Bitrix Site Manager 4.0

Quick Start Guide
to Newsletters and Subscriptions

Contents

PREFACE **3**

CONFIGURING THE MODULE **4**

SETTING UP FOR MANUAL SENDING E-MAIL MESSAGES **6**

Creating a newsletter 6
Providing subscription facilities 8
Subscription Form *8*
Newsletter subscription page *10*
Creating a subscription editing page *12*
Managing subscribers 15
Automatic enrolling *15*
Manual enrolling *16*
Importing subscribers addresses *18*
Managing newsletter issues (e-mail messages) 20
Creating an issue *20*
Sending issues *24*

MANAGING AUTOMATED NEWSLETTERS **25**

Creating an automated newsletter 25
Testing the automated newsletter template 28
Editing a newsletter template 30
Subscribing to automated newsletters 32

© Bitrix, 2005

Preface

The high functionality of the **Newsletter** module allows to carry out nearly all tasks required by a modern site in respect of bulk sending mail messages to recipients. Newsletters and maillists make it possible to inform existing or potential clients about the progress of your company, new projects, services, promotion actions etc.

With the **Newsletter** module, you can create various e-mail newsletters, for example:

- company news;
- press releases;
- site news;
- new products and services;
- headlines;
- announcements;
- other newsletters.

Visitors of your site can subscribe to the desired newsletters without your assistance.

The **Newsletter** module visual components can be easily placed on pages of the public section of the site. This enables you to create web forms with which visitors can subscribe to your newsletters. Both **registered** and/or **anonymous** visitors can subscribe to your newsletters.

You can perform sending newsletter messages to subscribers in either *manual* or *automated* modes. In the latter case, sending is carried out as per user-defined schedule (i.e., on the specified days and times).

Generally, the process of subscription management can be outlined as a sequence of the following steps:

creating a subscription rubric (newsletter);

implementing the user interface for subscribing to the previously created newsletter;

defining subscribers;

creating the newsletter issues;

sending newsletter e-mail messages.

© Bitrix, 2005

Configuring the Module

Before you start creating your newsletters and mailing lists, you have to set the module-wide preferences first.

Go to the module settings page:

Newsletter module -> **Module settings** (the button on the toolbar)

or

System settings -> **Settings** -> select **Subscription** from the drop-down list.

The module settings form contains the following preferences:

Parameter name	Parameter value
Allow anonymous subscriptions:	☑
Show authorization links if subscribed anonymously:	☑
Public section containing the subscription edit page (macros: #LANG_DIR#):	#LANG_DIR#about/
Use visual HTML editor:	☑
Interval in seconds for stepwise emailing in the "Direct mail" mode (0 - send all at once):	20
Default From e-mail:	product@comp.ru
Default To e-mail:	contact@contactmail.com
Mail message encoding:	Windows-1251 ISO-8859-1
Allow 8-bit symbols in message header:	☐
Send images as attachments:	☑
Days to keep the unconfirmed subscriptions (0 means do not delete):	60
Method of automatic sending issues:	Agent
Number of messages to be automatically send by agent during one step in "directly to each recepient" mode:	2
Method of automatic generation:	Agent
Check period for the issue generation (sec):	60

Allow anonymous subscriptions: check this box if you want to allow *anonymous* users (those who are not registered or not authorized on the site) to subscribe to your newsletters.

If you need to display a link which would invite *anonymous* users to authorise whenever they attempt to subscribe, check the **Show authorization links if subscribed anonymously** box.

Public section containing the subscription editing page: this field should contain path to the site folder in which you expect to save a page used to edit the subscription in the public section. The path must be specified relative to the site root directory.

© Bitrix, 2005

Use visual HTML editor: check this box if you want to use the embedded visual HTML editor for creating and editing newsletter messages.

Interval in seconds for stepwise emailing…: this field contains the duration of a single step of sending for the **Direct Mailing** mode, in seconds. This mode assumes sending messages directly to subscribers with their e-mail address in the **To** field of a message.

Default From e-mail address: the default address of a sender which is to be used in all created messages.

Default To e-mail address: the default recipient address which is to be used in all created messages. This value must be specified because at least one destination address is required by a message to be sent.

Mail message encoding: these fields contain encoding(s) to be used for displaying a message.

Allow 8-bit symbols in message header: if this option is checked, symbols of the upper part of the ASCII table are enabled in the message headers. Otherwise, such symbols (usually national characters) are printed using the Base-64 encoding.

Send images as attachments: if this option is checked, images will be sent as attachments to an e-mail message, which enlarges messages but ensures the image dispatch. Otherwise, messages will contain links to the images which are downloaded and displayed at the message view time.

Days to keep the unconfirmed subscriptions: specify here the time interval within which unconfirmed subscriptions are valid and in the ready-to-go state. When the specified interval expires, subscriptions unconfirmed by users are deleted. If the value of this field is **0**, unconfirmed subscriptions are never deleted.

Method of automatic sending issues: specify here which method is to be used to schedule the message sending in automated mode:

Agent – the automated sending is scheduled using internal facilities of the Bitrix Site Manager;

Cron – should be used if the system is installed on a Unix server.

§ **Number of messages to be automatically send by agent during one step in "directly to each recepient" mode**: specify here the number of e-mail messages to be sent at a single run of the agent when sending newsletter messages directly to each recipient. Used to decrease the mail server load.

Method of automatic generation: choose the method to be used for the automated generation of newsletter issues:

Agent – the automated sending is scheduled using internal facilities of the Bitrix Site Manager;

Cron – should be used if the system is installed on a Unix server.

Check period for the issue generation: specify here the time interval (in seconds) to elapse before the system checks whether a recurrent newsletter message is to be created. Less values cause checks to occur more often.

The **Module permissions** section enables you to assign different permissions to different user groups to access the **Newsletter** module.

For example, if you want users of some group to be able to create newsletters and send issues (i.e. newsletter messages), you have to assign the **Write** permission to this user group.

© Bitrix, 2005

Setting up for manual sending e-mail messages

The manual message sending assumes that a message is created, edited and sent by a user in person, who is granted the following permissions:

site administrator permissions;

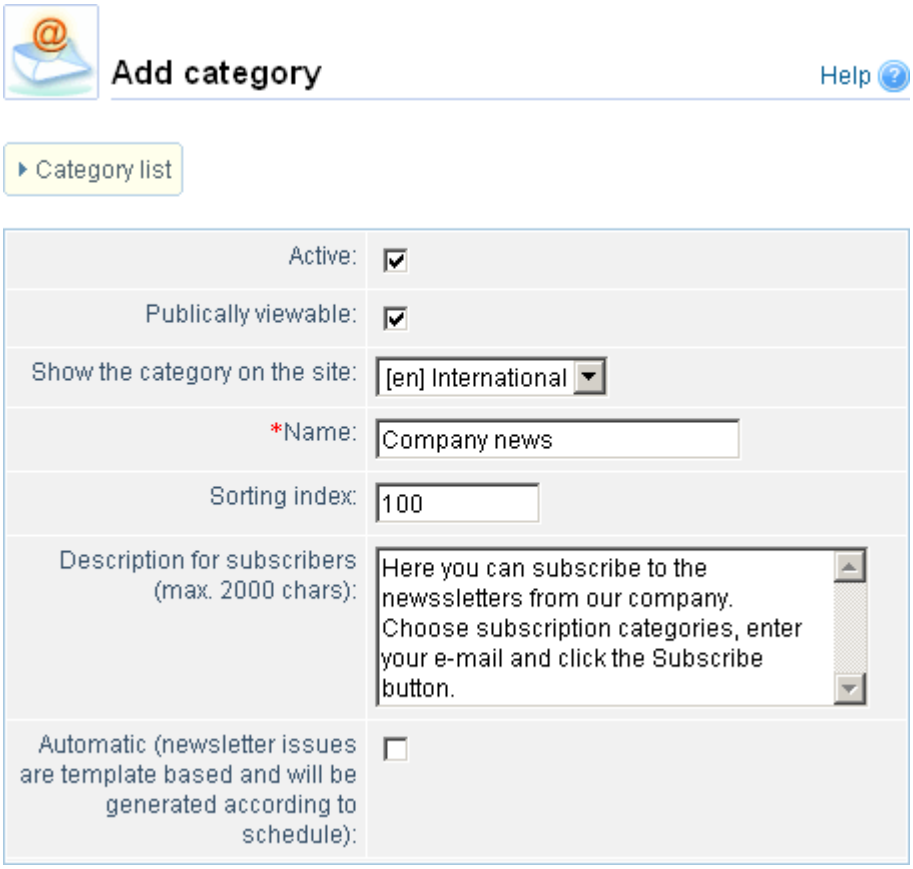
Write level of permission for the **Newsletter** module.

Creating a newsletter

Go to the **Newsletter categories** page (**Newsletter** -> **Newsletter categories**);

Click **Add** to open the new category creation form.

Now you have to provide the desired values to the following form fields.



Active: checking this box enables site visitors to subscribe to the newsletter being created, and causes the newsletter messages to be actually sent to subscribers.

Publicly viewable: check this box if you want the newsletter to be visible in the public section so that visitors can subscribe to it.

If you do not want to allow all visitors to subscribe to this newsletter, uncheck this option. This causes the newsletter to be created as hidden. The hidden newsletter can be used in the following ways:

§ you can subscribe users to this newsletter manually;

or, for example,

§ if you have added a visual component **Subscription Form** (or **Newsletter subscription page**) to a page of a private area of the site, (e.g. **Partners**), you can set the value of a **Show hidden**

© Bitrix, 2005

subscription categories property of these components to **Yes**. In this case, only users who are allowed to access the **Partners** section, can subscribe to this newsletter.

Show the category on the site: choose the site on which the newsletter subscription link is to be displayed.

Name: the name of the newsletter displayed to the site visitors;

Sort index: specify here the weight of the newsletter. The weight defines position of the newsletter relative to other newsletters in lists. Greater values cause the newsletter to be positioned higher in lists.

Description for subscribers: type any text here that thoroughly describe the newsletter. This text is displayed in the public section of the site on a **Subscriptions** page.

Automatic: leave this option unchecked as we want messages of this newsletter to be sent manually.

Save the newsletter by clicking **Add**.

© Bitrix, 2005

Providing subscription facilities

The **Newsletter** module system contains two visual components that you can add to your pages to enable visitors to subscribe to the created newsletter: the **Subscription Form** and the **Newsletter subscription page**. The visual components become available if you create or edit your page in the embedded visual HTML editor.

Subscription Form

A **Subscription Form** is an aggregate of the following fields:

list of newsletters;

a text input field in which a visitor types their e-mail address to subscribe to messages of the selected newsletter(s).

The **Subscription Form** can be added to the site template as well as it can be placed on any page of the site. This form displays available newsletters and allows visitors to subscribe to any of them quickly.

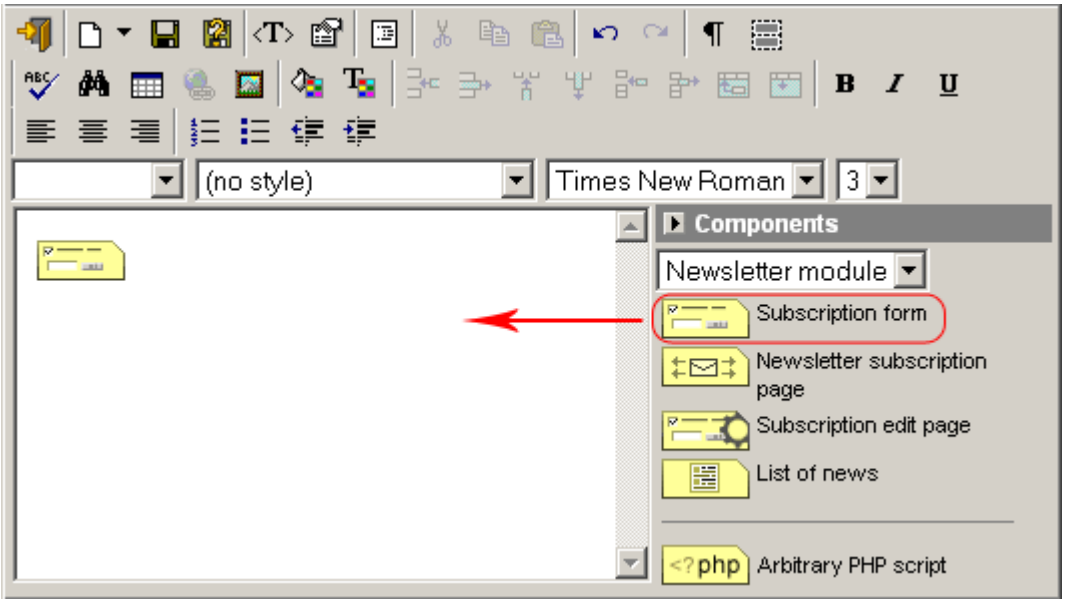
> **Note**: currently, adding the **Subscription Form** to the site template is possible only by editing the template code in a text editor manually.

Go to the public section of the site. Open the site section in which you want to create the **Subscription Form**. For example: the **About us** section.

Create a new page in this section (button on the toolbar) or start editing any existing page (button on the toolbar).

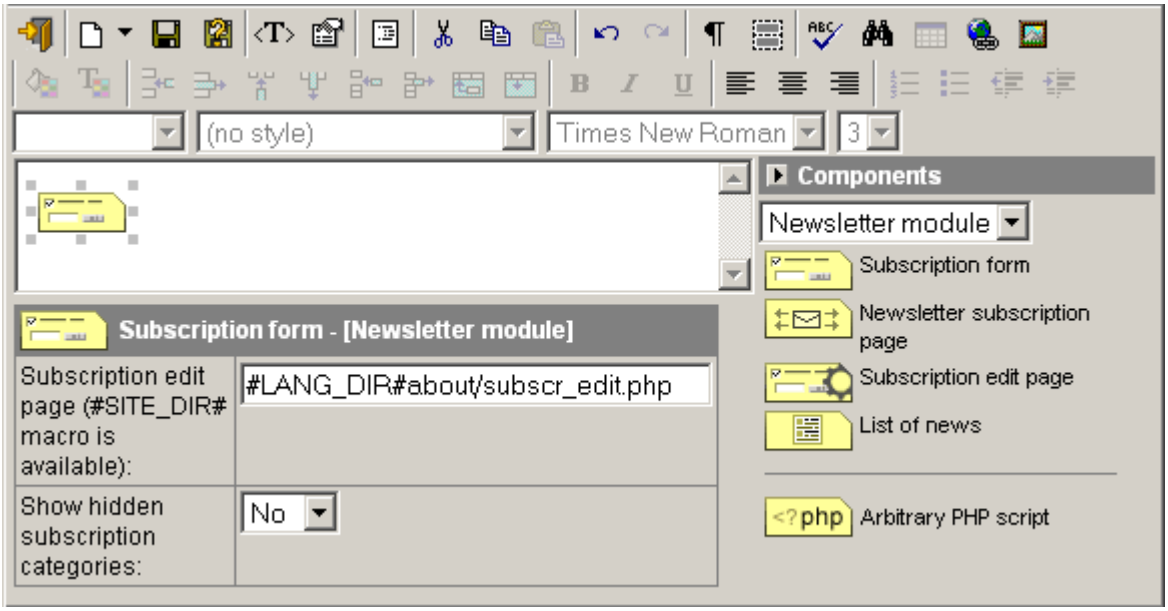
> **Note**: the visual components can only be used if you create or edit a page in the embedded visual HTML editor.

Select **Newsletter** from the drop-down list on the **Components** bar. Select the **Subscription Form** component on the toolbar with a mouse. Drag and drop it to your page.



After you have added the component, the component properties window is shown at the bottom of the screen. If it is not still visible, select the added component with the mouse.

© Bitrix, 2005



Subscription edit page: in this field, you should provide the pathname of a page that visitors could use to edit parameters of their subscription in the public section of the site (for example, **subscr_edit.php**). The path and the name should be specified taking into account parameters provided in the **Newsletter** module settings (e.g. **#SITE_DIR#about/**, here **#SITE_DIR#** is a macro defining the site root folder). You have to create the subscription editing page without fail later.

Show hidden subscription categories: with this field, you can allow or disallow hidden newsletters to be displayed in the **Subscription form**. Hidden newsletters are those whose property **Publicly viewable** is not active (in the newsletter creation/editing form).

Save the modified page by clicking **Save** or **Save As…** The **Save As…** command allows to add a link to the page being edited to the **left** or **top** menu of the current site section.

After you have finished with adding form, the **Subscription form** will look like the following:

The list displays names of all newsletters that satisfy the following conditions:

the newsletter display site is set to the current site;

the option **Publicly viewable** is active (checked) (see Creating a newsletter).

The list only displays hidden newsletters if the appropriate property is activated in the **Subscription form** component.

© Bitrix, 2005

Newsletter subscription page

This page can be created using the visual component **Newsletter subscription page**, which stipulates the following areas to be allocated:

list of newsletters available to the current user;

area with controls for switching to the subscription editing page;

area with controls used by visitors to retrieve their lost passwords.

With the **Newsletter subscription page**, visitors can subscribe to the desired newsletters and obtain lost passwords. The page allows to switch to the subscription editing page containing information on its current state. If a user wants to modify their active subscriptions, one must authorize by filling the following fields:

for *unregistered* users: type the e-mail address and the subscription confirmation code received upon subscription;

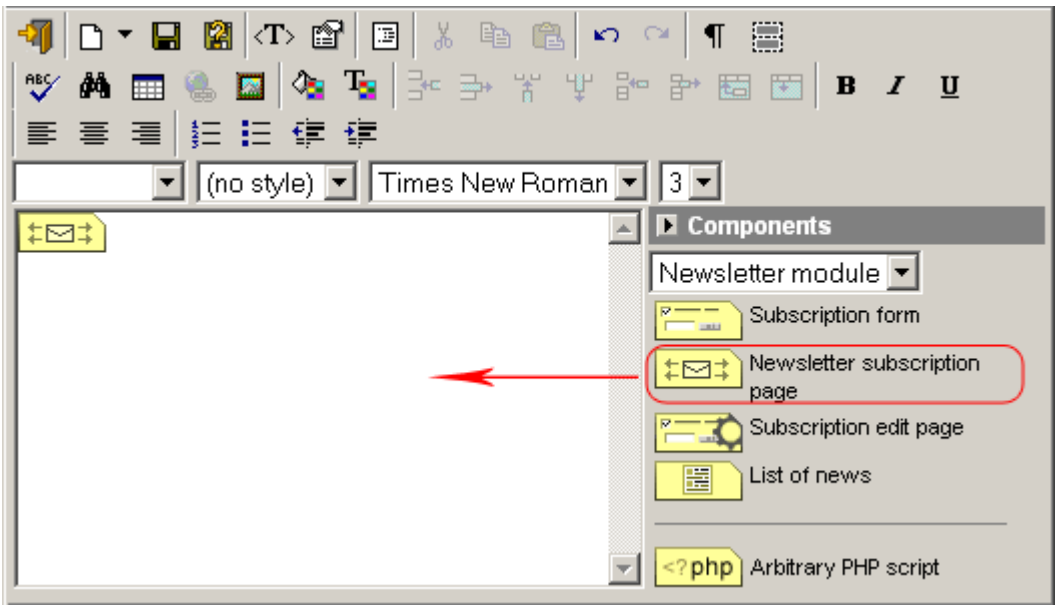
for *registered* users: type the e-mail address and the password used to authorise on the site.

The most common and snug way to use the **Newsletter subscription page** component is to place it on a separate page.

Switch to the public section of the site. Open the site section in which you want to create the subscription page. For example, in the **About us** section.

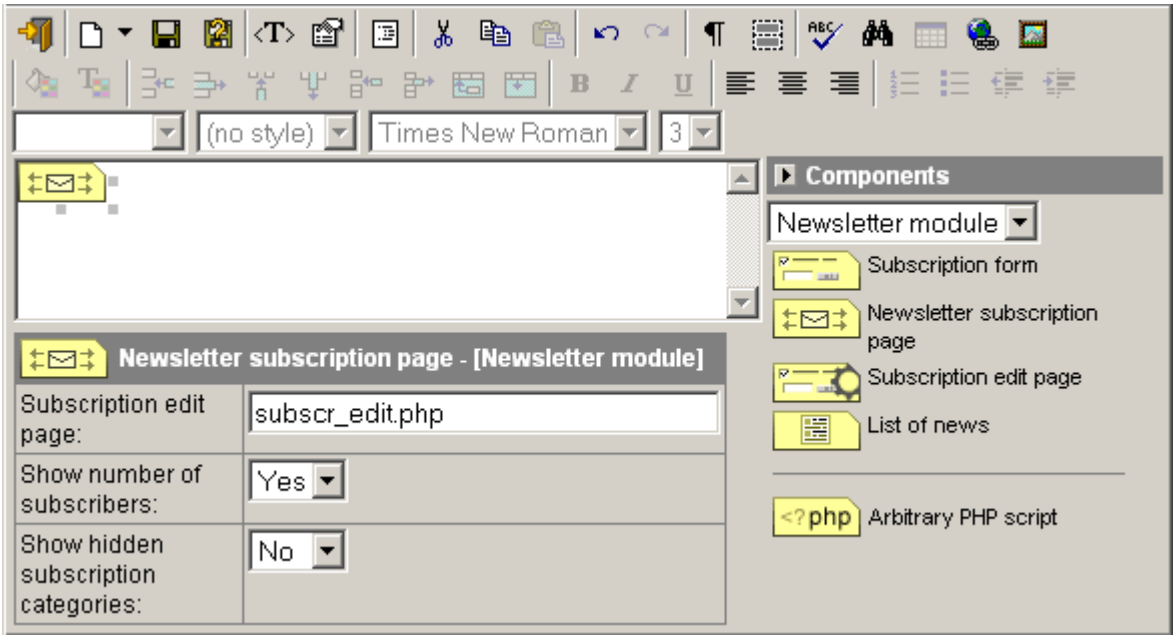
Create a new page in this section (button on the toolbar).

Select **Newsletter** from the drop-down list on the **Components** bar. Select the **Newsletter subscription page** component on the toolbar with a mouse and insert it into the page.



After you have added the component, the component properties window is shown at the bottom of the screen. If it is not still visible, select the added component with the mouse.

© Bitrix, 2005



Subscription edit page: in this field, you should provide the name of a page that visitors could use to edit parameters of their subscription in the public section of the site (for example, **subscr_edit.php**). Whenever a user attempts to create or edit a subscription, one is redirected to this page. Since this page is stored usually in the same folder as the **Newsletter subscription page**, you can omit the path and type its filename only. You have to create the subscription editing page without fail later.

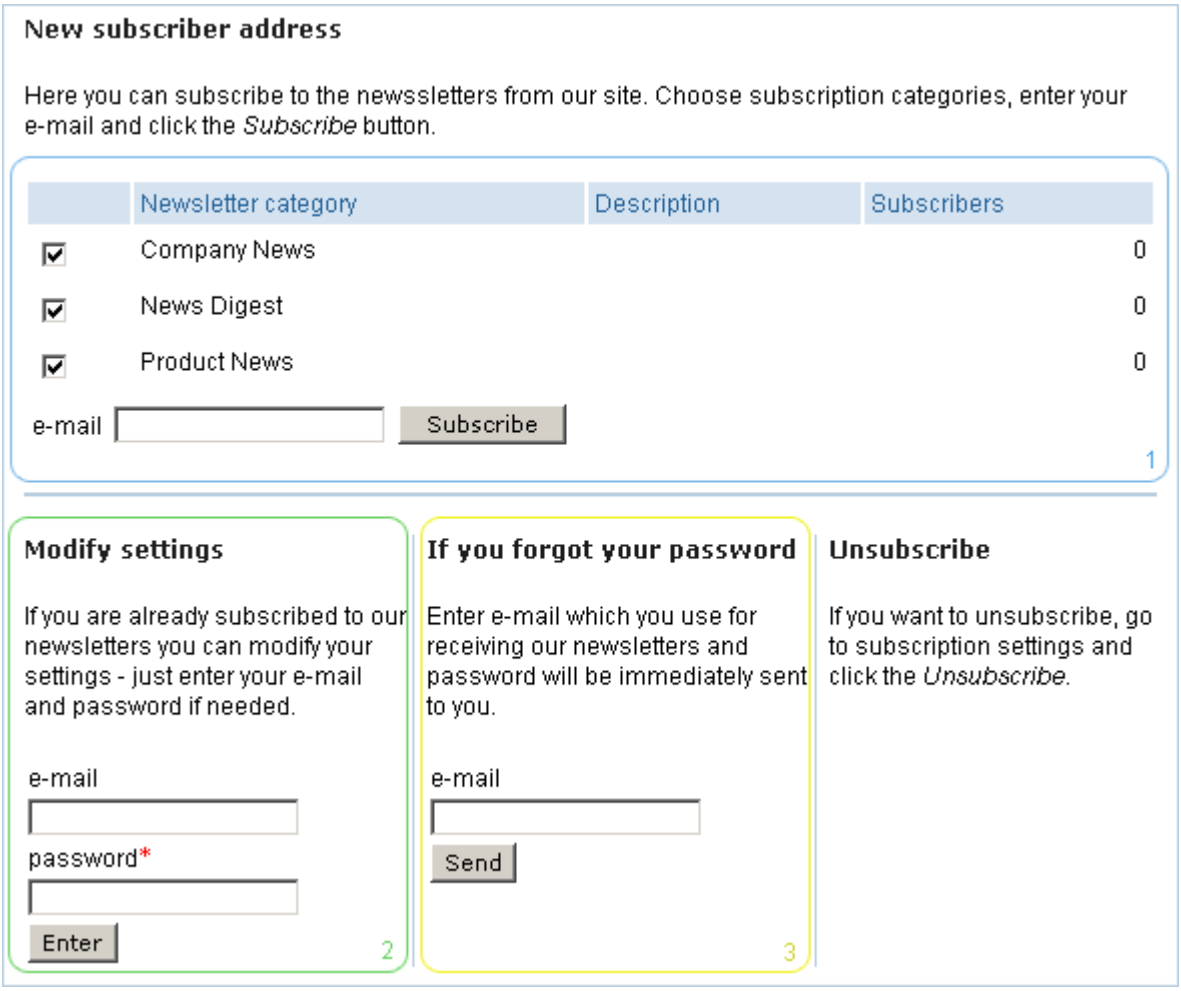
Show number of subscribers: set this field to **Yes** if you want to display the count of existing subscribers for each newsletter.

Show hidden subscription categories: this field enables you to allow or disallow displaying hidden newsletters on the subscription page. Hidden newsletters are those whose property **Publicly viewable** is not active (in the newsletter creation/editing form).

Save the modified page by clicking **Save** or **Save As…** The **Save As…** command allows to add a link to the page being edited to the **left** or **top** menu of the current site section.

Now, the **Newsletter subscription page** should look like follows:

© Bitrix, 2005



Legend

Subscription registration area. The list displays names of all newsletters that satisfy the following conditions:

the newsletter display site is the current site;

the option **Publicly viewable** is active (checked) (see Creating a newsletter);

You can tell the list to display hidden newsletters by setting the parameter **Show hidden subscription categories** to **Yes**.

Subscription editing page access area.

Subscription password or code retrieval page access area.

Creating a subscription editing page

Subscription editing page is used to allow users to control their subscriptions: view parameters and current state, edit subscriptions to newsletters or unsubscribe.

For subscription editing purpose, it makes no difference which means was used to register a subscription – via the **Subscription form** or the **Newsletter subscription page**. You always create your subscription editing page using the **Subscription edit page** visual component.

Switch to the public section of the site.

Create a new page (button on the toolbar).

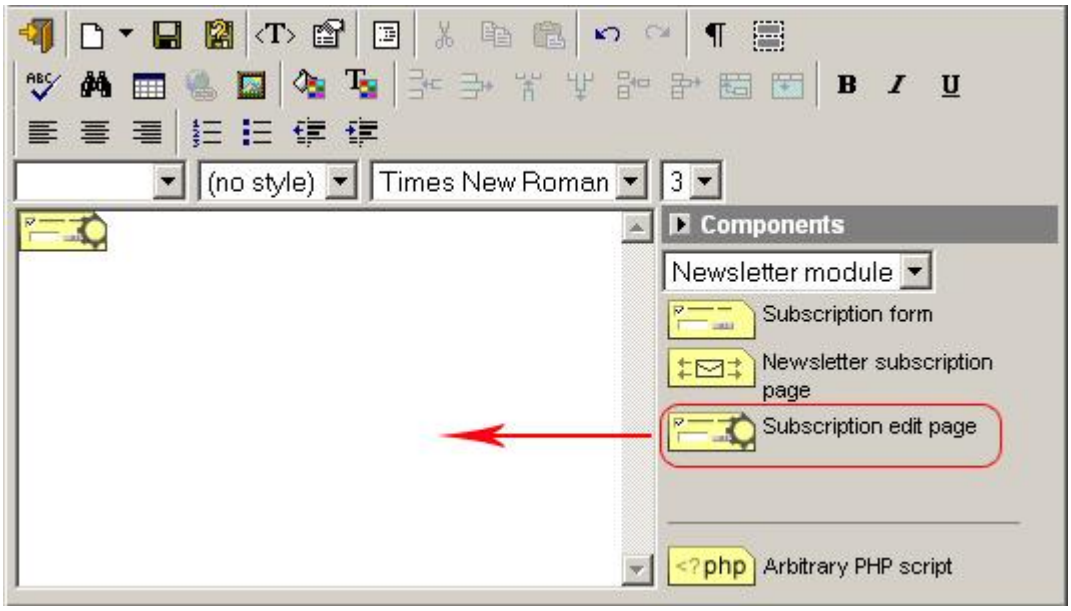
If you create a subscription editing page for use with the **Subscription form**, you have to save the new page under the same path and name you have specified in the **Subscription form** component properties (e.g. `#SITE_DIR#about/subscr_edit.php`);

If you create a subscription editing page for use with the **Newsletter subscription page**, you have to save the new page under the same name you have specified in the **Newsletter subscription page**

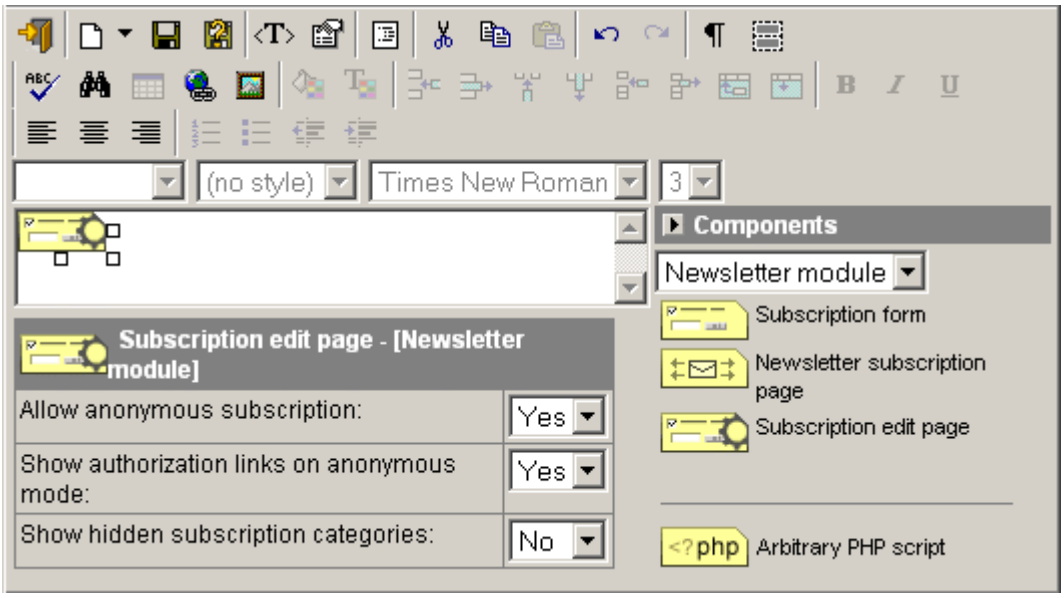
component properties. If the page file name does not include full path, the new page must be saved in the same folder as the newsletter subscription page.

If you use both components on your site, they can share a single subscription editing page. If this is the case, you have to specify the same uniform pathname to the subscription editing page in the properties of all such components (**Subscription form** and **Newsletter subscription page**).

Select **Newsletter** from the drop-down list on the **Components** bar. Select the **Subscription edit page** component on the toolbar with a mouse and insert it into the page.



After you have added the component, the component properties window is shown at the bottom of the screen. If it is not still visible, select the added component with the mouse.



Allow anonymous subscription: set this field to **Yes** if you want to allow *anonymous* users (those who are not registered or not authorized on the site) to subscribe to your newsletters and edit their subscriptions.

If you need to display a link which would invite *anonymous* users to authorise whenever they attempt to subscribe, set the **Show authorization links on anonymous mode** field value to **Yes**.

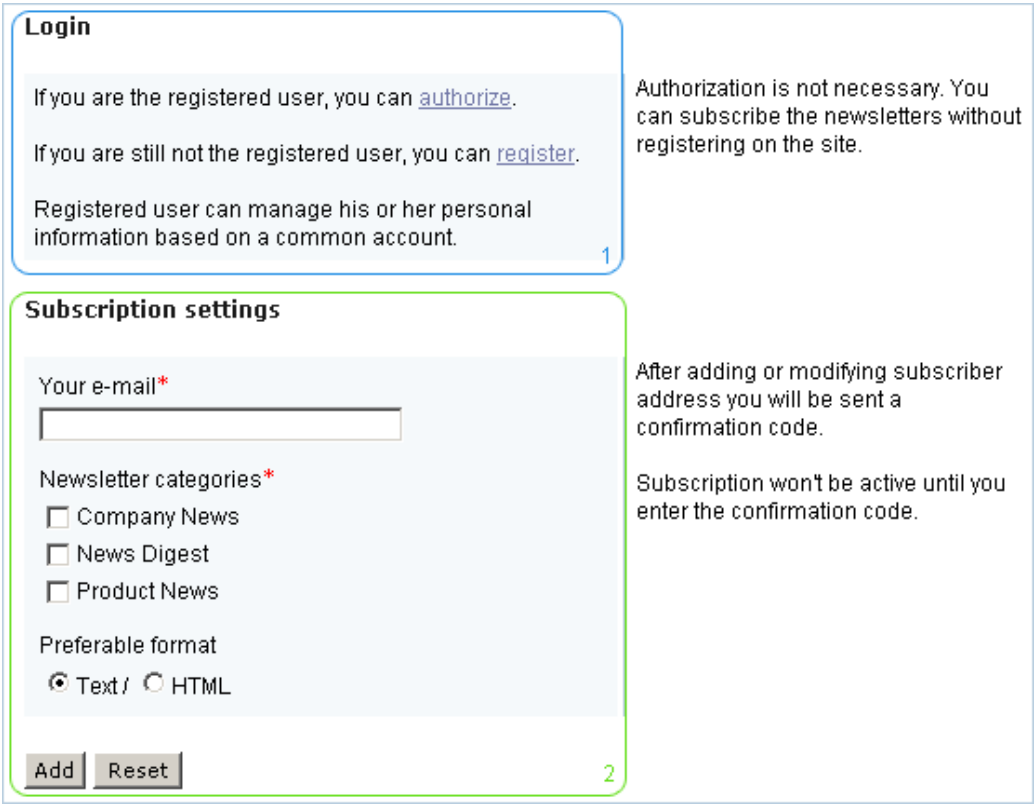
Show hidden subscription categories: with this field, you can allow or disallow hidden newsletters to be displayed in the list of newsletters. Hidden newsletters are those whose property **Publicly viewable** is not active (in the newsletter creation/editing form).

© Bitrix, 2005

Save the modified page by clicking **Save** or **Save As…**.

If you create the subscription editing page for use with the **Subscription form**, you are recommended to add a link to the subscription editing page to the section menu (using the **Save As** command). This is required because users usually want an option to edit parameters of their existing subscriptions, not only to customize a new one.

The subscription editing page will look like follows:



Legend

1*. Links to the authorisation page (for registered users) or registration page (for anonymous subscribers). The registration link is only displayed if the corresponding properties are active in both **Newsletter** module settings and **Subscription editing page** component properties.

2*. Subscription settings editing area. Contains the following fields:

- the field used to enter a new subscription e-mail address;
- the list of newsletters available to a current subscriber;
- the field for choosing the required format of e-mail messages.

© Bitrix, 2005

Managing subscribers

Subscribers are visitors who register their subscription to one or more newsletters.

The system offers the following methods to add subscribers to database:

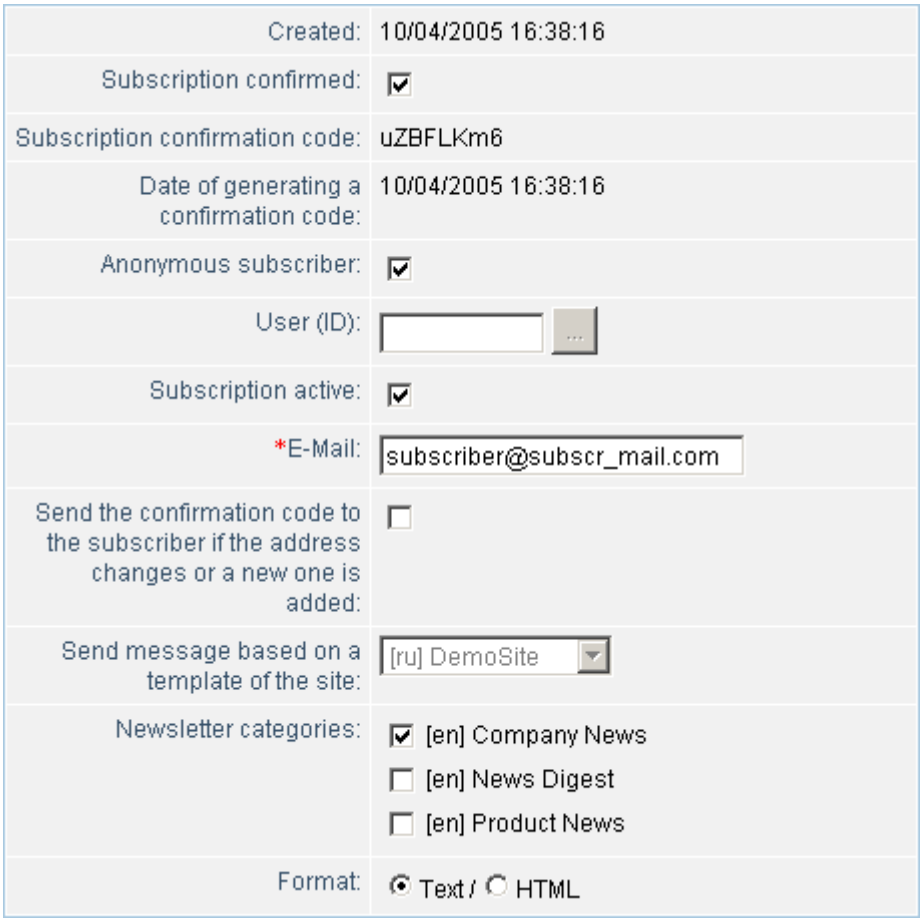
automatic enrolling: subscribers become added to the database automatically upon subscribing to any newsletter;

manual enrolling: registration information on a single subscriber can be added manually by the Administrator or any other person who is granted an appropriate permission;

importing: a list of subscriber addresses can be imported from an external file.

Automatic enrolling

Whenever a site visitor subscribes to any newsletter, their information is automatically added to the **Newsletter** module by creating a new subscriber:



Created: date and time when a subscriber was enrolled. This field cannot be changed.

Subscription confirmed: after the subscription occurs, the subscription confirmation code is sent to a user. The user (subscriber) has to enter the received code in a corresponding field on the **Subscription editing page** to confirm their intention to receive e-mail messages of the chosen newsletter. If the subscription is confirmed, this field is checked.

Subscription confirmation code: automatically generated code for the subscription confirmation purposes. This code has been sent to the subscriber's address. You cannot modify this field.

Date of generating a confirmation code: date and time when the subscription confirmation code was generated. You cannot modify this field.

Anonymous subscriber: this field is checked if the subscription has been performed by a user who had not been previously registered and/or authorised on the site.

© Bitrix, 2005

Subscription active: this option should be checked to let the e-mail messages of the selected newsletters to be sent to the subscriber. Otherwise, the subscriber will not receive newsletter messages. This option can be changed by the site administrator or any other user who is granted an appropriate permission.

User (ID): if the subscription has been performed by a user who had been previously registered and authorised on the site, this field contains the ID of this user.

Send the confirmation code to the subscriber if the address changes or a new one is added: this option should be checked if you want the subscriber to receive confirmation messages when their subscription address changes or a new address is added. Any confirmation messages will be sent to a new address. This field can be modified by the site administrator or any other user who is granted an appropriate permission.

Send message based on a template of the site: this field indicates a site whose template will be used to send messages to this user. This is a read-only preference.

Newsletter categories: shows newsletters to which the user has subscribed.

Format: shows the format in which a user has chosen to receive the newsletter messages.

Values of the form fields (except read-only ones) can be changed by both subscriber (on the **Subscription editing page**) and the the site administrator or any other user who is granted an appropriate permission.

Manual enrolling

You can add subscribers manually on the **Add address** page.

Go to the list of subscribers (the **Newsletter** module -> **Subscribers**).

Click **Add** to open a new subscriber parameters form.

Fill in the form fields in the following manner:

Subscription confirmed: it is common to check this flag when adding subscribers manually, since you want to subscribe a user implicitly.

Anonymous subscriber: if a subscriber you are about to add is not a registered site user, check this box.

User (ID): if the subscriber is a registered site user, specify their ID in this field. Click "**...**" to select the ID from the list.

© Bitrix, 2005

Subscription active: check this option so as to let the e-mail messages of the selected newsletters to be sent to the subscriber. Otherwise, the subscriber will not receive newsletter messages.

Send the confirmation code to the subscriber if the address changes or a new one is added: this option should be checked if you want the subscriber to receive confirmation messages when their subscription address changes or a new address is added. Any confirmation messages will be sent to a new address.

Send message based on a template of the site: select a site whose template will be used to send messages to the subscriber.

Newsletter categories: choose here the newsletters to which you want to subscribe the user. This list shows all the newsletters on your site, including hidden ones (i.e. those unavailable in public newsletter lists).

Format: select the format in which to send the e-mail messages to the subscriber.

Save changes by clicking **Add** or **Apply**.

After you have saved changes, the subscriber is enrolled in the list of subscribers.

© Bitrix, 2005

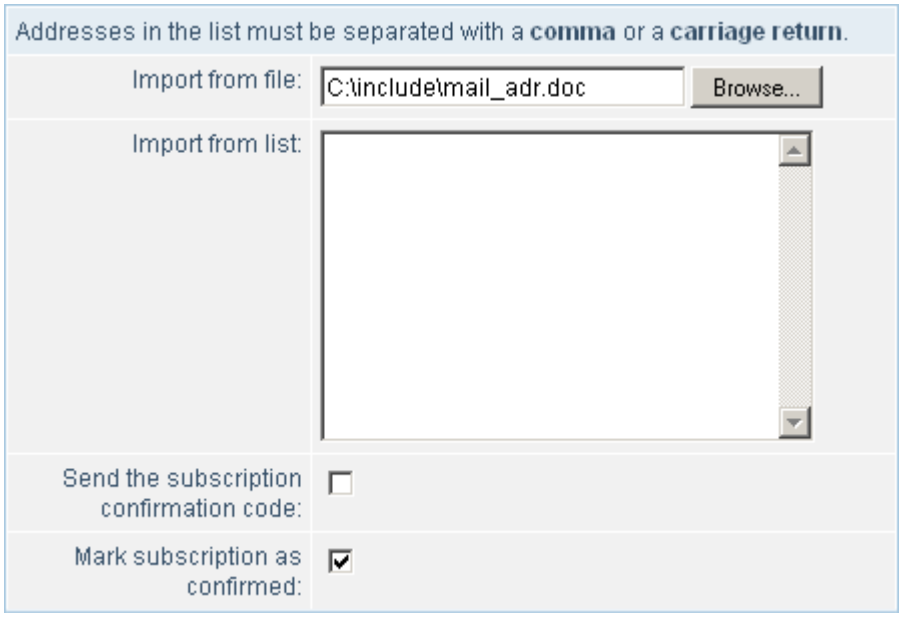
Importing subscribers addresses

The **Import addresses** function allows to add e-mail addresses to the subscriber list maintained by the **Newsletter** module, from any external text file. Such file should contain e-mail addresses separated with **commas** or **new line**.

Do the following to import e-mail addresses.

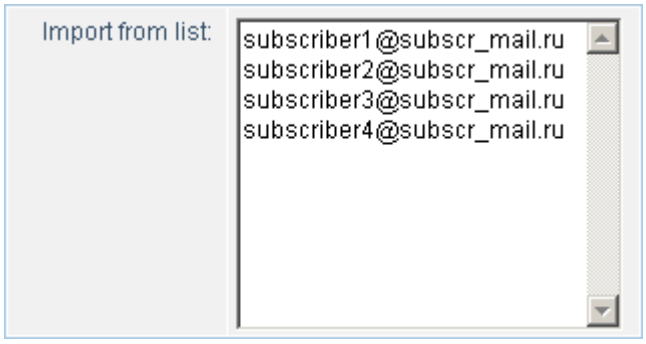
Go to the address import page (**Newsletter** -> **Import addresses**).

Fill in the form fields in the following manner:



Import from file: click **Browse** to select the file containing e-mails to be imported.

Import from list: you can specify e-mail addresses by typing them in this list. For example:



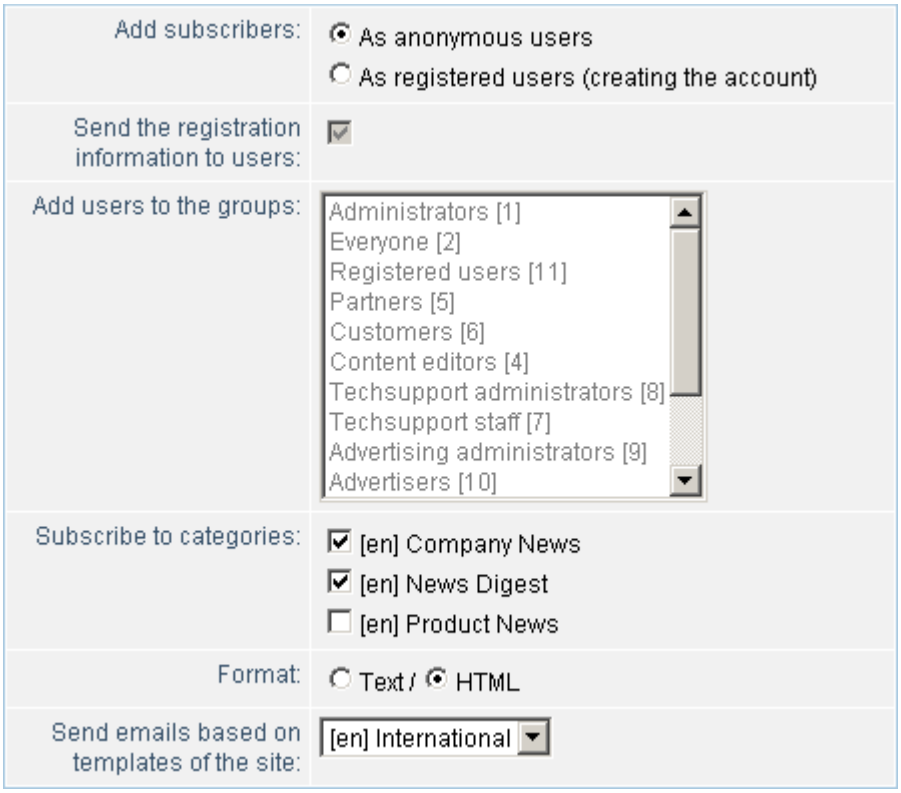
Send the subscription confirmation code: check this option if you want subscription confirmation codes to be sent to all the imported addresses.

Mark subscription as confirmed: check this box if you want to let all the imported subscribers receive newsletter messages without having to confirm the subscription.

It is wise to confirm the subscription automatically if you have chosen not to send the subscription confirmation code (i.e. the **Send the subscription confirmation code** option is not checked).

Next, specify parameters common to all the imported subscribers (e-mail addresses):

© Bitrix, 2005



Add subscribers: this radio group is used to choose the status in which the imported subscribers are to be enrolled in the system:

As anonymous users: site user records are *not* created for the imported subscribers. The system will automatically generate subscription codes for the imported users and will send codes to their addresses;

As registered users: site user record will be automatically created for each imported subscriber.

Send the registration information to users: this field is only available if you import subscribers as registered site users.

If you want the registration information (login, password etc.) to be sent to the imported subscribers, you have to check this option. Using this information, your subscribers will not only be able to edit their subscription preferences, but also access the site resources restricted to permissions of their user group.

Add users to the groups: the list of user groups is enabled if you import subscribers as registered site users only.

Select a user group to which you want to attach the imported subscribers. Hold the *Ctrl* key down to select more than one user group.

Subscribe to categories: select newsletters whose messages you want to be sent to the imported subscribers.

Format: select the format in which to send the e-mail messages to subscribers.

Send emails based on templates of the site: select a site whose template will be used to send messages.

Click **Import addresses** to add the subscriber's addresses from a selected file or the form list.

After you have finished with importing, a message is displayed indicating the import statistics:

Total unique addresses to import: total count of addresses suggested for import;

Added addresses: number of addresses actually added to the system;

Bad addresses: number of addresses that caused errors while adding them (e.g. addresses with invalid syntax).

© Bitrix, 2005

Managing newsletter issues (e-mail messages)

Creating an issue

An *issue* is an e-mail message which is to be sent to a newsletter subscriber.

Perform the following actions to create a new issue.

Go to the list of issues (**Newsletters** -> **Newsletter issues**).

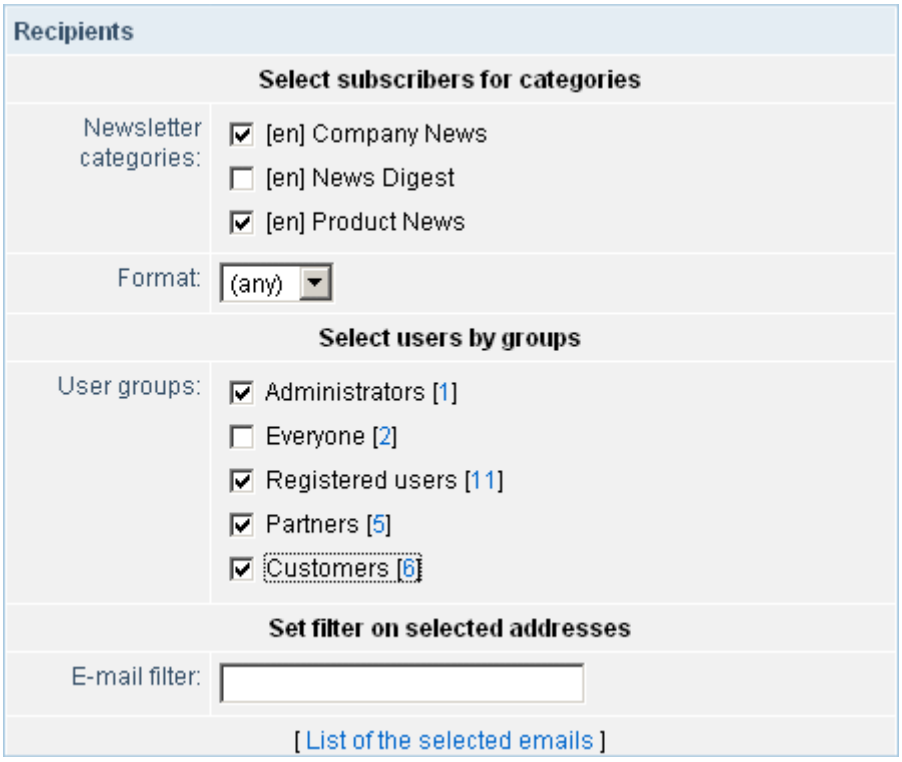
Click **Add** to switch to the newsletter issue creation page.

Fill in the required form fields.

The **Newsletter status information** section displays the current issue status.

All newly created issues are always set to the initial status of **Draft**.

The **Recipients** section is used to select subscribers and the site users to whom the issue being created is to be sent.



Newsletter categories: select newsletter(s) whose subscribers are to receive the newsletter message.

Format: this field allows to choose a “virtual” category of subscribers to whom the message is to be sent, depending on a subscriber’s e-mail message format preference. This field has three options:

any – the issue will be sent to all subscribers, disregarding their e-mail message format preferences;

text – the issue will be sent only to subscribers who have chosen to receive messages in the *plain text*;

© Bitrix, 2005

HTML – the issue will be sent only to subscribers who have chosen to receive messages in the *HTML* format.

User groups: select here user groups whose members are to receive the issue being created.

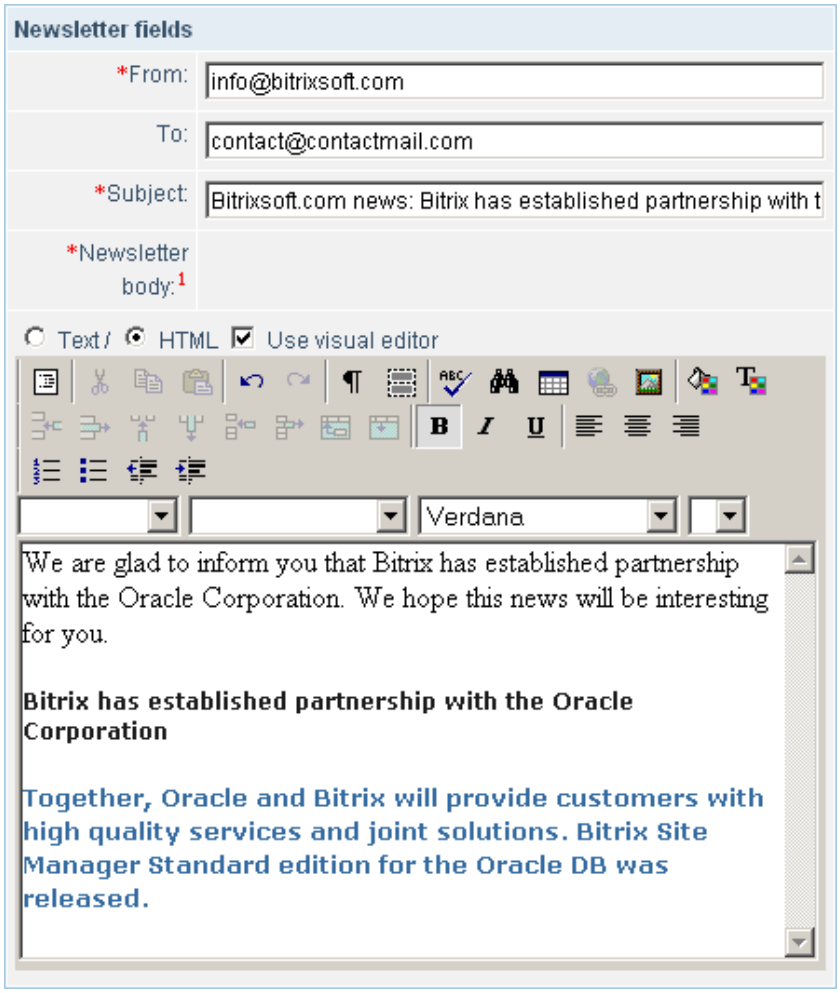
E-mail filter: this field is used to specify a condition that will be applied to e-mail addresses. The issue will be actually sent to matching addresses only. You can use special expressions to specify the filter condition (see the product **Documentation**). For example, if you want to restrict the issue sending to e-mail addresses registered on the **bitrixsoft.com** server only, set the following filter: **%@bitrixsoft.com**

The link **List of the selected emails**, if clicked, opens a window with a list of all e-mail addresses to which the issue will be sent.

The **Additional emails** section can be used to specify additional e-mail addresses to which the issue is to be sent.

In this field, multiple e-mail addresses must be separated with *comma* or a *carriage return*.

The **Newsletter fields** is the main section that you use to create a message.



© Bitrix, 2005

From: this field contains the message sender address. By default, the sender address specified in the **Newsletter** module settings is used. This field is mandatory.

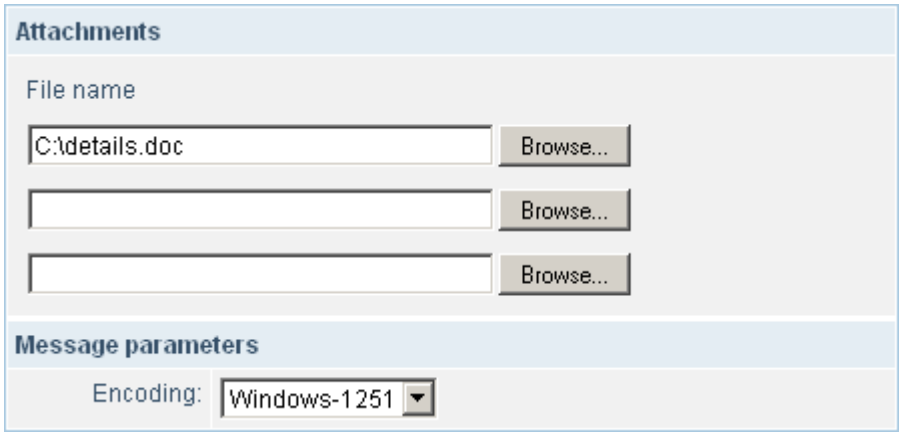
To: this field is used to specify the message recipient address. By default, the recipient address specified in the **Newsletter** module settings is used. This field must contain at least one address.

Subject: specify here the message subject. This field is mandatory.

Body: arbitrary text of your message. If you want any mages that you have used in your message to be sent with the message as attachments, you need to activate this function in the **Newsletter** module settings.

This field must not be empty.

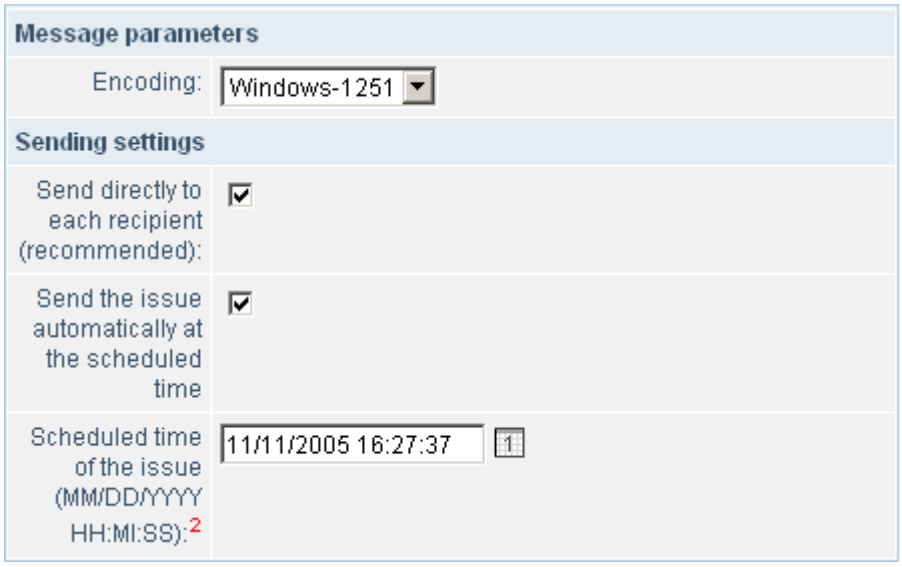
In the next sections:



in the **Attachments** section, add files you want to be sent with the message. Click **Browse** to select and add files.

in the **Message parameters** section, select the desired message encoding.

The **Sending settings** section is used to set the delivery preferences of the issue:



Send directly to each recipient: it is strongly recommended to activate this option. This function means that the message will be sent personally to each recipient (i.e. the **To** field will contain the real address of the recipient).

Send the issue automatically at the scheduled time: check this box if you want the issue to be sent on the scheduled date and time automatically.

Scheduled time of the issue: if you have checked the option **Send the issue automatically at the scheduled time**, specify the date and time of the issue sending in this field. By default, this field initially contains the date and time of the issue creation.

© Bitrix, 2005

Save the created issue by clicking **Add** or **Apply**. This will add the issue to the list of messages in the **Draft** status.

Important!

For an issue with the option **Send the issue automatically at the scheduled time** activated to be sent at the specified time, it must be saved using the **Send** button. The message status will be changed to **In progress**.

If you want to interrupt sending such message, click the **Pause** link in the **Actions** column on the **Newsletter issues** page.

If you save an automatic message using **Add** or **Apply**, it will be set in the **Draft** status, which means it will not be sent automatically on the scheduled time.

© Bitrix, 2005

Sending issues

If you have activated the **Send the issue automatically at the scheduled time** option, specified the time of sending when creating the newsletter issue and saved the issue by clicking **Send**, the message will be automatically sent on the specified date and time.

If you want to send the message manually, use one of the below methods.

You can send the message right from the issue editing page. To do so, simply click **Send** at the bottom of the page.

After this, you will be transferred to the newsletter issues page. The status of the created issue is now **In progress**, which means that the sending is now taking place.

You can also save the created issue in the **Draft** status to send it some time later.

To send a previously created issue, go to the newsletter issues page (**Newsletter** -> **Newsletter issues**). In the list, choose the issue you want to send and click the corresponding **Send** link in the **Actions** column.

ID	Modified	Subject	Type	Status	Sent	Actions
11	11/11/2005 17:11:40	Bitrixsoft.com news: Bitrix has established partnership with the Oracle corporation	html	[D] Draft		Send Modify Copy Delete

You can interrupt the issue sending. To do so, click the corresponding link **Pause** in the **Actions** column.

ID	Modified	Subject	Type	Status	Sent	Actions
11	11/11/2005 17:15:21	Bitrixsoft.com news: Bitrix has established partnership with the Oracle corporation	html	[P] In progress Addresses processed: **0** from **5**		Pause Copy

After you have stopped sending, you can switch to issue editing by clicking the **Modify** link, or proceed with sending by clicking **Continue**.

ID	Modified	Subject	Type	Status	Sent	Actions
11	11/11/2005 17:15:38	Bitrixsoft.com news: Bitrix has established partnership with the Oracle corporation	html	[W] Paused Addresses processed: **0** from **5**	11/11/2005 17:15:37	Continue Modify Copy Delete

After the sending is completed, the issue can be moved to one of the following statuses:

Sent: if the sending completed without errors;

Sent with errors: if any errors occurred while sending an issue (for example, it could not be delivered to one or more addresses).

For an issue whose status indicates errors, the issue editing page will make available a command button **Resend to failed addresses**. By clicking this button, you will instruct the system to repeat sending the issue to failed addressed only.

© Bitrix, 2005

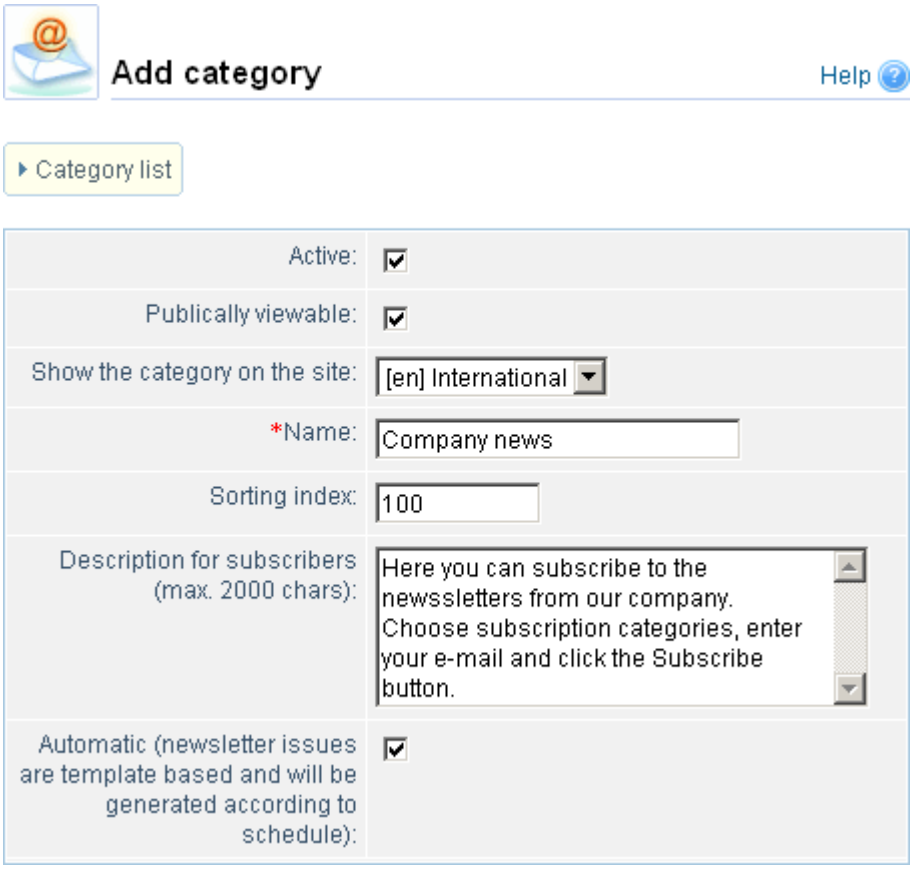
Managing automated newsletters

Creating an automated newsletter

The **Newsletter** module of the Bitrix Site Manager offers a unique function which allows to generate and send the newsletter messages (issues) in an unattended mode (i.e. automatically).

Go to the newsletter creation form (the **Newsletter** form -> **Newsletter categories**, then click **Add**).

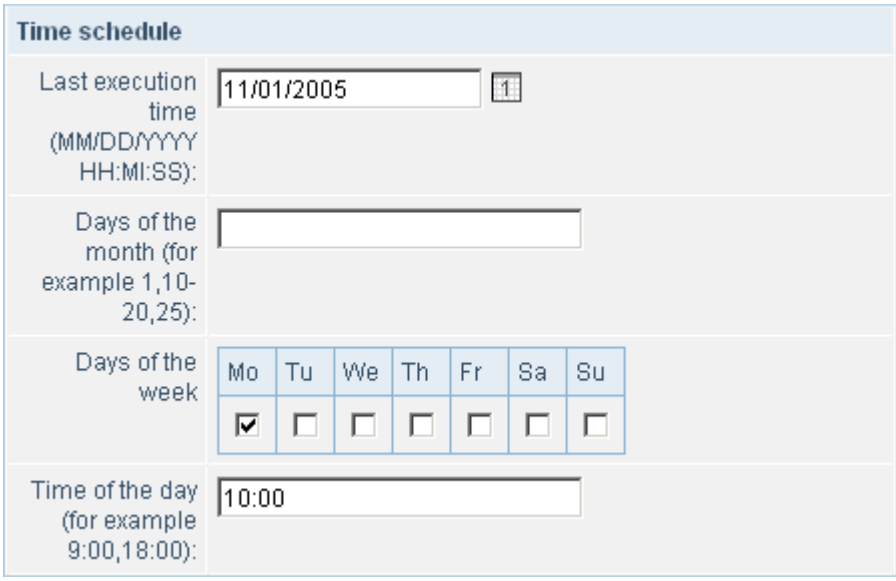
Fill in the form fields in the same way as for the manual newsletter (see Creating a newsletter).



§ To make this newsletter automated, check the **Automatic** box.

In the **Schedule** section, assign dates and times when the newsletter issues are to be automatically generated and sent:

© Bitrix, 2005



Last execution time: in this field, you have to specify the date and time after which the newsletter issues will not be generated. No newsletter issues will be generated and no e-mail messages will be sent after the time specified in this field. Initially, this field contains the *current* date and time of the newsletter *creation*.

Days of month: if you want the newsletter issues to be generated and sent on the predefined days of month, specify them in this field.

There are several ways for prescribing the newsletter issue creation days:

single date: issues will only be generated and sent on the date specified. For example, set this field to **1** to instruct the system to create and send issues on the first day of each month;

list of dates: issues will be generated and sent on each of the specified dates. For example, set this field to **1,8,15,24** to instruct the system to create and send issues on the following days of month: 1, 8, 15 and 24;

date range: issues will be generated and sent every day within the specified range. For example, if you want to generate and send the newsletter issues every day from 8 to 15 of each month, set this field to **8-15**.

You can combine these methods. For example, it is legibly to type the following rule: **1,2,15-20,25**.

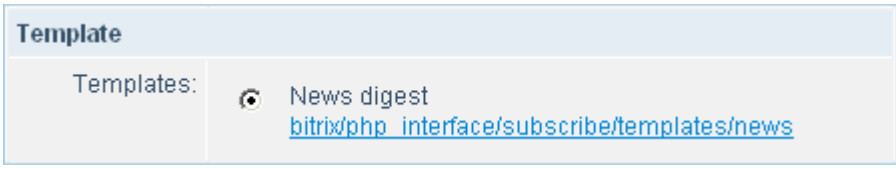
Days of week: select days of week when the issues are to be generated and sent. For example, if you want to set up a weekly newsletter which is sent on Mondays, check the box **Mo**.

Note: Automated newsletters require that you specify at least one of the following parameters: **Days of month** or **Days of week**.

You can mix these settings. In this case, the newsletter issues will be generated and sent when the conditions of these fields (dates and days of week) intersect and coincide. For example, if you set **Days of month** to **10**, and **Days of week** to **Mo**, the newsletter issues will be sent **only** if the **10th** of a given month is **Monday**.

Time: specify the time when the newsletter issues are to be sent. You can set your newsletter to be generated and sent more than once a day, for example: **8:00, 16:00, 24:00**.

In the **Template** section, select the template that the system will use for the issue generation.



© Bitrix, 2005

Note: Template is the PHP code that selects the required information by calling the system API functions.

Currently, the Bitrix Site Manager includes a “news feed” template. This template picks the latest news and builds e-mail messages according to the user supplied schedule.

Finally, specify the sender address in the **Newsletter fields** section:

The **From** field is required to be filled. By default, the sender address specified in the **Newsletter** module settings is used.

Save the created newsletter.

Note. The automatically created newsletter issues will be actually send **only** if they contain any data added by the components of a newsletter template. Any static text found in the issue body (e.g. *Dear Sirs* and other addresses) is not a sufficient condition for such issues to be sent.

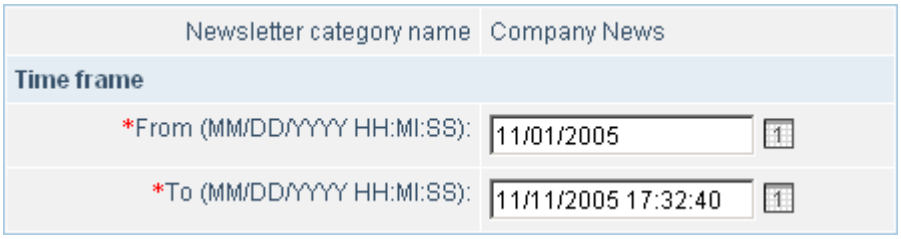
© Bitrix, 2005

Testing the automated newsletter template

The **Newsletter** module functionality is extended with the feature of previewing issues of automated newsletters generated using the selected template. Thus, you do not need to undertake a trial sending to check the appearance of issues.

After you have filled in all the required fields of the newsletter creation form, save it by clicking **Apply**. After this, a **Check template** link will become available at the top of the form menu.

Click this link to switch to the **Template Check** page:



In the **Time frame** section, enter the beginning and end dates of the period for which you want to view the issue.

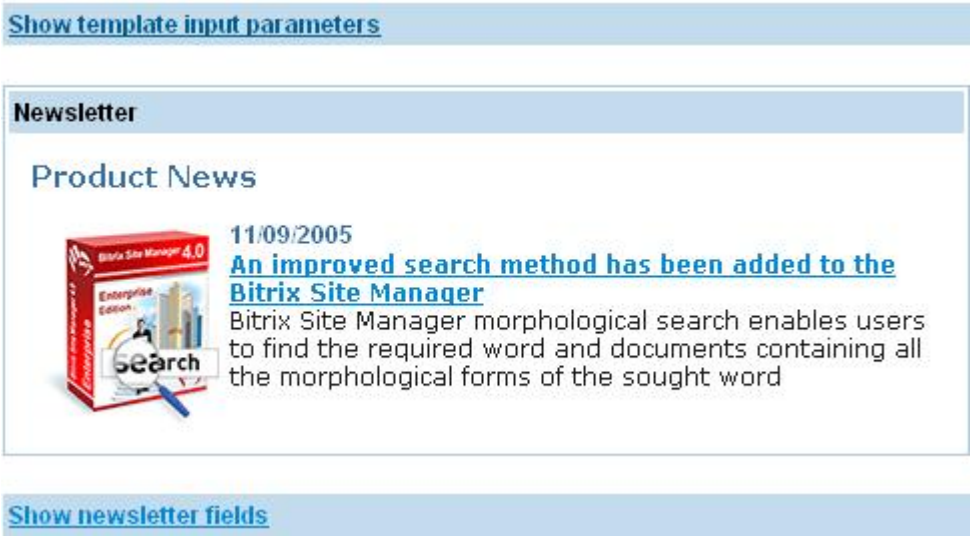
For example: you have scheduled your newsletter to be generated monthly on the 1st of each month. If you want to view the issue to be sent on the 1st of October, enter the date of the previous issue in the **From** field (September, 1), and the date of the next issue in the **To** field (October, 1).

Click the **Check** button. This will result in the following aspects of the issue displayed:

the template input parameters;

the issue (message) parameters;

the message body just as how your subscribers will see it:



After the template have been checked, the **Add newsletter issue** button becomes available at the bottom. By clicking this button, you can add the current message to the global list of newsletter issues. If you do so, all the data of the message body is rendered as static text (in contrast to standard automatically generated issue). By using the visual HTML editor, you can edit the message text, add images etc. After that, you can send the newly created issue either manually or in automatic mode.

© Bitrix, 2005

This function enables you to create *singular issues*, for example those containing a selection of some information: site news, information on the site visitors for a certain period of time, statistical data etc. The following steps are required to create a singular issue:

create a template which will be used to select the required information;

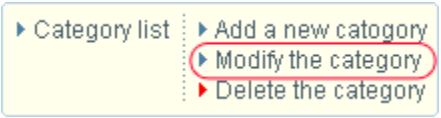
create an automated newsletter and bind it to the above created template;

switch to the template check page;

check the template and add the generated issue to the global list of issues;

send the created issue to one or more addressees, manually or automatically.

You can click a **Edit newsletter** link on the **Template check** page to switch back to editing the just checked newsletter.



© Bitrix, 2005

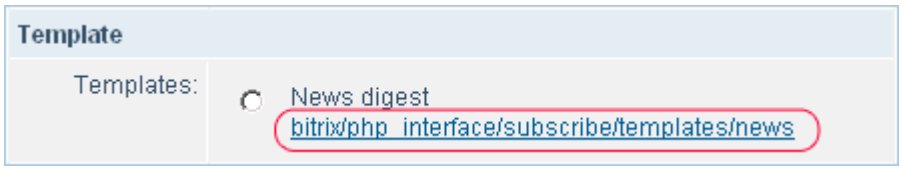
Editing a newsletter template

An automated newsletter generation template is the PHP code that selects information from the database using the system API functions.

The visual HTML editor allows you to create and edit any such template.

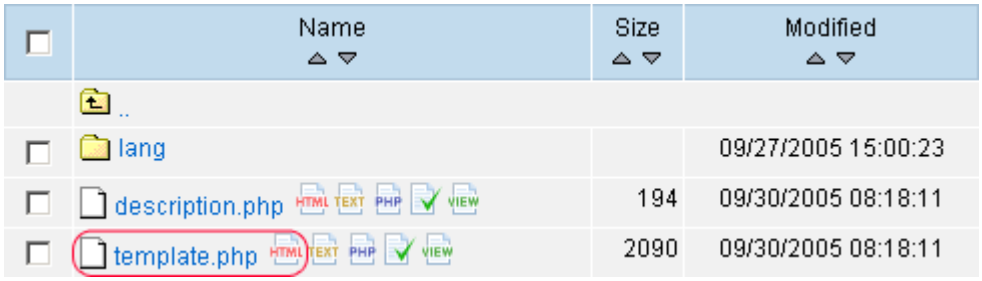
1. To create a new template, switch to the visual HTML editor and create a new document.
2. If you want to edit an existing template, do the following.

   2.1. Go to a site folder containing the required template. To do so, click a link located under the template name on the *newsletter editing page*:

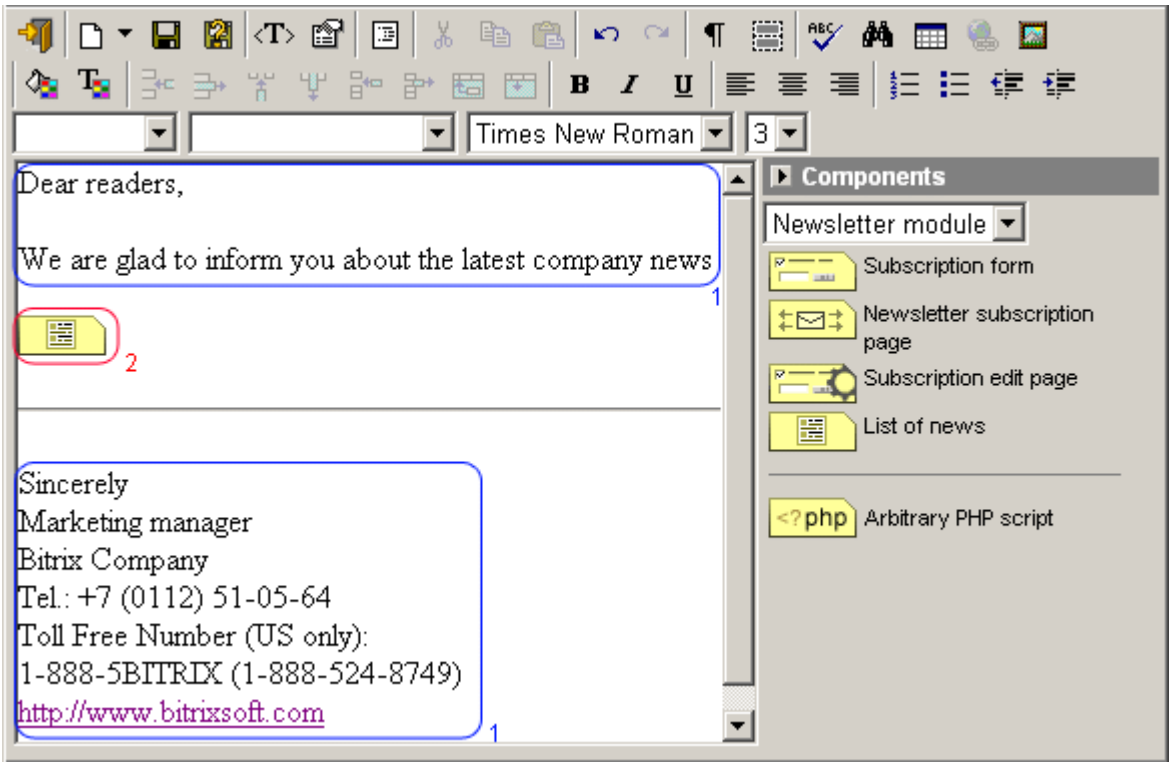


   You can also open the required folder by browsing the site structure from the **Site Explorer** module.

   2.2. Select the required template file and start editing it in the visual HTML editor.



3. A common automatic newsletter template usually includes the following elements:



Legend

Static text. A template constituent which remains unchanged and is displayed in each issue generated using the template.

© Bitrix, 2005

An example of static text can be the greeting, auxiliary information on a newsletter or your company etc. Static text may include absolute links, for example, to any company site resources.

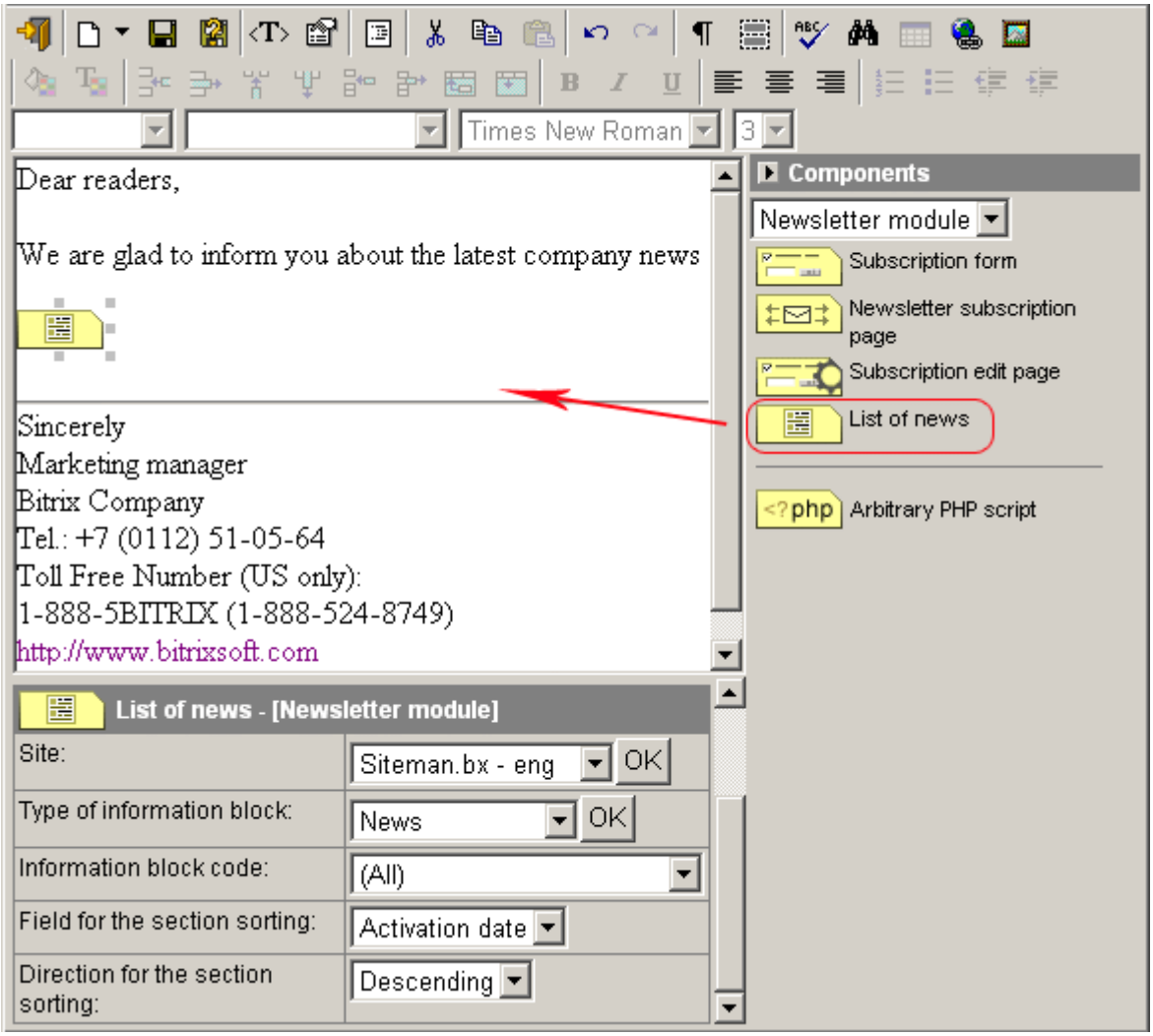
Template component. Components are used to enrich a newsletter issue with the dynamic information. For example: a selection of site news, lists of news products and services, statistical information or any other data for a certain period.

A template component is the PHP script that selects data depending on its purpose. When creating a newsletter, you can use any standard or custom component.

Currently, the system ships with the template component **List of news**. This component selects news from one or more information blocks and inserts the selection in the message body. This operation causes all relative links found in the selected news to be replaced with their absolute equivalents. Thus, a subscriber is enabled to navigate your site from the received message.

4. Insert and customize the **List of news** component.

   On the **Components** bar of the visual HTML editor, select **Newsletter** in the drop-down list. Select the newsletter template component and insert it in your page by dragging and dropping it.



After you have added the component, the component properties window is shown at the bottom of the screen.

- **Site**: choose the site from which the information is to be retrieved (in our case: the site news);
- **Type of information block**: choose the type of information blocks to be the source of information;
- **Information block code**: choose an information block whose elements will be selected. If you want to select all information from information block of the specified type, set this field to **All**.
- **Sort element by field**: specify the field by which the list of news is to be sorted when rendered in the newsletter issue.
- **Element sorting direction**: specify the desired sorting direction.

5. Save the modified template.

© Bitrix, 2005

Subscribing to automated newsletters

Visitors can be subscribed to messages of an automated newsletter in much the same fashion as to messages of a manual newsletter.

- If the newsletter is hidden, the administrator (or other person with sufficient permissions) can add subscribers manually by selecting this newsletter on the subscriber (address) editing page;
- If the newsletter is public, visitors can subscribe to it by themselves via the **Subscription form** or on the **Newsletter subscription page**, which can be created using the **Newsletter** module components.

  For a public newsletter, the administrator (or other person) can also add subscribers manually.

© Bitrix, 2005