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SendStudio v4.0

Setup Guide (PHP)

http://www.sendstudio.com

Contents

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Introduction

SendStudio is a powerful, all-in-one email marketing solution that's incredibly easy to use and a snap to install. SendStudio handles everything, from building a list and creating personalized newsletters, to measuring campaign results and sending automated follow up emails.

SendStudio can be easily installed on your web server by simply following the instructions in this setup guide.

Server Compatibility

SendStudio will work on most Linux based platforms, including RedHat, FreeBSD, OpenBSD, Mandrake, etc.

* Web Server running Apache (1.3.2 or higher)
* PHP v4.1.0 or above (preferably not a pre-release)
* MySQL 3.23 or above
* safe_mode turned off (default)
* open_basedir turned off (default)

Client Requirements

To create and manage your mailing lists and newsletters using SendStudio, you MUST be on a PC (not a Macintosh) and have Internet Explorer version 5.5 or above.

If you don't have a current version of Internet Explorer, you can download it free from Microsoft:
http://microsoft.com/windows/ie/default.htm

Keep in mind that your visitors DON'T need this browser to subscribe to your mailing list or receive your emails, any browser is fine! You just need Internet Explorer to run the SendStudio control panel.

Installation Overview

Setting up SendStudio requires knowledge using FTP and setting server permissions (CHMOD). Previous experience setting up PHP scripts is an advantage.

Your web host must have PHP installed. You should also have a MySQL database setup.

These instructions assume you have the complete SendStudio package, which was made available to you as a zip file during your purchase. You should be sitting in front of the web server where you intend to install SendStudio.

Installation Process

STEP 1. Uploading Files

Unzip the SendStudio package onto your local hard drive. Using an FTP program, login to your web server and copy the files across into a directory, such as your root directory.

STEP 2. File Permissions

SendStudio makes use of several files during both installation and execution. These files need to be modified, and thus require the appropriate write permissions. These files exist in the following folders (please CHMOD them accordingly):

- **/archive: CHMOD to 757**
  (Owner: Read, Write and Execute; Group: Read and Execute; Other: Read, Write and Execute)

- **/archive/images: CHMOD to 757**
  (Owner: Read, Write and Execute; Group: Read and Execute; Other: Read, Write and Execute)

- **/archive/index.php: CHMOD to 757**
  (Owner: Read, Write and Execute; Group: Read and Execute; Other: Read, Write and Execute)

- **/archive/index_list.php: CHMOD to 757**
  (Owner: Read, Write and Execute; Group: Read and Execute; Other: Read, Write and Execute)

- **/includes/config.inc.php: CHMOD to 757**
  (Owner: Read, Write and Execute; Group: Read and Execute; Other: Read, Write and Execute)

- **/temp: CHMOD to 757**
  (Owner: Read, Write and Execute; Group: Read and Execute; Other: Read, Write and Execute)

- **/temp/images: CHMOD to 757**
  (Owner: Read, Write and Execute; Group: Read and Execute; Other: Read, Write and Execute)

STEP 3. MYSQL Database

SendStudio makes use of a MySQL database to store your mailing lists, newsletters, link tracking statistics, etc. This database should be created on any MySQL server that is accessible from the server where you are installing SendStudio.

Simply create a new database (such as "sendstudio"), as well as a new user account with full permissions on that database. You can use an existing database if you desire, as during installation you can specify a table prefix for the ActiveKB tables. Note your MySQL details down, as you will need them for step 4.

STEP 4. Setup Wizard

SendStudio includes an integrated setup wizard, which will step you through the installation. The installation collects MySQL login details, as well as various configuration details.

To start the setup wizard, navigate to the /admin folder in your web browser, for example: http://www.mysite.com/sendstudio/admin. This guide assumes that you have index.php setup as your default document in Apache.

The SendStudio setup wizard will appear. It contains 5 separate sections, which are described below:

1. **MySQL Database Details**
   This section is where you should enter your MySQL database connection details. There are 4 mandatory and 1 optional text fields to complete:

   - MySQL Server: The I.P. address or hostname of the server where MySQL is installed, such as localhost or 204.45.6.7

   - MySQL Username: The username of the MySQL account you created earlier, such as "root"

   - MySQL Password: The password of the MySQL account you created earlier, such as "mypassword"

   - MySQL Database: The name of the MySQL database you created earlier, such as "sendstudio"

   - Table Prefix (optional): A text value that will be prepended to all MySQL table names, such as "ss_". You should specify a table prefix if your database will contain other tables.

2. **SendStudio Directories**
   This section allows you to specify the locations of various directories which SendStudio needs to use. There are 2 text fields to complete, and both should already contain values that SendStudio has tried to guess for you. If they are incorrect, you can enter the correct values as required:

   - SendStudio Path: The complete URL to the "sendstudio" folder on your web server (including a trailing forward slash), such as http://www.yoursite.com/sendstudio.

   - Root Directory: The root-relative path to the "sendstudio" folder on your web server (including a trailing forward slash), such as /htdocs/www/sendstudio/.

3. **SendStudio License Key**
   This section allows you to enter your SendStudio license key. There is 1 mandatory text field to complete.

   - License Key: You should enter the license key that you received via email when you ordered SendStudio. Your license key will start with "SS".

4. **Miscellaneous Settings**
   This section allows you to configure various miscellaneous settings for SendStudio. There are 2 optional checkboxes to tick.

   - Show Info Tips?: If yes, SendStudio will show a random email marketing tip across the top of the control panel when you are logged in.

   - Auto Archive Content?: If yes, SendStudio will make a copy of each newsletter sent, and place it as a plain text or HTML file in the "/sendstudio/archive/[list-name]" folder.

Once you have completed all sections, click on the "Update Settings" button at the bottom of the page. Your SendStudio configuration details will be saved to the includes/config.inc.php file, and your MySQL database will also be created.

Finally, you should delete the admin/functions/install.php file.

Congratulations, you are now ready to login to the SendStudio control panel and start creating mailing lists and newsletters!

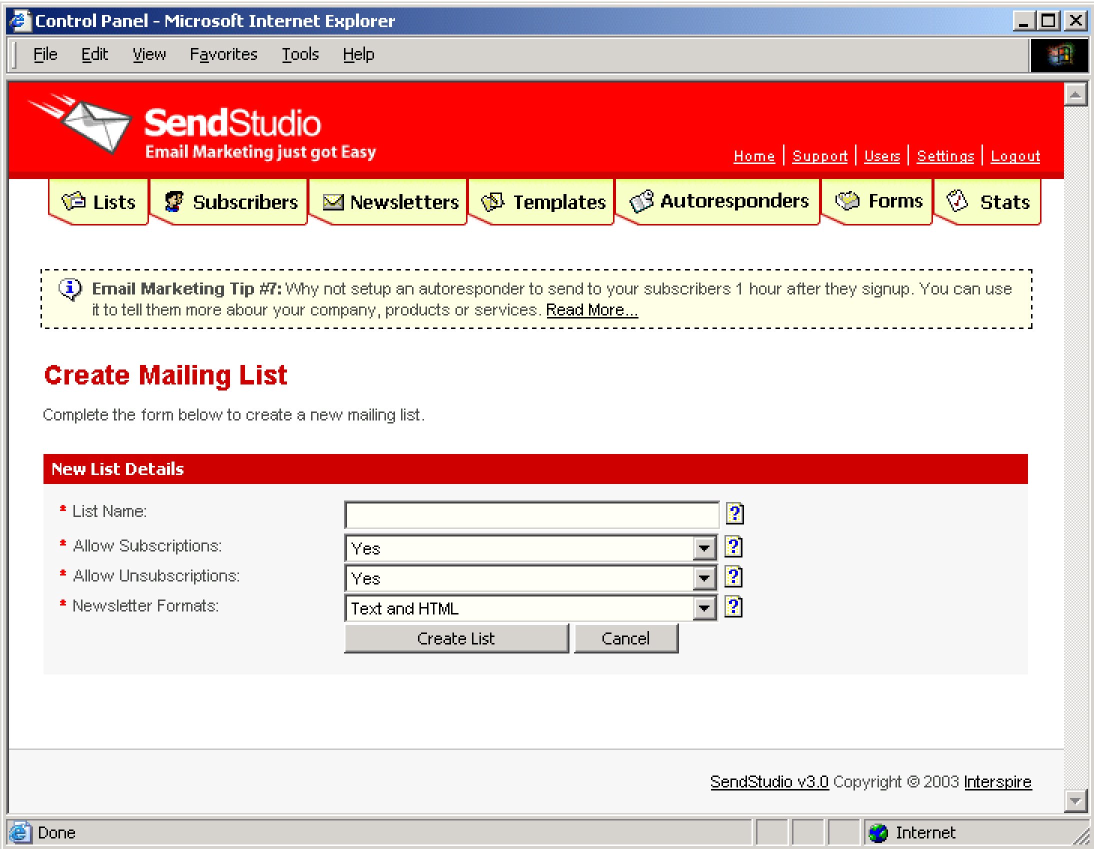
Logging into the Control Panel

Now that you have installed and configured SendStudio, it's time to login to the SendStudio control panel. Open the /sendstudio folder in your web browser, such as http://www.mysite.com/sendstudio. Enter your admin user and password details in the form and click on the "Login" button.

Once you have logged in, click on the "Settings" link at the top of the page. You will see the "SendStudio Settings" page. For future reference, you can change all of your SendStudio settings from here.

You are now ready to create a mailing list, which is what we will do next.

Creating a Mailing List



To create a new mailing list, move your mouse over the "Lists" button on the menu at the top of the page and click on the "Create Mailing List" dropdown menu. The "Create Mailing List" page will appear. There are 4 details that you need to complete for each new mailing list. We will look at each of them now:

- List Name: The name of this list as it will appear both in the control panel and on your subscription forms.

- List Owners Name: The name of the person who owns this mailing list.

- List Owners Email: The email address of the person who owns this mailing list.

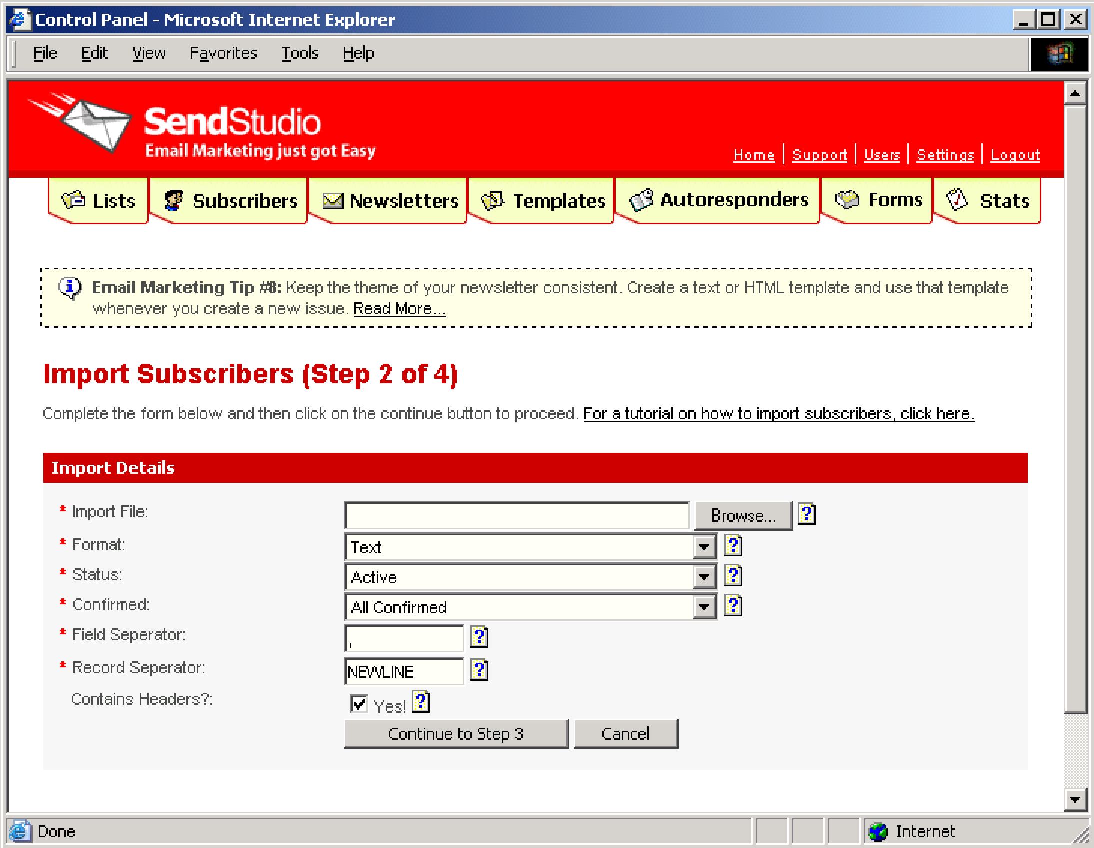
- Allow Subscriptions: Can this list accept subscriptions? If yes, tick this box.

- Allow Unsubscriptions: Can this list accept unsubscriptions? If yes, tick this box.

- Newsletter Formats: Which type of newsletters would you like to be able to create for this mailing list? Text, HTML or both?

Once you have entered details in all of the required fields, simply click on the "Create List" button at the bottom of the page. We are now ready to import subscribers for this mailing list.

Importing Subscribers



SendStudio allows you to add subscribers to your mailing list in 2 different ways. Firstly, by importing from a file. This is the best method if you have hundreds, or even thousands of subscribers to import. Secondly, you can add individual subscribers to your mailing list. Both options are available from the "Subscribers" dropdown menu at the top of the page.

In this setup guide, we will look at how to import subscribers from a file on your hard drive.

To start, move your mouse over the "Subscribers" button on the menu at the top of the page and click on the "Import Subscribers" dropdown menu. The import wizard contains 4 steps:

- ## Step 1: Choose a Mailing List

  Start by choosing the mailing list that you would like to add subscribers to. Click on the "Continue to Step 2" button to go to step 2.

- ## Step 2: Specify Import Details

  Note: If you need help importing subscribers, make sure you view the tutorial *Importing Subscribers: A Quick Tutorial*, by clicking on the "For a tutorial on how to import subscribers, click here." link in SendStudio.

  Firstly, click on the "Browse…" button to choose a file from your hard drive that contains the subscriber details you want to import. This should be a plain-text file, in

CSV (comma separated value) format. Next, there are 6 options that you can choose. They are:

- Format: Which newsletter format should these subscribers be 'flagged' to receive? Text and HTML, text only or HTML only?

- Status: When these subscribers are imported, should they be marked as active or inactive?

- Confirmed: If a subscriber was to join your list using a normal subscription form with 'Requires Confirmation' enabled, then they would be marked as unconfirmed until they click on the confirmation link inside the email automatically sent to them.

- Field Separator: What is the character used in your import file that separates the contents of each new field in a record?

- Record Separator: What is the character used in your import file that separates one record from the next?

- Contains Header?: Does the first line of your import file contain headers? If so, each header should be separated with a field separator, such as: email, name, sex.

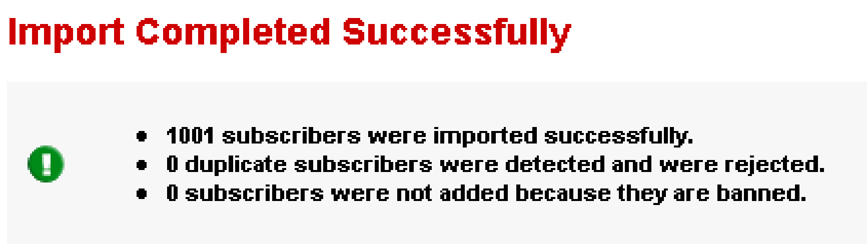
- **Step 3: Link Import Fields**

After uploading your import file, SendStudio will process each record and return a list of fields. The fields from your import file now need to be "linked" to the subscriber fields in SendStudio.

By default, you will only be able to map to the "Email Address" field, but if you have created your own custom fields (discussed later), then you will be able to link your import fields to your custom fields as well.

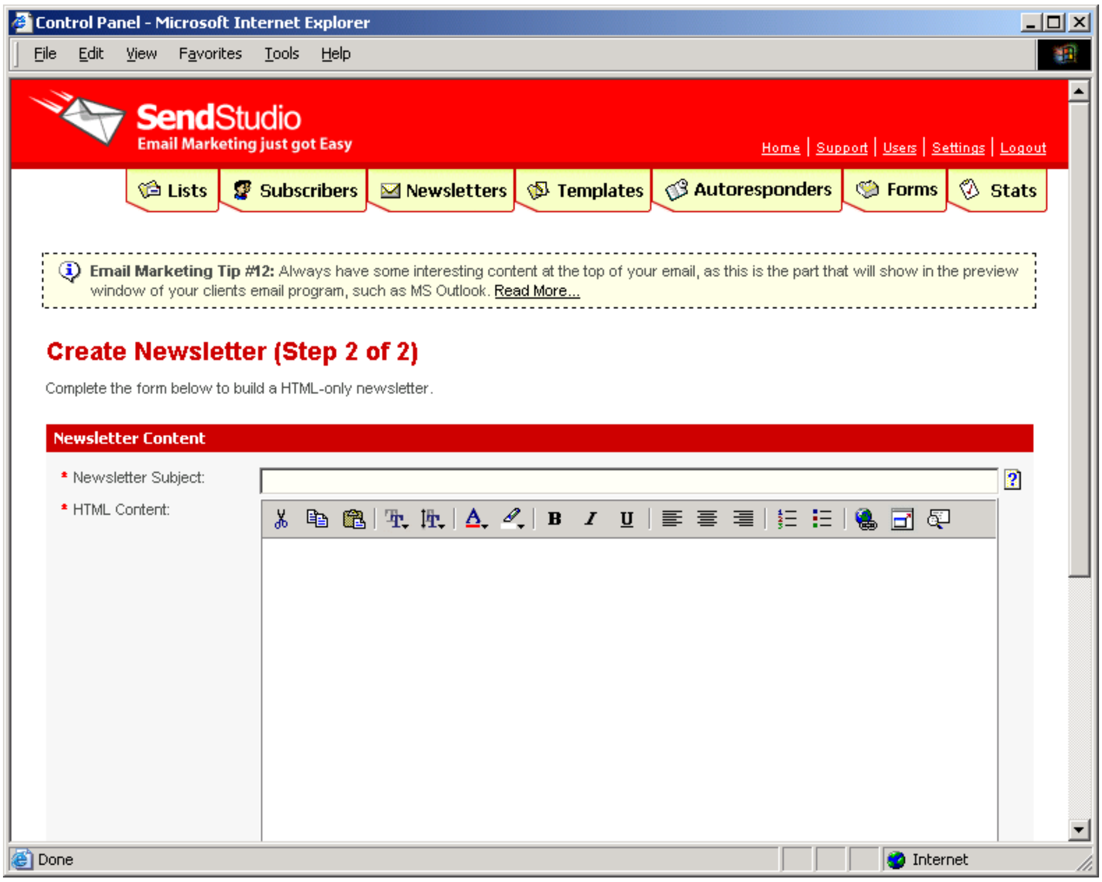
- **Step 4: Import Report**

Once your import has been completed, you will see the results of the import. If you have tried to import either duplicate or banned email addresses (discussed later), then these will also be shown in the import report, which will look something like this:



Click on the "OK" button when you are done. You are now ready to create a newsletter, which is what we will look at next.

Creating a Newsletter



SendStudio allows you to create newsletters in 3 different formats: text only, HTML only, or text and HTML (multi-part).

In this setup guide, we will look at how to create a simple HTML email, complete with personalization features.

To start, move your mouse over the "Newsletters" button on the menu at the top of the page and click on the "Create Newsletter" dropdown menu. The newsletter wizard contains 2 steps:

- ## Step 1: Newsletter Details

  Firstly, you will need to tell SendStudio 3 different things about your newsletter:

  - Newsletter Name: What do you want to call this newsletter? This name will only be used to show you a 'friendly name' for this newsletter in the SendStudio control panel.

  - Newsletter Format: How will this newsletter be composed and sent? Select HTML if you want to include colored text, images, tables, etc. Choose text to create and send your newsletter in plain-text. Alternatively you can choose both 'Both HTML and Text' to create 2 version of your newsletter. Subscribers who can view HTML will see the HTML version. Those that can't will see the plain text version. For this example, choose "HTML" from the newsletter format list.

- Newsletter Template: If you have created a template (discussed later), you can choose to use it from this list. The content from that template will then be included in your newsletter content on the next page. Double click on a template to preview it.

- ## Step 2: Newsletter Content

On this page, you can create the content of your newsletter. There are 2 mandatory and 2 optional fields to complete:

- Newsletter Subject: Enter the subject line -- as it will appear in your subscribers email client -- for your newsletter here.

Choose Either One of the Following:

- HTML Content: SendStudio includes an advanced WYSIWYG (What You See Is What You Get) HTML editor, which can be used to create and format rich text, links, lists, etc. To create the content of your newsletter, you can either type it directly into the WYSIWYG editor, or you can click on the "Source Mode" button on the toolbar, and paste in HTML from another application.

At the bottom of the WYSIWYG editor, you will notice 2 links: *Insert HTML Merge Field*, and *Insert Unsubscribe Link*. When clicked, the *Insert HTML Merge Field* link will display a popup box containing several personalization tags. Personalization tags can be used to insert customized data into your newsletter. The HTML merge field popup looks like this:

Basic Tags		**[Close]**
Email Address	%BASIC:EMAIL%	Insert
Confirmation (Confirmed/Unconfirmed)	%BASIC:CONFIRMATION%	Insert
Status (Active/Inactive)	%BASIC:STATUS%	Insert
Format (Text/HTML)	%BASIC:FORMAT%	Insert
Subscription Date	%BASIC:SUBDATE%	Insert
Unsubscribe Link	%BASIC:UNSUBLINK%	Insert
List Fields		
Images		
Links		

To insert a personalization tag into your content, click on the "Insert" link next to it. Click on the "Close" link at the top of the popup to close it. The personalization tags you can insert are:

- Email Address (%BASIC:EMAIL%) This will insert the subscribers email address, for example "john@site.com".

- Confirmation (%BASIC:CONFIRMATION%) This will insert the subscriber's confirmation status (Only applicable if the visitor subscribed using a double opt-in process), for example "Confirmed".

- Status (%BASIC:STATUS%) This will insert the subscriber's status, for example "Active". Subscribers can be marked as active or inactive.

- Format (%BASIC:FORMAT%) This will insert the type of newsletter that the subscriber has chosen to receive, for example "HTML".

- Subscription Date (%BASIC:SUBDATE%) This will insert the date that this visitor subscribed to your mailing list, for example "11 Nov 2003".

- Unsubscribe Link (%BASIC:UNSUBLINK%) This will insert a link to automatically unsubscribe this subscriber from your mailing list.

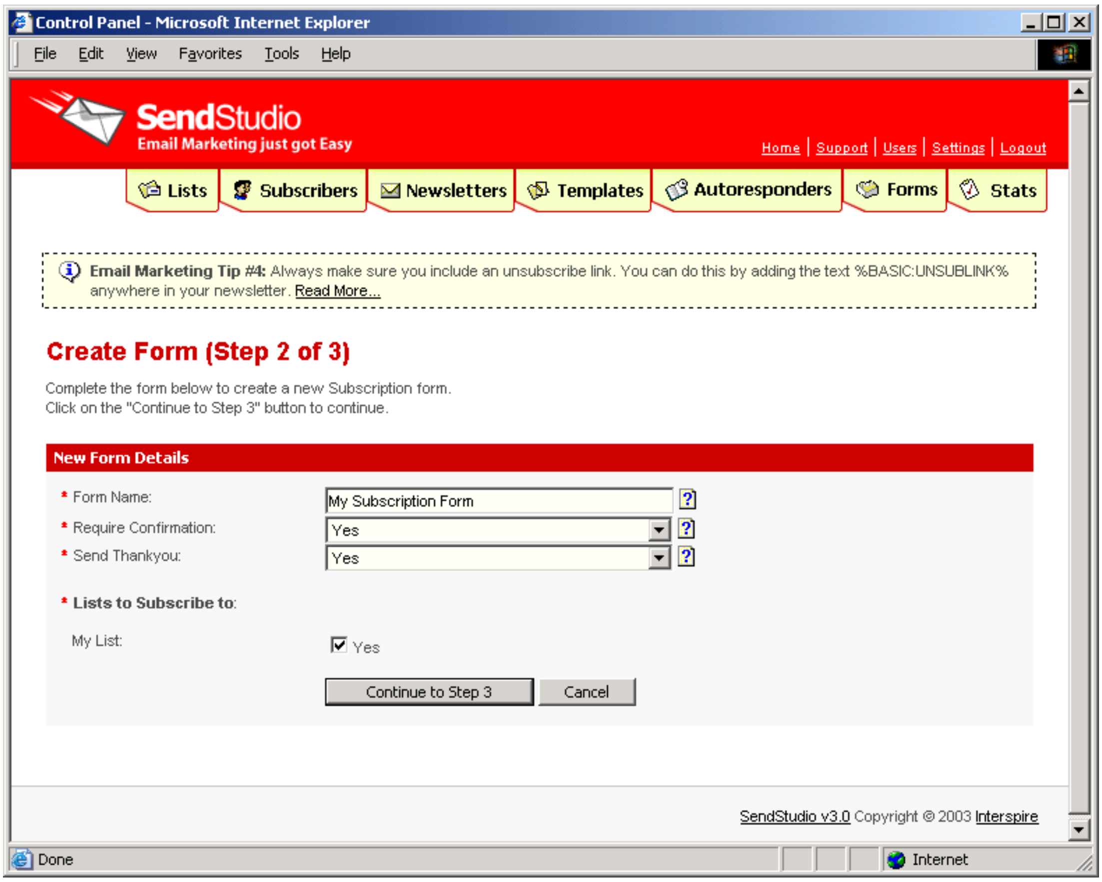
OR

- HTML Content File: If you have already uploaded your newsletter as a HTML file, enter the URL of the file and it will be automatically downloaded and saved as the content of your newsletter.

After you have created the content for your email, you have the option to preview your email before its sent. To do so, enter your email address in the "Preview Email" box and click on the "Send Preview" button. A preview of your email will then be sent to the email address entered.

Remember to click on the "Save Newsletter" button after you have previewed your newsletter. Now that you have created your newsletter, it's time to create a subscription form so that your visitors can join your mailing list, which is what we will do next.

Creating a Subscription Form



With SendStudio, it only takes a couple of clicks to generate pre-designed subscribe and unsubscribe forms for your website.

In this setup guide, we will look at how to create a simple subscription form, complete with customizable confirmation messages and/or redirect URL's.

To start, move your mouse over the "Forms" button on the menu at the top of the page and click on the "Create Form" dropdown menu. The form wizard contains 3 steps:

- ## Step 1: Form Name and Type

To create a subscription form, start by entering a name for your form, and choosing a form type:

- Form Name: Enter the name of this form here. The form is used in the control panel for your reference and is also included in the HTML code that you can place on your site. An example would be "MySite.com Newsletter Subscription Form".

- Form Type: Would you like to create a subscribe or unsubscribe form? Choose the form type from this list.

- ## Step 2: Notifications and Lists

On this page, you can setup double opt-in confirmation, thankyou emails and also choose which lists will be displayed on the subscription form. The fields to complete are described below:

- Require Confirmation?: If yes, then a double opt-in process will be used to verify subscribers. This means that after they complete the subscription form, they will also be required to confirm their email address by clicking on a link inside an email that will be sent to them automatically.

- Send Thankyou?: If yes, a thankyou email will be sent to this subscriber after they complete the subscription form.

- Lists to Subscribe to: Choose at least one list to display as a checkbox on your subscription form. If you choose more than one, your visitors will have the ability to choose which lists they want to subscribe to.

- ## Step 3: Confirmation Messages / Links

Depending on the options that you chose on the previous page, you will now be required to enter various confirmation messages or redirect links for the following events:

- Subscription Confirmation:

- Confirmation Email: Enter the text that will be emailed to this visitor to confirm their subscription to your mailing list. This text should include the %EMAIL%, %LISTS% and %CONFIRMLINK% personalization tags.

Choose one of the following:

- Confirmation Page: Enter the HTML that will be displayed in the visitors browser when they have successfully confirmed their subscription to your mailing list.

OR

- Confirmation Page URL: Enter the URL to a web page that will be displayed in your visitors browser when they have successfully confirmed their subscription to your mailing list.

- Subscription Thankyou:

- Thankyou Email: Enter the text that will be emailed to this visitor when they have successfully subscribed to your mailing list.

Choose one of the following:

- Thankyou Page: Enter the HTML that will be displayed in the visitors browser when they have successfully subscribed to your mailing list.

OR

- Thankyou Page URL: Enter the URL to a web page that will be displayed in your visitors browser when they have successfully subscribed to your mailing list.

- Subscription Error:

Choose one of the following:

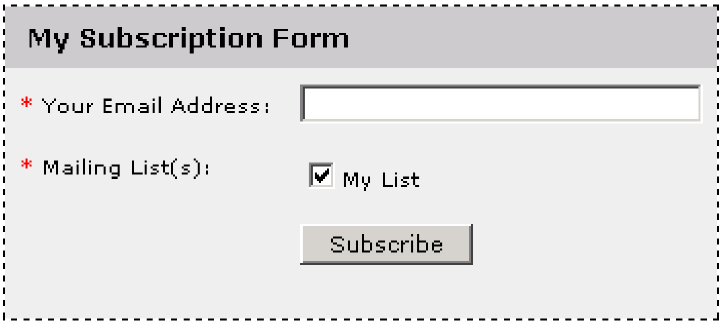
- Error Page: Enter the HTML that will be displayed in the visitors browser if an error occurs during the subscription process.

OR

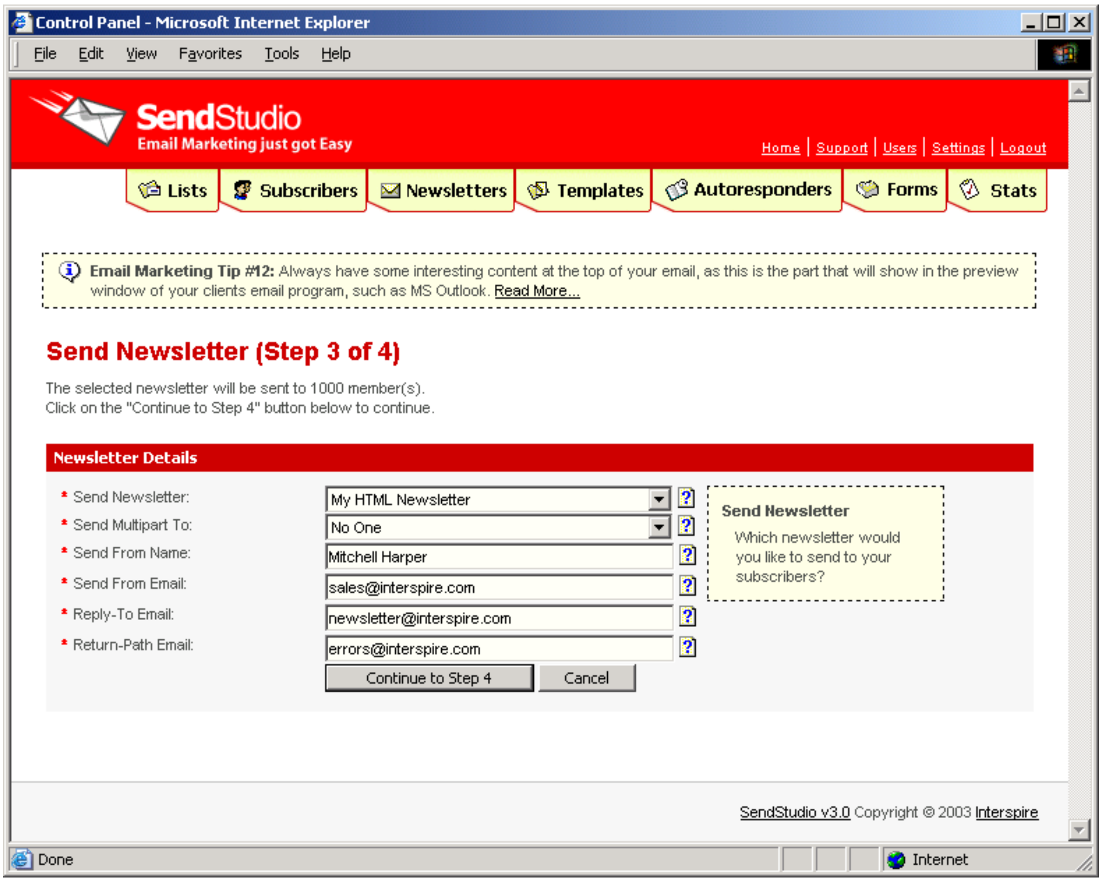
- Error Page URL: Enter the URL to a web page that will be displayed in your visitors browser if an error occurs during the subscription process. The error message that occurred will be passed to this page as a query string variable. If you are familiar with any server-side scripting language, then you can easily extract this variable and display it in your web page. An example for PHP is shown below:

```
<?php

   $theError = $_GET["error"];

   echo "An error occurred while trying to subscribe you to our newsletter: ";
   echo $theError;

?>
```

Once you have completed the fields described above, click on the "Save Changes" button. This will save your subscription form. When the next page appears, you will see a "Get HTML" button. Clicking on this button will present you with the HTML code for the subscription form that you just created. Simply copy and paste this HTML code into your web page to start accepting subscriptions to your mailing list!


My Subscription Form
* Your Email Address:
* Mailing List(s):
My List
Subscribe

Sending a Newsletter



SendStudio includes full support for sending your newsletter in real-time. This means that you can easily pause and resume sending, and also see an exact count of how many subscribers your newsletter has been sent to -- as it's still being sent!

In this setup guide, we will look at how to send a simple HTML newsletter to your subscriber list, complete with an unsubscription link at the bottom of the newsletter (which is required by law in some countries).

To start, move your mouse over the "Newsletters" button on the menu at the top of the page and click on the "Send Newsletter" dropdown menu. The send wizard contains 4 steps:

- ## Step 1: Choose a Mailing List

  Start by choosing the mailing list that you would like to send your newsletter to. Click on the "Continue to Step 2" button to go to step 2.

- ## Step 2: Targeted Subscriber Sending

  On this page you can tell SendStudio which subscribers to send your newsletter to. You can filter subscribers on a number of different fields, including status, format, email address, and any custom fields that you have created (described later).

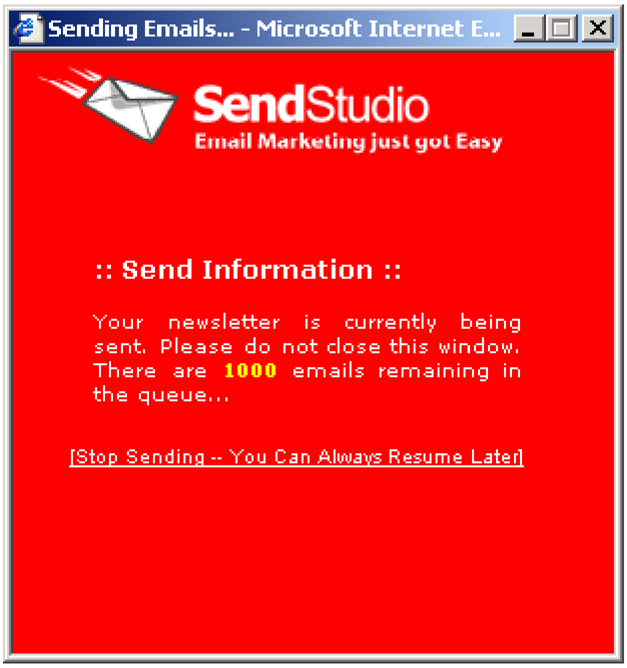
- ## Step 3: Newsletter Details

  Here you can choose which newsletter you want to send. If you are sending a mult-part newsletter (composed of both text and HTML versions), then you can choose which type of subscribers to send it to: all, or HTML only.

  You can also enter "From" name and email parameters, as well as a reply-to email address (which is where your subscribers reply will be sent if they click the "Reply" button in their email client) and return-path email address (which is where all emails that bounce will be sent).

- ## Step 4: Confirm and Start Sending

  SendStudio will now display a summary of the newsletter that is about to be sent, including newsletter name, number of recipients and approximate sending time. To actually start sending the newsletter, click on the "Send Newsletter" button. The send popup will appear, as shown below:

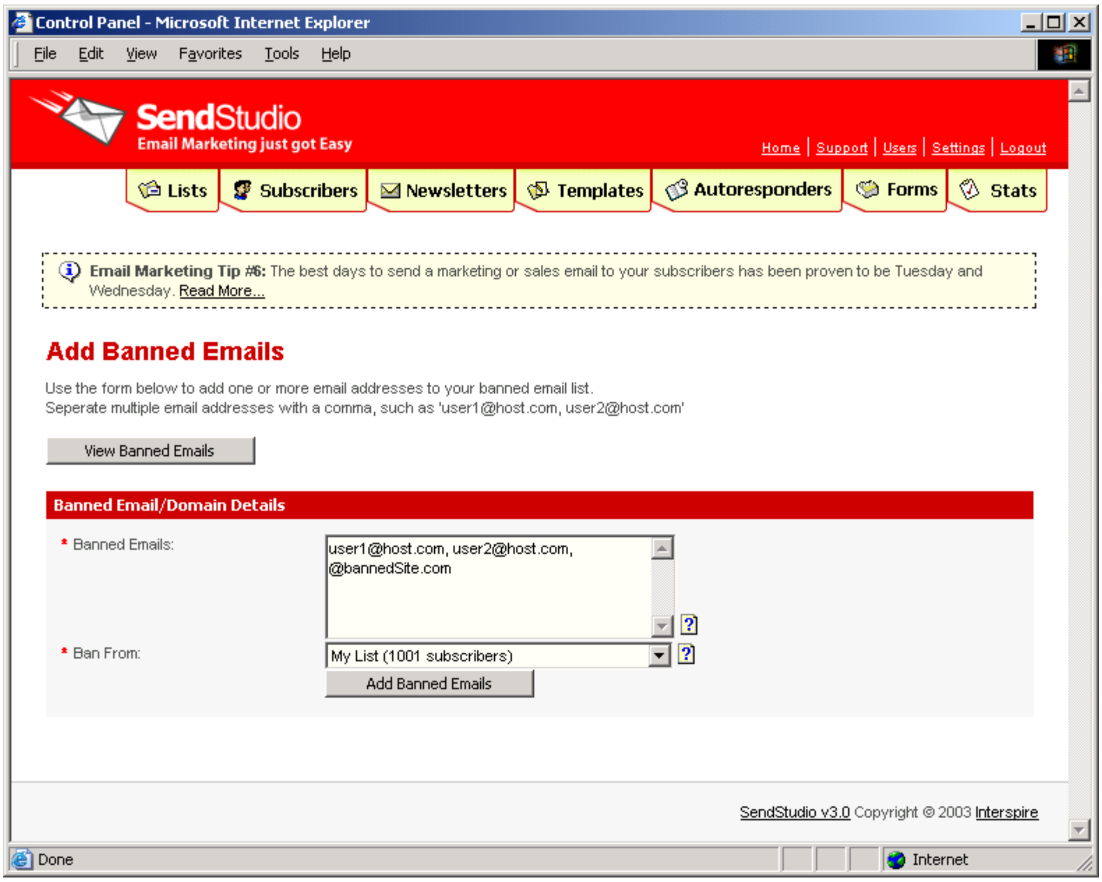


  This window *must* be kept open for your newsletter to be sent out. The send popup will automatically refresh every 3-5 seconds, showing you how many emails are left in the queue.

To pause sending at anytime, click on the "Stop Sending" link. To resume, click on the "Newsletters" button at the top of the SendStudio control panel, and click on the "Resume" link next to the newsletter that you want to resume sending for.

Congratulations! You have successfully just created and sent your first newsletter with SendStudio! On the following pages, we will look at all of the other functions that make up SendStudio, such as custom subscriber fields, autoresponders, users and link tracking.

Banning Subscribers



SendStudio allows you to ban certain email addresses and domains from subscribing to your mailing lists. To ban a particular email address or domain, move your mouse over the "Subscribers" button on the menu at the top of the page and click on the "Banned Subscribers" dropdown menu. Click on the "Add Banned Emails" button to start the banning process.

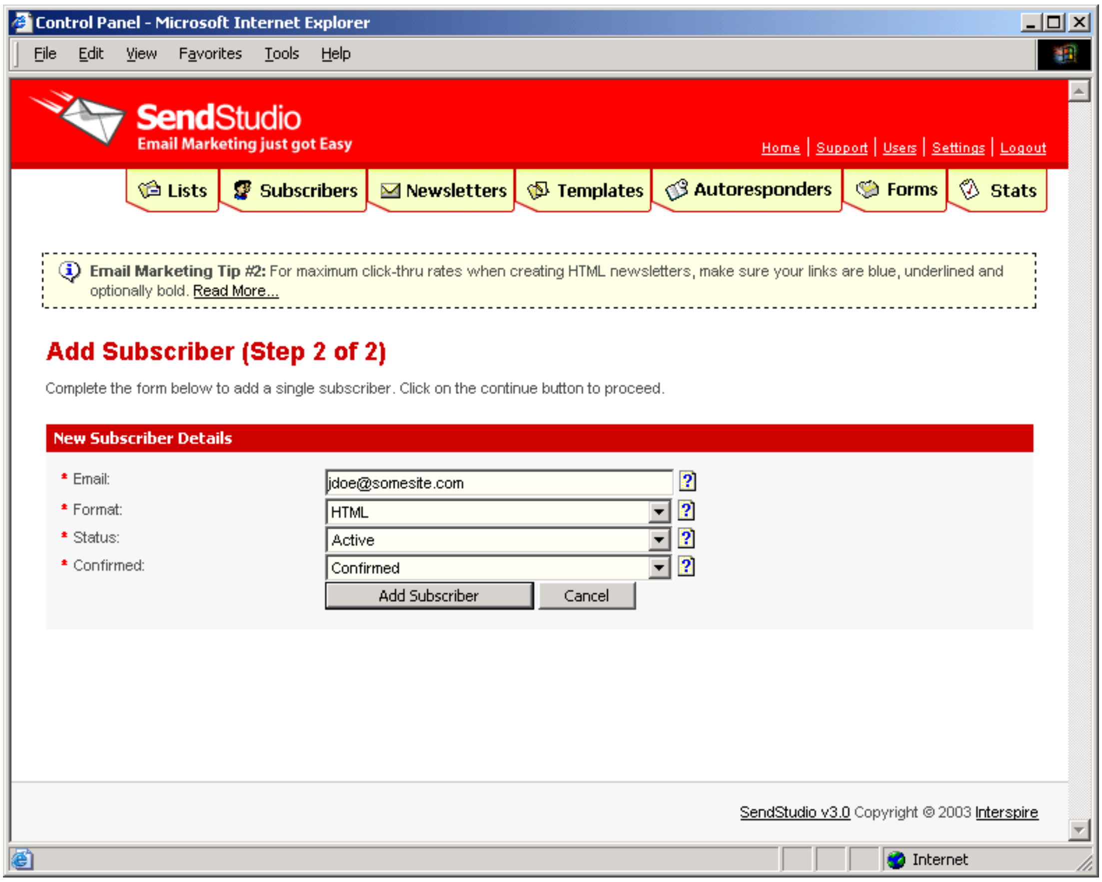
There are 2 fields that need to be completed to ban an email address or domain. They are described below:

- Banned Emails: Enter the list of emails that you wish to ban here. You should separate each email address with a comma. To ban an entire domain enter @DOMAINMAME. For example, '@hotmail.com' would ban everyone using Hotmail.

- Ban From: Which list would you like to ban these emails/domains from?

Once these fields are completed, click on the "Add Banned Emails" button. The email addresses/domains that you entered will now be banned from subscribing to the mailing list that you selected.

Add Subscriber Via Form



As an alternative to adding importing subscribers from a file on your hard drive, you can also add subscribers individually by using the "Add Subscribers via Form" method.

To add a single subscriber, move your mouse over the "Subscribers" button on the menu at the top of the page and click on the "Add Subscriber via Form" dropdown menu. There are 2 steps that need to be completed to add a subscriber. They are described below:

- ## Step 1: Choose a Mailing List

  Start by choosing the mailing list that you would like to send your newsletter to. Click on the "Continue to Step 2" button to go to step 2.

- ## Step 2: New Subscriber Details

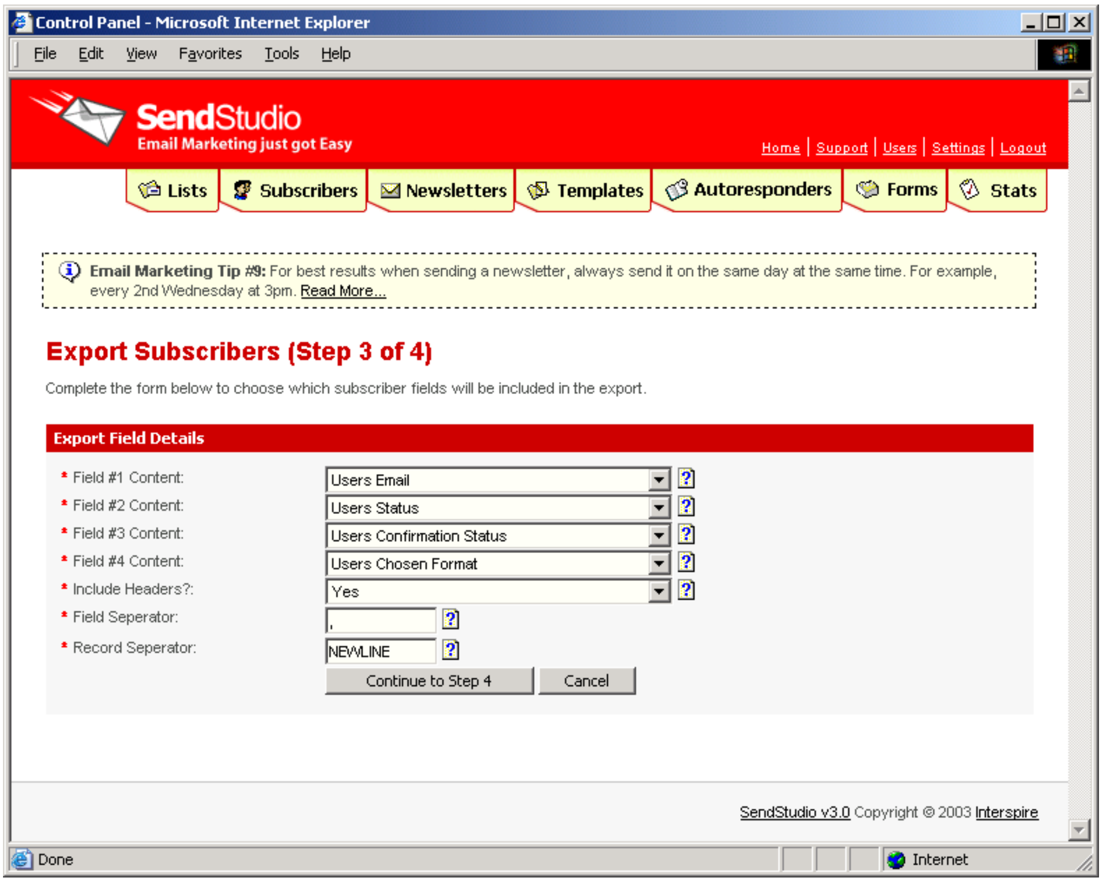
  On this page you should enter details for the new subscriber. There are 4 mandatory fields that need to be completed. They are described below:

  - Email: This subscribers email address.
  - Format: Which newsletter format should this subscriber be 'flagged' to receive? Text or HTML?
  - Status: When this subscriber is added, should he/she be marked as active or inactive?
  - Confirmed: If a subscriber was to join your list using a normal subscription form

with 'Requires Confirmation' enabled, then they would be marked as unconfirmed until they click on the confirmation link inside the email automatically sent to them.

Once these fields are completed, click on the "Add Subscriber" button. The details that you entered will now be added to the selected mailing list as a new subscriber.

Export Subscribers



SendStudio allows you to export subscribers from your mailing list to a text file, which you can then download and use in other applications, such as Microsoft Excel.

To export subscribers, move your mouse over the "Subscribers" button on the menu at the top of the page and click on the "Export Subscribers" dropdown menu. There are 4 steps that need to be completed to export subscribers. They are described below:

- **Step 1: Choose a Mailing List**

  Start by choosing the mailing list that you would like to send your newsletter to. Click on the "Continue to Step 2" button to go to step 2.

- **Step 2: Targeted Subscriber Selection**

  On this page you can tell SendStudio which subscribers you'd like to export. You can filter subscribers on a number of different fields, including status, format, email address, and any custom fields that you have created (described later).

- **Step 3: Link Export Fields**

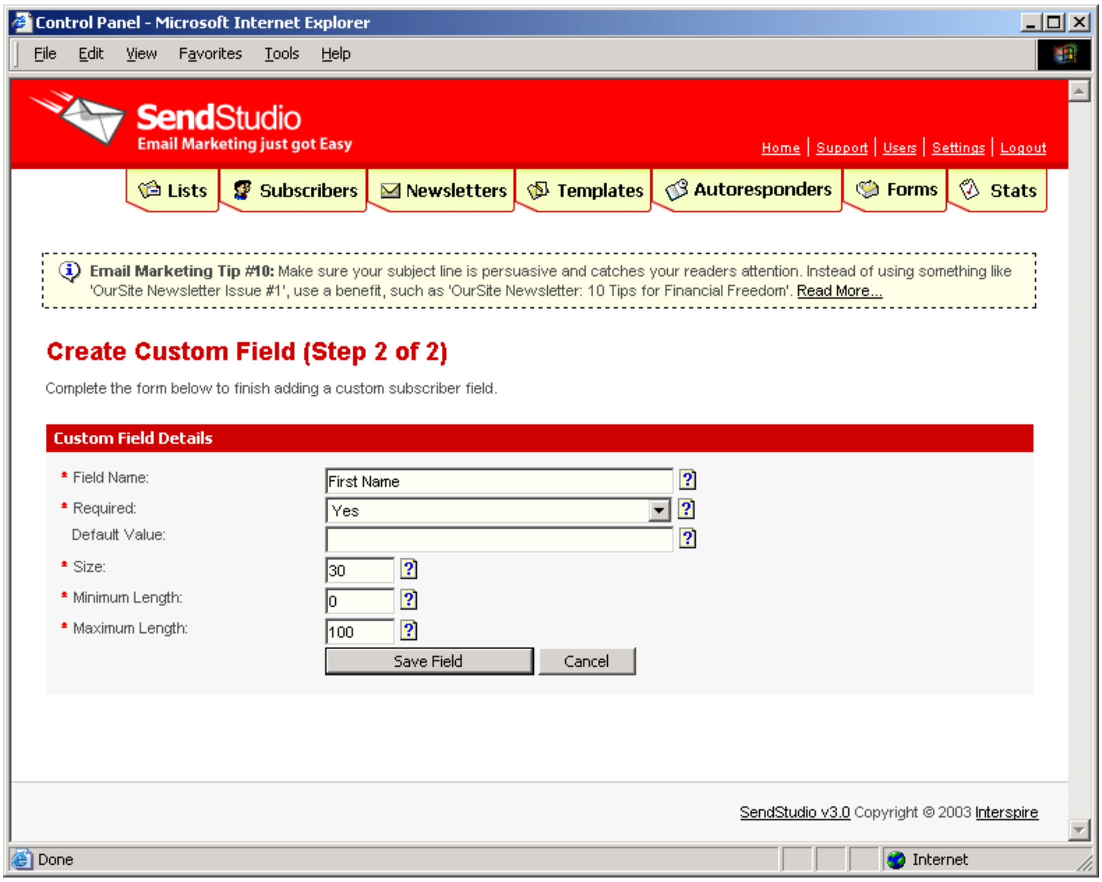
  Step 3 allows you to choose which fields will be exported, and in what order. The following fields can be completed:

- Field Content: Which fields should be exported?
- Include Headers?: Should this export include field headers? If so, the first line of the file will look something like this: email, status, format.
- Field Separator: Which character should be added to this export file to separate the contents of each new field in a record?
- Record Separator: Which character should be added to this export file to separate one record from the next?

- **Step 4: Download Export File**

  Once the export has been completed, simply click on the "OK" button to download the export file.

Custom Subscriber Fields



One of SendStudio's most powerful features is its in-built personalization. Custom subscriber fields can be create and then used in the following ways:

- To collect personal information from your subscribers
- To search and filter subscribers for viewing, importing and exporting
- To personalize your content, specifically for your subscribers

We will now look at how to create custom subscriber fields. For more information on actually using custom subscriber fields in your newsletter, please see the section entitled "Creating a Newsletter".

To create a custom subscriber field, move your mouse over the "Newsletters" button on the menu at the top of the page and click on the "Custom Subscriber Fields" dropdown menu. Choose a mailing list to work with, and then click on the "Create Custom Field" button. There are 2 steps that need to be completed to create a custom field. They are described below:

- ## Step 1: Custom Field Name and Type

  Start by choosing a name for your custom subscriber field. The name of this field will be shown on your subscription form so that new subscribers can enter a value for this custom field.

  Next, choose a custom field type. Possible options include a one line textbox, multi line textbox, dropdown list and checkbox (yes/no).

Click on the "Continue" button to go to step 2.

- **Step 2: Additional Custom Field Details**

On this page you can specify additional details for your new custom field. Possible fields include:

- Required?: When filling out your subscription form, does this form have to be completed?

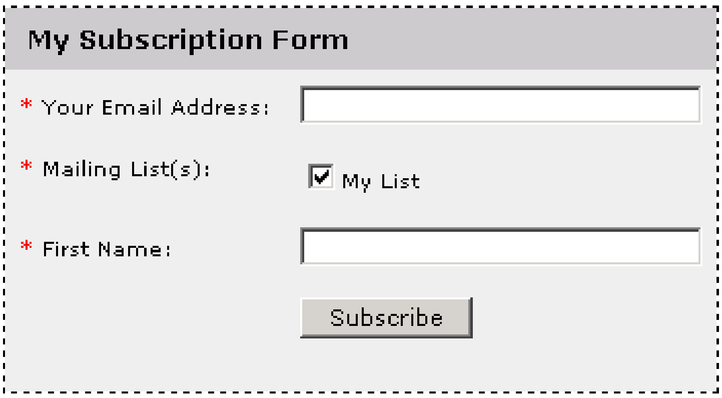
- Default Value: Should this field contain some text by default? If so, enter that text in this box.

- Size: How wide should this text box be? 30 is the default width of a text box on a web page.

- Minimum Length: Do you require a minimum number of characters for this field? If so, enter the minimum length here, such as "2".

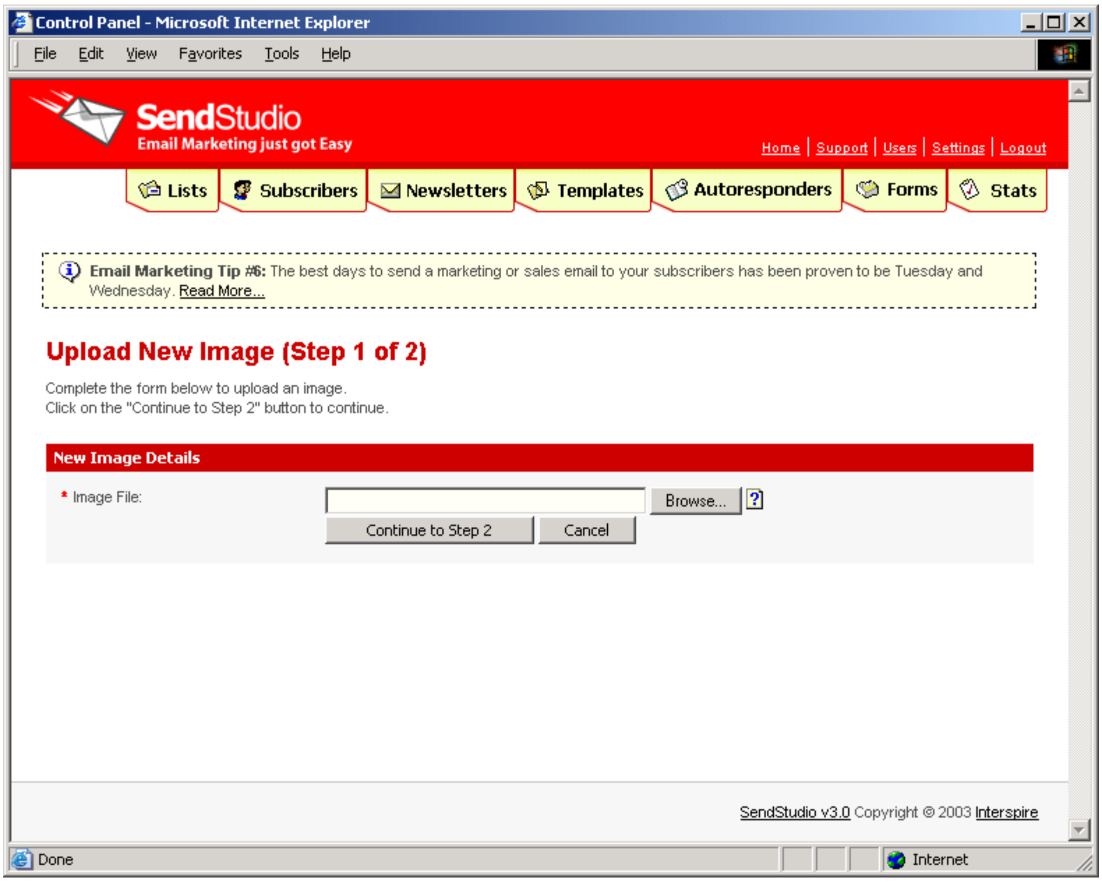
- Maximum Length: Should the text in this field not exceed a certain number of characters? If so, enter the maximum length here, such as "10".

Once you have completed the form, click on the "Save Field" button at the bottom of the page. Now, when you create a subscription form, your custom field will be displayed, and your visitors will be able to specify a value when they subscribe to your mailing list:



You will also be able to insert custom fields into the content of your newsletter, by clicking on the "Show HTML Field Merge Popup" or "Show Text Field Merge Popup" when creating a newsletter.

Image Manager



To add images into your newsletter, you have 2 options:

- When creating a HTML newsletter, click on the "Toggle Source Mode" button on the toolbar of the WYSIWYG editor and paste in the complete HTML for your newsletter.

- Use the SendStudio image manager to upload an image, and then insert that image into your content by clicking on the "Insert HTML Merge Field" popup when creating a newsletter.

We will now look at the second option -- how to use the SendStudio image manager to upload and then insert an image into your newsletter.

To upload an image, move your mouse over the "Newsletters" button on the menu at the top of the page and click on the "Image Manager" dropdown menu. Finally, click on the "Upload Image" button. There are 2 steps that need to be completed to upload an image. They are described below:

- **Step 1: Upload Image File**

  Firstly, choose an image file from your hard drive to upload. Valid image types include GIF's (.gif) and JPEG's (.jpg).

Click on the "Continue to Step 2" button to go to step 2.

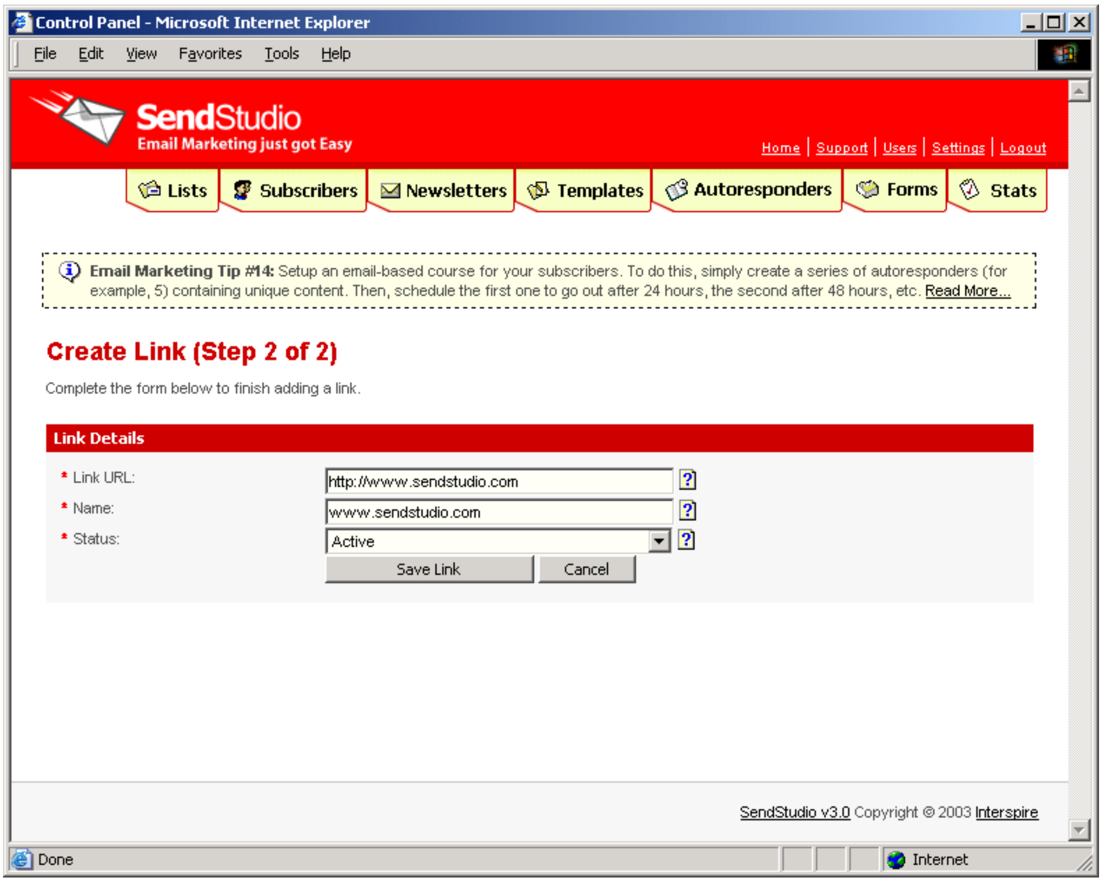
- ## Step 2: Image Name

  On this page you can enter a name for the image that you just uploaded. The image name will be used in the control panel for your reference only, and your subscribers will not see this name.

Once you have uploaded an image, you can include it in the content of your newsletter. To do this, create a newsletter as described under the "Creating a Newsletter" section. When you are editing the content for your newsletter, simply click on the "Insert HTML Merge Field" link and the custom field popup will appear.

You will see your image listed under the "Images" category. Simply click on the "Insert" link next to the image that you want to insert, and a placeholder, such as %IMAGE:4% will be inserted into your content. When your newsletter is sent, this placeholder will be replaced with the actual image that you uploaded.

Link Manager



To add links into your newsletter, you have 2 options:

- When creating a HTML newsletter, click on the "Insert Link" button on the toolbar of the WYSIWYG editor and enter the details for the link.

- Use the SendStudio link manager to create a new link, and then insert that link into your content by clicking on the "Insert HTML Merge Field" popup when creating a newsletter.

We will now look at the second option -- how to use the SendStudio link manager to create a new link and then insert that link into your newsletter.

To create a new link, move your mouse over the "Newsletters" button on the menu at the top of the page and click on the "Image Link" dropdown menu. Finally, click on the "Create Link" button. There are 2 steps that need to be completed tocreate a link. They are described below:

- ### Step 1: Link URL

  On this page, enter the URL to the link that you want to create, such as http://www.mysite.com/

Click on the "Continue to Step 2" button to go to step 2.

- **Step 2: Other Link Details**

  On this page you can enter a name for the link that you just create. The image name will be used in the control panel for your reference only, and your subscribers will not see this name.

  You can also choose the status of this link. If it's active, you will be able to add it to your content when creating a newsletter. If not, it wont be displayed in the link popup.

Once you have created a link, you can include it in the content of your newsletter. To do this, create a newsletter as described under the "Creating a Newsletter" section. When you are editing the content for your newsletter, simply click on the "Insert HTML Merge Field" link and the custom field popup will appear.

You will see your link listed under the "Link" category. Simply click on the "Insert" link next to the link that you want to insert, and a placeholder, such as %LINK:6% will be inserted into your content. When your newsletter is sent, this placeholder will be replaced with the actual link that you created.

Newsletter Templates

If you are planning to create a frequently published newsletter that will always have the same look and feel, then templates can be a great time saver. You can create both text and HTML-based templates, and then when you create a newsletter, you can choose a template to automatically populate your newsletter content with.

We will now look at how to create a newsletter template.

To create a newsletter template, move your mouse over the "Templates" button on the menu at the top of the page and click on the "Create Template" dropdown menu. There are 2 steps that need to be completed to create a newsletter template. They are described below:

- **Step 1: Template Name and Format**

  To start with, enter a name for this template. The template name will only be used in the control panel to help you identify this template. Next, choose a format for this template. You can create a text-only, HTML-only, or mixed (text and HTML) template.

  Click on the "Continue to Step 2" button to go to step 2.

- **Step 2: Template Content**

  Depending on the format that you have chosen for this template, you will see either 1 or 2 boxes to enter content in: a text box for the text version of the template, and/or a WYSIWYG box to enter content for the HTML template.

  If you have chosen to create a mixed (text and HTML) template, enter the HTML content first. Then, to extract only the text from the HTML content, click on the "Extract Text from HTML" link.

To actually use a template, create a newsletter and choose the template from the "Use Template" list. You can also double-click on any template in this list to preview it before using it.

Autoresponders

Autoresponders allow you to send a series of targeted emails to your subscribers over a certain period of time. For example, you could create and send 3 different autoresponders to each new subscriber: the first after 1 hour, the second after 3 hours, and the third after 24 hours. We will now see how to setup and create an autoresponder.

Step 1: Setting Up the Cron

SendStudio autoresponders require cron, which is a service on Linux that allows you to schedule when certain files will be run. To enable autoresponders for SendStudio, firstly you must create a new cron job. This cron job needs to point to the following file on your web server:

- users/send_autos.php

You will need to specify the full path to this PHP script in your cron file. To get the full path, login to your SendStudio control panel and click on the settings link. Copy the "root directory" field and append the path to the send_autos.php script above, so you get a full path, like this:

- /htdocs/www/sendstudio/users/send_autos.php

You should set your cron job to run every hour. If you are unfamiliar with how to setup a cron job on your server, please see the following links:

- http://www.phpfreaks.com/tutorials/28/0.php
- http://www.htmlcenter.com/tutorials/tutorials.cfm/155/PHP/
- http://schvin.net/writings/crontab.html
- http://www.4webhelp.net/tutorials/misc/cron.php
- http://www.sitepoint.com/article/1196

Step 2: Creating an Autoresponder

To create an autoresponder, move your mouse over the "Autoresponder" button on the menu at the top of the page and click on the "Create Autoresponder" dropdown menu. Choose a mailing list to create an autoresponder for, and click on the continue button. There are 2 steps that need to be completed to create a newsletter template. They are described below:

- **Step 1: Autoresponder Details**

  On this page, you can specify various options for your autoresponder. There are 4 mandatory, and 1 optional fields. They are described below:

  - Email Subject: The subject line that your subscribers will see when this autoresponder arrives in their inbox.

  - From Email: The email address that should appear in the "From" field where this autoresponder email is sent.

  - Email Format: How will this autoresponder be composed and sent? Select HTML if you want to include colored text, images, tables, etc. Choose text to create and send your autoresponder in plain-text. Alternatively, you can choose "Both HTML and Text" to create 2 versions of your autoresponder.

- Use Template: If you have created a template, you can choose to use it from this list.

- Send Time: How many hours after someone subscribes to your mailing list should this autoresponder be sent (in hours)?

- **Step 2: Autoresponder Content**

  Enter the text or HTML content for your autoresponder here. Click on the "Insert text/HTML merge field" link to insert custom fields in the content of your autoresponder.

Once you have setup your cron job and created your autoresponder, it will automatically be sent to any new subscribers after however many hours you specified when you created it. You can create as many different autoresponders as you like, for as many different lists as you like.

SendStudio Statistics

SendStudio includes the ability to view 3 different types of reports, relating to your mailing lists, subscribers and newsletters.

We will now look at how to view SendStudio statistics.

To view a report, click on the "Stats" button on the menu at the top of the page. There are 3 different types of reports that you can view. They are described below:

- **Report #1: Signup Time + Day**

  This report shows data relating to when subscribers joined your mailing list. The report is broken down into 2 separate sections: new signups by day, and new signups by hour.

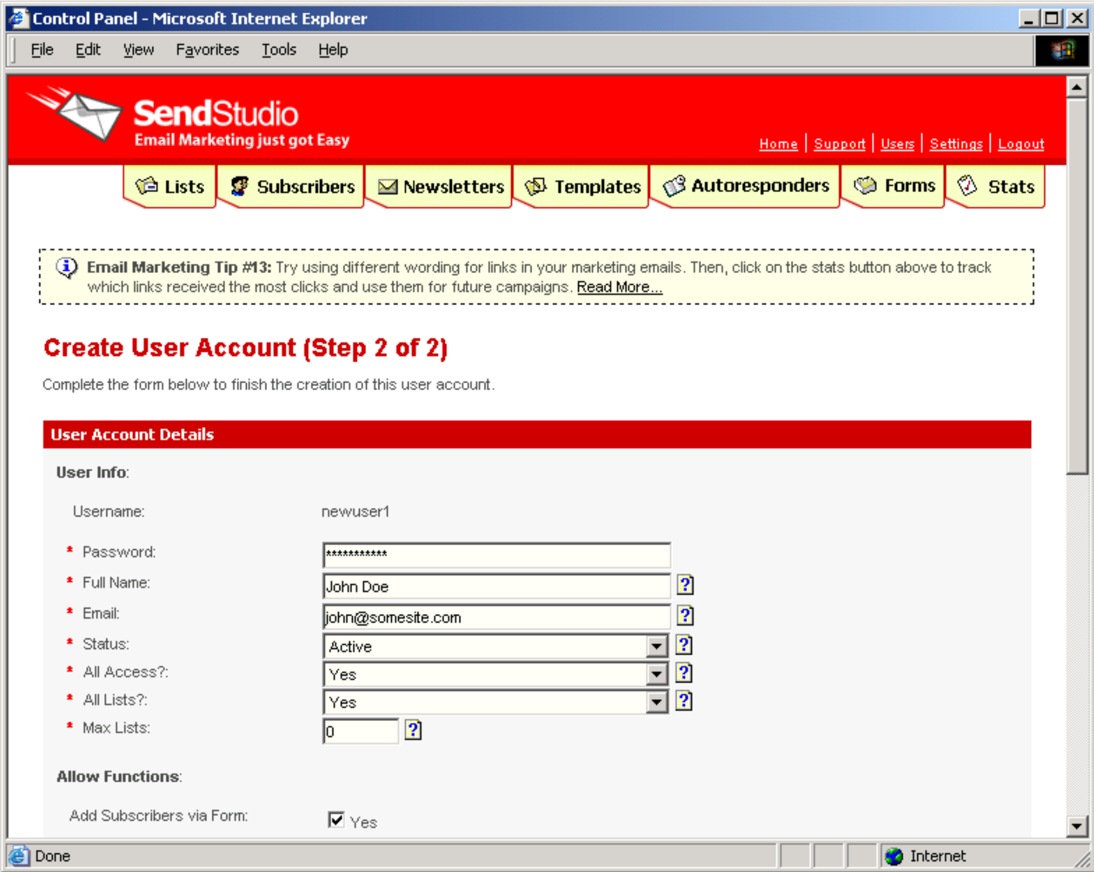
- **Report #2: Subscriber Details**

  This report can be used to filter subscribers based on certain fields, such as status, email address, which links they have clicked on in your newsletters, or any of the custom fields that you have created. When you have chosen the filters, you will see a numeric breakdown of subscribers that match the criteria that you specified.

- **Report #3: Send Statistics**

  This report will list the details of each newsletter that has been sent, as well as various statistics pertaining to that newsletter, including newsletter name, date sent, number of recipients, how many recipients opened the email (HTML format only) and the time taken to actually send the newsletter.

SendStudio Users



SendStudio includes the ability to create multiple users. The default single website license allows you to create up to 3 different users. Each user can be restricted in terms of access to both functionality and mailing lists.

We will now look at how to create a new SendStudio user.

To create a new user, click on the "Users" link on the menu at the top of the page. The "Manage Users" page will appear. Click on the "Create User Account" button. There are 2 steps that need to be completed to create a SendStudio user. They are described below:

- **Step 1: Username and Password**

  Enter both a username and password for the new user. Click on the "Continue to Step 2" button to continue.

- **Step 2: Additional Details and User Permissions**

  On this page, you can enter additional details for your new user, and also restrict which functions and mailing lists they have access to. There are 8 mandatory fields that you have to complete. They are described below:

  - Full Name: The full name of the user who will be using this account.
  - Email: The email address of the user who will be using this account.

- Status: Should this user account be set to active? If yes, this user will be able to login.
- All Access?: If yes, this user will have complete access to every part of the control panel, including all functions.
- All Lists?: If yes, this user will be able to perform tasks on every mailing list.
- Max Lists: How many lists can this user create? Enter "0" for unlimited.
- Allow Functions: Choose which functions this user will have access to from the list provided. If you don't want this user to access all functions, make sure that "All Access" is NOT ticked for this user.
- Allow Lists: Choose which lists this user will have access to from the list provided. If you don't want this user to access all lists, make sure that "All Lists" is NOT ticked for this user.

Once you have completed this form, click on the "Create User Account" button. This user will now be able to login to the SendStudio control panel, and will be restricted to the functions and lists (if applicable) that you have chosen.

Newsletter Archives

SendStudio contains a feature that allows you to automatically have all newsletters that are sent archived. To check if this setting is enabled, login to the SendStudio control panel and click on the "Settings" link. Make sure the "Auto Archive" checkbox is ticked and update your settings.

How Does Archiving Work?

The following steps show how archiving works from within SendStudio (assuming that it's enabled):

1. When you send a newsletter to your mailing list, SendStudio will create a folder in the sendstudio/archive folder, based on the name of the list that you are sending the newsletter to.

   For example, if your lists name is "ProductX Special Offers", then SendStudio will create a directory called sendstudio/archive/ProductX_Special_Offers.

2. Depending on the format of the newsletter you are sending, SendStudio will create either 1 (for text-only or HTML-only) or 2 (for mixed format) versions of the newsletter. HTML newsletters will be saved with a .HTML extension, and text newsletters will be saved with a .TXT extension. The name of the file is based on the name of the newsletter.

   For example, if your newsletters name is "ProductX Version 5 Notice" and it's in HTML format, then the file created will be "ProductX_Version_5_Notice.html". This file will then be archived into the sendstudio/archive/ProductX_Special_Offers folder, as discussed above.

3. After you send a couple of newsletters, it's a good idea to add a link from your site to your archives folder to 1) Encourage more visitors to become subscribers by seeing past issues of your newsletter, and 2) So that search engines spider your newsletter content, thus improving your search engine ranking.

   To link to your archive folder, place a link from your site to the sendstudio/archive folder, such as:

   See our newsletter archives

Bounced Email Handling

SendStudio also includes support for managing bounced emails. When an email "bounces", it means that it could not (either temporarily or permanently) be sent to the intended recipient successfully.

By using SendStudio's integrated bounce handler, you can track, manage and remove bounced email addresses from your mailing lists. To use SendStudio's bounce handler, follow these steps:

1. Create a mailing list

2. Create a newsletter

3. Send the newsletter to your mailing list. When entering the details to send your newsletter, in step 3 you will notice a field called "Return-Path Email". The return-path email is a special email address, in that when you send a newsletter and it can't be delivered to its intended recipient (i.e. it bounces), SendStudio will place this email in the inbox of the email address specified as the return-path email.

   The return-path email address should be accessible via POP3 (if you are unsure of this, contact your web host) and should be used EXCLUSIVELY for SendStudio bounce handling. You should NOT specify your personal email address or an email address that you use for any other purposes as the return-path email address.

4. Once you send your newsletter, click on the "Lists" tab at the top of the page. You will see a "Process Bounces" link next to the mailing list that you just sent your newsletter to. Click on this link.

   Complete the fields that appear in the form. Make sure you enter the same email address that you entered for the "Return-Path Email" in the previous step into the "Bounce Email Address" field.

   You should also specify the user and password to access this email account, and choose what activity should be taken when a bounced email is found: either mark that subscriber as inactive, or completely delete him/her from the subscriber list.

5. Once you have completed the "Process Bounced Emails" wizard, you will see a "Start Processing" button. Simply click on this button to launch the SendStudio bounce handler, and processing of bounced emails will display in a popup window. That's all there is to it!

Rebranding SendStudio

SendStudio is easily rebrandable, meaning that you can use your own logo, color schemes, etc. To rebrand the SendStudio control panel, follow these steps:

1. Open the sendstudio/admin/includes/templates.php file in your favorite PHP editor.

2. The OutputPageHeader() function outputs the top part of the template in the control panel, including the logo, the buttons, and the dropdowns. The top template isn't in a plain HTML file, as the buttons and menus are displayed dynamically, based on the permissions of the current user.

3. To change the logo, you can either upload your logo to sendstudio/admin/images/logo.gif, or you can edit the OutputPageHeader() function as described above.

4. To change the bottom part of the page in the SendStudio control panel, edit the OutputPageFooter() function.

5. To change the stylesheet used by the SendStudio control panel, edit the OutputStyleSheet() function.

Note: If you haven't enabled archiving, you can do so from the settings page in the SendStudio control panel.

The SendStudio archives are a great way to automatically have all newsletters that you send archived. You can then link to the sendstudio/archive folder from your website to show your visitors archives of your previous newsletters. The archives look like this:

To rebrand the SendStudio archives, follow these steps:

1. Open the sendstudio/archive/index.php and sendstudio/archive/index_list.php files in your favorite PHP editor.

2. The index.php file lists all of the folders in the archive directory. When you send a newsletter, a new folder is created in the archive folder in the format of sendstudio/archive/[list_name], such as sendstudio/archive/my_list. Then, each newsletter that you send to that list is archived as a static text/HTML file in this folder, and the index_list.php file is also copied into that folder. The index_list.php

file simply lists each file in the folder with an icon next to it.

3. To change the look of these files, edit the following variables contained within those files:

   - $topTemplateHTML: The HTML code that should be output before the file/folder listing
   - $bottomTemplateHTML: The HTML code that should be output after the file/folder listing
   - $font: The font name used when outputting the list of files/folders
   - $fontSize: The font size used when outputting the list of files/folders

4. To change the images used to display a folder, HTML page and text page, edit the images inside the sendstudio/archive/images.

Conclusion

Thank you for your purchase of SendStudio. We hope that it increases your profits and your relationships with your customers!

For the latest information regarding SendStudio, please visit our website:
http://www.sendstudio.com

For more information regarding this and other innovative web solutions, please visit our company website:
http://www.interspire.com