Recite CMS Control Panel Add-On User Guide: Mailing Lists

Recite CMS Package: mailinglists-2.1.3

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Table of Contents

List of Figures

Chapter 1. Introduction

Recite CMS allows you to send bulk e-mails to users using the mailing lists functionality. This works by using one of the following methods.

- Using built-in driver. Using this driver allows you to create, test and send e-mail campaigns all within Recite CMS. This option is recommended for a small number of users only (perhaps up to about 500 users).

  Campaign Monitor driver. This option lets you easily synchronise users in Recite CMS with `Campaign Monitor [http://www.campaignmonitor.com]`. This solution is recommended for a larger number of users.

Note

Developers can develop custom mailing list handlers. The mailing lists package comes with support for Campaign Monitor, but you can develop support for other providers/solutions.

This guide will show you how to manage mailing lists in Recite CMS. Knowledge of user management in Recite CMS is assumed. Refer to the Recite CMS Control Panel User Guide for more details. This document is available from the `Recite CMS Documentation Portal [http://docs.recite.com.au]`.

Chapter 2. Getting Started

There are two different Control Panel widgets available to help you manage mailing lists. These are as follows:

- **Mailing Lists**. This widget lists all mailing lists. Clicking on a mailing list will open its details in the **Mailing List Viewer** widget.

- **Mailing List Viewer**. This widget is used to view and manage a single mailing list. This widget can be opened by clicking on a mailing list in the **Mailing Lists** widget.

- **Campaign Viewer**. This widget is used to view and manage a single e-mail campaign. It can be opened by clicking on a campaign when viewing a mailing list's list of campaigns. *Campaign Monitor campaigns cannot currently be managed using Recite CMS.*

You can add the mailing lists widget manually from the `User Management` category.

Chapter 3. Creating a Mailing List

To create a new mailing list in Recite CMS, you must first have a user directory created. The users that are in this user directory (or users that will be created in future) are the only users that can be in the mailing list.

Note

This user directory must have at least one e-mail address field. If there is no e-mail field, then having users in a mailing list is of no use.

To create a new mailing list, click the **New Mailing List** button in the **Mailing Lists** widget.

First you must select if you want to the Recite CMS driver or the Campaign Monitor driver. Next, select the user directory to use for the mailing list and any of the other options. When creating a new Campaign Monitor mailing list you will need to specify your Campaign Monitor API Key and the ID for the Campaign Monitor client. These are both available from your Campaign Monitor account.

Once you have enter these values, click the **Create Mailing List** button. They keys will now be verified, and if successful, your new mailing list will be created.

Note

If you are using Campaign Monitor a new mailing list has now been created in your Campaign Monitor account.

The new mailing list will now appear in the **Mailing Lists** widget. If you click the mailing list from this widget, the mailing list viewer widget will be opened.

Figure 3.1. Managing mailing lists in the Control Panel
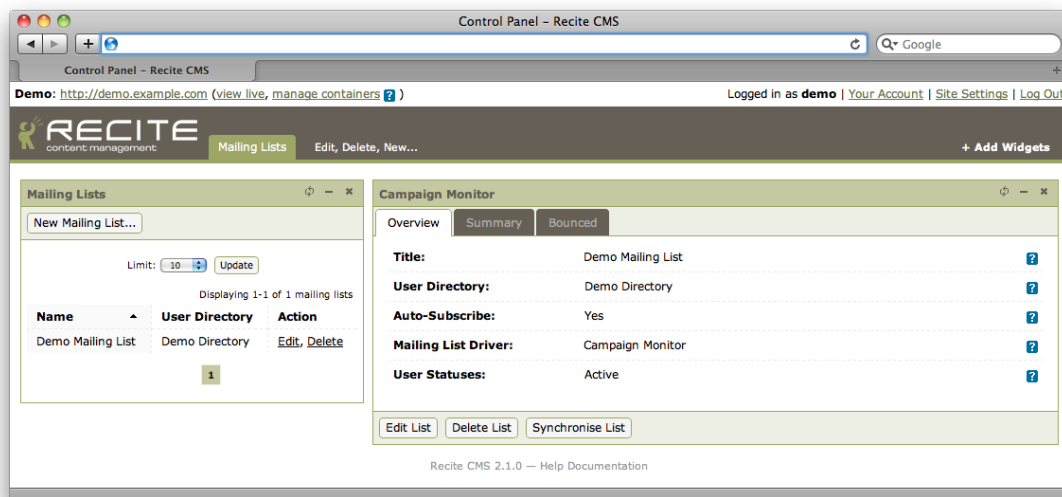
Chapter 4. Editing a Mailing List

To edit a mailing list, click either **Edit** link besides the mailing list in the **Mailing Lists** widget, or click the **Edit List** button when viewing the mailing list.

You will then be prompted to make your changes. Click **Save Mailing Lists Changes** to save your changes. The mailing list will automatically synchronise after you have made any changes (there may be a delay in this occurring).

Note

If you are using Campaign Monitor, you cannot change your API key or Client ID settings once they are set. If you need to, you must delete this mailing list then creating a new mailing list.

Chapter 5. Deleting a Mailing List

To delete a mailing list from Recite CMS, click the **Delete List** when viewing the mailing list. You will be prompted to confirm this action. Click **Yes, delete the mailing list** to confirm deletion. This action cannot be undone.

Note

Deleting a mailing list from Recite CMS will not delete it from Campaign Monitor.

Chapter 6. Synchronising a Campaign Monitor Mailing List

If you believe the data in Campaign Monitor doesn't match our local directory data, you can force the list to synchronise with Campaign Monitor by clicking the **Synchronise List** button when viewing the mailing list.

Caution

This can be a slow process if your user directory is large.

Chapter 7. Managing Campaigns

If you are using the built-in mailing list manager you can manage and send e-mail campaigns. To do so, click the **Campaigns** tab when viewing the mailing list. You will now be shown a list of existing campaigns (if any).

Creating a Campaign

Before you can create a campaign you must create a new e-mail template using the template management tools. This template forms the body of the e-mail campaign. It can contain a series of placeholders to include each user's details.

The type of template to create is **Mailing List Campaign Template**. In addition to the user fields, you can include an unsubscribe link so the user can opt-out of any future e-mails.

To create a new campaign, click the **New Campaign** button when viewing the list of campaigns. Select the campaign template, and if required, select any additional files to attach to the sent e-mail.

Click the **Create Campaign** button to create the campaign. It will be created in draft mode. This allows you to test and make any changes before it is sent.

Once saved it will appear in the list of campaigns for the mailing list. Click on the campaign to show its details in the **Campaign Viewer** widget.

Testing a Campaign

Once you've created a campaign, you can test it out before you send it to everybody in the corresponding mailing list. To do so, click the **Test Campaign** button.

You will then be prompted to enter an e-mail address. This is where the test e-mail will be sent. In order to simulate a real e-mail, the details of a random user are included in the test e-mail.

Note

You can only test a campaign while it is in draft mode.

Sending a Campaign

Once you have completed your testing and are ready to send the campaign, click the **Send Campaign** button. You will be prompted to confirm this action.

Cancelling a Campaign Mailout

Once a campaign send has been initiated it is possible to cancel the mailout. Although users already processed will receive the e-mail, anybody remaining will not receive the e-mail.

To cancel the mailout, click the **Cancel Campaign** button while it is sending (or about to be sent).

You can view the **Report** tab to see how many people it actually went to.

Deleting a Campaign

You can delete a campaign either before it is sent, or once sending is complete (you cannot delete it while it is being sent - you must cancel it first).

To delete a campaign, click the **Delete Campaign** button. You will be prompted to confirm this action.

Viewing a Campaign Report

Once a campaign has been sent (or partially sent), you can view a report about the mailout. This shows you a list of users to which the e-mail was sent.

Click the **Report** tab when viewing the campaign to access this information.