batch Processing at Subscribers

With batch processing at subscribers it is possible to subscribe a further mailing list, to move from one to another mailing list or to unsubscribe from a mailing list multiple subscribers at once. Especially with filter by mailing list this is a very strong tool! Moving only works, if you filter by mailing list. The filtered mailing list is that one, from which the subscribers are taken off.

Batch processing is very simple: Tick the checkbox in front of the subscribers, you want to edit. Then click to the button **Batch** at the toolbar. A pop-up appears, at which you select the desired mailing list and the action **Subscribe**, **Unsubscribe** or **Move**. A click to **Process** processes the selected action.

Archive and Restore

Archive is exactly that what the name says: To archive something.

In BwPostman you can archive newsletters as well as subscribers as well as mailing lists and even whole campaigns and templates. All, BwPostman has to deal with, you can archive. And all what is archived, can be restored from the archive. But in the archive you can't change anything except the state of a newsletter.

To archive e.g. a newsletter go to the overview of the newsletters (mostly is wanted to archive sent newsletters), mark the select box it front of the row of one or more newsletter(s) to archive and click in the toolbar at the button **Archive**. BwPostman shows a confirmation prompt to surely archive the selected newsletters, that you can answer with **Ok** or **Cancel**.

For archiving the permission **archive** is necessary.

For restoring you select the tab **newsletter** in the archive, select the desired newsletter(s) to restore, and click at toolbar to **Restore**.

Archiving mailing lists, subscribers, campaigns and templates works the same. At campaigns there is an additional question, whether the newsletters assigned to the campaign shall be archived or restored, too.

For restoring the permissions **View archive** and **Restore** are necessary.

Delete

The archive contains an additional function: It is not possible to delete something in the lists of newsletters, subscribers, campaigns, mailing lists and templates. Deleting only is possible in the archive. Here, too: Mark the desired to delete in the appropriate tab at the select box and click on *Delete* at right top. Here also you have to answer a confirmation prompt. And also an additional question appears at campaigns to delete the assigned newsletters or not, too.

For deletion the permissions **View archive** and **Delete** are necessary.

Check-In

The button *Check-In* you find in each list view of BwPostman. With this button you may check-in entries that are orphaned. You recognise these entries at the lock symbol at the beginning of a row.

> **Caution:**
>
> Not all entries, that show a lock symbol, are orphaned! Rather in the contrary. The lock symbol shows, that an entry is edited. The entry indeed becomes an orphan, if you don't leave editing of the entry by buttons but closing the browser or tab, the browser or pc crashes or something else.

To check-in tick the checkbox with the lock symbol and click to the button *Check-In*. To check-in you need **administration rights**.

Adjust The Look In The Front-end

To adjust the look of BwPostman to fit your template, **basic knowledge of CSS and HTML is necessary**. And you should have installed an extension in your browser to inspect the currently displayed page. For Firefox, my preferred browser, there exists a great extension called **Firebug**. Such an extension also exists for Internet Explorer and in Chrome and Opera such a functionality is already implemented.

All elements, that are shown in the front-end, may be addressed individually at least since version 0.9.7 of BwPostman. The exact CSS path to the element you may find easily with above-mentioned extension. For all elements, BwPostman uses in front-end, CSS Styles exists in the CSS file delivered with BwPostman. Most of them are empty and may be filled if needed.

For the component you find this file at

<Joomla-installation-directory>/components/com_bwpostman/assets/css/bwpostman.css

For the subscription module it is the file:

<Joomla-installation-directory>/modules/mod_bwpostman/css/bwpostman.css

For the overview module it is the file:

<Joomla-installation-directory>/modules/mod_bwpostman_overview/css/bwpostman_overview.css

You might change the CSS Styles in this files. But that only would reach until the next update of BwPostman, because while updating the file is set back to initial settings.

Another possibility is to set the desired CSS Styles in a CSS file of your template. But alike before there is still the problem, that the changes only last until the next update of the template.

This is the reason I implemented a solution on a permanent basis since version 0.9.7 of BwPostman:

Create a file named *com_bwpostman.css* for the component, one file called *mod_bwpostman.css* for the subscription module and one file called *mod_bwpostman_overview.css* for the overview module in the CSS directory of the template you use. Even better: Copy the delivered CSS files to this location. These files will be read from BwPostman after all other CSS files. This means, that the CSS styles set in these files, override all previous read CSS styles.

Thus the path to these CSS files is:

<Joomla-installation-directory>/templates/<your template>/css/

Templates - Adjusting the appearance of a newsletter

Since version 1.1.0 BwPostman has a great template system for newsletters. Many thanks to Karl Klostermann for this. It is not only his idea, he realized it. Very great!

Thanks to the provided **default templates** for HTML and text newsletters, it is now also possible for less experienced users to send out optical attractive newsletters, that meets the corporate identity, the appearance of the association or or or and really looks well on mobile devices. Simply copy one of the delivered templates, give a new name and make changes to your wishes.

For the experienced user there also are **free templates** for HTML and text newsletters. Here you are completely free in design. Important to know, that despite of the high grade of freedom the newsletter finally gets added a table with the imprint by BwPostman.

You may create as many templates as you want. In example you may create an own, individual template for each mailing list.

Templates will be assigned to the newsletters while creating a newsletter. There you select the desired template from lists of HTML and text templates. To simplify the selection, a thumbnail will be shown at the tooltip.

One each HTML or text template you can set to default. This then is the preselection, if you create a new newsletter.

Like all other sections of BwPostman you reach the templates by dashboard of BwPostman with a click to templates. With the buttons *Add HTML-Template* and *Add Text-Template* you create a free HTML or text template. Templates also are reached by main menu of Joomla!® with *Components à BwPostman à Templates*.

> **Caution:**
>
> If you change a template of an existing newsletter, then all additional input, that you made in editor, will be lost. This is the same behaviour like you know doing changes at selected content in first tab while editing a newsletter. Unfortunately there is no other solution feasible for now.

Install Templates

Since version 1.3.0 of BwPostman there is a possibility to install further standard templates. To do this there exists a button *Install template* at the toolbar. A click to the button leads to a view, where you may select and install the template package. The packages is a ZIP archive – as usual at Joomla!® – , that will be installed with a click to the button

Start template installation. Now a view appears, where you see the single steps of the installation of the template. A click at the button *back* leads you back to the list of templates. Afterwards the new template is available like all other templates for the use at a newsletter.

New templates you may get at the downloads for BwPostman at Boldt Webservice.

> ### Important:
>
> Templates of BwPostman don't have to do something with templates of Joomla!®! While templates for Joomla!® are build to display websites all the same in all browsers as desired by the website owner, templates for BwPostman are made to give the same look-and-feel for the newsletters at all mail clients. But while even some "renegade" browser manufacturers made their browsers standard-compatible, at the mail clients is heavy proliferation the norm, which grows with each second mobile device.

Export templates

Since version 2.1.0 of BwPostman there is the ability to export templates. With this You are able to transfer templates created for one installation to another.

After activating the checkbox of the desired template at the list of templates and a click to Export template a file is created that contains the template in a installable manner. When this process has finished, a message with a download button is displayed. This file also is stored at

<my_Joomla_installation>/images/bw_postman/templates/

and can be downloaded (or deleted) from there as well using the Media-Manager of Joomla!®.

The file name contains the ID of the exported template, because the ID is surely unique, there are no two templates with the same ID. The title of the template cannot be used (quite alone).

You don't have to conserve the file name, the import of the template works with every file name.

Standard Templates

Standard templates are predefined templates for newsletters, that you may use directly. The title of the included standard templates begins – who wonders – with standard. They all are responsive. That means, that they look well even on small displays, which occurs

on mobile devices. Nevertheless standard templates can be individualized widely. To keep out of harm's way I suggest to copy a provided template and then adjust. If an adjustment is not possible with one provided template: Perhaps it is possible with another?

At the left you make the adjustments, at the right you see a preview of the template, that will be refreshed by clicking to **Refresh preview**. A refresh also will be done, if the template will be saved.

Tab *Generals*

Here you do the general settings to the template. The template gets a name and a description, you set the width of the newsletter as also the font size, the space and the colour for font and background of the various sections. Here you also may select a little image, a so called thumbnail. This image is shown in the list of the templates as preview and in the tooltip at the select list, if you create a newsletter.

Caution:

This preview image is not identically to the preview at editing a template! The preview while editing is dynamically and can be refreshed again and again, while the thumbnail is a static image, in example created with a screenshot.

This preview image is not created automatically by BwPostman! You can create such a preview image, if you take a screenshot of the newsletter. You quite may take the screenshot from the preview while editing the template. BwPostman looks for preview images in the folder *<Joomla-installation-directory>/images/bw_postman*. Here you have to upload the saved image. Uploading you can do with Media Manager if Joomla!®, which you will find at **Content → Media Manager**.

Tab *Header*

Here you define the header, with which the newsletter begins. It consists by logo and/or text. You can select whether show only the logo, only the text or both in the header of the newsletter.

If you chose logo and text, then alignment **Left** or **Center** means, that the logo is shown at left and the text at right. **Right** means, that the logo appears at right and the text at left.

If you select **only logo** or **only text**, then alignment works as expected.

The text can be entered in two lines, for which you may select different font sizes. The colours for font, background and shadow of header you also chose here. Shadow only works with standard template Deep Blue.

Tab *Intro*

In the newsletter then follows the intro with a heading and a text. The text can be personalized. Place the cursor to the desired place in intro text and click to the button **[FIRST-NAME]**, **[LASTNAME]** or **[FULLNAME]**.

You can select, if the intro will be used or not. Furthermore you can change the heading as well as the text in newsletter at the tabs **HTML-Newsletter** and **Text-Newsletter**.

Tab *Articles*

After that the single articles follow. The single articles may be divided by a divider, for which you may select a colour. In addition you can set, if the author of the article and the creation date shall be shown.

You may add a button **Readon** for each article. This is useful, if you only want to show a teaser in Newsletter to read the full article at your website. For this button **Readon** you can select colour of font, the button and the shadow.

> **Caution:**
>
> If there are changes to a standard template afterwards, that impacts the article (in example width of newsletter, background colour of articles, font colour, show author and so on), at an existing newsletter you have to switch to another template and switch back to this template or you have to change selected content, to adopt the changes. Unfortunately there is no other solution feasible for now.

Tab *Footer*

In the footer most of all is the legal information: The legal information from the options of BwPostman may be switched on and off and you may define an address block. Also for the footer of the newsletter you can select colour of font, background and shadow comfortably.

Finally you may define until five buttons for social media or your own proposals. The buttons have a common heading. Each button may be configured individually with settings for the colours of font, button and shadow. You can comfortably enter the label and the link target.

The only thing, you can not adjust, are the links for unsubscribe, edit subscription and the link to the website at the end of the newsletter.

Free Templates

Free Templates for newsletter are exactly that what the name says: Free! Free in positioning of the elements, free in the look of the elements. However this freedom has its price: There are no predefined sections, that you may adjust fast and easy only by clicking with the mouse. Here all is "handmade". There are provided samples for each HTML and text templates. The title begins with Sample / Beispiel.

Because there are no predefined sections, there only are three (HTML Templates) or two (text templates) Tabs.

Here, too, counts: In the left you make your settings, in the right you see a preview of the template, that will be refreshed and updated by clicking to **Refresh preview** or saving the template.

Tab *Generals*

Here you enter a name and a description for the template and you can select a little image, a so called thumbnail. This image will be shown in the list of the templates and in tooltip at the selection list while creating a newsletter.

> **Caution:**
>
> This preview image is not identically to the preview at editing a template! The preview while editing is dynamically and can be refreshed again and again, while the thumbnail is a static image, in example created with a screenshot.

Then you set, if the author and/or the creation date of the article shall be shown and if there shall be a button **Readon**.

Tab *Template CSS*

This tab naturally does only exists at HTML templates. This is the section where you enter the CSS styles. CSS knowledge is needed and only pure CSS code is allowed!

Tab *Template HTML/Template Text*

Here you may compose your HTML framework for the newsletter. Under the editor you find several buttons for personalisation, content, unsubscribe link, edit link and the imprint.

Simply set cursor at the desired position in editor and click to the button.

Maintenance

Since version 1.0.1 of BwPostman you have the possibility to save and restore the tables of BwPostman. Additionally these tables can be checked. If errors occur, then they will be repaired automatically. That works very reliable, but a hundred-percentage-guarantee I cannot give.

With this you have the possibility to de-install a totally shot to pieces installation of Bw-Postman and install BwPostman anew without loosing mailing lists, newsletters, campaigns, subscribers or templates.

> **Therefore this hint, too:**
>
> Save your data! This can be done with save tables from BwPostman. The reflection: "*If I do some repair and something goes down in drain, then the fat's in the fire.*' prompted me to code a backup routine. But the best and latest backup will be worth nothing, if I can't restore it in worse case. Furthermore it gave a restore tables, too.

Maintenance is called from the dashboard of BwPostman or from sub-menu. Beside basic settings, with that BwPostman can be configured and the link to the forum there are three buttons: **Check and repair tables**, **Save tables** and **Restore tables**.

Check and repair tables

With one click to this button the tables were checked by reference to the SQL installation file of the installed version of BwPostman. The result of the check and the repair attempt is shown step by step in an overview. With the button **Back** in the toolbar you get back to maintenance.

Internally the check works as follows:

First will be checked, if there are all needed tables in place. Missing tables are created. Next will be checked, if there are some tables having BwPostman in their name, but are not needed (e.g. remaining from a previous installed version). These will be deleted if any.

In the next step each table is checked for engine, default character set and primary key and will be corrected if needed.

Following each table will be checked for column names and attributes (also called properties) of the columns. Divergences are corrected, too.

In the second last step the Asset-IDs of the data sets of all tables will be checked. That are the data sets, which holds the access rights for each newsletter, subscriber,etc. If there is no Asset-ID, there will be an attempt to create one. With a missing Asset-ID it is not possible to delete an item. If creating the Asset-ID fails, then you once have to open the item manually in back-end and save it. E.g. the Asset-ID misses, if you read in the tables of BwPostman directly to the database, e.g. with phpMyAdmin.

Finally it will be checked, if the entered User-IDs matches them of Joomla!® and they will be corrected if needed, too. This happens by comparing the email addresses of the sub-scribers with the email addresses of the users of Joomla!®.

Well, this is an attempt to find and correct essential errors as well as not as urgent prob-lems. The essential errors are displayed in red, lesser problems occur in yellow-orange. If such appears in the overview, the result follows right below. Only when the result is red there is an error that cannot be corrected automatically.

Save tables

Backup of tables is suggested from time to time, especially before a check/repair of the tables, nobody knows…

With one click at the button **Save tables** structures and data of the tables are assembled in XML formatted file and a browser window is shown, which asks what to do with this file. It is useful to save the file (locally). Remember well where the file is to find, perhaps it will be needed some time!

Since version 1.3.0 of BwPostman the access rights of the component, the tables and the individual items are saved. Because the access rights are closely related to the user groups, the user groups and their parent groups, for which are assigned access rights for BwPostman, are saved also.

Since version 2.1.0 of BwPostman this backup file also may be packed to reduce file size. The used pack format is ZIP.

The backup will be packed automatically, if the switch **Compress backup** file at Basic settings at the options of BwPostman is activated.

The backup file not only is offered for download, it also is stored at folder

<my_Joomla_installation>/images/bw_postman/backup_tables/.

So You are able to download or delete the backup file using the Media Manager of Joomla!®.

Restore tables

Restoring tables won't work with one click:

One click to the button **Restore tables** lends to the view, where you may select the backup file. The click at **Start restore** starts restoring tables to the database.

> **Caution:**
>
> With this click all existing tables of BwPostman will be deleted from database and only the backup data are available afterwards!

Since version 2.1.0 of BwPostman the restoring of a backup of BwPostman recognizes, if a backup file is packed and unpacks it automatically before restoring.

Immediately after restoring the tables will be checked by above-mentioned manner to ensure, that the structure of the restored tables fits the installed version. Certainly the result is displayed.

With the button **Back** you get back to maintenance.

> **Also important to know:**
>
> Restoring of tables only works with backup files made by BwPostman!

Since version 1.3.0 of BwPostman the access rights of the component, the tables and the individual items are saved. Because the access rights are closely related to the user groups, the user groups and their parent groups, for which are assigned access rights for BwPostman, are saved also.

At restoring the tables the structure of the user groups will be restored. While doing so, BwPostman checks by means of the name of the user group, if the user groups deposited at the backup are still present and have the same ID. Deleted user groups are not created, because I don't know why these user groups are deleted. Mostly this has a particular cause. If the user groups with there names are still present, then BwPostman changes the values of the used user groups to the new IDs.

If against expectations the restoring abort, then this is normally no problem. BwPostman creates a restore point before restoring. Th this restore point will be returned, if something goes wrong while restoring. With this it is ensured, that a running version of BwPostman exists and one is not left empty handed with empty or missing tables.

Migration of BwPostman to another Joomla!® Installation?

When your read the above, you may wonder: Am I able to migrate from one Joomla!® installation to another by **Save tables** and **Restore tables**?

The answer is: Yes, conditionally and if BwPostman is installed at this installation of Joomla!®.

Mailing lists and campaigns are absolutely not the problem. By this reason – among others – there is the check and pacing of stored User-IDs while check and repair tables, if possible.

There are more difficulties with the newsletters. Beneath the HTML version and text version BwPostman stores the IDs of the articles. If the articles of Joomla!® are exactly the same, that means textual and with ID, then there are absolutely no problems. But if content or IDs differ, or content, to that the newsletter possesses an ID, in the new installation have a completely different article, there will be at last a problem editing the unsent newsletters in the new installation.

Its the best to test such things with a Joomla!® installation that is designated to test, before you do it to a production environment.

Modules

BwPostman Module

This module displays a registration form for the mailing lists of BwPostman. Basically this module doesn't anything else as the registration form of the component nut at a module position. With this module it is possible to display a registration form for newsletters at all desired pages.

The tabs **Module**, **Menu Assignment**, **Advanced** and **Permissions** are known from Joomla!®. But the registration module also offers further settings:

Mailing list selection

At mailing list selection all mailing lists are displayed, which are accessible at front end. If You don't select something, all here displayed mailing lists are accessible for selection at the module. Certainly the access level is considered. If a visitor is not logged in, only the publicly accessible mailng lists are offered.

With this option You have the possibility to offer registration forms for different mailing lists at various pages.

Also You can set, if the description of the mailing list is displayed at the module. If You want to conform to the GDPR, You should activate this setting. Below You can set the number of characters, after which the description is shortened. After this number of characters there are displayed three dots. But to fulfil the GDPR anyway, a tooltip with the complete description is displayed while hovering the shortened description with the mouse.

Settings for the registration form

These settings are identically to the Options of the component at **Registration** and are not described here.

The special feature here is, that You are able to select different settings for component and each module. With this You may only ask for the mail address for a general, public accessible newsletter as example. For a newsletter, which is only accessible for a specific user group, You can set first name, last name and gender obligatory to be able to personalize the newsletter widely.

BwPostman Overview Module

With this module You are able to display a list of calendar month, which contains published newsletters, at a module position. The number of sent and published newsletters of the month is displayed afterwards in parenthesis. You can set, to which recipients and campaigns the newsletters are sent. Also the selection of newsletters are widely configurable.

The tabs **Menu assignment**, **Advanced** and **Permissions** are known from Joomla!®.

The settings for **Newsletter Selection**, **Mailing list selection** and **Campaign selection** are the same as at menu entry **Published newsletters (overview)**. If a menu entry is selected, the settings for recipient lists, campaigns and newsletter selection of the menu entry are used and the settings at the module are ignored.

The only difference, which is specific for this module, is **# of months**. Here You set the number of months, which are displayed at the module, if they correspond to the selection criteria.

Plugins

Enhanced personalization

Since version 2.0.0 there is beneath the former simple personalization a plugin for enhanced personalization for BwPostman. This plugin I s activated per default and needs no options.

While the simple personalization only enables the use of first and/or last name, You can use gender related personalization with the enhanced personalization plugin. There is not only a male text and a female text possible, You can also us a neutral text, if You want to address companies or subscribers without entered gender:

[bwpostman_personalize | "male text" | "female text" | "neutral text"]

Example:

[bwpostman_personalize | "Dear Mr" | "Dear Mrs" | "Hello"] [LASTNAME]

Important:

- **Between the opening square bracket and the following bwpostman_personalize there must not be any character, also no space!**

- The double quote **must** be entered. With this character the text to be inserted is determined. This allows to enter spaces before and after the text to insert. That implies further, that this character **is not allowed** in the text to insert.

- Is no text entered, then there will not raise an error, but also nothing is inserted.

User2Subscriber

Since version 2.0.0 there is another plugin for BwPostman to automatically subscribe to selectable mailing lists while a user registers at the website. The plugin is **deactivated** per default.

Plugin activated

If the plugin is activated and a mailing list is selected, then a notice (see below) and a select box for the newsletter is displayed at the registering form of Joomla!®. The select box is set to **no** by default to be in conformity with the law.

If no mailing list is selected, the plugin also shows nothing.

If the user clicks to **yes**, there will be displayed more input fields potentially. This depends on the settings of the component. There could appear all input fields, that are selected at the settings on BwPostman at registration. It will concern the fields for **gender**, **first name**, **last name**, **additional field** and **mail format**. Also the settings for obligation are taken from these settings.

Subscribers created this way first are unconfirmed. Only after confirmation of the account of the website they will be confirmed also for the mailing lists. With this Double-Opt-In is complied. Especially if You point out, that the user is automatically added to the newsletter. For this notification the input field message at the options is conceived.

Options

The options to this plugin allows to set if the mail address of the subscriber will be changed if the mail address of the account is changed. You also can define whether a subscription will be deleted if an account will be deleted. Indeed, Joomla!® does not offer a possibility to delet an account to the user. This setting therefore only concerns user, which will be deleted at back-end.

The mailing lists the user shall get a subscription can be selected at the tab **Select Mailinglist**. At that time the user/subscriber has no possibility to change something at the selection. That can be done later if he has confirmed the account.

Warning messages

In particular situations warning messages are displayed in back-end of Joomla!®, caused by BwPostman. I was very willing to catch all messages, for that no messages are displayed. But in some cases there is no chance to do so, for that messages are displayed from time to time.

The warning messages occur, when

- Joomla!® **Error Reporting** is set to **Maximum** or **Development** at *System → Global Configuration → Server*

- and/or **display_errors** is set to **ON** in *php.ini* of the server

Appendix

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