MailWorks v4.0 Setup Guide

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Introduction

The documentation shown below is included with each purchase of MailWorks Professional and acts as an informal guide to installing, upgrading and using the powerful MailWorks Professional suite. If this guide fails to answer your questions, then please fill out our support form, which you can do [here](#).

Both installing and using MailWorks Professional are extremely easy, and by simply browsing though this user guide you should be able to start using MailWorks professional immediately.

Web Server Requirements

- **Operating System:** Linux, Unix, BSD or Windows 2000 and above
- **Web Server:** Apache
- **Scripting:** PHP v4.1.0 or above
- **Database:** MySQL 3.23 or above
- **Mail Server:** You must have a mail server setup and configurated though your php.ini file
- **Browser:** Internet Explorer v.5.5 or above on a Windows PC. MailWorks Professional does not work on Mac OS.
- **JavaScript:** Must be enabled
- **Other:** Your PHP installation must support the set_time_limit() function and must also have magic quotes enabled. Both of these options are present in default installations so this should rarely cause problems.

If you are unsure of your Web Server specifications, please contact your host to ensure that your server will be able to run MailWorks Professional.

Uploading MailWorks To Your Server

MailWorks Professional is a set of PHP scripts that should be copied to your web server. This installation guide will explain exactly how to get your copy of MailWorks Professional up and running in just minutes.

If you are upgrading from a previous version of MailWorks Professional please refer to the upgrade section of this guide.

First off, extract the zip file that you downloaded from the SiteCubed web site. Make sure you preserve the directory structure, and that the files names are kept in the proper format. MailWorks Professional will not be able to run if the directory structure is not preserved.

In the zip file you should see one readme.txt file, two folders (mwadmin and mwsubscribe) which contain the program, as well as this setup guide.

Using your favourite FTP program, or via Internet explorer's FTP capabilities, log into your web server via FTP and move into the root directory, where all your web page files are stored on the web server. The path to your root directory may look something like /home/sites/mysite.com/html, or something similar.

Next, upload the two folders (mwadmin and mwsubscribe) and their entire contents into a directory of your choosing on your web server. MailWorks Professional does not need to be installed into the root directory.

The directory structure on your server should look something like this:

```
/home/sites/mysite.com/html
    /mwadmin
        /ew
        /images
        /includes
        /issues
        /newsletters
        /styles
        /templates
    /mwsubscribe
        /email_images
        /image
```

Once you have uploaded the two files and their contents on to your web server, you must CHMOD the following files and folders:

CHMOD **mwadmin/issues/** to **757**
CHMOD **mwadmin/newsletters/** to **757**
CHMOD **mwadmin/conf.php** to **757**

CHMOD stands for CHange MODe, which essentially changes the file permissions on a directory or folder, so that MailWorks Professional can write to certain files as required.

Most good FTP Clients will allow you to CHMOD files by using the following method:

- Right click on the folder or file and select properties
- In the properties window, there should be a number of check boxes and a small input field related to permissions.
- In the input field, change the 3 digit number to the require number, and save the changes.

This will allow MailWorks to operate as required, including such things as upload templates, as well as saving your configuration file.
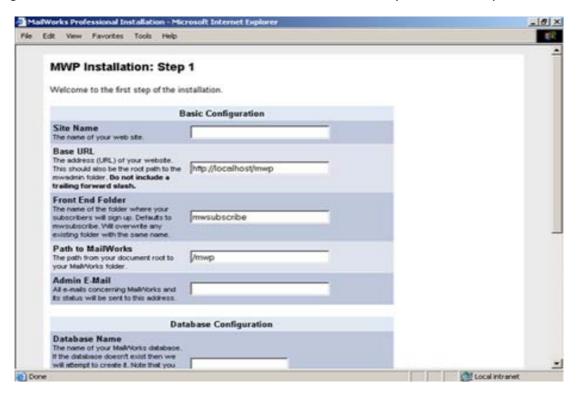
Once you have completed uploading the files (leave your FTP client open), open up Internet Explorer and go to http://www.yoursite.com/mwadmin, or wherever you uploaded MailWorks Professional to. Replace www.yousite.com with your own domain name. Once you have called that location into your browser, you will automatically be directed to the MailWorks Professional installation script, where you will be asked various questions to enter the data required to proceed with your installation.

Installing MailWorks Professional

In MailWorks Professional version 4.0 we have included a multi-part installation process, which will have you up and running within minutes.

Firstly, you will be presented with information regarding the installation and the requirements for MailWorks Professional. Once you have read though this notice, click 'Continue' to proceed to the next page.

The first page contains the following options which you must complete to continue. These gather information so that MailWorks Professional can successfully install itself to your server.

- **Site Name:** The name of your web site. This will appear on your subscription pages, which you can accesses from http://www.yoursite.com/mwsubscribe/

- **Base URL:** This is the URL to the root location of the uploaded folders. For example, if your mwadmin folder is at the following location:
  http://www.yoursite.com/mail/mwadmin/ then your base URL would be
  http://www.yoursite.com/mail. This should be automatically detected when you run the install script.

- **Front End Folder:** The name of the folder where your subscribers will sign up. The default for this is mwsubscribe, but this can be easily changed. Be warned that if the folder name you specify exists, then its content will be deleted and overwritten.

- **Path to MailWorks:** This is the path from your document root to your MailWorks Profesional folders. In the previous example, this would be /mail. If you install MailWorks Professional in the root directory, then this should be /

- **Admin Email:** Any status emails that are sent from MailWorks Professional will be sent to this address. These emails allow you to receive updates on MailWorks. They will also notify you of what other MailWorks users are doing.

- **Database Name:** The name of your MailWorks database. If the database does not exist then MailWorks will attempt to create it. Note that you must have CREATE DATABASE privileges for your MySQL to create the database.

- **Database Host:** The host name or I.P. address where your MySQL database is located. In most cases this will be 'localhost'.

- **Database Username:** Your MySQL database username.

- **Database Password:** Your MySQL database password.

- **Table Prefix:** MailWorks Professional allows you to prefix your database table names so that they will not conflict with any other database names. If you are unsure about this option, then leave it as 'mwp'.

Once you have filled out this form, click on the "Continue Installation" link to proceed.

MailWorks Professional will then start the installation process by validating the data you provided on the previous page. After this, it will check your read/write access to the configuration file, as well as your database details. This will ensure that your MailWorks installation can continue without failure.

If everything is successful then MailWorks will then attempt to create your database tables, as well as save your selected options to the configuration file.

If MailWorks Professional successfully passes though all of its operations, then you then will be able to continue onto the next page by clicking the 'Continue Installation' link.

Creating an Administrator Account
You will now need to create an administrator account by filling out the details presented before you. Please ensure that you choose a username and password that you will not forget, otherwise you will not be able to log into the MailWorks admin area.

Once you have completed the account details, proceed by clicking on the "Continue Installation" button. MailWorks will now create your user account and finalize the installation. Continue onto the next page where you will be greeted with a status page informing you of the successful installation.

You have now completed the installation of MailWorks Professional. Before you continue to login, you must delete the upgrade.php and install.php from your server. Once the files are removed from your server, browse to the mwadmin directory on your server, where you will be presented with the MailWorks admin login screen.

Once you have logged in for the first time, you will need to update your configuration options. Click on the "Update Configuration" link under the menu down the left side of the page. You can get more details of the configuration page by reading the "Update Configuration" section of this guide.

Upgrading

If you own MailWorks Professional version 2 or 3, then you will be glad to know that you will be able to upgrade to MailWorks Professional version 4 without having to complete a fresh install. Like the install program, MailWorks Professional uses a multi-page upgrade script to collect and process required data for the upgrade from your current version to version 4.

When you upgrade there are a few things you will need to change. Be sure to follow these directions carefully if you wish to complete a successful upgrade.

(This upgrade guide comes from the point that you have install MailWorks Professional before, and you have a basic understanding of file uploading via FTP)

Once you have unzipped the new version 4.0 files (preserving the file structure and file names) to your local computer, log into your server via ftp and move into the mwadmin directory. Once you have located this directory, download the conf.php file to your computer, in a SAFE location. You will need this file to continue the installation, as it contains your previous configuration of MailWorks.

Before you upload the MailWorks version 4.0 files, make sure you create a backup of your MailWorks database, using the MailWorks backup feature. If you are currently running version 2.0 of MailWorks Professional then please contact your web host to create a backup of your database for you.

Once you have backed up your database, upload the two folders (mwadmin and mwsubsribe) to the same directory where your older version was kept. You should overwrite the two old folders with the two new folders.

Once those files have successfully uploaded, upload the backup copy of conf.php into the mwadmin directory, overwriting the new version of the file. This is needed so the upgrade script can access your database and various other details.

When this is completed, call the upgrade script into your browser. The URL should look something like: http://www.mysite.com/mwadmin/upgrade.php

This will bring you to the welcome screen of MailWorks Professional. Once you have read the details, proceed to the next page by clicking "Continue".

Before the upgrade can begin, MailWorks needs to gather a few details, to successfully complete the installation.

Firstly, choose the previous version of MailWorks that you were using. If you are unsure then the easiest way to know is to check for the backup feature in MailWorks. If your previous version had a backup option, this means that it was version 3.0 of MailWorks. If it doesn't then you are running version 2.0 of MailWorks.

Note: You cannot upgrade from version 1.0 of MailWorks. You will need to complete a fresh install if you are running version 1.0 of MailWorks.

Secondly, you need to provide the path from your document root to your MailWorks folders. This should automatically be detected, however make sure it is the correct path. If the MailWorks Professional folders are installed in the root directory, use / as the path.

Last up are your MySQL details. These are shown from your previous installation of MailWorks. You cannot edit these, and they should not need to be changed. They are shown only to confirm the database details.

Version 4.0 of MailWorks also includes table prefixing. Once you have correctly filled out the form, proceed to the next page by clicking on "Continue Upgrade".

Like the install script, the upgrade script will then check your details, as well as your server's ability to read and write to files and access your MySQL database server, etc.

If everything is successful then continue to the next page, where MailWorks will start to upgrade itself to the next version. It will then add and update database tables, as well as prefix the table names. All of this will ensure that your MySQL database is compatible with MailWorks Professional version 4.0.

Once this is complete, continue to the next page where you should receive a confirmation that the upgrade is complete. Before you proceed to login to MailWorks Professional, please ensure that you delete the install.php and upgrade.php files from your server (located in the mwadmin folder).

When you first login to MailWorks Professional you may not see all of the recent additions until you update your user preferences. There are some new permissions that will need to be turned on so that you can access these new areas.

As well as updating your user details, it is strongly advised that you update your configuration details by clicking on the "Update Configuration" menu option.

Changes Made

If you upgraded from versions 2.0 or 3.0, then you will be glad to hear that MailWorks Professional has undergone many changes in version 4.0.

Some of the changes are as follows:

- A highly advanced WYSIWYG editor, which will allow you more control over your newsletters.
- The ability to select which database tables you want to backup.
- Export subscribers based on which newsletters they have subscribed to
- MailWorks Professional now tracks what emails were successfully sent and which ones failed. This allows you to try to resend to any subscribers that failed.
- MailWorks Professional now allows you to ban email addresses (complete and domain names) as well as IP addresses from signing up to your newsletters.
- Turn off the archive system on the subscriber pages.
- When a issue is sent, an email will be sent to the admin email account notifying the administrator of the status of the issue.
- Importing subscribers that already exist in the database will update their details
- Send a test of the issue before you send it to your subscribers.
- Import HTML files as issues, so you can create your issue in another editor, which will allow you to incorporate JavaScript into your newsletters.
- Import newsletter templates, which will allow you to set the default content when creating an issue based on that newsletter.
- Unsubscription links at the bottom of your issues, allowing your subscriber to unsubscribe or change their preferences at the click of a button.
- Set the number of days before a subscriber is deleted if they do not confirm their subscription.
- Limit the amount of emails sent per hour.
- Internal and external style sheets in HTML newsletters.
- The ability to rename the mwsubscribe folder.
- Able to resume sending the newsletter if the browser is closed, if the sever should encounter a problem, etc…
- Collect additional data from your subscribers with custom fields. Custom fields can also be used as personalization tags. You can also export custom data!
- Greater compatibility with mail servers. Several bugs removed with some mail servers.
- Backup is now in SQL format not PHP. Also has restore backup feature.
- Change of design in admin area.

To Make MailWorks Professional easier to manage and use, several options have been renamed to avoid confusion. The main differences are listed below:

- Newsletters have been renamed to issues (newsletter issues). Anything previously related to newsletters has also been renamed to issues. For example, "Send Issue" instead of "Send Newsletter".
- Templates have been renamed to newsletters.

We fell that these name changes will avoid confusion for first time users of our program, and also allow us to add such features as import issues and templates for newsletters, etc.

Using MailWorks Professional

MailWorks Professional is an extremely powerful program, which allows you to manage your subscribers, send newsletters, and gather information.

The following sections of this guide will attempt to inform you of how to use MailWorks the way it is indented and to its full capacity. By following this guide you will know all there is to know about MailWorks in less than 20 minutes.

If you should have any questions regarding MailWorks Professional, or if you have any suggestions for the next version, then please let us know by contacting us at support@mailworkspro.com

Configuration Options

MailWorks Professional has many different configuration options in an attempt to allow you to customize it to your own needs. Some of these options are quite advanced, and this section we will attempt to provide as much detail for each option.

It is STRONGLY advised that you update your configuration after you have installed/upgraded MailWorks. This will allow you to update many options that are not set up in the installation/upgrade.

Site Details
Site Details are important, as they provide the basic details for MailWorks to operate correctly.

- **Site Name**: This is the name of your web site. It will be used throughout the admin area of MailWorks as well as on the subscription pages.

- **Site URL**: The site URL should be the complete URL (including http://) to the location of the MailWorks folders. For Example, if mwadmin is located at:

  http://www.mysite.com/admin/mail/mwadmin

  … then your Site URL would be:

  http://www.mysite.com/admin/mail

  Do not include the slash on the end of the URL, as this may cause problems.

Subscription Folder: This is the name of the subscription folder where your subscribers will go to subscribe to your newsletters. You should also link to this folder from your main web site.

Document Root: This is the path from your root directory to where the MailWorks folders are. For Example, if mwadmin is located at:

http://www.mysite.com/admin/mail/mwadmin

… then your Site URL would be:

/admin/mail

Admin Email Address: This is the email address that will be used for email status updates, such as when an issue is sent to subscribers, etc.

MySQL Database Details
This is where the database details are stored so that MailWorks can successfully connect to your database and retrieve the required information. It is very important that you do not change these details, as they may render MailWorks inactive.

Database Server: This is the server name or IP address of your MySQL server. In many cases this will simply be "localhost".

Database Username: This is the username to connect to your MySQL database.

Database Password: If required, you will need to enter your password here.

Database Name: Your MailWorks Professional database name.

Miscellaneous

These are the various options that allow you to further customize MailWorks Professional.

Throttling: This allows MailWorks to limit the number of emails sent per hour. You may find that this is a requirement on some shared hosting servers. Check with your host if there is a limit to the number of emails that you can send per hour. To allow MailWorks to send as many emails as it can, simply set this option to 0.

Show Unsubscribe Links: If turned on this will automatically add unsubscribe and change preferences links to the bottom of your text and HTML emails, giving your subscribers a 1-click option to unsubscribe and change their details.

Removed Unconfirmed Emails: This option is great if you wish to delete your subscribers if they have not confirmed their subscription. If you do not wish to delete unconfirmed subscribers, set this to 0.

Delete Failing Emails: When you send newsletters to your subscribers, MailWorks tracks which emails are sent successfully, and which emails failed. You then have the option to resend to the failed list. On the second attempt at sending the emails, do you wish to delete the failed subscribers? This is a great way of removing erroneous email addresses.

Banning

If required, you can stop specific emails and IP addresses from signing up to your newsletter service. You can even stop certain domains from signing up, such as hotmail.com for example.

If you have an exception to a banning rule, for example, you have banned hotmail.com but you want to allow user@hotmail.com to sign up, then you will need to import that email address using the import feature.

Banning only works on new subscribers. It will not ban current subscribers nor will it affect the import function.

Banning: Do you wish to ban emails or IP addresses from signing up to your newsletter service?

Banned Email Addresses: With MailWorks Professional you can ban complete or partial email addresses from signing up to your service. To band a complete email address, enter the full email address. If you wish to ban a domain such as hotmail.com then enter the domain name, separating all entries with a space.

Banned IP's: You can ban users from subscribing based on the IP address that they are broadcasting from their computer. You can enter a complete address or a partial address. The IP scanner works from left to right, so if you enter 202, then it would block the address 202.1.1.45 but not 34.234.54.202 or 34.202.54.96. Make sure you place a space between each IP address.

Archives

Archives are a great way for new subscribers to see your newsletter issues before signing up, and allow current subscribers to view previous issues.

Show Archives: Do you wish to show your current and new subscribers your previously sent issues? Turning this off will no longer allow visitors to view the archive.

Backup

Backing up is a great way to ensure that you wont loose your data in a server crash. It is advised that you backup MailWorks regularly.

Backup Tables: MailWorks Professional allows you to backup more then just your MailWorks database tables. Select any additional tables (hold down CTRL to select more the one table) that you want to backup. When you complete a backup, any additional tables that you have selected will also be backed up.

Subscription Page Templates

Subscription templates allow your subscription area to look more like your main web site.

Templates: If you have a top and bottom template file and you would like to use them on the subscriber pages of MailWorks then turn this option on so that you can provide the paths to your templates.

Top Template: If you have a top template, provide the FULL URL to the file. The file must be located on a web server.

Bottom Template: If you have a bottom template, provide the FULL URL to the file. The file must be located on a web server.

Email Responses

Customize the email responses that your subscribers receive when they confirm their subscription and retrieve their password.

Retrieve Password Email: This is the email content that is sent when a subscriber requests a password. You can use personalization tags in the email, which are then displayed in the description. Make sure that you display the %%pass%% somewhere in the email, as this is the randomly generated password that they will need to login.

New Subscription Confirmation Email: This is the email content for when a new subscriber confirms the subscription. You can use personalization tags in the email, which are displayed in the description. It's important not to change the URL format that is displayed, as this is the URL that they will need to visit to confirm there subscription.

Policies

State your privacy policy and what you will and will not do with your subscriber's details.

Privacy Policy: Your privacy policy is vital when sending our newsletter, as it informs subscribers of what you intent to use there details for. You can use this privacy policy to reassure people that they will not be subscribed to a spam service, etc.

Note: Sending spam from MailWorks Professional is in direct violation of our license agreement, and you may be reported to your web host if you send Spam email.

Backing Up Your Database

Backing up your database is very important, and should be done on a regular basis. When you create a backup, MailWorks Professional generates SQL for your selected tables (see configuration options on page 13).

This SQL is in a special format that contains all of your data. The file (usually backup.sql) should be stored in a safe place, and if necessary should be backed up onto CD or disk.

Backing up creates a snapshot of the current data in your MailWorks database, which is great if anything should happen to your database.

To create a backup, click the backup option from the menu on the left. A dialog box will be displayed giving you instructions on what to do. Once you have read this, click 'OK'. A save dialog box will be displayed. Save this file to your computer in a safe place. You have now created a backup. If you open the backup file in notepad then you will see the details of your database, as well as the time the backup was generated.

Also there is a copy of your backup stored on your server. Its located in the mwadmin directory, named 'backup.sql'.

If anything should happen to your data then you can easily restore it.

Note: Its important to ensure that your backed up database structure is the same as your current MailWorks database. For example, at the time of your backup if you had two custom fields called first and last name then you should make sure that they and they only exist in your backup file.

Restoring Your Backup
To restore your backup, click the restore backup link in the left menu. You will be given a chance to select the backup file from your computer. Once you have selected the correct file, click 'Continue'. MailWorks Professional will then upload the file, read its contents, and restore the data, overwriting any existing data in your database.

Note: In MailWorks Professional version 3.0, MailWorks created a php file as a backup. You can still use this backup by placing the file on your server and calling it in your browser. Note that this backup will only work with version 3.0 of MailWorks Professional, and not version 4.0.

Creating Your First Newsletter

Creating your first newsletter is the first step to sending out your newsletter issues. A newsletter contains rules and options that each issue with use and follow. The newsletter is not actually the email itself.

Newsletters are actually what subscribers will see. They subscribe to your newsletter, and they receive issues of that newsletter when you send it.

MailWorks gives you the option to create, edit and delete newsletters, as well as import newsletter templates. In this guide we are going to show you how to create, delete and use newsletter templates.

To create a newsletter, click "Create New" under the Newsletter menu on the left, or click "View Newsletters", then "Add Newsletter" from the newsletters main page.

Once you come to the create newsletter page, you will be presented with a form that you are required to fill out. We will go though each of these options one by one.

Newsletter Name: The name for your newsletter. This is the name that subscribers will see when they join up. It's best to use a name that describes the newsletter, so that subscribers will know what the newsletter is about.

Description: This is the description that the subscribers will see. It's best to explain what the newsletter is about, what information they will receive when they subscribe, etc.

Newsletter Topic: The newsletter topic allows you to create multiple newsletters categories. For example, you may have 5 newsletters related to computer hardware, 4 newsletters related to computer software, etc. In this case computer hardware and computer software would be the topics.

If you don't have any topics created, then you can create a new one by clicking in the field '[Enter New Topic Here]'.

From Address: Which email address should be shown in the "from" field when you send your related issues?

Reply Address: Which email address should be shown in the reply to field when you send your related issues?

Newsletter Template: This provides a list of your current templates. Templates allow you to specify a default layout when you create a new issue.

Sending Frequency: This allows you to notify your subscribers of the frequency that your newsletter will be sent. This does not actually control the sending of the issues, it just informs the subscribers when they are sent. If you do not have a frequency, select 'No Sending Schedule'.

Format: Do you want your issues to be in text or HTML format?

Tracking: This option will only be shown if you have selected HTML as the format for your newsletter. Tracking will allow you to see the total number of subscribers who have opened a sent newsletter issue. You can view this in the stats page after you have sent out a related issue.

Visibility: You can make your newsletter private, which will stop subscribers seeing thenNewsletter on the subscription pages. This also affects the newsletter archive.

Once all these options have been filled out, click on the "Add Newsletter" button. If all of your options are filled out correctly then you will have successfully created your first newsletter.

If you want to delete a template, click the checkbox next to the corresponding newsletter and "Delete Selected". Deleting the selected newsletter also deletes any related issues, and any other information related to the selected newsletters.

Templates are a new feature in MailWorks Professional version 4.0. Newsletter templates allow you to specify a HTML file as the default content when you create a related issue. The advantage of using templates is that all your related issues will share the same design and other components that you have added into your template.

To use templates in your newsletters, click on the "Manage Templates" link in the left menu. Here you will be presented with a upload form, where you can select a HTML file (.htm or .html) as a template. Once you have uploaded the template, it will be listed in the "Manage Templates" area, where you can view and delete the template.

Note: Caution should be taken when deleting templates, as if they are in use, they will no longer be available for the selected newsletters.

When you are creating or editing a newsletter, untick the "No Template" option under the newsletter template heading, and select your template file to use a template. When you create a new issue based on this newsletter, it will use the selected template file as the default content for that issue, instead of a blank page.

Creating An Issue

Once you have created your newsletter, the next logical step is to create an issue. Creating an issue (also referred to as newsletter issue) is simple. Issues are based on newsletters and each newsletter can have multiple issues.

Each issue contains the data that will actually be sent to your subscribers, which includes the subject line and the content (text or html). You can also use imported files as issues, which saves you the hassle of creating an issue through your web browser.

MailWorks Professional gives you the option to create, edit and delete issues, as well as create, edit and delete issues based on a HTML template. Creating an issue is very easy, and only takes a few minutes to do. Firstly, click "Create New" under issues on the left menu.

Before you start filling out the form, scroll down to **Newsletter Template**. Select the newsletter you wish to base your issue on. This issue will use the rules that you have setup for the newsletter template. Also, selecting the **Newsletter Template** will then display either a WYSIWYG editor (if the newsletter is html format) or a text box (if the newsletter is in text format).

If the newsletter that you choose has a selected HTML template, then that content will be loaded into the **Issue Content** window.

It's now time to fill out the **Issue Name** and **Subject Line**. The subject line is what the user will see when they open up their mail program's inbox, so its important to choose a good subject line to grab the readers attention.

If your selected template is in HTML format then you will also be given a chance to choose a style sheet. You can either choose External, Internal or None. If you choose internal, you must provide the CSS code for your newsletter. If you choose external, then you must provide the full URL to the style sheet.

Note: Because of Internet Explorer 6.0, there are some security restrictions which will stop the style sheets working if the external style sheet is not located on the same server as your copy of MailWorks. To ensure you do not encounter this problem, always place your style sheet on the same server as where you are creating your newsletters.

It's now time to start creating your newsletter. If you're creating a HTML issue and you have provided an internal or external style sheet, then click on the "Refresh Style List" before you begin. This will populate the drop down style list on the WYSIWYG editor.

One very big feature of MailWorks Professional is the ability to use personalization tags in your issue content and subject fields. This allows you to use special tags to place the users email address and other personal data back into the issue, making each newsletter that you send unique. To use personalization tags in your content or subject line, all you have to do is find the personalization tag link at the top of the page and paste that into your content.

An example of a personalization tag looks like this:

%%email%%

You can also use data from custom fields as personalization tags. Once you have added all the content for your issue, save your newsletter issue by clicking on the "Add Issue" button.

You have now created your very first issue. The issue will be listed in the "View Issues" section of MailWorks.

When you look at the list, you will notice that the issue you have just created has the status of "pending". This means that your issue has not been sent.

You can also delete any issue by clicking the checkbox next to the corresponding issue and then clicking on "Delete Selected" button at the bottom of the list.

Importing Issues
MailWorks also has the ability to import issues. This means that instead of creating the issue content from scratch, you can import an already created issue and use that instead.

To import an issue, firstly click on the "Imported Issues" menu option. There will be a file upload area, where you can select a HTML file from your computers hard drive. Select a valid HTML file and upload it, making sure that the file name does not conflict with any previously uploaded issues, as this will overwrite the already existing issue.

Once you have uploaded the HTML file successfully, you will automatically be brought back to the imported issues page, where your recently uploaded file will be listed, with the option to create an issue on the far right. Click this link to create your issue.

Imported issues are basically the same as normal issues, except that you do not have to provide any content or style sheets, as these are already part of the HTML file.

Fill out the form and select your newsletter. Notice that only HTML newsletters are shown, as only HTML files can only be uploaded. You also have the option to view a full page preview of the imported issue, simply by clicking on the full page link.

Once you have completed the form, click on the "Add Issue" button to add the new details to the database. You can also delete the imported issue files, however this will also delete the related issue data as well, so be careful.

Once you have added your issues, you also have the option to edit them if should need to make changes. The status column will let you know if the issue is pending or has been sent.

Building A Subscriber List

Before you can send out your created issues, you must have subscribers to send them to. There are two ways that you can do this:

1. Invite people to sign up via your MailWorks subscription page

   or …

2. Import subscribers via the import feature.

Both of these options are easy to setup and take little time at all.

Inviting Signups
Inviting people to sign up is quite easy. It can be as easy as placing a link to the subscriber folder (mwsubscribe) on your web page. This will allow more people to gain access to the subscription pages. This is the ultimate way for any site to grow its newsletter subscriber base.

You can also encourage people to sign up by placing an email form on your web site. When a subscriber fills out this form and submits their email address, it is automatically entered into the subscription form of the MailWorks Professional signup page.

You can use the following example code to create this feature on your web site:

```
<form method="get" action="http://www.mysite.com/mwsubscribe/">
<input type="hidden" name="what" value="subscribe">
<input type="text" name="email" value="">
<input type="submit" value="subscribe">
</form>
```

This is a really basic example of how you can add a form to your web site that will encourage people to join your subscriber list.

Allowing users to sign up is also a great way of collecting personal information which you can define using custom fields in the MailWorks admin area. These will be discussed later, and they allow you to collect information such as names address, phone number, etc of your subscribers.

Importing Subscribers
Another way to build your subscriber list is to import subscribers using the MailWorks import function. If you have a previous list of subscribers or wish to import emails and other details from another application, you can easily do so with MailWorks Professional.

MailWorks Professional has a very advanced import feature, which will filter out bad email addresses, not import duplicate email addresses, and update any previous subscribers details if needed.

To import your subscriber list into MailWorks Professional, firstly click "Import" under the subscriber's menu. Once you have done that you will be presented with a form that you will need to complete with the relevant details.

Step 1 requires you to provide your list. Your list can be pasted directly into the text box, or if you already have your subscriber list in a text file, then you can choose that file from your hard drive and MailWorks will upload it and process it the same way as the data that you paste into the text box. If you have custom fields (discussed in the next chapter), then you can also import those details along with your users email addresses.

To import additional custom field data, you must import your data in the following format:

Email,custom_field1,custom_field2,custom_field3

If you only have data for custom_field3 for example, then you would import data like this:

Email,,,custom_field3

We will touch on custom fields in more detail later.

Note: It's important to make sure that there are no spaces between the data, and that each field is separated by a comma.

Next up, you will need to select your subscriber delimiter (the character that separates one subscribers details from the next). If you're importing extra custom field data then you MUST select the new line, otherwise, select the delimiter based on the way your subscribers data is setup.

Lastly, you will need to select which newsletters you want these new subscribers to be subscribed to. Once you have completed the form, click on the "Import Subscribers" button and you should be presented with a confirmation page, giving you the status of what happened during the import.

You will be told how many users were successfully created, how many failed, or had bad email addresses, and also how many existing subscribers were imported, as well as if their details were updated.

These are the two main ways that you can build your subscriber list. You should look at other ways to advertise the fact that you have a newsletter, as it is a great way to notify your subscribers of changes to your site, inform them of new products, etc.

Custom Fields In MailWorks

Custom fields are a very new addition to MailWorks. Custom fields allow you to collect extra information from your subscribers, which is not normally collected by MailWorks Professional. This data could be anything from the subscribers first and last names, to what coloured socks they like to wear. The options are endless, and it's a great way to build a demographic snapshot of your subscribers.

When you create a custom field it will be displayed on the subscription pages, where a user can enter their response for this custom field, such as age, sex, etc. Custom fields can also be included in each newsletter issue that you send out, they can be exported, etc.

On a fresh install of MailWorks Professional there should already be two custom fields called first name and last name. These are just examples of what you can do with custom fields.

Each custom field has a set of rules which define how the data will be formatted, how much data can be stored in that field, and various other options.

To view the list of current custom fields, click on the "Custom Fields" link under the subscribers menu. Here you will see a list of all of the active custom fields.

Creating a custom field is a very simple process. Firstly, open up the custom field form by clicking on the "Add Custom Field" button in the custom fields area. This will display the form to collect the custom field data. Each of the fields displayed will have a different effect on how the custom field works.

The fields are as follows.

Field Title: This is the title that will be displayed to your subscribers for this custom field. You can also use a question for your title, such as "What Color Socks Do You Wear?".

Description: This is the description that will be presented to your subscribers. You can also use this field to explain what type of data the user must enter if it is required.

Field Name: This is the actual field name that is created in the database. This name must be unique as you cannot have two names that are the same.

Required Field: This applies to the subscription pages. If the field is required then MailWorks Professional will ensure that this field is completed when the subscriber submits their subscription details from the signup page.

Personalization Tag: If required, you can use the data collected by this field in your issues through personalization tags. For example, if your custom fields name is "age", then you can include something like

Your age is %%age%%

… and MailWorks will replace %%age%% with the age that the subscriber entered when they signed up.

Field Type: This is the type of field that you wish to be displayed. You have 4 options: text box (single line), text box (multi-line), yes/no, or a drop down list. Choose the type that relates most to the data that you wish to collect.

Selectable Options: If you select a dropdown list for your field type, then you must enter the options for the dropdown list in this field. Separate each option with a comma, for example: **Red,Blue,Pink,Orange,Purple,Black**

Maximum Length: If you choose a text box as your field type, then you will need to specify the maximum length of text that the user can enter as a value for this custom field when they are subscribing to your newsletter.

Once you have completed all of the fields, click on the "Add Custom Field" button at the bottom of the page. This will then save your custom field to the database and update the subscriber database table, so that it can accept the custom data.

Now that you have your custom fields setup, visit your subscription page (http://www.yoursite.com/mwsubscribe/) and click subscribe. You will notice that the custom field is now displayed in the subscription form, allowing your visitors to enter a value for each field.

You can also change the order of the custom fields. This will allow you to put your more important fields at the top of the page. To change the order of your custom fields, go to the custom fields page in the MailWorks admin area and click on the "Change Order" button. You will then be presented with the list of your custom fields in their current order.

To change the order of the fields, select a field and click on the up or down button to change the order of the selected field. Once you are happy with the order, click on the "Update Order" button to update the order of your custom fields.

Exporting Subscribers

Exporting subscribers allows you to create a list (in a predefined format) of your current subscribers from a newsletter that your subscribers have joined.

You can export subscribers email address, status, dated joined, as well as any custom fields that you have created. There are various options when exporting your subscriber list, and we will do our best to inform you of each option below.

To export your subscriber list, click on the "Export" link under the subscribers menu on the left. You will now be presented with various options for your export:

Export Format: This is the of the export file that will be created. Once you click on a format, a preview will be shown on the row below.

Preview Of Output: Once you have selected your desired export format then this area will show a preview of how a single row of data will look in the export file.

Fields: You have the option to select which fields you would like to export. All fields are selected by default.

Search: Search will allow you to export email addresses based on a specific search term. For example if you only want to export email addresses from hotmail.com you would enter "hotmail.com" in the search box.

Limit: The limit field allows you to set limit the number of subscribers in the export. By default this option is set to export all users. You can even choose a starting point for the export.

Export Group: If required, you can export subscribers that are only subscribed to a specific newsletter.

Once you have chosen all of your export options, complete the export request by clicking "Export Subscribers" at the bottom of the page. Once you have done that, you will immediately be presented with a download dialogue box, which will contain your subscriber information. Save this file to your computers hard drive.

You can then open the data in a related program, such as Notepage or Excel and view the exported subscriber information.

Topics

You can use topics to sort your newsletter. For example, if you have 5 newsletters related to computer hardware and 5 newsletters related to computer software, then you would create two topics: one for hardware and one for software.

To create a topic, simply click on the "Create New" link under the topics menu. Provide a title and submit the form. That's all there is to it!

Sending Newsletter Issues

After you have created your topics, newsletters, issues, and your subscriber lists, you will be able to send out your first issue. Sending out your issues may take a while, depending on your server speed, as well as the number of subscribers you have.

To begin sending your issue, click the "Send Issue" link under the left menu. You should see a small form with a drop down list called "Issue To Send". This list contains all of the newsletter issues that you have created.

Start by selecting the issue you would like to send. When you have done that, the page will automatically reload itself, displaying the issue information, such as Subject Line, From & Reply-To email addresses, and the total number of subscribers for that issue. If you need to change these details then click on the edit button next to the corresponding field.

At the bottom of the page you have the option to choose who the newsletter issue is sent to. To start off with, it's a good idea to make sure that the newsletter issue will look OK, so select test newsletter and then click "Send Newsletter".

On the next page, MailWorks will then tell you the status of the sent issue. Because you have chosen the test option, the newsletter will be sent to the admin email address that you setup in the "Update Configuration" page. Click on the return link and check your email account for the test email. Check the content for errors, etc and ensure that your issue is formatted correctly before sending it out to your subscribers.

When you're ready, change the "Send To" option to all subscribers, and click on the "Send Newsletter". On the following page, you should see the newsletters being sent out in real time, with a status of the email. If the newsletter was sent successfully then a green tick will appear next to the subscribers email address. If not, a red tick will appear. Depending on your server and the amount of subscribers, this may take a couple of minutes, or a couple of hours.

It's important to ensure that the browser isn't closed during the sending session. If, during the sending, the list should stop sending for more than 5 minutes, then please click on the resume link. This may happen if the server struggles to send out a particular email.

Once the entire list has been sent out, you will automatically be greeted with a confirmation of the status of the sending, notifying you of the number of successful and failed emails, and also the time it took to send out the issue. An email will also sent to the admin's email that contains these details.

Once a newsletter issue is sent, you can resend it for any reason. If you return to the send issue page and select the previous issue, you notice that the "Send To" option will change, because you have already sent the issue.

If required, you can send that particular issue to all subscribers again, to any emails that failed, or if for any reason your previous attempt at sending the issue stoped, you can continue sending from where it stopped sending.

If you have newsletter tracking turned on, then you can also view the results of the tracking on the stats page.

Adding and Modifying User Accounts

It's extremely easy to add and modify admin user accounts with MailWorks Professional. Users can be assigned permissions and can only work on certain parts of the MailWorks administration area.

For Example, you can create an account for John and only assign him permissions to create and edit newsletters. You can then create an account for Kim and setup her account so that she can only create newsletters and export subscribers.

MailWorks Professional gives you this option, so that you can have better control over what your users can access. To manage your users, click on the "view users" menu, under the users menu on the left. You will see a list of users who are currently setup to login to your copy of MailWorks Professional.

When you first install MailWorks, you will create an admin account so that you can login. You will notice that your MailWorks administrator account has the checkbox greyed out so that you cannot delete it.

When you create a new user you will be required to enter the users email address, as well as their username, password and their first and last names. This information will be used when the user completes certain operations that affect MailWorks Professional.

You also have the option of setting permissions for this new user. Checking a certain permission will allow the user to complete that task. If a user does not have permission to activate a certain function, then they will be told so when they try to perform that function.

Lastly, you can also modify a users details by clicking on the users name when you view the user list. You may also delete any unwanted users by selected the corresponding checkbox next to there name and then clicking on the "Delete Users" button at the bottom of the list.

Viewing Statistics

MailWorks Professional tracks and displays powerful statistics that show you everything from new subscribers that your list received today to tracking HTML emails to how many subscribers came from .COM host names, etc. Click on the "Stats" link on the menu to the left to view the statistics page.

This page is extremely handy to view on a daily or weekly basis to see how your newsletter subscriber list is coming along. It's a good idea to print these stats every week to track how your subscriber list grows over time.

Conclusion

This setup guide has shown you how to use MailWorks Professional to maintain a subscriber list and send newsletters directly from your web browser. If you have any questions, then don't hesitate to visit our support page by clicking here. We are always happy and willing to answer any support questions that you may have via online chat or email.

If you have any suggestions for MailWorks Professional please do not hesitate to send them to us at suggestions@mailworkspro.com.